



Bureau of Planning and Sustainability  
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## MEMO

**DATE:** December 12, 2011  
**TO:** Planning and Sustainability Commission  
**FROM:** Joe Zehnder, Chief Planner  
**CC:** Susan Anderson, Director and Eric Engstrom, Principal Planner  
**SUBJECT:** Proposed Draft Portland Plan Memo 4: Work Session Discussion Guide

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The upcoming work session on Tuesday, December 13, 2011, provides an opportunity for the Planning and Sustainability Commission (PSC) to discuss the themes that emerged during the public hearing, in the written testimony and in member's own reading of the Proposed Draft Portland Plan. The purpose of the memorandum is to provide an outline of potential discussion topics for this work session. The PSC will have a second work session on Tuesday, January 10, 2012 to continue deliberations and provide direction to staff and a recommendation to the City Council.

This memorandum includes the following:

- 1. Purpose and Use of the Portland Plan** - This is a description of the purpose of the plan and responds to questions about funding, the budget process, what adoption of the plan means and other related topics.
- 2. Action Item Review Criteria** - This includes the set of criteria staff recommends using to determine which actions should remain in the plan, which should be removed and which actions suggested in the public testimony should be included.
- 3. Summary of Themes and Preliminary Staff Recommendations** - This includes a summary of eleven themes from the oral and written public testimony and staff's initial recommendations for how to respond to these themes during the plan revision process.

The following attachments are also provided:

Attachment A: List of Portland Plan-related community discussions and meetings attended by BPS staff  
Attachment B: Tentative Portland Plan Revision Schedule  
Attachment C: Proposed Draft Portland Plan Public Testimony - Comments 52 through 76



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## 1. PURPOSE AND USE OF THE PORTLAND PLAN

### Shared Priorities

The purpose of the Portland Plan is to highlight specific actions that address the strategic, priority issues identified in the plan, particularly those that represent a change in practice. The five-year actions in the Equity Framework and the Integrated Strategies represent a starting place for this work. The five-year actions are relevant, achievable and impactful actions that were identified based on detailed research and input from the public and partner organizations. Each of the partners will contribute to or lead the implementation of the actions identified in the plan.

The Portland Plan starts with the vision that Portland will be a prosperous, healthy and equitable city. Achieving this vision will require prioritizing projects, programs and practices that increase equity; ensure economic prosperity for businesses and residents; support positive youth development and learning; and focus physical development and growth to create a healthy, connected city.

### Funding and Budget Process

The Portland Plan assumes that our ability to act on these priorities must come mostly from existing resources. To do this, plan implementers must examine how to shift priorities among existing budgets and programs and find ways to better align programs and projects across organizations to meet the Portland Plan goals.

The City and other Portland Plan partners face notable challenges funding the maintenance and operation of basic infrastructure and services. While the Portland Plan does not address dealing with these funding deficits, it sets up a framework to support balancing the change-oriented priorities identified with the on-going need to maintain sound basic infrastructure and services. The City and partner organizations will strive to find this balance during their budget processes.

### Adoption and Next Steps

The City Council is scheduled to adopt the plan by resolution in 2012. The plan will be a non-binding policy document, but adoption of the Portland Plan means we are making a strong, clear and public commitment to work together on our shared priorities and on the goals identified for each.

The Office of Management and Finance will work with City bureaus to redefine the annual budget instructions. The revised budget instructions will include directions to identify how the work outlined in proposed budgets support the Portland Plan's goals.

BPS will identified land use and growth-related policies and incorporate them into the City's state-mandated Comprehensive Plan.

The City will work with current and future partner organizations to develop a formal implementation agreements and relationships.

### What's In, What's Out

Incorporation in the plan is a strong indication that the City will try to prioritize their implementation over the next 5 years, but actions or policies in the plan are not guaranteed to happen. By referencing the plan in its annual budget process, City Council will use it as a mechanism to encourage budgetary focus, goal setting, and continuity from year to year.



The absence of a particular policy from the Portland Plan does not mean the City lacks a policy on that issue. The City has a comprehensive set of policies, beyond the Portland Plan. The purpose of this citywide strategic plan is not to list every City policy, but to highlight changes we need to make to meet our priority goals. For a full list of current City policy, go to the Portland Policy Documents website: <http://www.portlandonline.com/auditor/index.cfm?c=26812>

The absence of a specific action from the Portland Plan does not mean the City will not take that action. Each City bureau has a more expansive set of programs and projects they implement each year and most bureaus have strategic plans with specific projects and programs.

The City will continue to take many other actions each year to carry out its mission and continue to deliver basic services.

## 2. ACTION ITEM REVIEW CRITERIA

A set of criteria is needed to determine if an action should remain in, be added to or deleted from the Portland Plan. Although each action does not need to meet all criteria, it is important for each action to meet multiple criteria.

- A. Efficient, multi-objective actions that leverage resources
- B. Positive equity impacts
- C. Alignment with bureau/partner strategic plans
- D. Likelihood of being started and/or completed in five years
- E. Clear, specific deliverables and measurable outcomes
- F. Willing lead partner

After the revisions are made, the plan will be reviewed with the following questions in mind:

- Do we have enough dependable “work horse” actions that we know will get the job done? These may not be glamorous or exciting tasks, but they are practical and useful.
- How have we addressed the nine action areas? Are we satisfied with the level at which each of the nine action areas were addressed?
- Do we have enough bold actions? Bold actions are inspirational actions that challenge ideas, have significant impacts but that may also be difficult to complete. Not every action needs to be bold, but there need to be enough bold actions to keep the plan meaningful and exciting.

Staff recommends that the PSC approve the proposed revision criteria and direct staff to use these criteria when responding to public testimony and reviewing the plan for clarity.



### 3. THEMES FROM PUBLIC TESTIMONY

#### A. Basic services

The Draft Portland Plan states that a successful city begins with high quality basic services, such as sewer, water, stormwater, parks and police and fire services, and a clean, healthy and high-functioning environment. This statement remains true, but BPS recognizes that the Draft Portland Plan did not include sufficient information on the relationship between the Portland Plan and these basic services.

Staff recommends revising the introduction of the plan to provide more information on basic services. Specifically:

- BPS will work with the Water, Police and Fire bureaus to ensure that appropriate policies and actions, if applicable, are added to the integrated strategies.
- Significant Bureau of Environmental Services (BES) and Portland Parks and Recreation (PP&R) policies and actions related to stormwater management and parks and recreation are already included in the text.
- BES and PP&R also submitted comments on the plan; their comments will be reviewed and incorporated as appropriate.

A critical first step to implementing the Portland Plan is establishing a clear process that all Portland Plan partners and City of Portland bureaus can use to assess the equity impacts of their decisions, infrastructure investments and programs. While the Equity Frameworks sets forth a macro-structure for decision-making in the “We will...” statements in each section of the plan, it does not lay out a step-by-step process agencies can use to inform decision-making.

Staff recommends developing an action that directs the City to develop an evaluation approach that can be used to determine how to consider equity impacts of infrastructure investments and programs. This lens also needs to provide a way of balancing equity needs with basis system needs, grey and green.

#### B. Equity and Disability

At the November 29, 2011, hearing numerous members of Portland’s disability community provided testimony on the Draft Portland Plan. The individuals provided powerful testimony describing their sense of marginalization and invisibility.

Staff received initial recommendations this summer to add additional text and actions related to increasing accessibility for those with disabilities. In response to those comments, staff revised the plan content; however, it is clear from the testimony provided that accessibility issues were not sufficiently addressed.

Staff recommends reviewing the plan to identify areas in which accessibility issues and the concerns expressed by and for persons with disabilities can be better and more explicitly addressed.<sup>1</sup> Staff will work with the Portland Disability Commission, the Portland Housing Bureau, the Office of Equity and Human Rights and others. Staff also recommends reviewing

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<sup>1</sup> BPS Staff is preparing an analysis of where disability and access issues are addressed in the plan and recommendations for where it could be better and more explicitly addressed. This analysis will be available for the PSC and the public on December 13, 2011.



the photographs in the plan and revising photos to ensure that Portlanders of all ages and abilities are included in the document.<sup>2</sup>

During the plan development process, it was acknowledged that it is extremely difficult to find reliable data on Portland's disability community. The dearth of information on the disability community makes it difficult to begin an initiative, like the racial and ethnic justice initiative, to combat disparities. One intention of the Equity Framework, which could have been stated more plainly, is the use the knowledge gained through the launching and establishment of a racial and ethnic justice initiative to develop a framework for developing an initiative to address disparities faced by Portlanders with disabilities. The second "We will..." statement in the Launch a Racial/Ethnic Justice Initiative in the Equity Framework alludes to this idea.

#### **C. Resiliency, Emergency and Hazard Planning**

Resiliency is a core concept in the Portland Plan. The Healthy Connected City strategy supports a physical environment that promotes, walking, biking and dispersed local access to goods and services. It also aims to improve the quality of public spaces, providing a greater variety of places for Portlanders to meet and gather. It provides spaces and encourages local community building, reduces reliance on fossil fuels by providing greater transportation options and incorporates nature into neighborhoods, increasing tree canopy and improving stormwater management.

Staff recommends adding actions or policies that relate to the Local Energy Assurance Plan (LEAP) process and planning efforts currently underway at the Portland Office of Emergency Management.

#### **D. Youth**

BPS is committed to supporting and encouraging Portland's youth and reducing their numerous barriers to success. Their success is important not only on an individual basis, it is critical to the success of the city, as they are the next generation of Portland adults. One of the three integrated strategies focuses on supporting positive and healthy youth development. Staff recognizes, however, that the content of the Thriving, Educated Youth strategy could be revised to better reflect and incorporate the priorities established by youth.

Staff will review the specific actions recommended by Multnomah Youth Commission representatives, such as expanding the Youth Pass program and supporting the Multnomah Educational Service District Outdoor School for inclusion in the plan. Staff recommends discussion of whether the PSC should establish a formal and on-going relationship with the Multnomah Youth Commission, i.e. annual check-in.

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<sup>2</sup> Some of the changes noted in this section, also apply to the concerns addressed under Multigenerational City.



#### E. Multigenerational City

It has been noted that the actions and policies focused on the needs of older Portlanders are not as prominent as those focused on the needs of youth. This is correct; however, there are numerous elements of the plan that work together to make Portland an age-friendly and multi-generational city.

Staff recommends developing additional text that highlights the actions and policies that support the needs of an aging population and will make Portland a great place to live for Portlanders of all generations.

#### F. Active Transportation and Bicycling

Some who commented on the plan are concerned that bikes and Portland's bicycle infrastructure is not receiving the attention it needs in the Portland Plan.

Bicycling and bike access is a core component of the Healthy Connected City strategy and improving the bike commute mode share is critical to meeting our commute mode goals; however, pedestrian and transit trips are also critical. Staff recommends focusing on the array of active and less-polluting transportation options available to all Portlanders.

Staff recommends adding additional text focused on the relationship between health and active transportation. The section would provide a clear definition of active transportation and describe the benefits of active transportation for personal, community and environmental health. It would also include references to bike, transit and pedestrian-related actions in the plan.

#### G. Community Action

At the public hearings and in written testimony, individuals and community organizations noted that it is not clear what individuals can do to implement and support the Portland Plan and that additional information on what Portlanders can do would be beneficial, not only to achieving plan goals but to maintaining long-term community support.

Staff recommends adding information to the implementation section that would provide community members with a path to support and help implement the Portland Plan.

#### H. Implementation

BPS staff recommends revising the Implementation section of the Portland Plan to be more specific and provide a clear plan of action for implementation.

Amendments to the Implementation section could include the following:

- Adding an action that directs the City to revise the budget process to better reflect the Portland Plan goals.
- Adding actions that specify when the plan will be evaluated and revised. For example, staff is considering recommending completing an evaluation at the end of year three, developing new actions through a public process during years four and five and adopting a new five-year action plan at the end of year five.
- Writing text revisions or adding an action that more clearly expresses the relationship between the Framework for Equity and Implementation.
- Creating a work plan that provides Portlanders with a mechanism to become more involved in implementing the plan on an individual, household or group level.



**I. Healthy Connected City - Adaptation and Relationship to Economic Prosperity and Affordability**

In written testimony, some authors noted a perceived conflict between the Economic Prosperity and Affordability strategy and the Healthy Connected City strategy.

Staff recommends adding additional text to the plan that explains the benefits and synergies between the Economic Prosperity and Affordability strategy and the Healthy Connected City strategy.

The Draft Portland Plan text refers to the human health benefits provided by a healthy and well-functioning natural environment, but it does not address the need to protect the environment for future generations nor does it explicitly recognize the intrinsic value of nature.

Staff recommends revising text to recognize the importance of protecting the environment for future generations and adding text that recognizes the intrinsic value of nature.

**J. East Portland**

It is widely recognized that East Portland has borne a significant amount of growth, but has not received all the infrastructure investment needed to support its growing population in a healthy way. The Draft Portland Plan includes many actions and policies aimed at improving conditions in East Portland.

Staff recommends adding additional text that points to recent investments in East Portland, particularly those made by PBOT, and efforts to continue that investment over time.

**K. Housing**

Staff recommends revising the housing policies and actions in the plan to better align with the Portland Housing Bureau's new strategic plan.



**Attachment A: Tentative Portland Plan Revision Schedule**

<b>12/28/12</b>	<b>Public Testimony Closes</b>
<b>1/3/12</b>	<b>Final Public Testimony Memo Provided to PSC</b>
<b>1/10/12</b>	<b>PSC Work Session</b> PSC concludes deliberations, provides direction to staff and recommendation to City Council.
<b>2/15/12</b>	<b>Recommended Draft Portland Plan Provided to PSC</b> This will be a “track changes” Word version of the plan.
<b>2/28/12</b>	<b>PSC Reviews Recommended Draft Portland Plan</b>
<b>3/21/12</b>	<b>Recommended Draft Portland Plan Provided to Public and City Council</b> This will be a fully formatted version of the plan.
<b>Late April</b>	<b>City Council Public Hearing</b>



## **Attachment B: Proposed Draft Portland Plan Presentations and Discussions**

Since the release of the Proposed Draft Portland Plan, staff discussed the Proposed Draft Portland Plan with the following groups:

- East County School District Superintendents - October 26, 2011
- North Portland Land Use Group - October 27, 2011
- Human Rights Commission - November 2, 2011
- Freight Commission - November 3, 2011
- Brentwood-Darlington Neighborhood Association - November 3, 2011
- Northwest Industrial Neighborhood Association - November 8, 2011
- Southwest Neighborhoods, Inc. (SWNI) - November 9, 2011
- Buckman Community Association - November 10, 2011
- Landmarks Commission - November 14, 2011
- Central Northeast Neighbors (CNN) - November 14, 2011
- Immigrant and Refugee Community Organization (IRCO) - November 15, 2011
- Hosford-Abernethy Neighborhood Association (HAND) - November 15, 2011
- St. Johns Boosters - November 15, 2011
- American Institute of Architects (AIA) Historic Resources Committee - November 16, 2011
- Design Commission - November 17, 2011
- Sellwood-Moreland Improvement League (SMILE)- November 17, 2011
- Fix-It Fair at Ron Russell Middle School - November 19, 2011 (tabling)
- Citywide Land Use Group - November 28, 2011
- Center for Intercultural Organizing (CIO) - December 5, 2011
- Portland Business Alliance - December 6, 2011
- Central Eastside Industrial Council, Land Use Committee - December 6, 2011
- Barbur Concept Plan Open House - December 6, 2011 (tabling)

## Proposed Draft Portland Plan Public Testimony - Comments 52 through 76

Date Received	Comment Number	Author	Address
11/18/2011	52	Patrick Quinton, PDC	222 NW 5TH AVE., PORTLAND, OR 97209
11/30/2011	53	Vicki Hersen	1411 SW MORRISON ST., STE. 290, PORTLAND OR 97205
11/29/2011	54	Carrie Richter, Landmarks Commission	1900 SW 4TH AVE., STE 5000, PORTLAND, OR 97201
11/30/2011	55	Anita Yap, Home Forward	135 SW ASH ST., PORTLAND, OR 97204
11/29/2011	56	Mary Vogel	PO BOX 12437, SEATTLE, WA 98111
12/1/2011	57	Pati and Matt Hall	5230 SE 118TH AVE., PORTLAND, OR 97266
12/4/2011	58	Don MacGillivray	2339 SE YAMHILL ST., PORTLAND, OR 97214
12/4/2011	59	Don MacGillivray	2340 SE YAMHILL ST., PORTLAND, OR 97214
12/4/2011	60	Don MacGillivray	2341 SE YAMHILL ST., PORTLAND, OR 97214
12/5/2011	61	Tom Miller, PBOT	1120 SW 5TH AVE., ROOM 800, PORTLAND, OR 97204
12/5/2011	62	Doug Kloutz	2630 SE 43RD AVE., PORTLAND, OR 97206
11/23/2011	63	Double Entry - There is no comment letter 63	
11/29/2011	64	Cathy Galbraith	701 SE GRAND AVE., PORTLAND, OR 97214
11/28/2011	65	Eric Inclan	7020 SE 42ND AVE., PORTLAND, OR 97206
11/29/2011	66	Joe Poracsky, Urban Forestry Commission	1120 SW 5TH AVE., ROOM 1302, PORTLAND, OR 97204
11/29/2011	67	Bill Wyatt, Port of Portland	7200 NE AIRPORT WAY, PORTLAND, OR 97218
11/29/2011	68	Terry Griffiths	4128 SE REEDWAY ST., PORTLAND, OR 97202-7534
11/29/2011	69	Suzanne Myers Harold	6206 SE 45TH AVE., PORTLAND, OR 97206
12/7/2011	70	Don MacGillivray	2339 SE YAMHILL ST., PORTLAND, OR 97214
12/7/2011	71	Alesia Reese and Arlene Kimura, East Portland Parks and East Portland Action Plan	1017 NE 117TH AVE., PORTLAND, OR 97220
12/7/2011	72	Daniel Ledezma and Kim McCarty, Portland Housing Bureau	421 SW 6TH AVE., STE. 500, PORTLAND, OR 97204
12/8/2011	73	Don MacGillivray	2339 SE YAMHILL ST., PORTLAND, OR 97214
12/8/2011	74	Judy Shiprack, Multnomah County Commissioner	501 SE HAWTHORNE BLVD., STE. 600, PORTLAND, OR 97214
12/9/2011	75	Don MacGillivray	2339 SE YAMHILL ST., PORTLAND, OR 97214
12/10/2011	76	Don MacGillivray	2339 SE YAMHILL ST., PORTLAND, OR 97214



**PORTLAND  
DEVELOPMENT  
COMMISSION**

[www.pdc.us](http://www.pdc.us)

November 18, 2011

Dear Portland Planning Commission Members:

I am pleased to submit comments to you on the Bureau of Planning and Sustainability's Portland Plan, Proposed Draft, October 2011.

The Plan aligns closely with the most pressing work of the Portland Development Commission (PDC), in particular, with the Economic Development Strategy and Neighborhood Economic Development Strategy (NEDS). The Plan draws deeply from these strategies and reinforces our efforts to spur business cluster growth and entrepreneurship, stimulate urban innovation and employment districts and to enhance neighborhood business vitality.

The Plan's framework for equity is a powerful context for its three integrated strategies, Thriving Educated Youth, Economic Prosperity and Affordability and Healthy Connected City. The Plan's over-arching emphasis on equity complements PDC's 2010-2014 Strategic Plan and the NEDS, which are predicated on distributing resources that benefit all Portlanders and minimize the adverse impacts of gentrification and displacement.

It is critical the Plan's Measures of Success and Scorecard be clear and balanced. How far we have to go to implement the Plan will drive funding and priorities for years to come. In that context, I cannot agree with the Plan's suggestion (Appendix C, Poverty and Unemployment have been sufficiently addressed, that we have largely "met or exceeded" a standard there). While we have made strides in recent years creating and retaining jobs, the reality is we have more work to accomplish in order to address systemic underemployment and generational poverty within priorities neighborhoods as identified in the NEDS and in communities of color citywide. Moreover, I am not convinced the Plan's measures for diversity (Appendix C) adequately portray the challenge we face as a City, nor do they match the strong framework for equity that begins the Plan. Finally, I would suggest the types of Citywide and Local Measures be balanced against the number of strategy elements for each of the three integrated strategies. For example, despite having eight strategy elements, 50 percent of the sixteen total, Economic Prosperity and Affordability has only 25 percent of the Citywide Measures. As Portland moves to a 2035 vision of prosperity, health, and equity, its measures of Poverty, Unemployment, and Equity must be accurate, balanced to the actions behind them, and materially significant in nature.

In closing, I'd like to reiterate support for the Portland Plan and my detailed comments are attached for your consideration.

I look forward to future conversations and helping to make the 2035 Portland Plan the best it can be.

Sincerely,

Patrick Quinton  
Executive Director

J. Scott Andrews  
*Commission Chair*

Aneshka Dickson  
*Commissioner*

John C. Mohlis  
*Commissioner*

Steven Straus  
*Commissioner*

Charles A. Wilhoite  
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## **PDC Detailed Comments on The Portland Plan, Proposed Draft, October 2011**

### **Economic Prosperity and Affordability**

Page 41, action plan item #8: Add PDC as a partner.

Page 41, action plan item #14: Add PDC as a potential partner.

Page 47, action plan item #24: Reword to "...accelerated office development and renovation,...".

Page 47, action plan item #20: Add Metro as the first potential partner and Port of Portland as a potential partner. If there other regional partners, as suggested in the action, suggest adding them to the list of potential partners.

Page 47, action plan item #21: Add Metro as the first potential partner and Port of Portland, PDC, BPS, and BES as other potential partners.

Page 47, action plan item #21: Reword to "Assemble and/or help prepare a 25-acre site...".

Page 49, action plan item #25: Capitalize "Portland Main Street"

Page 49, action plan item #26: Reword to "Focus Area Program: Establish a Focus Area Program..."

Page 49, action plan item #27: Add Venture Portland as a potential partner.

Page 49, action plan item #28: Reword to "Small business development: Focus city resources for small business development, supporting the growth and development of neighborhood-based businesses, and provide those services at the neighborhood level."

Page 49, action plan item #32: Add "currently" prior to the word "existing".

Page 49, action items #25, 26, 27, 28, 29 and page 81, action item #42 – add NGOs as potential partners, which is done in other places in the Plan, and would be consistent with the Neighborhood Economic Development Strategy.

Page 55, action plan item #41: Include PDC as a potential partner.

### **Healthy Connected City**

Overall comment: The text of the goals listed on page 59 should mirror the text of the lettered goals on page 64, 66, 70, and 78.

Page 67, action plan #7: Reword to: "Neighborhood businesses and services: Use the Portland Development Commission Neighborhood Economic Development Strategy to strengthen neighborhood hubs."

Page 67, action plan #9: Remove PDC as a potential partner; PDC is no longer directly involved in housing development..

Page 67, action plan #11: Remove the words "Retain and...". Add Bureau of Planning & Sustainability as a potential partner.

Page 69, action plan #14: Remove PDC as a potential partner; Hollywood is not within an Urban Renewal Area.

Page 71, action plan #25: This action plan appears redundant with page 47, action plan #21. If both actions are to remain, please ensure that the potential partners are the same.

Page 75, action plan #32: Add PDC as a potential partner, as the lead on Foster Lents Integration Partnership.

Page 79, action plan #41: Reword to “Social impact and mitigation: Utilizing the City’s Neighborhood Economic Development Strategy, further develop tools to address potential residential and commercial displacement as development occurs.”

Page 81, action plan #42: Okay as is, however, add PDC as a potential partner if the examples might also be related to the Neighborhood Economic Development Strategy.

### **Measures of Success**

Page 86, Income Distribution bar chart: The numbers next to each quintile are confusing. Suggest adding “%” to the x-axis to clarify, or use another graph that is more easily understandable.

Page 87: The Diversity Index is a very powerful indicator; it is worth drawing out more analysis in the text.

Page 88: The Dissimilarity Index section is confusing, particularly compared to the very compelling Diversity Index graphic. It will likely be unclear to the general public what the Dissimilarity Index is measuring.

Page 97: Measure 7, Transit and active transportation. The goal is too aggressive for the entire city. It is probably appropriate for the Central City, but when used in the Context of Local Measure on C-10, it is no longer about Commuting and Getting to Work, but about walkability more generally.

Page 101, Measure 9, Complete neighborhoods. There are good data on the Access to Healthy Food; we would recommend an objective related to access to food and not to, or not just to, sidewalks.

Page 102 – Access to healthy food: The map is not the same as what was included in the City of Portland Grocery Store Request for Information. That RFI map was easier to understand; perhaps it should be used here.

Page 104: The Neighborhood business vitality header is misleading for what the data are representing. This section should be retitled to reflect that data that are being represented – for example “Neighborhood business leakage”.

Pages 114 and 115: The Sub-area Scorecard is misleading. For example if an area of the city receives a score of ‘10’ for poverty, what standard is that meeting or exceeding? Same with unemployment – these seem backwards. Following are specific edits on local measures that would impact the scorecard and rankings.

## **Appendix C. Local Measures**

Page C-6, Poverty: As per cover letter comment, it is unclear what standard is being met or exceeded. The Poverty measure is likely not illustrated correctly. If the Goal is 10 percent, then below it (2, 6, 6, 7) would be Green, Meets or Exceeds; Near Target (9, 10, 10, 10) and Far from Target would be above 10 percent (12 to 28).

Page C-7, Unemployment: As per cover letter comment, it is unclear what standard is being met or exceeded. If the goal is under 5, then no Local Areas should have Green. Far from Target would be 9 and above. The impression made by this graph that there isn't a problem.

Page C-9, No more than 30% cost-burdened households: As per cover letter comment, it is unclear what standard is being met or exceeded. There is a level of data issue, but this graph from the American Community Survey should be checked for alignment with the page 50, Cost burdened households indicator from the MetroScape scenarios data.

Page C-10, Walkability: The goal seems too high, and it is not explained. The subareas may simply be too different to have this uniform goal.

Page C-12, Carpool: The goal is too high, even higher than Amsterdam. Again, the subareas may simply be too different to have this uniform goal. For both Walkability and Carpool, the Central City is different. These don't work on the Local Measure format.

Pages C-16, Diversity and C-17, Foreign born population: These data points are critically important in demonstrating the values and framework of equity for the Plan. As a Diversity measure, it must be weighty enough to do the equity framework justice and instead C-16 reads as the odds of a chance encounter with someone in your neighborhood from a different racial or ethnic group. For the foreign-born population, the C-17 measure is not usable for actions and investment, as it is not something public policy/investment can move. Another example to consider is in the State of Entrepreneurship in Portland report, where it was noted that only 17.8 percent of Portland tech startups have been identified as having a foreign-born founder, below both the average of comparison metros and the national average of 25.3 percent. Finally, we suggest using the Diversity Index from page 87 data to give these measures more substance and/or perhaps there are other additional indicators that could make more compelling measures.

Elders in Action has been advising the City of Portland on how to ensure the quality of life for older residents since 1968. We have helped shape many positive improvements for Portland residents of all ages these past 43 years. We were pleased when we were asked to help coordinate a special Portland Plan Senior Day on June 3, 2010. The goal was to incorporate the qualities that make an “age friendly city” as reported in the World Health Organization’s Age Friendly Cities Project. Portland was the first city in the United States to sign on to World Health Organization’s Global Network of Age Friendly cities. We saw this as a wonderful opportunity to help guide adequate planning for Portland in 2035 when the 65 and older population will double.

Unfortunately the draft Portland Plan for 2035 fails to embrace the vision that would make Portland a vibrant city for the “age wave” when 1 in 5 residents will be over 65. We would hope the essential features and vision of an age friendly city as noted by the World Health Organization would be more clearly stated in the Portland Plan draft.

The draft Plan does not incorporate planning strategies to meet the growing needs of a maturing Portland. The 85 + population is the fastest growing demographic group in the U.S. and the 2010 census shows the number of people 90+ has tripled in recent decades. There is no mention of how Portland will positively work to ensure a city that promotes active aging. An age friendly city should be part of the measure of success.

Embracing the talent and wisdom older adults can provide to help ensure thriving and educated youth is not mentioned in the plan. In the creating jobs section there is no mention of training and job creation in the care giving and other aging service industries that will be required to meet the needs of the fast growing elder population. The healthy connected city strategies could be more specific in the actions to meet the Age friendly community features.

We hope that Portland will build on being the first City to join the World Health Organization’s Global Network of Age Friendly Cities by embracing its vision and values in the Portland Plan for 2035. After all, those who are 41-50 years of age in 2011 will be 65-74 in 2035 and they will want to continue to be active and involved in the community. An Age Friendly city is an inclusive and accessible urban environment that promotes active aging.

Submitted by: Vicki Hersen, Executive Director  
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November 29, 2011

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Portland Planning and Sustainability Commission  
1900 SW 4<sup>th</sup> Ave, #7100  
Portland, OR 97201

Re: The Portland Plan

Dear Chair Baugh and Commissioners:

Thank you for giving the Portland Historic Landmarks Commission (HLC) the opportunity to review and submit comments on the draft Portland Plan. Although we commend the Commission as well as Planning and Sustainability staff for tackling challenging issues of providing equity through a series of integrated objectives, we remain concerned that this draft fails to acknowledge the essential role historic preservation and protection of the built environment play in furthering those objectives. Not only do historic neighborhoods, with their lovely tree-lined streets, interconnected blocks and great architectural details provide a sense of place where people want to be, the relatively small building footprints and narrow roads provide some of the most walkable and mass-transit accessible places within the City. However, these same attributes makes these areas highly attractive to increased density which, in turn, has led to demolition of resources and the construction incompatible infill. The Plan must address this issue and could do so through the following recommended revisions:

### **A Healthy City Protects its Historic Resources**

Preserving the build environment is a key component of a community's characteristics. The draft Plan misses the mark where it fails to acknowledge that the existing historic fabric is as essential to maintaining vibrant neighborhoods as protecting natural habitat areas. Engaging the community to address equity and the elevation of racial justice requires a concurrent commitment to the inventory and preservation of the built environment constructed to house and serve various communities, city-wide, especially those that serve minorities. In discussing Vibrant Neighborhood Hubs, at pgs. 66-69, or Connections for People, Places, Water and Wildlife, at pgs. 70-77, historic preservation must play a role. As such, we recommend the addition of this new Guiding Policy:

- Preserving the build environment, including its archeological resources, is a key element of a community's characteristics. Support grass-root, neighborhood historic preservation efforts including the updating of historic inventories, the designation of historic or conservation districts and density restrictions that would encourage adaptive reuse while ensuring infill compatibility.



#### 5-Year Action Plan Items:

- Resource Conservation: Support efforts of neighborhood or public agency - initiated historic preservation efforts including updating historic inventories, the creation of new or altered landmark, historic and conservation districts as well as the designation of individual resources.
- Resource Conservation: Codification of the Secretary of Interior Standards for the Treatment of Historic Property, providing a stop-gap of design standards for historic and conservation districts that either do not have district-specific historic guidelines or those guidelines are woefully out of date. Also, such adoption will allow for uniform decision-making across districts.

#### Historic Preservation is a “Green” Objective

A stated 2035 Objective within the Plan is to reduce transportation-related carbon emissions in an effort to address climate change. Although transportation choices contribute 34% to greenhouse gas emissions in Oregon, residential and commercial construction and operation contributes a very close 31%.<sup>1</sup> The draft plan makes no mention of that reducing carbon emissions would be enhanced by embracing the goal of using what you have. Adaptive reuse of our existing buildings reduces the amount of demolition and construction waste deposited in landfills, lessens unnecessary demand for energy and other natural resources and conserves embodied energy (the amount of energy originally expended to create extant structures). Many historic and older buildings are remarkably energy efficient because of their site sensitivity, quality of construction, and use of passive heating and cooling. According to the U.S. Energy Information Administration, commercial buildings constructed prior to 1920 have an average energy consumption of 80,127 BTUs per square foot. For the more efficient buildings built since 2000, that number is 79,703 BTUs. We recommend the following Guideline amendment:

Public decisions that Benefit Human and Environmental Health, pgs64-65, or Coordinated Inter-Agency Approach, pgs 78-79

- Prioritize the investment of public dollars in projects that enhance stewardship of City-owned resources, encouraging maintenance and preservation over demolition couples with new construction.

#### Five-Year Action Plan

- Public decisions and investments. Identify and implement an agency and bureau-wide strategy for eliminating the expenditure of public funds in the demolition or neglect of historic buildings. Encourage other public entities to do the same.

#### Vibrant Neighborhood Hubs

- Acknowledge that maintenance and redevelopment of existing structures contributes to reducing carbon emissions and is therefore an essential element of combating climate change.

#### Five-Year Action Plan

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<sup>1</sup> Oregon Department of Forestry, Background Report: Status of Oregon Greenhouse Gas Emissions and Analysis (2009).

- Resource conservation. Encourage historic preservation as strategy for addressing climate change including efforts to reduce or eliminate preservation related building or land use review permit fees and other incentives.

### **High-Rise Zoning is Inconsistent with Historic Preservation**

The HLC shares the Planning Commission's commitment to promoting vibrant neighborhood areas by encouraging development within hubs and corridors. This commitment must include efforts to increase density through the removal of non-contributing structures and infill. One of the failures of "Portland Today" is the perceived authorization for high-rise zoning that is inconsistent with the identified character of landmark, historic, and conservation districts, such as Old Town / Chinatown, as well as in areas eligible for future district designation, such as Buckman or Richmond. High-rise zoning encourages property owners' desire to maximize building height and scale that detracts from the character of the area. Further, this inconsistent zoning encourages stagnation and neglect by owners who are banking on the expectation of taller and larger buildings as soon as the historic building is in such disrepair, removal can be justified. After all, historic districts represent "constrained developable lands" that occupy less than 3.3% of the entire city leaving plenty of opportunities for tall, over-stuffed buildings. The Plan needs to acknowledge this current shortcoming and identify strategies to be included in the City's comprehensive plan resolving this concern. Such policies might include:

#### **Coordinated Inter-Agency Approach, pgs 78-79**

- Coordinate planning, implementing development regulations, and design standards that are internally consistent and that support protecting the existing building environment.

#### **Five-Year Action Plan**

- Planning and investment: When adopting or amending comprehensive plan and zoning regulations, eliminate zoning authorizations that do not reinforce, complement or support the historic significance of historic and conservation districts.

### **Historic Resource Inventory Priorities**

5-Year Action Plan policy 40 as currently drafted provides:

"Planning and investment: Inventory historic resources in neighborhood hubs and along civic greenways and develop a strategy to preserve key resources."

The HLC fully endorses this objective but suggests some alternative language that prioritizes inventory updates in those areas under the greatest pressure for redevelopment. It should prioritize areas that have not been inventoried in the first instance or where redevelopment has made the inventory obsolete. It must also include civic corridors and not just neighborhood hubs. Consider the following:

- Planning and investment: Coordinate with neighborhoods and identify a strategy for a phased inventory of historic resources. Priority shall be given to areas of

the Central City, neighborhood hubs and corridors that have or are most likely to experience more immediate redevelopment pressure.

Again, thank you for giving HLC an opportunity to comment on this herculean effort. Please do not hesitate to call on the Commission if we could be of further assistance or if you wish to discuss these recommendations further.

Sincerely,

Carrie Richter  
Historic Landmarks Commission Chair

Cc: Commission  
Tim Heron



# homeforward

hope. access. potential.

Executive Office

November 30, 2011

**Board of Commissioners**

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Bureau of Planning and Sustainability Commission  
City of Portland  
1900 SW Fourth Avenue, Suite 7100  
Portland, OR 97201

Sent Electronically: [bps@portlandoregon.gov](mailto:bps@portlandoregon.gov)

RE: Portland Plan, Proposed Draft October 2011

Dear Commissioners:

**Executive Director**

Steve Rudman

On behalf of Home Forward, I would like to provide the following comments on the Portland Plan, Proposed Draft, October 2011.

We commend the City of Portland for the tremendous undertaking of developing a strategic vision for the City for the next 25 years. We are honored to be a lead partner and participant in development of the plan. We also recognize the great effort on outreach, plan development and thoughtful conversations that have occurred over the past several years and which have led to this proposed draft.

In accordance with the mission and values of Home Forward, we are prepared to continue our collaboration, coordination and partnership with the City and other organizations to achieve the desired outcomes of the Portland Plan.

In particular, we support the policy framework for "Neighborhoods and Communities that Support Youth" (C, p29), Equity, 18, where we are listed as a potential partner, because we recognize the importance of stable housing to students' abilities to be successful in school. We also support "Access to Housing" (C1, p 52) and will continue to work collaboratively with the Portland Housing Bureau to achieve these results.

Under C3, Household Economic Security, p. 57, Home Forward is listed as a potential partner under Equity, 49, *Disadvantaged Workers: Increase skill-level of low-income, multi-barriered residents who need remedial education, ESL, and other special assistance to overcome basic skill deficiencies, disability related disadvantages, such as mental illness, criminal background and chemical*

A new name for the Housing Authority of Portland

November 30, 2011

Bureau of Planning and Sustainability Commission

Page Two

*dependency issues through workforce training and wrap around services, and Equity, 51, Anti-poverty strategy: Engage with the Multnomah County Community Action Agency to develop a comprehensive anti-poverty strategy to increase economic self-sufficiency.*

A number of Home Forward's programs provide opportunities for residents and participants to engage in programs designed to help them achieve economic self-sufficiency. As the largest provider of public housing assistance in Multnomah County, serving upwards of 15,000 households with housing assistance, Home Forward is uniquely positioned to provide bridges for our residents and participants to connect with additional resources such as Multnomah County and WorkSystems, Inc.

In addition, we are currently refining our Strategic Directions and developing a "Families Forward" initiative. This initiative will take a "dual track" approach by supporting both youth and heads of households as we believe that the whole family must be stable in order to successfully take the next step towards self-sufficiency. We are exploring new partnerships with school districts and other youth organizations, in addition to continuing our existing strong relationships with work force training organizations in the development of this initiative. More intentional and strategic alignments of partnerships, programs, and funding can provide a coordinated approach to the provision of needed services in this time of shrinking budgets and economic downturn.

Our commitment to providing safe, decent and affordable housing should be a shared priority for everyone in the region. Unfortunately, due to the economy and our limited resources and funding, we cannot address this alone. That is why we support a strong imperative for aligning resources, services and programs to serve our neighbors in need. Home Forward serves all of Multnomah County, and, as we know, poverty does not have boundaries, and we believe such collaborations and support should cross jurisdictional boundaries. With that said, we recommend that the City of Portland make a concerted effort to partner, not only with Multnomah County, but with adjoining cities such as Gresham. East Multnomah County is an excellent example of where collaboration between Portland and Gresham can create a great opportunity for supporting families.

Again, we commend the City for this monumental, but very important undertaking. We fully support your efforts and will continue to seek new ways to provide safe, decent, affordable housing throughout our community.

November 30, 2011

Bureau of Planning and Sustainability Commission

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Thank you for the opportunity to participate in the development of the Portland Plan.

Best regards,

A handwritten signature in black ink, appearing to read "Anita Yap". The signature is fluid and cursive, with the first letter of each word being capitalized and prominent.

Anita Yap

Deputy Executive Director

cc: Steve Rudman, Executive Director



# CNU CASCADIA

CONGRESS FOR THE NEW URBANISM - CASCADIA

November 29, 2011

Planning and Sustainability Commission  
1900 SW 4th Ave.  
Portland, OR 97201-5380  
Attn: Portland Plan testimony

I'm Mary Vogel, Advocacy & Alliances Chair of the Congress for the New Urbanism, Cascadia Chapter. We are a potential partner on the Portland Plan as we are the planners and urban designers who have long designed and created walkable neighborhoods even while our colleagues were creating suburbia. In the Portland area, we can take credit for Fairview Village, New Columbia, Orenco Station and more recently, urban infill in the Pearl, the Interstate Corridor, Gresham, Milwaukie and elsewhere in the region. Many of us tend to be small business owners, even sole proprietors, who team up amongst ourselves and with other professionals.

First we want to commend Portland Planning Director, Susan Anderson, for bringing the ethic of the Portland Plan to her role on MTAC and insisting that urban design should play a more prominent role in Metro planners scenario planning for reducing greenhouse gases. She stimulated a very positive discussion amongst planning directors throughout the region on the importance of urban design in addressing climate change—a discussion that CNU considers central to the effort. We encourage her to keep MTAC's/Metro's toes to the fire on this!

We support the emphasis of the Portland Plan on equity but with the recognition that that equitable investment must take a whole new direction—not just catch up with the mistakes we made in the past such as putting in curb and gutter to drain our stormwater away as quickly as possible or widening roads with the presumption that everyone drives. We especially like the focus on complete neighborhoods where residents can meet their basic needs on foot. We have been not only advocating, but designing and building that for over 20 years.

We have some of the best expertise in the nation on what it takes to make retail successful and look forward to working with neighborhoods and the city on that. We also have some of the longest history in creating truly transit-oriented development and making transit hubs great places.

We love the “Healthy and Affordable Food” actions, especially the 1000 new community garden plots. This may become essential far sooner than we might think. At least one member of our group has joined Depave to help neighborhoods get this going faster than the wheels of the bureaucracy might turn. I myself have run an EarthBox gardening program on the balconies of a downtown affordable housing complex for the past couple years. I have attached photos to my emailed testimony.

We look forward to working with the city to create the interconnected network of city greenways that will encourage walking and biking and weave nature into neighborhoods. I myself have long worked in creating Habitat Connections through stream restoration, invasive species removal and native plant plantings and through helping to create the Intertwine by working on two Metro Parks & Greenspaces ballot initiatives.

Through the charrette concept that CNU pioneered (and our Portland-based National Charrette Institute keeps evolving), we have excellent tools to engage neighborhoods in creating 75 miles of new Neighborhood Greenways—as well as new Civic Corridors.

New Urbanists have long been known for placemaking—especially with an emphasis on streetscapes and other public places. New Urbanists have written many of the tools that citizen advocates who care about such things use today: The Smart Growth Manual, the Smart Code template, Suburban Nation, the Sprawl Repair Manual, Light Imprint Handbook and others. So we are well-equipped to help with Civic Corridors.

As you know, the Urban Land Institute is the “think tank for the real estate industry”. Many of its experts, both national and local, have pointed out over the last year, that the wave of the future is urban, mixed-use, transit-oriented and green building. While none of the ULI experts had any answers about how, in the current economy, to actually finance and build development where it is most needed, Metro’s own Expert Advisory Group was more explicit. Their report “Achieving Sustainable, Compact Development in the Portland Metropolitan Area: New Tools and Approaches for Developing Centers and Corridors” identifies one of the greatest obstacles in centers and corridors development as the **current credit market**.

The EAG report has a number of recommendations pp 20 – 23 re: financing—recommendations that would require local communities to be more proactive in the financial realm and work with citizens and the private sector to create altogether new tools. Since Metro seems to have dropped the ball with the EAG, we’d like to suggest that the city pick it up to get this group’s input on this **clearly missing element in the implementation section of The Portland Plan**.



Transitions PDX was right in their testimony! We aren't going back to the way things were before. We need new tools to finance the new ways of developing that the plan calls for. Before Wall Street banks got involved in development financing, money for development had long come from the local level. We need to find ways to get back to that.

**Such action should be taken sooner rather than later if we are to preserve the intellectual infrastructure w/the skills to implement the Portland Plan.**

A number of my colleagues are abandoning the profession for other careers where they can still make a living.

Mary Vogel, CNU-A  
Chair, Advocacy & Alliances CNU Cascadia  
503-245-7858  
mary@plangreen.net





GARDEN KIT



# **POLICY REPORT**

## **Achieving Sustainable, Compact Development in the Portland Metropolitan Area: New Tools and Approaches for Developing Centers and Corridors**

PREPARED BY

The Institute of Portland Metropolitan Studies  
Portland State University

NOVEMBER, 2009

This report has been prepared by the Institute of Portland Metropolitan Studies based on the deliberations of a group of Portland area experts in real estate development and finance, known for this purpose as the Expert Advisory Group on Developing Centers and Corridors, convened in July through October of 2009.

### **Expert Advisory Group on Developing Centers and Corridors**

Convener/Facilitator:

**Gil Kelley**, Senior Research Fellow, Institute for Portland Metropolitan Studies\*

Expert Advisory Group Members:

**Dennis Wilde**, Principal, Gerding Edlen Development Company; residential, commercial and institutional developers

**Vern Rifer**, Principal, Vernon L. Rifer Real Estate Development, Inc.; residential and commercial developers

**Jerry Johnson**, Principal, Johnson Reid; economic and real estate development consultants

**Kate Allen**, Housing Policy Manager; City of Portland, office of Commissioner Fish

**Matthew Stanley**, Senior Relations Officer; Umpqua Bank

**Mark New**, New & Neville Real Estate Services; real estate appraisers

**Abe Farkas**, Principal, ECONorthwest, economic and planning consultants

**Kevin Cavanaugh**, Principal, Cavanaugh & Cavanaugh, LLC and Ten-Pod Development, architects and developers

**Jim Irvine**, Principal, The Conifer Group, Inc.; residential developers

**Dave Leland**, Principal, Leland Consulting Group; planning and development consultants

**Steve Burdick**, Principal, Killian Pacific; residential developers

**Beverly Bookin**, Principal, The Bookin Group; urban planning consultants

**Don Hanson**, Principal, OTAK; land planning and development consultants

**Ed McNamara**, Principal, Turtle Island Development; residential developer

**John Southgate**, Economic Development Director, City of Hillsboro

**Alice Rouyer**, Redevelopment Director, City of Gresham

**Ron Bunch**, Community Development Director, City of Tigard

**Michael Mehaffy**, Principal, Structura Naturalis Inc.; planning and development consultants

**John Spencer**, Principal, Spencer & Kupper; planning and development consultants

**Tom Kemper**, President, KemperCo, LLC

**Fred Bruning**, Chief Executive Officer, Center Cal Properties, LLC

\* Mr. Kelley is the former Director of Planning for the City of Portland. He served as project lead for this effort and is the principal author of this report. Dr. Sheila Martin, IMS Director, and Elizabeth Mylott, Research Assistant also contributed to this study. IMS wishes to thank the staff of Metro for their participation and support, particularly Robin McArthur, Andy Shaw, Chris Deffebach, Megan Gibb and Beth Cohen.



**Institute of Portland Metropolitan Studies**  
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November 12, 2009

Mr. Michael Jordan  
Chief Operating Officer  
Metro  
600 NE Grand Avenue  
Portland, OR 97232

Dear Mr. Jordan:

We are pleased to transmit the findings and conclusions of the Expert Advisory Group on Developing Centers and Corridors. This group was convened by the Institute for Portland Metropolitan Studies at the request of Metro and was charged with investigating the barriers to compact, mixed use development in the metropolitan area, with a particular focus on centers and corridors. The group met several times over the summer and enthusiastically offers a perspective on the current and long-term challenges to development, a set of overall recommendations on enhancing the investment environment, and a proposed Action Plan for increasing public and private investment in centers and corridors.

We have written up their findings and recommendations in this report and would be happy to present this report, with the assistance of members of the Expert Advisory Group (EAG), to the Metro Policy Advisory Committee and to Metro Council. The EAG and some of the regular observers of the group's proceedings (primarily local elected officials) have also expressed an interest in presenting these findings to local city councils and planning commissions.

Please let us know how we can help you present and further the work that has begun here.

Sincerely,

Sheila Martin, PhD  
Director

Gil Kelley,  
Senior Research Fellow

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**This report presents the findings of a group of public and private real estate development experts that investigated the tools and strategies that will be needed to get us from here ....**



Photos taken from Metro's image library

**... to here. As you will read, simply hoping the economy will rebound won't be sufficient.**

## Executive Summary

This report represents the work of a group of local public, private and institutional experts in real estate development and finance convened by the Institute of Portland Metropolitan Studies at Portland State University. This was done at the request of Metro, which wanted outside expert advice on ways to achieve more robust development of centers and corridors in the Portland metropolitan area, an important aspect of implementing the 2040 Growth Concept. Although the expert advisory group (EAG) enthusiastically took on this task, it wanted to first back up a step and deliberate over whether and to what extent center and corridor-based development was indicated by long term trends and what larger implications this might have for both the local real estate development industry and for regional governance. In other words, rather than to simply offer a list of new micro strategies, the EAG wanted to preface its advice with an opinion about the magnitude of shifts that may now be occurring in the marketplace and extend its advice into the realm of governance, particularly with regard to what they see as a more sustainable and effective framework for public-private-institutional collaboration for managing growth and building desirable communities. The background and purpose of the EAG work is further explained in Chapter 1.

The group's principal findings and conclusions, explained in Chapter 2, are that:

### **A. Compact mixed-use development is highly indicated by major trends.**

The direct and indirect costs (including environmental costs) of low-density, sprawled development are becoming much greater and will be very difficult to sustain. This trend will likely continue and escalate as the true costs of energy and carbon are "priced in" to the development equation. Demographic changes and consumer interests are shifting demand toward more compact development forms. The current credit situation is unlike anything the U.S. has experienced in many decades. This condition will likely last several years and the credit market will likely not return to the way it was. The current level of public investment in compact urban development is not sufficient to address escalating costs of development. There will be a need for recalibration of the ratio of public to private investment in compact urban development, at least in the near to medium term, and this may differ from place to place.

### **B. The Portland metropolitan area will need to overcome present obstacles and create new mechanisms to encourage the development of centers and corridors that is needed to accommodate increased demand.**

The variety of financial, regulatory and design challenges to center and corridor development require new, more innovative approaches, including enhanced public-private-institutional cooperation. Given the scarcity of resources in the public sector there is a need to both prioritize investments and consider ways to enhance resources for investment. Improving certainty and reducing transaction costs in local development deals (including permitting) will be needed if infill supply is to be accessible. Good design will be critical in gaining and sustaining public acceptance and building the kind of communities that we want. Many of these changes will not be possible unless the region develops a focused and sustained collaboration between public, private, non-profit and institutional sectors to deliver on the promise of a new way of building our communities.

The EAG advocates an "action plan" in Chapter 3, a set of strategies that should be employed to encourage more robust development in centers and corridors, including:

**1. Establish a structure for on-going cross-sector structure collaboration and learning,** including a task force composed of public, private, non-profit, professional association and institutional interest and a University of 2040-type educational structure. Teams from the Expert Advisory Group will also engage in an early outreach and education effort about the findings of this report.

**2. Develop a diagnostic tool for assessing the health of individual centers and corridors** that can determine the relative strengths and weaknesses of various components in locally specific ways. A diagnostic tool would address vision, orientation and commitment to the private sector, available resources and the physical and market conditions in the area. Local jurisdictions may need to realign internal structures and protocols to address significant barriers that often stand in the way of facilitating compact development.

**3. Develop a public-private “Development Toolkit”,** including a set of center and corridor design prototypes, a checklist for initial assessment of potential public-private investments (development partnerships) for local governments, a public-private development handbook, and featured pilot programs and demonstration projects. Conducting an assessment of the use of more traditional tools already in use in some jurisdictions will help provide a better understanding of their applicability to other centers and corridors.

**4. Develop a new approach to gap financing.** Lenders are unwilling to assume any construction or stabilization risk until their problem assets are resolved. Assemblage of land is a barrier of entry for development projects in smaller communities. Underwriting and construction loan management could be outsourced to commercial lenders with a core competency in construction lending. Interest rate risk would be mitigated with an appropriate hedge. Commercial banks are reluctant, unwilling, or unable to portfolio residential condominium loans while condominium projects achieve stabilization. Local governments could make up for this lack of available financing through providing a variety of levels of support including providing credit enhancements (e.g. third party guarantees, letters of credit, etc.) to lenders of development projects.

**5. Create a new mechanism for metropolitan infrastructure investments that will support compact mixed-use development.** Although further details of such a mechanism will need to be further investigated, it could be governed by the following characteristics: flexible funding source, strategic allocation not “dividing the spoils” allocation, emphasis on leveraging public and private dollars and key outcomes, constant over a long period of time.

**6. Advocate for legislative changes and position the region for federal and foundation funding.** State law should be amended to allow local governments in the metro region the voluntary option of whether to adopt geographically limited discretionary review for certain large, high impact developments in town centers and corridors designated in the 2040 Growth Concept. Another issue that needs to be addressed by the legislature is enhancing local authority for public infrastructure financing. State limitations on local taxes for infrastructure funding that will be necessary to build/rebuild centers and corridors should be removed. The region should also make efforts to position itself for federal support within the emerging “placed-based” funding emphasis of key federal departments and programs.

It is important to note that the EAG believes that developing these strategies further should be accompanied by an assessment of the readiness of all designated corridors and centers to fulfill 2040 aspirations, even with new tools and strategies. The EAG believes that not all centers and

corridors can be expected to develop as envisioned in the 2040 Growth Concept, at least not within the expected time frame and perhaps, not as robustly. In order to accommodate this reality, the EAG feels that there ought to be flexibility within the regional planning process to designate new centers, including some at or near the edge and to possibly change the designation of some existing centers.

This report was developed by the EAG with the primary focus of encouraging center and corridor development in both the long and short term. The group recognized that Metro, and its regional partners, are currently engaged in decision-making about the urban growth boundary and designating urban and rural reserves and further recognized that these decisions are governed by state law and have their own processes and will be governed by adopted regional criteria. While the group expressed the hope that Urban Growth Boundary and Urban Reserves decisions be strategic in light of the larger forces illuminated in this report, the information presented in this report is intended to focus on current and future challenges to successful center and corridor development.

Most importantly, the group recommends that implementation of these new efforts not simply be left to Metro to initiate or deliver on its own. Instead, these strategies should be fleshed out, added to and implemented by a new or reinvigorated collaboration between public and private interests, including community and institutional interests. In this construct, Metro would retain and even enhance its leadership role but would be able to engage the kind of cross-sector collaboration that will be needed to lead desired and necessary change in a positive way. Without this collaboration and without prioritizing this as an early action, the EAG believes that limited initiatives can be accomplished but the overall effort required will not be able to be sustained, nor its full potential realized. The need for a collaborative regional strategy is more fully explained in Chapters 3 and 4.

The EAG members thank Metro for the opportunity to offer candid and thoughtful advice and stand ready to help in continued work to build “the greatest place”.



# Chapter 1

## Purpose and Background

### *Background*

The Portland area's regional government, Metro, has broad authority to plan for the future of the metropolitan area, particularly for the urbanized areas of Clackamas, Multnomah and Washington counties that include and surround the city of Portland.<sup>1</sup> Metro's work in this regard is guided by a long-term regional growth management plan, the 2040 Growth Concept, first adopted in 1995, that carries out the mandates of Oregon's land use planning law and establishes a vision for the region.<sup>2</sup> Metro's role has largely been to set development policy and to rely on the private sector and local jurisdictions to implement 2040 Growth Concept. However, Metro has also been involved in implementation of the long range plan in two significant ways: allocating regional transportation funds to local jurisdictions for construction of a variety of road, transit, bicycle and pedestrian projects; and acquiring permanent open space through voter-approved public bonds.<sup>3</sup> Although Metro has independent taxing authority, it has used this power very sparingly.<sup>4</sup>

Since its inception fifteen years ago, the 2040 Growth Concept has posited compact, mixed-use, transit-oriented development as a central element of shaping regional growth patterns, limiting sprawl and creating livable communities. The primary locations for accommodating this kind of urban form are in areas known as *centers* and *corridors*, so designated in the 2040 Growth Concept. Directing growth into centers, corridors, and employment areas as designated in the 2040 Growth Concept has been the region's overarching strategy to preserving farms, forests and natural areas outside the boundary and protecting single-family neighborhoods within existing communities. Specifically, the region has agreed that encouraging compact development can help to address climate change, ensure equity, create jobs, and protect the region's quality of life. The centers and corridors recently inventoried for Metro's study on center and corridor performance (which did not account for the entirety of 2040 designated corridors) comprise about 12 percent of the land area within the urban growth boundary but attract about 22 percent, almost double, of the total development activity inside the three-county area.<sup>5</sup> In 2002, Metro voters, upon referral by the Metro Council, committed to retain the low-density character of existing single family neighborhoods currently within the urban growth boundary – designated as single family

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<sup>1</sup> The UGB was first established by Metro in 1979 and approved by Land Conservation and Development the following year. Since then, the boundary has been expanded a total of 186 times. However, only 3 expansions have been of significant acreage (over 1000 acres), with the biggest addition in 2002 with over 18,000 acres. From 1998-2008, the percent of total residential permits for the three-county region that occurred inside the UGB is 89 percent versus 11 percent outside the UGB [Draft 2009-2030 Urban Growth Report, Residential Analysis].

<sup>2</sup> Oregon Senate Bill 100, passed in 1973, created the Department of Land Conservation and Development (DLCD) and the Land Conservation and Development Commission (LCDC), which developed 19 statewide land use planning goals. Metro's own long-range growth management plan, the 2040 Growth Concept was first adopted by the Metro Council in 1995.

<sup>3</sup> The Regional Flexible Fund process, through which federal funds are allocated to transportation projects, occurs every two years and is documented in the Metropolitan Transportation Improvement Plan (MTIP). The amount allocated for Regional Flexible Funds in the 2012-2013 cycle was \$67,799,741. Metro has also issued two bond measures for open space. Voters approved the \$135.6 million 1995 open space bond measure to protect over 8,130 acres of natural areas and 74 miles of river frontage. Voters also approved the \$227.4 million 2006 natural areas bond measure, which has already protected over 800 acres of natural habitat.

<sup>4</sup> The Metro charter gives Metro authority to ask for voter approval for broad-based revenue sources such as a property tax, sales tax or income tax. Metro's only property tax levy for operations is dedicated to the Oregon Zoo. The charter also grants the council authority to adopt taxes of limited applicability without a vote of the people, but only after review by a citizen tax study committee. The only niche tax currently levied by Metro is an excise tax on Metro's goods and services.

<sup>5</sup> According to building permit data from 2000-2007 that was recently analyzed for a Metro study on center and corridor performance. The centers used in the study include all regional and town centers, but only 70 corridors were analyzed for the study. There are many more 2040 corridors in the region than the 70 studied.

residential neighborhoods outside of regional and town centers.<sup>6</sup> Other areas include employment and industrial areas that could also see substantial investment and re-development. The basic spatial diagram of the 2040 Growth Concept is shown in Figure 1.

As part of its growth management strategy, Metro has made a number of efforts in the last five years to encourage compact center and corridor-based development. These efforts include conducting public and leadership education, convening development forums and assisting pilot projects with gap financing and technical assistance. However, although centers and corridors in the metro area have been emerging and developing, they have not done so as quickly or as robustly as hoped. Centers and corridors in the region have the potential to be more successful than they have demonstrated so far. Most local jurisdictions have come to embrace the 2040 aspirations by zoning for more mixed-use capacity and, in some cases, creating urban renewal districts to spur local development. Many centers and corridors have also seen substantial transportation improvements in the last 15 years, including provision of light rail transit. However, in most cases, this transit investment alone has not provided a sufficient basis for aggressive private investment in nearby development. In order to ensure existing urban areas can accommodate future growth and achieve sufficient capacity for households and jobs, additional, more innovative tools will be needed to encourage private investment in centers and corridors.

Metro is currently shifting its focus and energy towards implementing the 2040 Growth Concept. A focus on implementation will be crucial to supporting the Making the Greatest Place initiative, the region's new, integrated approach to guiding growth and development that responds to new market, financial, social, and environmental challenges. Metro is placing emphasis on the creation of new tools and approaches designed to achieve key outcomes agreed upon by the region, such as vibrant communities, economic prosperity, and leadership on climate, within the overall 2040 Growth Concept policy framework.

#### *Metro's request of IMS*

In June, 2009, Metro asked the Institute of Portland Metropolitan Studies at Portland State University (IMS) to convene experts in real estate development and finance to identify obstacles and recommend possible strategies for enhancing the state of center and corridor development. The subsequent recommendations will be presented to Metro's Chief Operating Officer and to the Metro Policy Advisory Committee and Metro Council. It is hoped that these findings and recommendations will become part of the Making the Greatest Place policy discussions and deliberations Metro is conducting over the year with constituent jurisdictions, the general public and a variety of stakeholders on the future shape of the region, leading up to an important set of decisions that Metro will make later this year and in 2010. These decisions involve: whether, where and how to expand the urban growth boundary; where and how to designate urban and rural reserves; how to prioritize and perhaps enhance infrastructure funding within the region; whether and how to change metro-level development policies for constituent jurisdictions; and how to best foster public-private partnerships at multiple levels for implementation of the 2040 Growth Concept. Local jurisdictions will also be developing and refining aspirations and mechanisms for development of centers and corridors for which they may find these recommendations useful.

From July through September, 2009 IMS convened a group of public and private development and finance experts from around the Portland metropolitan area. That group, known for this purpose as

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<sup>6</sup> In 2002, the Metro Council referred Measure 26-29 to voters which amended the Metro charter to, prohibit Metro from requiring increased density in existing single-family neighborhoods. The measure passed.



the Expert Advisory Group on Developing Centers and Corridors (EAG), was composed of developers, lenders, planners, development consultants, appraisers, brokers, public sector development officials and public infrastructure providers. The group met several times at Portland State University over the summer and engaged in an active on-line discussion as well. Sub-group meetings on finance and on design and regulation augmented the large group meetings.

The EAG considered the following questions:

- Are market, financing and other trends pointing to compact, mixed-use development or not?
- If so, are there specific obstacles to this type of development in the Portland metropolitan area that should be removed?
- What actions might be taken to improve the investment environment for center and corridor development, and by whom?

Based on the EAG deliberations over these questions, IMS has prepared this report, which sets forth a number of findings and conclusions about compact, mixed-use development in centers and corridors. Also included is a six-point action plan recommended by the EAG. The action plan is aimed at developing new strategies and tools that would encourage and accelerate the development of centers and corridors in the metropolitan area over the next ten to twenty years.

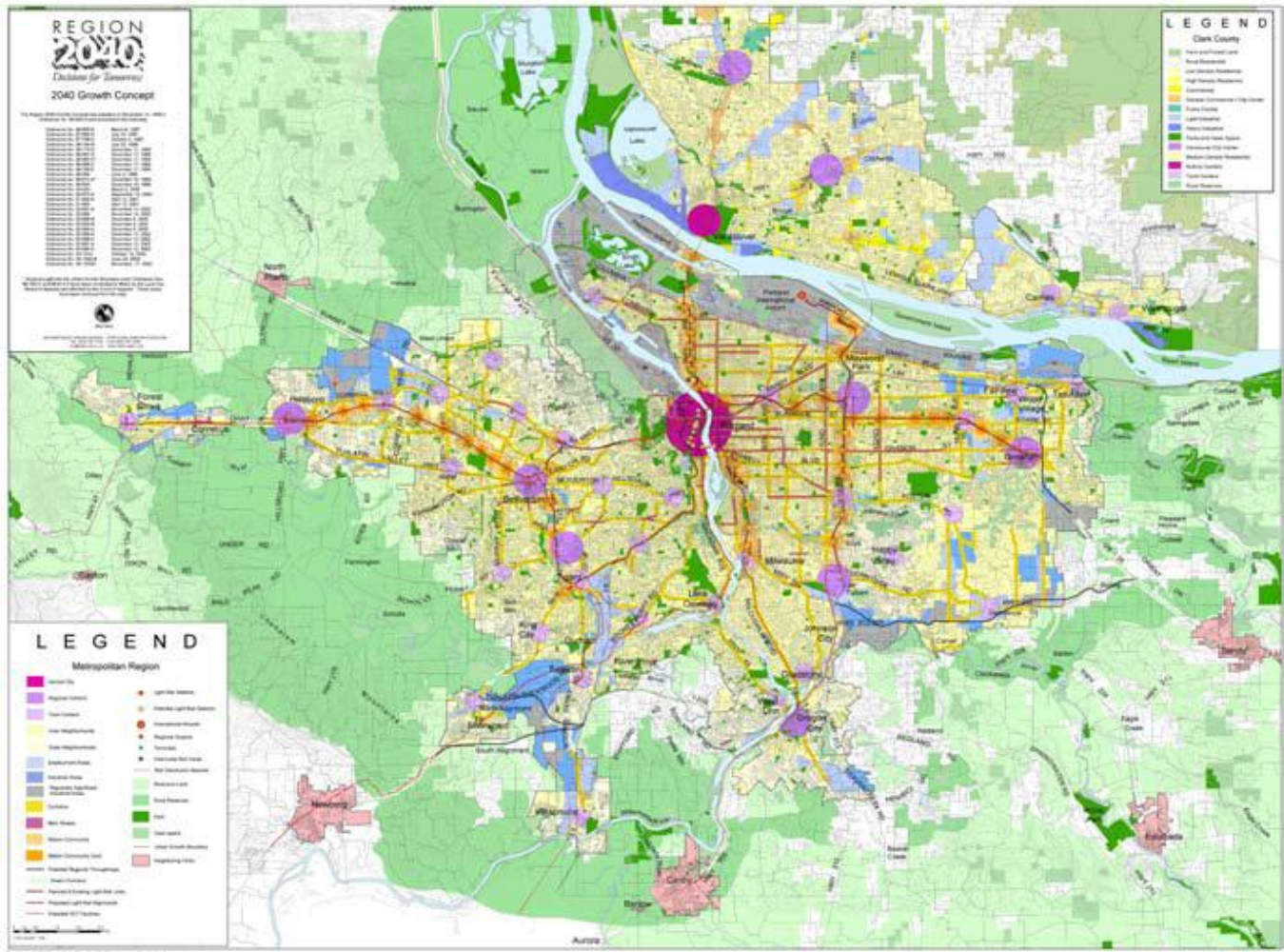
The action plan makes the following recommendations, which are described in more detail in chapter 3:

- A. Establish a structure for on-going cross-sector collaboration and learning
- B. Develop a diagnostic tool for assessing the health of individual centers and corridors
- C. Develop a public-private development toolkit to facilitate appropriate development
- D. Develop a new approach to gap financing
- E. Create a new mechanism for metropolitan infrastructure investments that will support compact mixed use development
- F. Advocate for legislative changes and position the region for federal and foundation funding

The reader will note that the EAG's findings and recommendations are dramatic; they suggest an ambitious agenda and recommend a new kind of cross-sector collaboration to implement this agenda. Expanding the discussion of these objectives to leaders in the government, private, non-profit and community sectors is paramount in the group's recommendations, as is creating an ongoing, collaborative forum for continued work and education. In writing this report IMS has attempted to state the conclusions and recommendations in the voice of the EAG itself.

The members of the EAG have expressed an interest and desire to stay involved in some way as these recommendations are shared and acted upon by Metro, local governments and other groups and organizations throughout the metropolitan area.

Figure 1 - The 2040 Growth Concept



## Chapter 2

### Findings and Conclusions

The shape of future development in the Portland area will be the result of several factors, some under our control and some not. These external and internal factors were identified as an important context for subsequent findings and recommendations on center and corridor development. Important external factors, climate change, increasing energy and resource costs, demographic and consumer preference shifts, infrastructure delivery deficiencies and financial/credit changes, will require us to rethink or intensify key policies and strategies that we now use. These factors represent major trends that are already beginning to evidence themselves here and elsewhere and will intensify greatly over the next several years and decades. Our ability to respond to them will have much to do with whether Portland remains a desirable place to live and a competitive place to do business. Because these factors are so large and change-inducing we have taken some effort to describe their magnitude in the next section.

There is also a crucial set of internal factors that must be re-aligned to make the most of an adaptive, creative and ultimately successful urban development strategy for the Portland metropolitan area in light of the external drivers. These factors include:

- Developing a set development templates that will work for retrofitting the area's centers and corridors within market and financial constraints;
- Building the capacity of the local development community to create value in new ways;
- Greatly enhancing public-private-institutional collaboration for both investing and learning;
- Educating local officials, planners and citizen/interest groups about the value of new development models and collaboration; and
- Developing new tools and processes for local development and development review.

These challenges and opportunities are enumerated in this chapter; recommended actions follow in the next chapter.

#### *Challenges and Opportunities Ahead*

We are entering a time of great change in urban development in the United States; this is a watershed moment in which the national economy is being reshaped and in which our patterns of urban development will also be reshaped. Global economic and environmental forces mean that the next decade will likely produce shifts in thinking and investment that may be as transformative as those in the decade following the Second World War. That decade, and the policies and investments that began in it, have largely shaped the pattern of development we live in today. The GI Bill, the mortgage interest deduction (initially limited to single family home ownership), the building of the modern highway system, the shutdown of inner city rail/streetcar systems, the availability of cheap land at the city edges, cheap fuel and energy and the re-orientation of consumer interests and the residential building industry to the expanding suburbs combined to spawn a new pattern of cities in the U.S. The post-war American city, outside of its pre-war core, is typically sprawling, automobile-dependent, socially segregated, monolithic in character, energy consuming, multi-jurisdictional and fiscally strained.

Sixty years on, the "post-war" way of building cities and communities has become no longer sustainable and may not even be desirable to consumers. Energy costs are rising, the level of carbon

emissions as they relate to global warming has become a defining issue, over-extended private lending is contracting and the gap between public resources and demands for public service and infrastructure continues to widen. At the same time, demographic changes in our population and changing consumer interests are pointing to a new demand for more urban, walkable environments with a variety of housing types and services nearby. The post-war building era is rapidly closing – it may even have closed already, with the recent collapse of the financial and credit markets. In the coming decades our cities and our national economy will be challenged to find new ways of organizing a more sustainable pattern of development. This will certainly involve finding good ways of filling in and redeveloping already “urbanized” areas – both urban and suburban - that can be transformed to create the kind of neighborhoods and communities that include elements of livability and vitality that are now being demanded by an increasing number of Americans.

The Portland metropolitan area may have an advantage over most American metropolitan areas, a running start in meeting these new challenges. This is because we have been very intentional about our development over the last several decades, making deliberate efforts to provide a level of “livability” and land conservation that are not typical of the post-war American city. Although the application of this intentionality has been uneven and the subject of continued local and regional debate, it has produced two advantages that the region may now build upon: a pattern of investments in physical development that has begun to anticipate the challenges of maintaining livability, sustainability, prosperity and equity in the “post-carbon era”; and, perhaps more importantly, a “civic infrastructure” that promotes collaboration among government, business, institutions and public interests in shaping our communities. This collaboration has encouraged innovation and promoted cost-sharing. We can use these building blocks (our “DNA”) to continue to develop our region and our communities in ways that are healthy, vital and sustainable while maintaining our sense of place and special identity, even as the metropolitan area (seven-county) grows by one million more people over the next 30 years.<sup>7</sup>

However, we should not assume that this potential for success will be realized on its own. It will not occur as a result of simply continuing current policies and practices, or even by making incremental adjustments to them. Instead, we must again take stock of the situation, be very intentional in our efforts and bold in our thinking. We urge the Portland metropolitan region’s policy-makers, developers, lenders, planners, architects and community leaders to understand the magnitude of the shifts occurring in the present pause in market activity and to think creatively and act deliberately. What will be demanded as the market recovers is nothing short of a new paradigm in investment, one where compact, mixed-use and sustainable development is the norm, rather than the exception or the “leading edge” as it is now, and one where public-private-institutional-community collaboration is the foundation of success. This report sets forth some ideas about how to start down this new path of more sustainable and successful urban development.

***General Finding #1: Compact mixed-use development is highly indicated by major trends***

The EAG considered whether market, financing and other trends point to compact, mixed-use development going forward. Our assessment is that although forces and results have been mixed thus far; this type of development will be the prototype for the next several decades. We cannot over-emphasize the importance of this. In general, this finding is supportive of the “architecture” of the 2040 Growth Concept and of keeping a tight urban growth boundary. However, as discussed in General Finding number 2; the 2040 Growth Concept and current policy are not sufficient to fully

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<sup>7</sup> These forecasts were released by Metro in March 2009 and are for the seven-county Portland-Beaverton-Vancouver Primary Metropolitan Statistical Area (PMSA), [http://library.oregonmetro.gov/files/20-50\\_range\\_forecast.pdf](http://library.oregonmetro.gov/files/20-50_range_forecast.pdf).

capture the future activity indicated by these trends. Our first conclusion was reached for the following four reasons:

- a. The direct and indirect costs (including environmental costs) of low-density, sprawled development are becoming much greater and will be very difficult to sustain. This trend will likely continue and escalate as the true costs of energy and carbon are “priced in” to the development equation.**

Climate change is now documented; carbon emissions are the cause. In Oregon, transportation alone accounts for 34 percent of greenhouse gas emissions. Compact urban development and an increase in mass transit ridership can reduce transportation emissions. Pedestrian friendly compact development with a mix of land uses can reduce driving from 20 to 40 percent, and is increasingly being cited as an important factor in achieving greenhouse gas reductions.<sup>8</sup> According to the Environmental Protection Agency, in 2008 passenger cars, vans, and SUVs accounted for 64 percent of all transportation emissions.<sup>9</sup> Accordingly, changing land use patterns to more compact development and making investments in improved transit and transportation options can achieve meaningful greenhouse gas reductions in the long term, ranging from 9 to 15 percent reduction by 2050.<sup>10</sup> From a consumer standpoint, peak oil and rising energy prices, long lead time for fuel efficient fleet of vehicles, and transportation costs as a share of household budget mean shorter commute trips will be demanded and home sizes will be smaller.

One challenge to increasing the amount of compact urban development is the costs and difficulty in delivering public infrastructure. In some areas the available infrastructure is not sufficient to support additional development. Metro is just beginning to document these costs through its research and planning initiatives. The 2008 Regional Infrastructure Analysis found that the public and private investment needed to accommodate growth in jobs and housing in the Portland metropolitan area through 2035 is \$27 to 41 billion, with \$10 billion needed just to repair and rebuild existing infrastructure. Traditional funding sources are expected to cover only about half that amount.

- b. Demographic changes and consumer interests are shifting demand toward more urban development forms.**

The population of the United States is projected grow by about 100 million between now and 2050. The population, which is aging, will continue to urbanize (90 percent of U.S. residents will live in cities versus 81 percent now). There is growing evidence that the population wants a more efficient living pattern – smaller homes, less private open space but more walkable neighborhoods with services close by, shorter commute times and transportation options.<sup>11</sup>

Metro estimates that the population of the seven-county Portland metropolitan area will increase from 1.9 million in 2000 to 3.6 to 4.4 million in 2060.<sup>12</sup> Demographic changes in the Portland metropolitan area from 2000 to 2030 include a decrease in the percent of households with children (32 to 28 percent) and an increase in the percent of households without children (from 68 to 72 percent).<sup>13</sup> In addition, households without children in the Portland metropolitan area are

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<sup>8</sup> Growing Cooler: The Evidence on Urban Development and Climate Change, Urban Land Institute, October 2007.

<sup>9</sup> Regional High Capacity Transit System Plan Summary Report, Metro, September 2009.

<sup>10</sup> Moving Cooler: An Analysis of Transportation Strategies for Reducing Greenhouse Gas Emissions, July 2009.

<sup>11</sup> National Association of Realtors & Smart Growth America, American Preference Survey 2004.

<sup>12</sup> 20 and 50 year population and employment range forecasts, March 2009 draft.

<sup>13</sup> Arthur Nelson, Metropolitan Portland mega-trends 2005-2040, presentation to Metro Council October 8, 2008.

projected to account for 86 percent of growth from 2000 to 2040.<sup>14</sup> These trends projecting smaller households without children underline the idea that demand is shifting from single-family homes to smaller multi-family units and even rentals.<sup>15</sup> The Joint Center for Housing Studies of Harvard University's State of the Nation's Housing 2009 report, which summaries a variety of 2008/2009 housing market and demographic data, reinforces how a population that is aging, diversifying and made up of smaller households will shift long run housing demand towards rentals, starter homes and senior housing.<sup>16</sup> This demand for multi-family units in more compact and walkable settings can be met at a variety of urban and suburban scales. Centers and corridors represent opportunities to showcase and create new types of development.

**c. The current credit situation is unlike anything the U.S. has experienced in many decades. This condition will likely last several years and the credit market will likely not return to the way it was.**

As a result of the recent financial crisis, commercial banks are consumed by managing "problem loan" portfolios. The need to clear out backlog, including toxic loans, will prevent many commercial banks from entering into new projects for several years. Additionally, regulatory and shareholder pressure exists to reduce the percentage of loan portfolios that are related to land acquisition, speculative development, and investor real estate. Underwriting criteria has tightened, and lending for certain project types has been curtailed.

Mezzanine lenders are consumed by existing problem assets in their investment portfolio. The ability to raise capital for new mezzanine funds is limited until exit strategies, such as sale or refinance of underlying assets, for portfolio investments improve. Institutions like Fannie Mae, who in the past bought up many of these loan packages, will no longer be buying them; and it is not clear who will take on that role. Banks are also reluctant to carry too much on their books, even after backlog is cleared. Large projects will be viewed as high risk loans because the market won't necessarily absorb all of the units/spaces as quickly as in the "easy credit era" that just ended. There is no good exit strategy for lenders who will already be holding a lot of unwanted property. In the future, large equity shares will be standard.

In this new lending environment, the credit-worthiness of developer/development partners will be emphasized much more so than in the past and may become a part of federal guidelines. Developers are now required to make larger equity investments at project inception, and demonstrate ready access to liquid resources to make additional equity contributions in the event that their projects are over budget or are not achieving targeted stabilization (e.g. lease-up, sale) as underwritten. A substantial gap exists between the capital required to invest in centers and corridors to support more intensive, compact urban development required to meet the region's growth needs and the capital available to fund the investment.

Smaller/phased projects, for example 20-50 units in one to three buildings as opposed to 200 units in one building, may be easier to finance. Re-use projects that add three to five residential units in the top floor of an updated building may be the scale the market could support. The current financial preference for smaller projects holds implications for centers and corridors and requires a rethinking of construction types.

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<sup>14</sup> Arthur Nelson, Metropolitan Portland mega-trends 2005-2040, presentation to Metro Council October 8, 2008.

<sup>15</sup> Arthur Nelson, Metropolitan Portland mega-trends 2005-2040, presentation to Metro Council October 8, 2008.

<sup>16</sup> *State of the Nation's Housing 2009*, Joint Center for Housing Studies of Harvard University, 2009.

- d. The current level of public investment in compact urban development is not sufficient to address escalating costs of development. There will be a need for recalibration of the ratio of public to private investment in compact urban development, at least in the near to medium term, and this may differ from place to place.**

Public or institutional investment will be very important, perhaps critical for the next several years, given the financial situation described above. From a public policy point of view, we may need to recalibrate the role and share of public investment in desired development outcomes. Two approaches of public investment and involvement in desired development outcomes—infrastructure provision and direct participation in lending (including land resources)—are possible and may be needed in tandem to address the current situation. Direct participation in lending may be more difficult to implement in terms of public acceptance unless there are clear public benefits and some check and balance or relative transparency. Third party institutional and non-profit entities acting as “brokers”/participants would provide greater skill and nimbleness but require accountability where public resources are concerned.

#### Implications of Finding #1:

These factors indicate there will likely be a pronounced shift in demand toward infill development in the coming years, but this can only happen if supply is provided and barriers that prevent the supply of compact development types are removed.

The set of factors described above point strongly to the fact that demand will be for development inside the current metropolitan area footprint, assuming supply can be achieved. At workshops held in 2008, the region’s mayors, councilors, and commissioners endorsed scenarios that accelerated and intensified development in centers and corridors and more recently, local aspirations from communities around the region reinforced this goal. Yet for these aspirations to be realized, significant design, regulatory, and financial tools are required to achieve capacity already existing within the metro area. It is also necessary to shift our thinking about land supply. Although we have traditionally thought of supply as being raw land outside and at the edge of the region, we need to start thinking of it as underutilized land inside existing communities.

There is capacity inside the existing metro area, but it is not accessible or developable in the same way as undeveloped land outside the boundary. Metro models estimate that the region’s centers and corridors have much more zoned capacity than can be developed under current market conditions.<sup>17</sup> This strongly supports the need for a new set of tools to unlock this excess and underutilized zoned capacity. For example, the City of Portland has estimated that 400 acres of vacant or underutilized land within its boundaries could become available for development in the next 20 years resulting in up to 100 million square feet of new building area.<sup>18</sup>

It is important to recognize that not all aspirations for growth in the region may be realized. The 2040 Growth Concept is a fifty year vision and not all centers and corridors will be developed as the 2040 Growth Concept envisions them, at least not in the 20-year time frame and perhaps not as robustly. In addition, some employment land may be warranted at the edge of the metropolitan region to meet specific needs as industry changes and evolves.

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<sup>17</sup> “Achieving Mixed use Compact Development in Centers and Corridors; Aspirations, Challenges, and Tools”, Background Information prepared for Expert Advisory Group by Metro staff, July 2009.

<sup>18</sup> City of Portland, local aspirations, June 2009.

***General Finding #2: The Portland metropolitan area will need to overcome present obstacles and create new mechanisms to further the development of centers and corridors***

The EAG also considered the following question, “What are the specific obstacles to center and corridor development in the Portland metropolitan area?”

- e. The Portland metropolitan area has a significant supply of underdeveloped land inside the urban growth boundary but current development approaches will need to be reworked and some development constraints will need to be removed to unlock that supply.**

Communities around the region have aspirations for accommodating significant growth in regional and town centers, corridors, and employment areas. Generally, the communities with high aspirations for growth such as Hillsboro, Tigard, Gresham, and Oregon City have the capacity to accommodate desired growth. However, full recognition of that density on the part of the public has not been tested in very many places since the original visual preference work by Metro. Although the zoned land supply is there, it is hard to realize the potential of this capacity with existing thinking and the traditional toolkit and approaches used by local governments. There are several constraints on development that if addressed, might free up additional supply within centers and corridors. These barriers include:

- fragmented property ownership;
- difficulty in aggregating land in small parcels;
- availability and cost of parking;
- inflexible development code; and
- fees that don’t support compact development.

To better accommodate these constraints, much new development will need to be finer grained and perhaps phased; a new breed of developer or overall development approach may also be needed to work this landscape. Since our region tends to have smaller more niche developers that lack the capacity to shift to alternative cities and learn new regulatory protocols, the lack of developer capacity also needs to be addressed.

- f. Given the scarcity of resources in the public sector there is a need to both prioritize investments and consider ways to enhance resources for investment.**

Many local jurisdictions are interested in pursuing development through urban renewal and property taxes in general, but these tools have long term limitations under Oregon law due to restrictions on revenue raised through property taxes.<sup>19</sup> In addition, the need to focus the marginal dollars generated by development that best achieves desired outcomes must be balanced with concerns about ensuring a geographically equitable distribution of resources. This raises issues of equity and geographic spread versus “leveragability”. In any case, prioritization, although difficult

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<sup>19</sup> Measure 5, adopted in 1990, limits the amount of property taxes that can be collected from each property by \$5 per \$1,000 of real market value (RMV) for education taxes and \$10 per \$1,000 of RMV for general government taxes. Measure 50, adopted in 1997, separated real market value from assessed value and reduced assessed value to 10 percent minus the 1995-1996 assessed value amount. In addition, Measure 50 froze existing property tax bases into permanent rates and limited assessed value growth to 3 percent per year unless major renovations occur on the property. Measure 50 provisions also apply to new properties, which are taxed at the same assessed value to real market value ratio as existing property.



politically, will have little effect without a new discipline around exercising leverage and cost sharing.

**g. Improving certainty and reducing transaction costs in local development deals (including permitting) will be needed if infill supply is to be accessible.**

Throughout the initial stages of the development process, tensions exist between certainty and flexibility and between community acceptance and time efficiency on the part of the developer. In order to overcome barriers and expedite development, certain elements of the development process need to be improved. Development and design review templates or frameworks can be developed to be regionally applicable but open to adaptation by local communities. Financial mechanisms for lowering risk in initial development deal negotiations might include the provision of seed money up front. Pilot projects that use clear information to advertise successes of reducing transaction costs and risks will be important to promoting this agenda.

**h. Good design will be critical in gaining and sustaining public acceptance and building the kind of communities that we want.**

The public and private sectors must pursue and promote contextually appropriate, quality development and involve community members and neighbors in the development process on a narrow spectrum of issues to help them better understand community benefits of certain development. Ordinances need to be reviewed for standards and State law that limits discretionary design review may need to be changed. A model zoning code, including form based concepts would be one way to help communities adjust their current zoning to accommodate new growth. A design toolkit, supported by Metro and a public private collaboration, is another approach that would allow communities to develop customized design standards, providing continuity and coordination while allowing individual control over the character of the result.

**i. There is need for a focused and sustained collaboration between public, private, non-profit and institutional sectors to deliver on the promise of a new way of building our communities.**

A focused and sustained collaboration between the public, private, non-profit and institutional sectors has not really existed in a formal way before. Although project-focused alliances have real value, the scale and complexity of the current challenge demand a higher level and more explicit forms of collaboration. An action plan like the one proposed here, including development of mechanisms for public financing and the creation of development toolkits and new development approaches may allow the results that single entities acting alone cannot achieve. Collaboration should not be viewed as being solely in the service of “deal-making” or co-investing; it must also serve the interest of education (continuous learning) and adaptive change (as we learn more and find new challenges). There needs to be a collective focus, beginning now, on educating leaders and the general public, starting with education of Metro and local officials and extending to development and design professionals and to neighborhood and other community organizations. An ongoing public private collaborative dialogue will increase understanding and build trust between different sectors.

## Chapter 3

### Recommended Action Plan

The Expert Advisory Group recommends that a six-part action plan be adopted as a holistic development strategy for the region. Although key elements of this plan are directed at and recommended for Metro to implement, it is equally important that local governments, professional associations, lenders and development groups also endorse it and participate in its further development. Metro should take the lead in convening the partners that will be needed to further develop and implement this Plan. Metro should also take a larger long term role in facilitating the implementation of compact urban development, by increasing its focus on an enhanced role in education, technical assistance, gap financing, infrastructure financing, and legislative advocacy.

#### **A. Establish a structure for on-going cross-sector structure collaboration and learning.**

Justification: The future of urban development, particularly infill development, will require multiple parties acting together in new ways. The traditional roles of government (regulator and infrastructure provider) and private developers (capital formation and real estate development) are not sufficient to accomplish robust center and corridor development. A more strategic view by governments of the use of tools at their disposal and more willingness on the part of private developers and lenders to meet public and community objectives and engage local governments as partners are required. This challenge may also require the emergence of a third kind of entity: quasi-governmental/quasi-private entities to facilitate aspects of development and redevelopment. This could take the form of a parking authority or regional “gap-financing” bank, possibly one that also brokers development credit transfers.

Furthermore, the shift to this new way of developing centers and corridors will take time and learning. This will require a sustained collaboration that is suitable for not only facilitating development but also for fostering on-going learning and adaptation. We need a convener, a public/private/institutional transaction broker and a University of 2040, where ongoing training and idea exchange/experimentation can occur. This kind of institution could provide a forum for regional exchange of local success stories in centers and corridors, useful strategies for achieving aspirations and ways to overcome challenges. Some formal partnership between local and regional actors should be formed to initiate this collaborative effort. Finally, public education about the importance of compact urban development and the new tools needed to achieve it should begin *now*, while the Making the Greatest Place process is engaging the community and local political leaders about achieving local aspirations.

Recommendation #1: Establish a task force composed of public, private, non-profit, professional association and institutional interests, and charge them with designing a structure that will accomplish three specific purposes:

- a. Devise an implementation strategy for this action plan
- b. Engage a spectrum of interests – particularly those policy and professional parties who will be key to the action plan’s implementation; and
- c. Examine and suggest ways in which a partnership and education function could be funded and sustained over time

The Metro Council President should convene this effort, together with the President of Portland State University and the Dean of the University of Oregon (Portland).

Recommendation #2: Establish a University of 2040.

A collaborative research think tank, the University of 2040 would advance best practices, while providing education for communities, developers, lenders and appointed and elected officials on facilitating compact urban development. The research and education provided by the University of 2040 will be central to the success of center and corridor development. Community groups must be shown that developers can act as partners, helping to achieve community aspirations. Developers need to learn how to work with the public sector to craft public-private partnerships. City councils and staff need to be educated about the complexities of financing, vertical ownership, and other on the ground realities of center and corridor development. City agencies need to engage in communication with each other and Metro to access support services. The Center for Real Estate at Portland State University runs a mentoring program for developers but the efforts need to be expanded. A University of 2040 that provides continual education and resources around achieving aspirations set forth in the 2040 Growth Concept could easily build off this foundation.

Recommendation #3: Engage in an early outreach and education effort about the findings of this report.

Teams from the Expert Advisory Group need to make contact with people at the ground level, including property owners, city officials and developers to communicate on the benefits of increased density, including improved service and urban amenities. EAG members can assist Metro over the next year in outreach efforts aimed at gaining understanding and acceptance of the findings and recommendations in this report.

**B. Develop a Diagnostic Tool for Centers and Corridors**

Justification: Although centers and corridors throughout the Portland metropolitan area share many attributes and aspirations, they are not all the same. They do not currently perform at equal levels nor should they be expected to perform in the exact same ways. A diagnostic tool for center and corridor health would provide a clear assessment of which areas have the necessary preconditions for successful development. This tool could be used by local governments as a self-assessment tool, by the region as a guide to making targeted regional investments and by developers to identify which areas are ready for investment. Talking in generalities can be of little use to local officials, developers and activists concerned with developing particular places. A convenient diagnostic tool is needed to assess the local conditions of these places and help in developing strategies for improvement and in efficient allocation of regional resources for assistance. In order to best use limited resources, both Metro and local governments need to make strategic investment decisions. Developers and lenders can benefit from knowing what level of commitment cities have for improvement and where they stand in the continuum of effort that will be required to achieve high performance. Developers and lenders will also make their own assessments for market values and conditions for individual projects.

The diagnostic tool will also allow communities interested in working with Metro to direct growth in predetermined centers and corridors to determine whether they have the requisite conditions for growth. If conditions in the community are not ready for growth, the diagnostic tool will provide guidelines as to the types of conditions needed. The tool would help Metro invest and target resources and help local governments build awareness, political support and the right conditions for growth. The diagnostic tool would also help developers by allowing communities to demonstrate their willingness and ability to make a public investment.

For example: Due to an insufficient street network, some regional centers lack adequate on-street parking. Creation of a street network would increase the amount of on-street parking thus allowing for new higher density development in the center. The street network would also provide greater connectivity, not only for cars and transit but also for pedestrians. The investment in infrastructure would demonstrate to Metro and potential developers that the community is a willing and enthusiastic participant in center development. Furthermore, the new streets would help to gain the support of the residents around the center by assuaging fears about traffic congestion while building a more livable community.

Recommendation #4: Develop a diagnostic tool for assessing the health of individual centers and corridors that can determine the relative strengths and weaknesses of various components in locally specific ways. A diagnostic tool might include the following:

*Vision:*

- Does the community have a vision that is both unique to the place and fits within the Metro 2040 Growth Concept?
- Are local codes supportive of the type of development envisioned for the area?
- Does the city have redevelopment plans and strategies for targeted areas?

*Orientation and commitment to private sector:*

- Is there private sector interest and/or engagement?
- Has the community identified redevelopment sites/areas and opportunities?
- Has there been a proactive outreach demonstration to the private sector on the part of the jurisdiction?
- Has the city demonstrated willingness to act as a backstop for a certain number of projects?
- Have market studies been conducted?

*Resources:*

- Does the community have development tools and financial incentives to facilitate desired development?
- Is the community targeting other public funds (parks, transportation, etc) towards meeting desired redevelopment goals?
- What kind of private investments have been made that carry out the intent of the plan? Do these projects have official priority designation? Are staff time and resources assigned to plan implementation? Is there a budget?

*Physical and market conditions (external factors):*

- What is the ratio of vacant, underutilized land compared to improvement to land values?
- What is the land utilization? Floor area ratio?
- How does the corridor function – capacity to ratio?
- What are the ownership structures and parcelization structure?
- Are the market conditions right for this type of development?
- What size of financing gap would exist for projects and what are the options?

The diagnostic tool should be easily understood by local staffs, officials, citizens and development interests, even though some of the underlying analysis may be technical. Metro, or the 2040 University function should lead the initial development of this tool and provide some level of on-going training and assistance to communities in using and refining it.

Recommendation # 5: Local jurisdictions may need to realign internal structures and protocols to address significant barriers that often stand in the way of facilitating compact development.

These challenges include a lack of a shared goal or mission among different city departments on development and building review processes, difficulty in helping to assemble small parcels of land for developers to use, and translating community aspirations into urban development. Strong direction from city leaders will be required to achieve greater alignment between city departments. The diagnostic tool mentioned in the preceding recommendation could be one way for local jurisdictions to identify necessary changes in the protocol and priorities of their city. However, a shift in the overall development approach of local jurisdictions will be required to fully achieve and accommodate the elements of this action plan and for those cities and counties to realize stated aspirations about center and corridor development.

### **C. Develop a Public-Private “Development Toolkit”**

Justification: Public-private partnerships are essential to the success of high-density center and corridor development, which can be challenging for inexperienced developers and officials. Metro can help to facilitate such partnerships through the provision of guidance and technical support, including physical design prototypes and basic public-private development agreement guidelines and examples.

Recommendation #6: Prepare a set of center and corridor design prototypes or a design manual

Entering into a lengthy and costly public design review process with unknown outcomes can pose a significant risk to developers and finding ways to mitigate that risk is important to encouraging more quality and successful development activity in centers and corridors. Public and private expectations about the form of infill development can be greatly enhanced by having a family of physical development prototypes. These can help local efforts to implement area plans and strategies for town centers and corridors and can be helpful in developing and refining codes and in infrastructure budgeting. These prototypes can be used to illustrate site plans, building forms, phased development, parking and street design. This can perhaps be accomplished with 10 to 15 basic prototype development templates, with variations. Development codes could be adjusted to allow simplified and expedited review of projects that conform to these, including simple design review. Projects that want to or need to go another route could be subjected to more discretionary review. The exterior detailing of the approved prototypes could be subject to creativity.

Design prototypes should cover site, near off-site and building plans and elevations for at least these infill development types:

1. Mixed-use (housing above or beside office or retail)
2. Base story (wood or concrete) plus 3 stories of wood-frame over
3. Base (concrete) plus 5 stories (steel) over
4. Courtyard housing
5. Phased development

Recommendation #7: Prepare a checklist for initial assessment of potential public-private investments (development partnerships) for local governments.

Many local jurisdictions have no clear way of assessing whether a development deal that involves some expenditure of public resources or special approvals is better than the next one. In addition, it is often unclear to local jurisdictions what public investments are most crucial in attracting private development and crafting successful public-private collaborations. Both the public and private parties often defer all risk and decision to the end of the process. A standardized initial assessment process could help all parties in sorting out which deals have potential to go further in the process and which should be reconfigured or rejected. A simple decision-tree analysis could simplify the process and add transparency for the public. As an example, a checklist might ask the following questions:

- Is the proposed project within the designated target area?
- Is the proposed project envisioned in the sub-area/development strategy for the target area?
- Is the amount of the requested public participation necessary for the development to have a reasonable probability of earning a market return on the investment of his/her resources?
- Can the City reasonably anticipate earning a return on the public participation equal to the percent it would currently pay on general obligation bonds assuming a new present value calculated over a 25 year term?
- Will the architectural design of the project be commendable?

Recommendation #8: Prepare a public-private Development Handbook

After an initial screening and a project is “green-lighted” to move forward, there is still a need for the actors involved to understand the components of an eventual deal for a public-private development. This understanding can be greatly enhanced for smaller jurisdictions and relatively inexperienced developers by having some standard materials that can be customized during the process. Even for experienced developers and agency staff, potential surprises and risks can be avoided or lowered by having a common set of understandings at the outset of the negotiation process. A handbook for public-private partnerships with model agreements and processes could be helpful and could be augmented with information particular to local jurisdictions. Metro and/or the University 2040 function should prepare this material and conduct trainings with the help of real estate professionals. Alternately, a series of questions to be addressed in a non-binding letter of understanding, followed by a formal agreement, can help guide jurisdictions through the public-private development process. The following examples represent the types of questions that should be included among the many questions to be included in such a list:

- If the site is owned by the public entity, who will be responsible for remediation of any soil contamination?
- Which group(s) will have design review or oversight, when will this oversight occur and when is the determination considered vested?
- Who is responsible for the cost of each infrastructure piece (sewer, water, streets, sidewalks, street lights, and street furniture) and who is responsible for the construction of these improvements?
- If a public ROW is vacated, is there a cost to the developer, how much, what rights are retained by the public and what obligations are assigned to the public and to the developer?

Recommendation #9: Continue and enhance pilot programs and demonstration projects

Expand the Metro Transit Oriented Development (TOD) program to enable it to facilitate additional developments around the metropolitan area, particularly where there are high levels of leverage available. This should include not only some level of gap financing but also some predevelopment/feasibility work, and possibly infrastructure funding. As the recommendations in the next section are implemented and grow (gap financing bank, & regional infrastructure finance) this expanded TOD program could combine and coordinate the application of some of those resources.

**Recommendation #10:** Conducting an assessment of the more traditional tools already in use in some jurisdictions will help provide a better understanding of their applicability to other centers and corridors. This could be done in conjunction with the development and deployment of the “diagnostic tool” described in Recommendation #4. Some of this work may have already been done by Metro as part of its centers program. The following tools should be examined:

- High capacity transit plans/availability
- On the ground density/capacity versus zoned density/capacity
- Urban Renewal/Tax Increment Financing (TIF) programs
- Economic Improvement Districts
- Reduced parking strategies/codes
- Mixed use development codes
- Travel Demand Management (TDM) programs
- Flexible zoning codes
- Incentives for more efficient energy use, including the disclosure of a building’s energy performance at the time of sale, that will help to fuel needed building and district-scale economies – e.g. market pricing bonus/penalty, district energy.
- Investment protocols and partnership information including incentive based pilots of prototypes that can be taken to scale for regional centers, entry-level requirements for self identifying (if you are willing to come to this level then you have access for these programs).

#### **D. Develop a new approach to gap financing**

**Justification:** Mezzanine lenders are consumed by existing problem assets in their investment portfolio. The ability to raise capital for new mezzanine funds is limited until exit strategies (e.g. sale or refinance of underlying asset) for portfolio investments improve. Commercial banks are consumed by management of problem loan portfolios. In addition, regulatory and shareholder pressure exists to reduce the percentage of loan portfolios that are related to land acquisition, speculative development, and investor real estate. Underwriting criteria has tightened, and lending for certain project types has been curtailed. Secondary markets (e.g. Fannie Mae, Freddie Mac) have tightened underwriting requirements, frustrating exit strategies for construction lenders on condominium and single family residential projects. Developers are now required to make larger equity investments at project inception, and demonstrate ready access to liquid resources to make additional equity contributions in the event that their projects are over budget or are not achieving targeted stabilization (e.g. lease-up, sale) as underwritten. A substantial gap exists between the capital required to invest in centers and corridors to support more intensive, compact urban development required to meet the region’s growth needs and the capital available to fund the investment. This gap might require a more active public role and involvement in the financial equation. The lending market is changing and now is the time to build the capacity to structure a variety of creative lending tools and mechanisms that take advance higher levels of collaboration between the public and private sector.

Recommendation #11: Local governments use Community Development Block Grants (stimulus), or other federal or local resources to acquire land or under-performing properties (bank “Other Real Estate Owned”) located in centers and corridors.

Benefits: Land or under-performing properties can be acquired at a low cost (e.g. lenders are motivated sellers). Acquired properties can be “inventoried” until market conditions improve. Pursuant to a development agreement, properties can be donated as “developer equity” once performance based “success” hurdles have been achieved (e.g. meets “green”, transit, affordability, market stabilization tests, etc).

Recommendation #12: Local governments use bonding authority to provide construction and stabilization financing for projects. Underwriting and construction loan management could be outsourced to commercial lenders with a core competency in construction lending. Interest rate risk would be mitigated with an appropriate hedge.

Benefits: Local government benefits from project completion, and may earn a return on the loan portfolio (e.g. coupon, less cost of funds/fees to lender for underwriting and servicing/interest rate hedge/credit risk). If possible, local government could participate in project profits due to the level of risk assumed.

Recommendation #13: Commercial banks are reluctant, unwilling, or unable to portfolio residential condominium loans while condominium projects achieve stabilization. Local governments can portfolio residential condominium loans while condominium projects achieve stabilization. Underwriting and interim servicing of residential mortgages would be outsourced to mortgage lending departments of commercial banks (fee for service) to insure that mortgages meet secondary market requirements, payments are applied correctly, and hazard insurance is tracked. Local government mitigates rate risk with an appropriate hedge. Cash would be returned to the local government when the portfolio can be sold on the secondary market.

Benefits: Local government benefits from project completion, and may earn a return on the loan portfolio (e.g. coupon, less cost of funds/fees to lender for underwriting and servicing/interest rate hedge/credit risk). Developer and lender enjoy greater certainty to their exit strategy.

Recommendation #14: Local governments provide credit enhancements (e.g. third party guarantees, letters of credit, etc.) to lenders of development projects.

Benefits: Local government minimizes cash outlay (assuming project performs) and benefits from project completion. Developer and lender enjoy greater certainty to their exit strategies.

Recommendation #15: Demographics must be well researched and support the project problem it is designed to solve (e.g. seniors, workforce housing, live workspaces, etc). Local governments can enlist the assistance of experienced developers for input on what will be required for successful development. Larger projects must be scalable (e.g. a 200-unit housing project would be phased as four 50-unit buildings to reduce construction and stabilization risk. Commercial lenders with capabilities to provide construction, stabilization and permanent financing need to be at the table at project inception.

Benefits: Large and small developers have the capacity and interest to participate. Construction and stabilization risk is reduced.



**E. Create a new mechanism for metropolitan infrastructure investments that will support compact mixed-use development. Although further details of such a mechanism will need to be investigated, it could be governed by the following characteristics:**

- Flexible funding source
- Strategic allocation not "dividing the spoils" allocation
- Emphasis on leveraging public and private dollars and key outcomes
- Constant over a long period of time

**F. Advocate for legislative changes and position the region for federal and foundation funding**

Justification: One attempt to broaden the authority to allow discretionary design review to include housing in centers and corridors locations, had region-wide endorsement from Metro and a coalition of cities in the 2007 legislative session, but did not pass. The 2007 bill (SB 891) nearly passed when industry groups were either supportive or took a neutral stance, but a very small group of affordable housing advocates were effective with one Legislator in raising the concern that design review could add to the cost of housing developments and that some jurisdictions might use the authority to discourage needed housing. In a different strategy, the City of Portland sought a similar bill in 2009 (SB 907) and those were unsuccessful as well, drawing additional opposition from the state homebuilders association. The city has experienced examples of poor design and siting for large housing developments along key light rail station areas, particularly in East Portland where the lot pattern and lack of street grid do not lend themselves to a "clear and objective" measurable "standards" template.

Recommendation #16: State law should be amended to allow local governments in the metro region the voluntarily option of whether to adopt geographically limited discretionary review for certain large, high impact developments in town centers and corridors designated in the 2040 Growth Concept. Despite the previous challenges of passing similar legislation, this effort should be continued as it would address significant challenges to development in centers and corridors. For example once common templates and overall design guidelines are in place for local centers and corridors, the permit approval process should be much easier to navigate for applicants and the public; however, some form of design review will be needed to maintain quality, reassure the public and prevent writing overly prescriptive codes. In complex mixed-use environments, this is best accomplished by limited discretionary design review. However, currently State law (ORS 197.303 – known as the Oregon Needed Housing Statute) prohibits local jurisdictions from enacting such discretionary authority for development where housing is included, even in limited geographies outside of Portland's Central City and Gateway Regional Center districts.

Recommendation #17: Metro should help cities improve the design quality in their centers and corridors by convening a stakeholders group for advice and consultation on how to conduct a study of the design review issue. A study might include best practices, examination of better "standards" for difficult sites and a cost-benefit analysis to assess any impacts to affordable housing – using existing design review examples. Metro could propose a safe harbor region-wide minimum design guideline template or a "clear and objective" standards template that then could be executed locally.

Recommendation #18: Infrastructure Finance - Local governments have limited authority to raise revenues in order to provide increased capital for public investments and public-private partnerships. State law currently places restrictions and in some cases, outright prohibitions, on

city, county and regional government taxing authority. Past initiatives capping property taxes have significantly reduced core local government revenues. The region should petition the state to review limitations on local taxing authority to provide new tools to make public investments in centers and corridors, particularly removing state restrictions on local taxing authority. Allowing the Portland metropolitan region to raise revenues to support public investments will be critical to the success of future growth and development

Recommendation #19: Place-based programming at the federal level - A new approach to federal funding that encourages collaboration among several federal agencies (HUD, EPA, DOT) provides an opportunity for the metro region to be an innovator in leveraging dollars to execute key development projects. The region should work to be a leader in demonstrating how to combine funds from different sources together to make a difference in the financial feasibility of the project. For example, the region should work to leverage existing transportation dollars, MTIP, HUD, CDBG or new affordable housing funds, and brownfields and other environmental funds and use this experience to support future success in securing additional federal funding.

## Chapter 4

### Role for METRO

Metro is central to the successful development of centers and corridors. The following new or expanded roles for Metro within its existing general authority should be considered. In some cases it may be decided that a new or other existing third party should take on all or part of a role described here, at some point in time. However, all of these are essential for carrying out an adequate centers and corridors development program of sufficient scale and timing and Metro should have some role.

- *Convener/facilitator* - Convene experts such as the task force mentioned in the action plan to refine the implementation of these recommendations.
- *Education and Outreach* - Enhanced role in funding and facilitating education and outreach programs and forums that share local successes in these endeavors.
- *New tools for center and corridor/compact, mixed-use development* - Develop and promote new tools to address obstacles to development.
- *Infrastructure financing* - Help to increase the total funding available by bringing new money to the table to support infrastructure. Also working to be creative in using a mix of public dollars to leverage private funds.
- *Gap financing bank* – Possibly act as manager of money put together by several lenders, lending sources.
- *Pilot programs/manager of predevelopment funds* – Offer resources and assistance on pre-development and feasibility studies for local jurisdictions.
- *Expanded incentives* - Operate a program to entice jurisdictions with various incentives to pursue compact urban development.
- *Technical support* – Increase technical support for project phasing and implementation, template development agreements, model zoning code, SDC credits, public-private collaboration, and diagnostic tools so local partners may better tackle challenging projects.

## Chapter 5

### Next Steps

This report contains recommendations that can be accomplished in both the long and the short term. Elements of the action plan also must be accommodated within the existing programs, priorities and budget capacity of Metro and local jurisdictions. Specifically, Metro's three-year long "Making the Greatest Place" effort is in the final stages of decision making. This process will culminate in decisions on transportation and land use priorities through actions on the Regional Transportation Plan, the Urban Growth Report, and urban and rural reserves in 2009. With these decisions, Metro has indicated that it will shift to an "implementation" phase of Making the Greatest Place.

This focus on implementing the policy priorities designated in the Making the Greatest Place process will help guide the agency's overall budget priorities discussion and the Planning Department's 5-year strategic plan that are currently underway. Metro Council and Metro staff will use the recommendations on promoting development outcomes presented in this report to help inform these budget and strategic planning processes, and decide how to advance the action plan described here.

Metro staff will also continue to coordinate with interested EAG members on the details of the group's recommendations as time, schedules, and interest allow. The EAG believes that there are a few recommended actions that can and should be adopted within the next several months. First, the EAG strongly emphasizes the importance of conducting outreach to local jurisdictions and the general public around the findings and recommendations presented in the report. Select EAG members will present the report to the Metro Council and to the Metropolitan Policy Advisory Committee (MPAC) as well as to local jurisdictions who are interested.

In addition, the EAG feels that it is important for Metro to begin the process of developing a collaborative effort between the public, private and institutional sectors that promotes successful center and corridor development. As mentioned in the action plan, the EAG recommends that Metro Council President David Bragdon convene potential partners from the University of Oregon, Portland State University, local jurisdictions and private developers and real estate interests to discuss how to best advance regional collaboration and education around compact urban development. It is unclear what form this effort will take. The EAG strongly recommends that Metro begin to lay the groundwork for this effort shortly after the report is released in order to maintain momentum around the recommendations and build support for future efforts like the University of 2040.

## Background Documents Investing in Centers and Corridors

Challenge:

As we recover from the current recession and real estate development rebounds from its present dormant state, what will make private investment to develop centers and corridors in metropolitan Portland more attractive, robust and timely? What will make these projects “pencil out”?

Assumptions:

1. **Population and employment in metropolitan Portland will grow substantially** over the next two decades and billions of dollars of private and public capital will be expended to serve this need, as well the changing needs of the current population and employers. The Portland metro area has had, and will likely continue to have an explicit and **proactive set of public policies (at the local and metropolitan level) that will help shape this growth**. In general terms, these policies have been effective in directing growth and change to date toward regionally held aspirations for quality of life, economic vitality and environmental health.
2. **Several other important trends indicate that compact, mixed-use development** (such as that available in centers and corridors) **will play an increasing role in market demand and public expenditures** in the coming decades: rising energy costs to consumers and businesses, the emerging imperative to reduce the “carbon footprint” of urban development, the growing and systemic deficiencies in public infrastructure financing and the need for infrastructure efficiencies, an aging population and reduced household size, and growing consumer interest in convenient, walkable and sociable districts as centers for daily life.
3. **Centers and corridors play a central role in adopted policy and in recently affirmed local aspirations for focusing new development**. Whereas significant land areas with the metro region are planned for (or will continue to serve as) low-density residential use or for industrial/employment use, more intensive, mixed-use development of centers and corridors throughout the region is and will remain a key public policy objective. Although centers and corridors represent only about 12 percent of the land area inside the current Urban Growth Boundary, they represent the potential for several times that amount in development capacity. They also represent perhaps the most important opportunity for developing local identity and local housing, employment and transportation options. To some extent this pattern and policy also exists in Clark County, which is outside of Metro’s jurisdiction but is an essential part of the metropolitan economy. Through conversations and work sessions with local elected leaders and stakeholders, Metro has recently reaffirmed local aspirations to further develop centers and corridors as a central component of directing new growth and investment.
4. **Whereas there have been notable successes in center-based mixed-used development in the last decade, it is clear that there are also significant challenges and obstacles to be overcome in developing many of the region’s centers and nearly**

**all of its corridors to a level commensurate with local and regional aspirations.** The Pearl District, South Waterfront, the Hollywood district and several main streets in Portland have seen a clear pattern of investment that reflect these goals, as has downtown Vancouver. There have also been notable projects in Gresham, Hillsboro, Lake Oswego and Milwaukee that indicate future potential for development of robust mixed-use districts. However, many centers and corridors, even those well served by transit and with appropriate zoning, have seen little of this kind of investment. Metro has summarized the challenges faced by local cities and counties in achieving compact, mixed-use development, based experiences reported by local jurisdictions and, to some extent, by private sector developers, as well as from Metro's own TOD program (see summary list attached). These range from regulatory issues, to infrastructure finance to community acceptance (neighbors) and other issues. This list of challenges should be reviewed and augmented by this Expert Advisory Group.

5. **Compact mixed-use districts (centers and corridors) in the Metro area should not all be expected to develop at once and, because conditions vary from area to area; future strategies will need to be nuanced to fit local situations and the metropolitan development toolkit should be sufficiently broad to allow different approaches in different locales.** A number of factors influence the readiness of centers and corridors for robust, compact mixed-use development, including market strength, community and political will and presence of infrastructure. In the attached summary of center and corridor development over the last decade, prepared by Metro staff, it's clear that some centers are established, others are emerging and some are only planned or new and have not yet become ready for the kind of development envisioned by the 2040 Growth Concept. One question that arises then is: should infrastructure investments be concentrated in areas that show readiness now and turn to investments in other places once they reach a point of readiness? The Metro summary document provides a good jumping off point for discussion of this and other issues.

Key questions for discussion by the Expert Advisory Group:

1. Which of the identified challenges/obstacles are most important to work on in the coming months, or year, and by whom? Are there additional challenges to be identified?
2. Will public-private partnerships (project-based or broader) be essential to center and corridor-based development? In what forms?
3. Are there new or existing tools or strategies that merit particular consideration? What are some leading ideas for further exploration?

**Achieving Mixed Use Compact Development in Centers and Corridors:  
Aspirations, Challenges, and Tools  
Background Information**

Prepared for Expert Advisory Group by Metro staff, July 2009

**Introduction and Background on 2040 Growth Concept**

Consistent with the region's 2040 Growth Concept, local jurisdictions throughout the Metro region have created visions for their communities and adopted plans for growth. Using a variety of tools, and financial incentives, communities have implemented some of their plans and have aspirations to see even more of their visions turn to reality.

A key part of the 2040 Growth Concept calls for investments in centers and corridors to support more intensive, compact urban development in order to meet the region's growth needs. Regional Centers are larger and serve markets of 100,000s while Town Centers serve markets of 10,000s. Corridors, main streets and station areas are other locations targeted for mixed use development. Though they cover only 12 percent of the region's land area, centers and corridors hold existing zoned capacity to meet a significantly larger share of the region's growth.

At workshops held last fall, the region's mayors, commissioners and councilors endorsed scenarios that accelerated and intensified development in centers and corridors and expressed willingness to consider new tools to support this development.

The Institute of Metropolitan Studies, under contract by Metro, will convene a dozen experts in the field of finance and development to provide advice on how to encourage private investments and achieve the kind of vibrant places that communities desire.

This paper, prepared by Metro staff, provides background information for the panel on the status of the centers and corridors in the region, the aspirations and challenges for these areas and the tools that have been considered in the past to overcome barriers. The paper is intended to help set the stage for discussion and recommendations by the expert panel on the following questions:

- Are we identifying the right challenges? Are there some missing?
- Are these the right tools? What tools should we be applying?
- How can the public and private sector best work together to leverage successful development?

**Status of Centers and Corridors**

Over the last 15 years, since the 2040 Growth Concept was adopted, local jurisdictions have developed plans for the Central City, seven Regional Centers and 33 Town Centers designated on the regional 2040 Growth Concept map. In addition, communities have developed plans for main streets and station communities designated at light rail stations outside of these centers. To a lesser extent, communities have planned for mixed use development on corridors designated on the 2040 Growth Concept map, which make up 400 miles of major and minor arterials and state highways. Centers and corridors combined make up about 12 percent of the area inside the urban

growth boundary. Metro’s models estimate that these areas have much more zoned capacity than can be developed under current market conditions.

- For the last eight years for which data was available (2000 – 2007), the three-county region (Clackamas, Multnomah and Washington counties) recorded \$20.5 billion in commercial and residential improvement investments based on building permit data. These investments (in raw dollars unadjusted for price changes) included the whole range of improvements for which building permits are required from parking lot resurfacing to multi-story office buildings. Of this amount, about two thirds was devoted to residential investment and one third was devoted to commercial investment. While centers and corridors only make up about 12 percent of total regional acres, they attracted 22 percent (or almost twice) of the total investment in the region. Commercial investment predominates in the Central City and Regional Centers while residential development predominates in the Town Centers and corridors.

<b>Three-County private investments as measured by building permit values 2000 - 2007</b>			
	Commercial	Residential	Total
Three county investments	\$6.8 B	\$13.7 B	\$20.5B
Share of three county investments in Centers and Corridors	\$2.5B (36.8%)	\$2.0 B (14.6%)	\$4.5B (22%)

**Source:** Building permit value data from Multnomah, Washington and Clackamas counties 2000-2007.

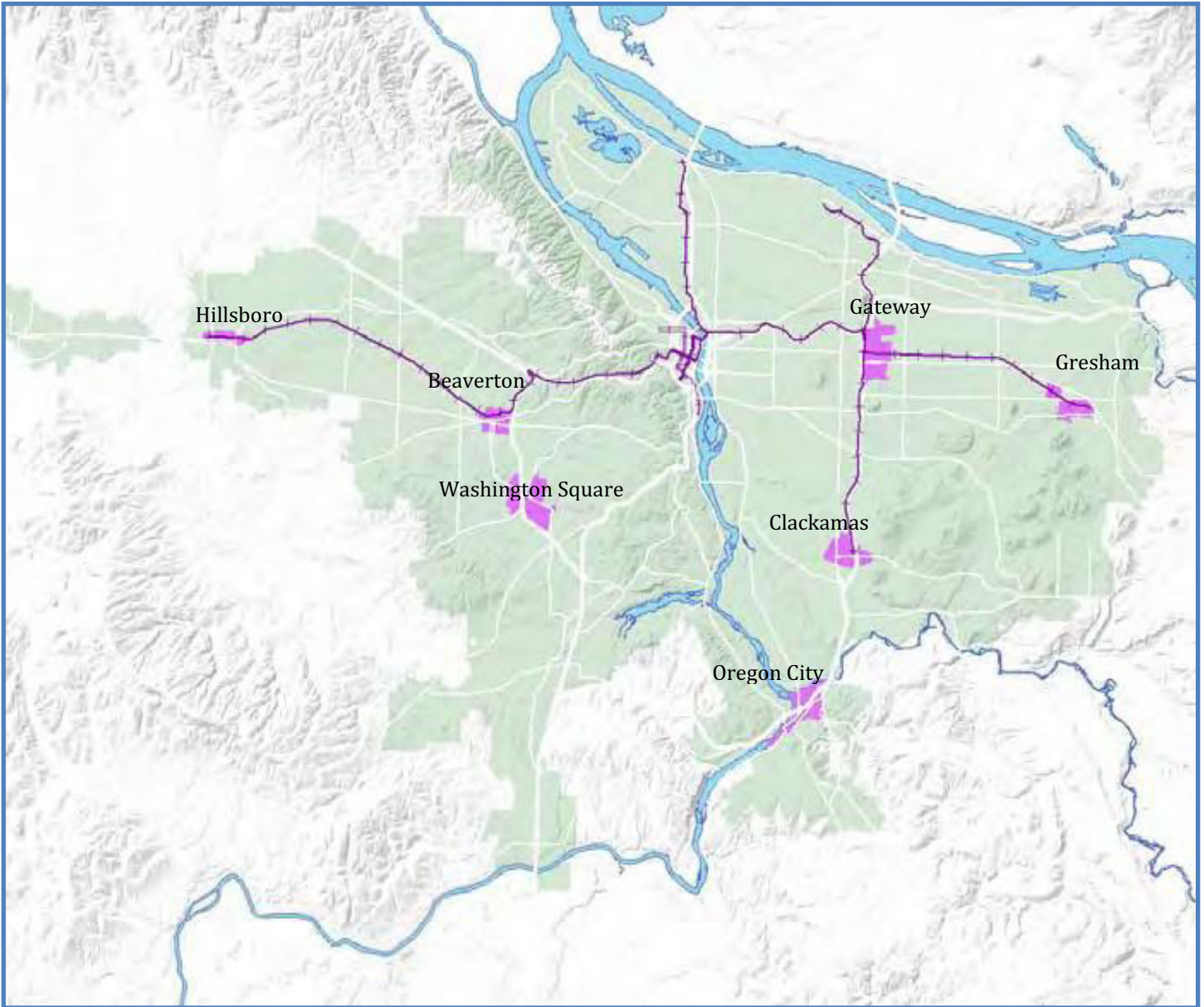
- The region’s centers have experienced different levels of private re-investment and effects on creating compact mixed use development. Some centers are established and have existing examples of vibrant mixed use businesses and residences, others are just emerging as centers and others are new centers in the planning stages. Very few of the region’s corridors have developed as vibrant, compact mixed use areas. The large acreage of these areas and zoned capacity presents a large untapped potential.
- Many factors influence the readiness and development interest in centers and corridors.
  - **Existing urban form-** Some centers have a pedestrian friendly, grid-like development pattern, some are highly auto-oriented and lack a pedestrian environment.
  - **Investment incentives-** Some jurisdictions have directed financial assistance through urban renewal and other incentives to enhance development potential in centers and corridors, many have not.
  - **Level of establishment-** Some centers are established and have existing examples of vibrant mixed use while others are just emerging and others are new centers in the planning stages.



- Past regional investments also have influenced the readiness of development in centers and corridors, including:
  - **Level of regional access**- Some centers are located along limited access highways while other centers and corridors are located on local or county arterials;
  - **Level of transit service**- Some centers and corridors have high capacity transit or frequent bus service while others have little or no service; and
  - **Level of street enhancements and connectivity**- Including green spaces, trails and other amenities.

The following examples give a very brief overview of current status of development in the Central City, Regional Centers, Town Centers and Corridors.

- **Central City:** About half of the 3000 acres included in the Central City, (after accounting for parks, the river and public right of way), can accommodate development. The area includes about 21,000 housing units and 70,000 jobs today. Since 1990, the area has developed an average of 1.3 million square feet of new development per year, according to the Bureau of Planning. The Central City has the highest levels of private investment, estimated at \$25/square foot based on the building permit data – or 10 times the value invested other centers and corridors. Values from building permit data can be more than ten times less than assessed value. Since 2000, the building permit data suggest about \$1.6 billion was invested in the Central City, or about one quarter of the total centers and corridors permit value.

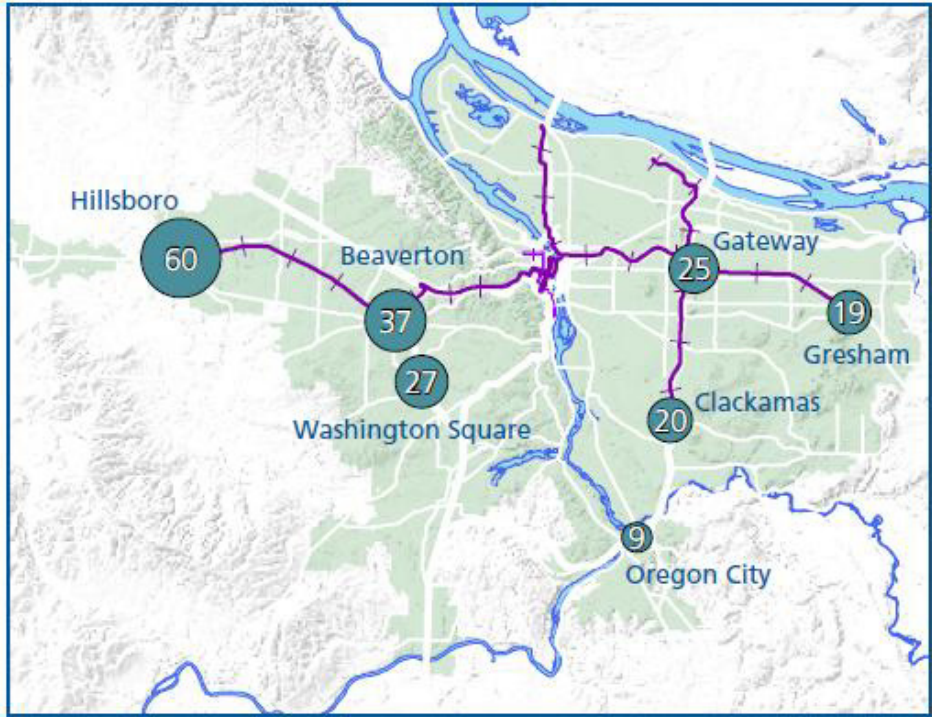


**Figure 1: Areas Designated as Regional Centers in Local Plans**

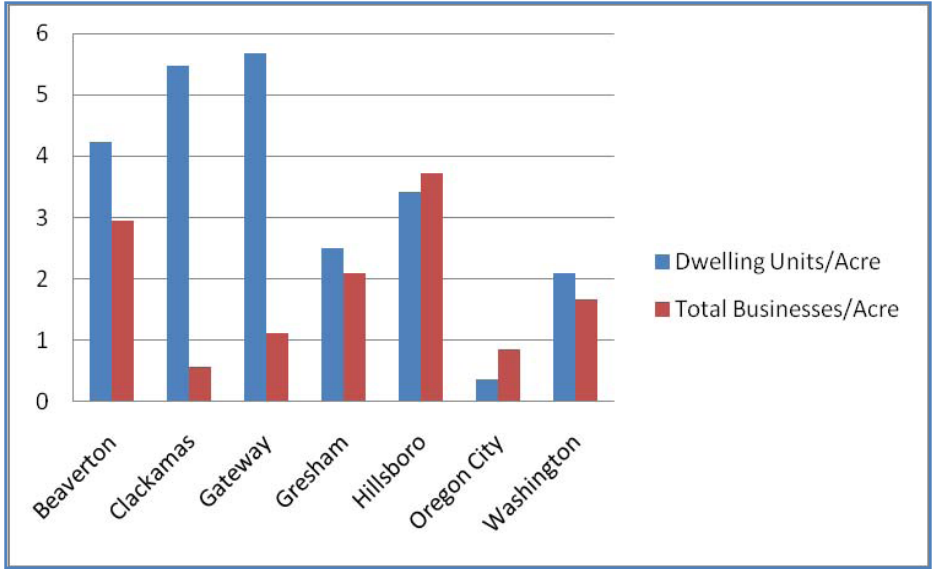
- **Regional Centers:** The seven Regional Centers, shown in Figure 1, account for about 3,400 acres. They range in size from 144 acres (Hillsboro) to 617 acres (Gateway). On average, they have a density of about 28 people per acre (people per acre refers to people who live and/or work in the area), less than 2 businesses per acre and 3 dwelling units per acre<sup>20</sup>, as shown in Figure 3. They reflect a mix of orientation – from government centers to regional shopping malls to historic town centers. The following highlights a few of the distinguishing characteristics of these Regional Centers:

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<sup>20</sup> State of the Centers Report, Metro, 2009.



**Figure 2: People per Acre in Regional Centers (includes residents and workers).**  
**Source:** State of the Centers Report, Metro January 2009 (ESRI business analyst data, www.ESRI.com)



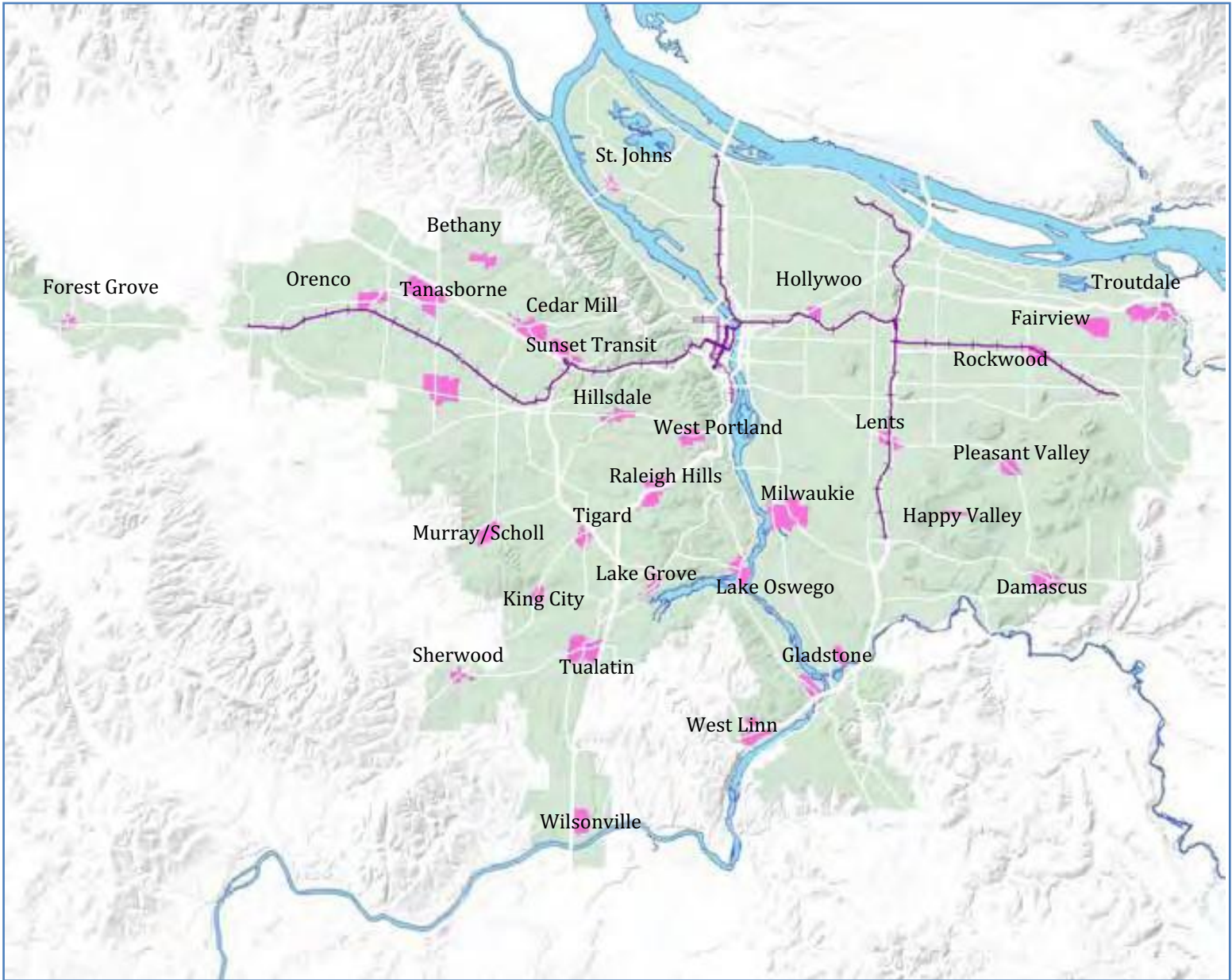
**Figure 3: Residential and Business Density in Regional Centers**  
 This figure helps illustrate the variety of urban form among the regional centers and shows which centers contain primarily residential or business developments or both.  
**Source:** State of the Centers Report, Metro January 2009 (ESRI business analyst data, www.ESRI.com)

- Washington Square Regional Center - Home of a major retail mall dating to the 1970s, the Center is located in both Tigard and Beaverton and has access to Highway 217 and several Washington County arterials and most recently, the new Westside Express rail. It has the lowest number of people per acre (5 people/acre) of all the Regional Centers based on the number of people living and working in the area and is a regional destination for shoppers. The Washington Square Center plan, a multi-jurisdictional effort, was completed within the last ten years to guide development.
- Hillsboro Regional Center – Located in historic county seat of Washington County, Hillsboro has more people per acre (60 people/acre) than other Regional Centers largely due to its government and institutional job base. It has direct light rail access to the Central City and is some distance from a limited access Highway 26 to the north. The City released a draft Downtown Community Plan in June and is in the process of revising their downtown code and considering urban renewal among other investments to support development. Recent larger scale development projects include the new Pacific University Campus expansion in downtown as well as a new City Hall and housing.
- Gresham Regional Center – The center includes two neighborhoods, Civic Neighborhood and downtown, within its 387 acres. The downtown is the historic center of Gresham while the Civic Neighborhood is the new government and commercial area developed around the light rail station. The area currently has 19 people per acre, an average level of dwelling units per acre and above average level of businesses per acre, compared to other Regional Centers. The city of Gresham has made a major investment in civic buildings and has partnered with Metro on several transit-oriented development projects. The City is currently updating its downtown code to support redevelopment and has applied vertical housing tax credits and explored other financing tools. Highway access between I-84 and Highway 26 has long been on the region’s list of transportation projects to improve access to the Regional Center and manage through traffic.
- Beaverton Regional Center – Serving as a commercial center located at the crossroads of two state highways (Hwy 8 and Hwy 10), Beaverton has a historic downtown with multiple property owners and small businesses, as well as larger scale development in the commercial area around the Beaverton Fred Meyer. Beaverton developed plans around the light rail stations and partnered with Metro for transit oriented development at the Beaverton Round and the Westgate site. The area has more people per acre (37 people/ acre) along with more dwelling units and businesses per acre than average for Regional Centers.
- Gateway – Located in the city of Portland, Gateway is the only center served by two Interstates (I-84, I-205) and, when the Max Green Line opens in the fall, by three light rail lines. Gateway has one of the highest levels of dwelling units per acre (6) and people per acre (25) in the region. The 617-acre area includes established

commercial and residential neighborhoods. Plans for Gateway call for major street improvements, including sidewalks, medians and increased connectivity within the super blocks, and new parks, plazas and other amenities to support redevelopment. The City has established an urban renewal area for Gateway to provide financial incentives.

- Oregon City Regional Center – Oregon City is similar to Hillsboro as a historic county seat and has access from Highway 99E and I- 205. The center has the lowest number of people acre (at 9) compared to other regional centers and covers 414 acres. The City of Oregon City has focused recent redevelopment efforts on two opportunity sites within the Center: a commercial development called The Rivers; and a mixed use residential project at The Cove. Both projects are in the final stages of planning.
- Clackamas Regional Center – In an unincorporated area, the Clackamas Regional Center is the home of a major regional shopping mall. The center, which includes the residential areas near the mall, has one of the highest dwelling units per acre (6) and lowest number of businesses per acre. Urban renewal funds supported access to the Center from I-205, the soon-to-be opened MAX Green Line, access within the center and other investments in the 489-acre center. The County has plans for new development opportunities associated with the station areas along the MAX Green line.





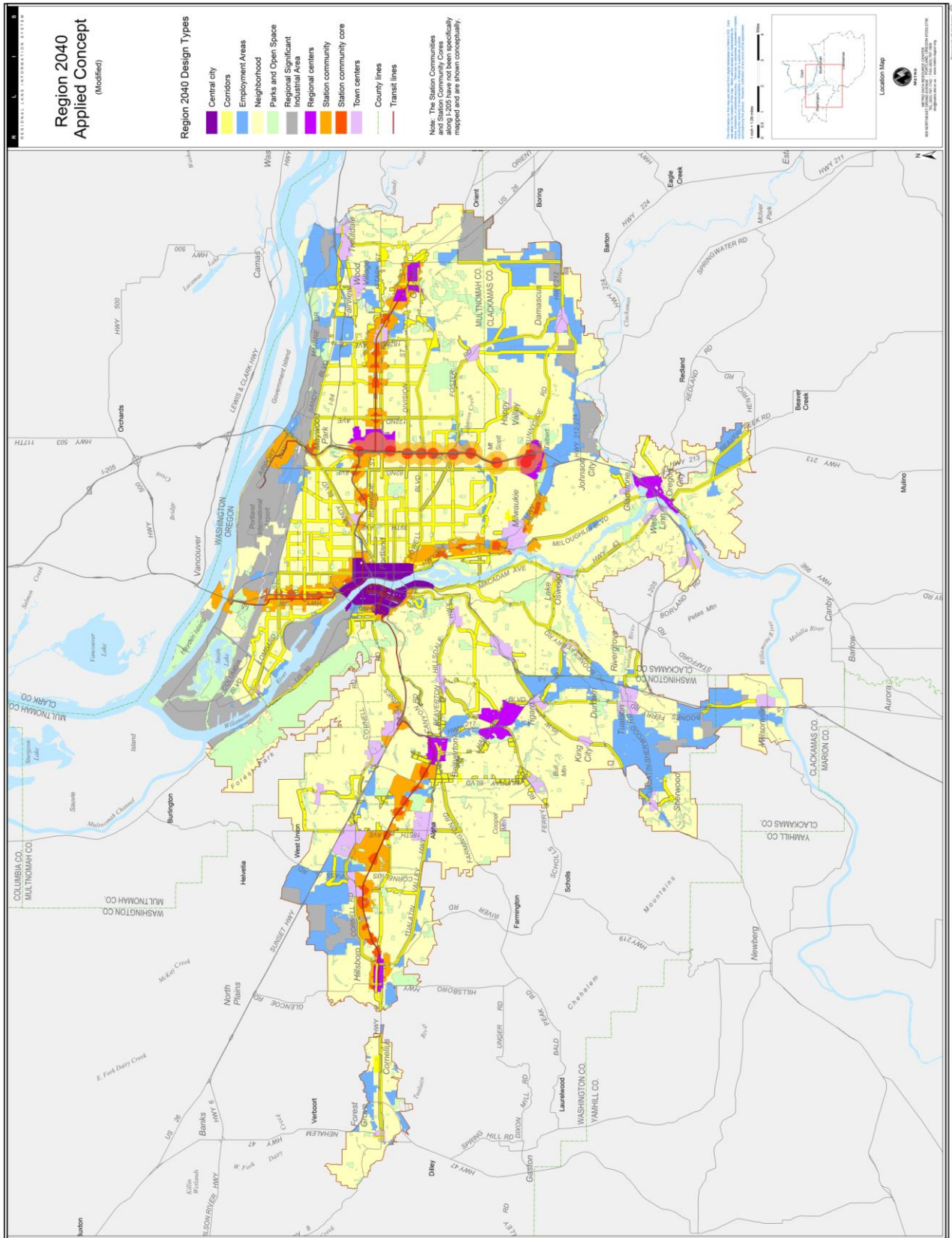
**Figure 4: Areas Designated as Town Centers in Local Plans**

- **Town Centers:** The Town Centers as a whole cover about 7,800 acres and range in size from the smallest at 48 acres (Gladstone) to the largest at 405 acres (Tanasbourne). Figures 4 and 5 illustrate the Town Center locations and their size. On average, Town Centers are more residential than the Regional Centers with higher average dwelling units per acre (5) and fewer businesses per acre (.5). The Town Centers cover a wide range of mixed use development status with some relatively recently developed, some emerging as centers and some more established. Some Town Centers are the downtown areas of small towns, some are new towns and some are older neighborhoods. Figure 6 illustrates the variety in the current physical character of the Town Centers. Some, such as Hollywood, have higher residential and commercial density. Others, such as Murray/Scholls have residential, but not commercial density and others, such as Pleasant Valley, are not yet developed. A few examples of the current status of Town Centers include:
  - Established Town Centers – Some Town Centers contain established historic downtowns with some already existing mixed use or compact development. Tigard, Lake Oswego, Tualatin and Forest Grove Town Centers are examples of centers located in established commercial districts with some mixed use development. Lake Oswego is an example of a center that applied urban renewal to support commercial and residential development at the Town Center scale. Hollywood and Hillsdale, in Portland, offer other examples of mixed use development in an older, established neighborhood. Milwaukie, another historic downtown, also has had recent mixed use development. These centers have access to a state highway or interstate. Over the years, these communities have invested in redevelopment and streetscape improvements and have developed plans for their communities that include high capacity transit, trails, parks or plazas.
  - Emerging Town Centers – Some Town Centers are more recently developed and are emerging as leaders with some mixed use or compact development. Orenco and Tanasbourne in Hillsboro, Bethany and Fairview Village Town Center are examples of Centers that have begun to develop over the past 20 years with more residential than business density. These emerging centers have somewhat limited transit service available, although Orenco is in a light rail station area, and have vehicular access from either state highways or interstates.
  - New Town Centers – Some centers are so new that they have not yet developed and are in the planning stages. These include the Pleasant Valley and Damascus centers which were recently added to the urban growth boundary as well as area that are still developing their centers plans, such as Happy Valley. These areas have limited vehicular access and little to no transit service.





- **Corridors:** Corridors reflect the largest acreage of any of the 2040 design types at over 16,000 acres. The corridors are located along existing and past state highways and major arterials and include some historic main street districts. The Corridor designation on the 2040 Growth Concept map, represented in figure 7, includes a half block on either side of the road. Some of the corridors are designated as main streets. Many of the corridors, but not all, are served by frequent bus service and most of the corridors carry high traffic volumes. Few communities have developed plans to implement these corridors as mixed use development and some of the corridors remain in single family residential use. The corridors are quite varied and represent great potential for redevelopment. Examples of the variety of corridors include:
  - Main streets – Examples of corridors on main streets include Tacoma Street in Sellwood and Adair/Baseline in Cornelius and Walker Road in Beaverton. In Portland, Southeast Belmont, and Southeast Hawthorne are examples of main streets with mixed use development. Some of these Main streets function more like centers in that commercial and multi-family development extend beyond a half block on either side of the road.
  - Major city or county arterials- Examples of these corridors include Northeast MLK, Interstate Avenue, Division Street and other major arterials in East Portland with commercial and residential redevelopment. While they may carry high traffic volumes, the street design of the more developed corridors supports other modes.
  - State Highways - Many of the region’s corridors are located along state highways that play a major role in vehicular traffic flow. Examples include, 82<sup>nd</sup> Avenue, McLaughlin Boulevard, Powell Boulevard and Beaverton Hillsdale Highway. While these corridors have experienced commercial and residential investment, little mixed use and compact development has occurred.



**Figure 7: Applied Region 2040 Concept Map**

This map represents areas designated as 2040 design types in local plans.

## Aspirations

- Communities have significant aspirations for growth in their centers and corridors and face a variety of challenges in achieving these aspirations. Metro recently requested planning directors to summarize the aspirations for growth in their community, the values that guide that growth and the barriers to achieving their aspirations. Unlike zoning or other reported data, the local aspirations submissions reflect where communities are investing their leadership skills, time and financial resources and identify barriers to achieving these aspirations.
- The aspirations reflect the consistent values of the region as a whole – a desire to develop vibrant, sustainable communities, attract strong, well-paid jobs, increase the jobs/housing balance and protect and improve natural areas. The aspirations reflect commitment to developing in centers and corridors consistent with the 2040 Growth Concept and demonstrate that aspirations in new areas such as Bridgeport Village, where more intense development is located outside of a center or corridor, are the exception.
- Some communities aspire for growth that could double or triple their current population or jobs while others are aspire to grow 25 percent or less. The aspirations reflect the mixed state of planning and challenges facing the centers and corridors in the region. These aspirations will likely evolve as communities update their comprehensive plans and modify their policies to respond to changing circumstances and growth challenges.

The following summaries are drawn from the local aspirations and illustrate the range of development that communities are trying to achieve and the challenges they face:

- **Central City:** Has the highest aspirations for growth and has zoned capacity available to meet these aspirations for years to come. Planning staff estimate that roughly 400 acres of vacant or underutilized land either is now or could likely become available for development in the next 20 years within the Central City resulting in over 100 million square feet of new building area if it were all developed. If 50 percent or 60 percent of this were developed as residential, it could represent between 50,000 and 60,000 new dwelling units. Aspirations include increasing the share of the region's job growth in the Central City. With zoning and infrastructure largely in place, the City aspires to develop zoned capacity and achieve their job growth targets.
- **Regional Centers:** Communities also have aspirations for significant growth in the Regional Centers. Highlights from some of the aspirations for Regional Centers include:
  - Tigard's aspirations for Washington Square Regional Center call for development of 50 dwelling units/acre and floor area ratio (FAR) of 2.0 or greater. Beaverton is considering options for increasing zoning to support their aspirations for redevelopment of an existing office park area west of Hwy 217. Aspirations call for improved access across Highway 217, and creation of an integrated, pedestrian and bike-friendly center with an integrated bus and high capacity transit system.

Aspirations include connecting to the new WES station from one side of Highway 217 to another and improving access from one side of the mall to the other across the parking surrounding the mall. Aspirations also call for addressing the congestion on Highway 217 to improve access and mobility standards to support redevelopment.

- Hillsboro Regional Center – The City’s downtown plan calls for 2000 to 3000 more jobs (a 25 percent increase) and 3000 more dwelling units (a 100 percent increase) in the larger Hillsboro Downtown area. Aspirations call for developing in a style that is compatible with the historic downtown area. Metro and the City also co-own a one acre redevelopment site in the heart of downtown directly adjacent to the Hillsboro Transit Centers that the City aspires to develop.
- Gresham Regional Center – Aspirations reflected in adopted plans for development in the downtown portion of the Regional Center include growing from 2500 jobs to 6000 jobs and from 1000 residents to 3,300 residents. In Civic Neighborhood, aspirations reflected in adopted plans call for doubling from 1000 jobs to 2000 jobs and increasing residences five-fold from 400 residences to 2000. Aspirations for Civic Neighborhood envision a tall, dense, mixed-use, transit-oriented urban environment with two MAX stations, Gresham’s largest concentration of retail stores and home to the tallest buildings in Gresham, both commercial office and residential. Aspirations for downtown Gresham envision a community with amenities such as boutique retail, coffee shops, performing arts center, relocated City Hall, bike shops, brew pubs and other nightlife, child care, multiple fine dining restaurants and a grocery store.
- Beaverton Regional Center – Beaverton is developing a comprehensive vision for its downtown using information gathered through an extensive public visioning process that was completed last year. The City aspires to have a vibrant mixed use and sustainable downtown that connects the library to the Round. The City has invested in supporting redevelopment at the Beaverton Round MAX station and the adjacent Westgate and is considering urban renewal as a tool. Beaverton also desires to improve the infrastructure within the center and has identified multiple investments in their transportation system plan to support circulation, access, and connectivity. The City has conducted parking studies and is interested in improving parking management.
- **Town Centers:** Aspirations for Town Centers reflect greater diversity than for Regional Centers. Some centers have aspirations for significant growth while others aspire for limited additional growth. The following highlights a few of the more significant of the aspirations and challenges.
  - Tigard Town Center – Tigard has aspirations for 2500 housing units and 1.9 million square feet of commercial in their downtown, which currently has about one million square feet of commercial. Tigard envisions a mixed use urban village that includes

two-to-eight story buildings with transit supportive land use densities. Their aspirations include improved street connectivity, parking standards and, potentially, structured parking. Tigard has already made multiple investments to support these plans, including preparation of a new vision document, location of new WES station, Main Street enhancements, adoption of urban renewal and relocation plans for the transit center, new investments in Fanno Creek trail and plans for a new plaza. High capacity transit is envisioned as a part of their center as well as an integrated bus/rail transit center.

- Amber Glen/Tanasbourne –Hillsboro has aspirations to expand the Tanasbourne Town Center with development at the adjacent 252-acre Amber Glen site and re-designating the Town Center to a Regional Center. Plans call for 2000 new jobs and 5000 new dwelling units on the Amber Glen site for a total of 24,000 units and 14,000 jobs in the combined center. Hillsboro has an active development planning process with the major property owners of the area. Aspirations include investing in the infrastructure for the center, including a new park and light rail transit extension as well as developing mid-rise housing.
- **Corridors:** Several jurisdictions identified aspirations for re-evaluating the potential for mixed-use development along corridors. Compared to the aspirations for centers, aspirations for corridors are not as well developed and some are being considered for the first time. Successful examples of corridor development patterns are harder to find, but some examples include recent development on the east side of Portland such as Southeast Hawthorne, Southeast Belmont and Northeast Sandy and along MLK and Interstate. A few examples of aspirations for corridors include:
  - Tigard identified aspirations for the Hwy 99W corridor for 40 to 50 dwelling units per acre and 30 to 40 employees per acres with a FAR of 2.0 or greater and two to 10 story buildings with larger buildings at key nodes. High capacity transit is a key component of this aspiration. Highway 99 W is one of the most congested and most used facilities in the region and aspirations include addressing impacts to the highway, improving pedestrian and bike safety and achieving high quality urban design and aesthetics.
  - Beaverton identified interest in examining the potential to redevelop several corridors. One example was a possible re-evaluation of the Main Street at Walker Road and 158<sup>th</sup>, an area currently planned for 750 dwelling units and 3000 jobs.
  - Portland identified enormous redevelopment potential in corridors and main streets, particularly in East Portland based on the revitalization corridors have recently seen along Southeast Hawthorne, Southeast Belmont, Southeast Division, Southeast Milwaukie, Northeast Broadway, Northeast MLK, Northeast Alberta, Northeast Killingsworth and Northwest 23<sup>rd</sup> and 21<sup>st</sup> Avenues, Northwest Thurman Street and parts of Beaverton-Hillsdale Highway. Aspirations for the corridors include improved infrastructure, access and circulation, higher rent levels, regional

and freight traffic, expanded local market areas, more complete street infrastructure and smaller pedestrian-oriented or community-focused clusters.

- In East Multnomah County, Wood Village and Fairview aspirations reflect interest in developing along the Halsey and Sandy corridors and Wood Village is considering plan amendments to support mixed use along the corridor. Gresham is initiating a study of their transit corridors for potential increased mixed use development.

**Table 1: Corridors Redevelopment Potential as Identified by Planning Directors in Local Aspirations**

<b>Corridor</b>	<b>Location</b>	<b>Aspiration</b>
Walker Road and 158 <sup>th</sup>	Beaverton	Current zoning calls for 750 dwelling units and 3080 jobs by 2020. Exploring options for corridor development
Beaverton Hillsdale Highway	Beaverton	Current zoning calls for 750 dwelling units and 3080 jobs by 2020. Exploring options for corridor development.
Sandy Boulevard	Fairview	Interest in redeveloping 90.5 acres of vacant and re-developable land
Hwy 8	Forest Grove	Commercial corridor development
Sandy Boulevard	Wood Village	Adopted new streetscape design and /or development standards and mixed use development standards for neighborhood commercial zone
Halsey Street	Wood Village	Adopted new streetscape design and /or development standards and mixed use development standards for neighborhood commercial zone
Interstate Avenue	Portland	Add 3250 dwelling units and 1,220 jobs between 2005 and 2035
82 <sup>nd</sup> Avenue	Portland	Mixed use development potential, particularly at key opportunity sites and along future streetcar line
Sandy Boulevard	Portland	Additional mixed use, residential and commercial development potential, particularly around key nodes and future streetcar line.
Martin Luther King Jr. Boulevard	Portland	Continued mixed use, commercial and residential development
Cully Boulevard	Portland	Additional small business and local serving retail for neighborhood
NE Killingsworth Street	Portland	Mixed use commercial plans, particularly linked to future of PCC and PPS
Powell Boulevard	Portland	Potential for redevelopment, particularly linked to future light rail line
Foster Road	Portland	Commercial development similar to Sellwood Moreland
SE Belmont Street	Portland	Realize planned development and potential of future streetcar lines to support development
SE Hawthorne Boulevard	Portland	Realize planned development and potential of future streetcar lines to support development
SE Division Street	Portland	Realize planned development with future streetcar lines to support development along Green Line station and, east of I-205, to achieve activity level similar to Hillsdale
Milwaukie Avenue	Portland	Potential for additional mixed use commercial along future LRT line
Tacoma Street	Portland	Achieve existing main street zoning (45' building heights and 3:1 FAR)
SE/NE 122 <sup>nd</sup> Avenue	Portland	Commercial and residential development as planned with activity level similar to Hillsdale.
Kenton/Denver	Portland	Redevelopment goal similar to Sellwood Moreland activity
Interstate Avenue	Portland	Redevelopment along light rail line
SE 136 <sup>th</sup>	Portland	Potential for future corridor designation

## Challenges

Over the last fifteen years, many challenges to developing in centers and corridors have emerged. Based on the recent local aspiration submissions, the research that Metro has completed while developing a series of Community Investment Toolkits, and the experience in supporting transit oriented development, several major challenges have been identified in achieving development according to the 2040 goals. A full bibliography of recent research is attached. Some of the key challenges are summarized below:

- **Market:** The market does not support the rent levels needed to make vertical mixed use development financially feasible. Market feasibility becomes more challenging at greater distances from the Central City.
- **Zoning:** The local aspirations and Metro data indicate that zoned capacity is not a problem – the challenge lies in developing codes that make the type of development we want to see the easiest thing to build. Many development codes present challenges for 2040 mixed use vertical development in some communities. For example, density requirements, height limits, and open space requirements can be barriers to developing mixed use or higher density projects.
- **Design:** Transitions between more compact development and existing neighborhoods has been identified as a problem affecting the implementation of projects in corridors and centers. These new developments face urban design challenges and the need for stakeholder support.
- **Public Private Partnerships:** Creating vibrant communities requires private investments and working relationships between the public and private sectors. Many communities lack the expertise and capacity to engage in public private partnerships.
- **Parking:** Parking presents multiple challenges. Too much parking is a barrier for pedestrian and transit use and limits FAR while an adequate or even abundant parking supply is a necessity for most lenders. Structured parking is often a suitable but costly solution, and funding these structures requires new public and private partnerships.
- **Public Amenities:** Vibrant communities have natural areas, parks, open space or some public space. Local jurisdictions have faced a variety of challenges in funding and designing these to create the sense of place that makes a center or corridor successful and able to leverage additional development.
- **Corridor design:** Lacking a wealth of successful examples, communities face a challenge in visualizing and designing a corridor that is compatible with higher traffic volumes and speed as well as with an attractive linear pattern of development.
- **Fragmented property ownership:** While some centers, particularly the newer centers, have single property owners, most face the challenge of moving forward on a coherent vision among multiple property owners with different objectives.



- **Development code:** While zoned capacity is not identified as a challenge except in the new developing areas, barriers in the existing code and the permitting process have been identified as challenges. Several cities are revising their code to support mixed use development now.
- **Fees:** Finding the right balance of using fees to support compact development and generate revenue is a challenge. Several cities discount fees to support redevelopment. Setting up the fee structure that supports compact development is a challenge when cities need revenue. Some cities have developed tiered system development charge fees and others give credits for transit oriented development. High fees further reduce the financial feasibility of compact mixed use.
- **Local access:** Achieving local circulation and street connectivity are challenges for most centers. Retrofitting an established neighborhood, such as Gateway or downtown Beaverton is expensive and affects many stakeholders.
- **Regional highway access:** Providing or maintaining access to the regional highway system is also a challenge. Emerging and new centers need new interchanges, highway or arterial access in order to achieve their aspirations. These projects compete for funding and take years to build.
- **Transit access:** Local aspirations identified improved transit access more than any other challenge to achieving their aspiration. Improved service, either by streetcar, light rail, frequent bus or even new bus route connections, is seen as important to increasing the market, improving access and supporting more compact development. Increasing transit services before the market is fully developed brings funding challenges.

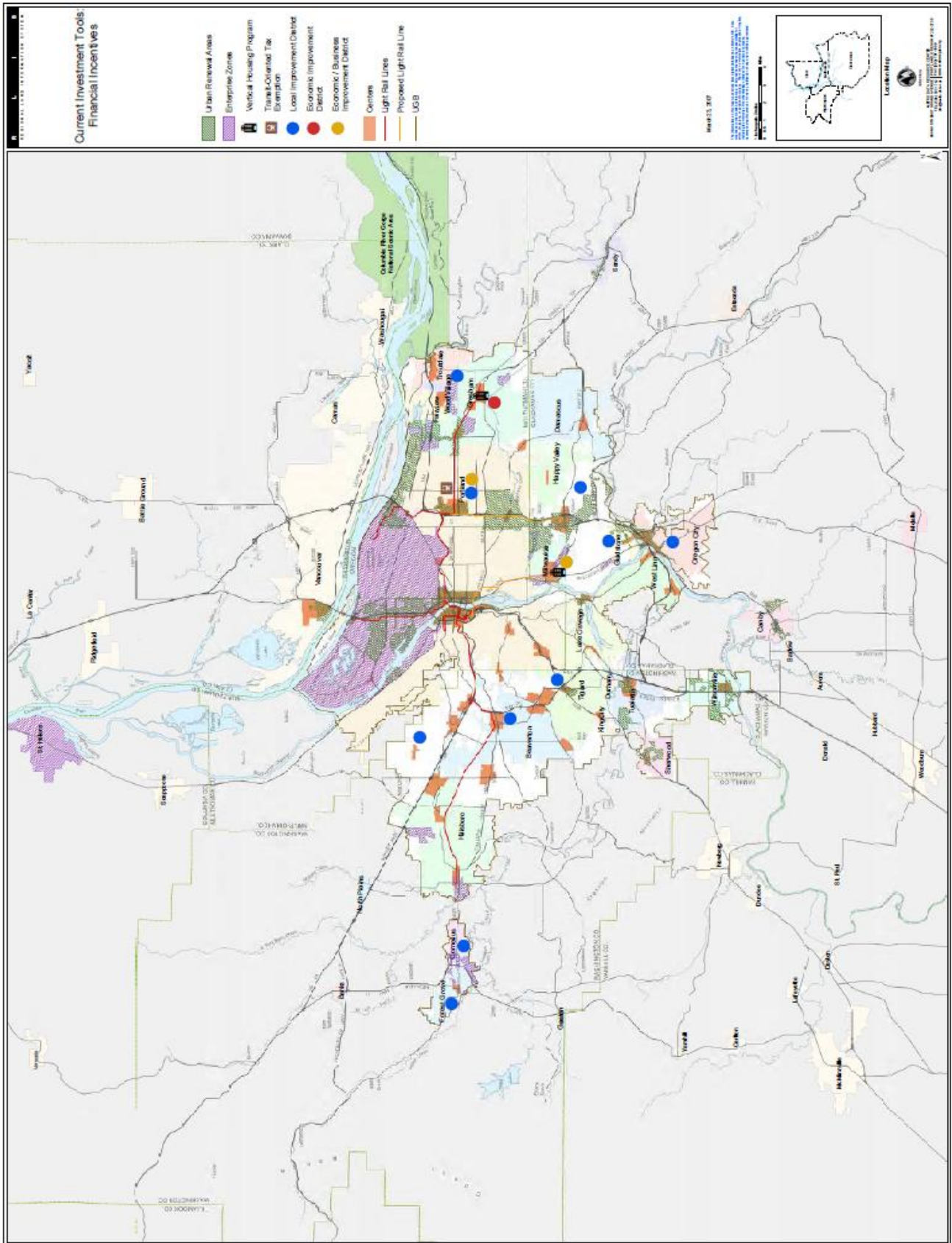
### **Tools to implement the 2040 Growth Concept**

Over the last 15 years, communities have tried to implement the 2040 Growth Concept and have faced a variety of challenges and tried a mix of tools to help get the development on the ground that the local jurisdictions envisioned. Metro's Community Investment Toolkits provide examples of some of these tools. Tools that have been used include:

- **Financial:** A variety of financial tools have been applied to help close the gap between what the market will support and the higher mixed use development costs. Some of the most common tools include urban renewal, tax abatements and fee reductions. In addition, financial tools have included direct public investments in a project and in the infrastructure to support the project. Additional funding sources include the gas tax, property tax, system development charges, street utility fees and local improvement districts. Figure 5 shows where urban renewal is currently applied within the region and the extent of the urban renewal capacity that is used.
- **Land Assembly:** The public and private sector have had to apply tools to assemble land with multiple property owners in established areas. Newer areas, with fewer owners, still require land assembly. Private sector tools include a variety of lease purchases and

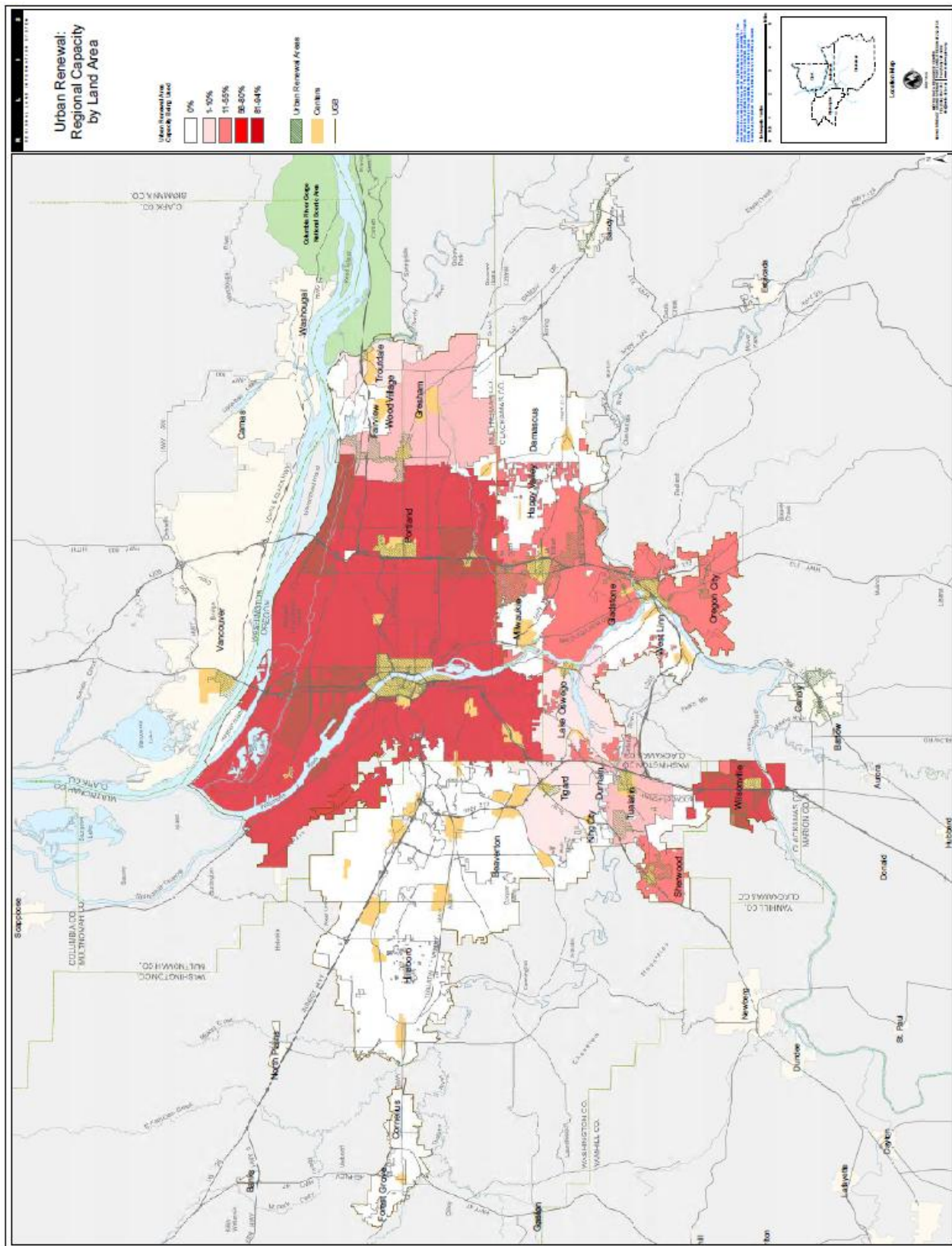
agreements. Public sector tools include voluntary, willing seller agreements or use of eminent domain.

- **Parking tools:** Public sector tools include changing parking code minimums or maximums, regulating on-street parking and allowing for shared-use parking. The Central City has led the region with public parking structures. In the areas outside of the Central City, the private sector has invested in parking structures for private developments, most notably for medical facilities. Shared parking arrangements have been made in some locations.
- **Plans and codes:** Development plans, mixed use development zoning and code changes are tools the public sector has used to support and implement their vision. Most communities in the region have developed plans for their centers and few have developed plans for their corridors. This is a tool that continues to be updated as community plans evolve.
- **Public sector staff:** Having public sector staff oriented and trained to work with the private sector is a tool that only a few communities have had the resources to support. Hillsboro is an example of making a priority to have public staff to support private development and it has helped support the redevelopment in their downtown and other parts of the City.
- **Public infrastructure investments:** Investments in community infrastructure, including parks, plazas, trails, streets and sidewalks, is an approach that communities throughout the region have applied. Metro's Metropolitan Transportation Improvement Program (MTIP) criteria have supported funding applications for allocations of federal transportation funds. Metro's open space bond measure, which dedicated a share for local park use, has been an important source of funding for parks.
- **Transit investments:** The region has made capital transit investments a priority as a tool to leverage redevelopment. The private sector has contributed to the local match for specific projects.
- **Education and Marketing:** Jurisdictions have developed marketing and education plans as part urban renewal plans and implementation. Other examples include the use of visualization tools to develop neighborhood and other stakeholder support and urban design and planning classes. Additionally, private sector broker materials market individual sites and districts.



**Figure 8: Financial Incentives Currently Used Around the Region**

Source: Community Investment Toolkit, Volume 1: Financial Incentives, Metro June 2007



**Figure 9: Map of Urban Renewal Currently Used in the Region**

**Source:** Community Investment Toolkit, Volume 1: Financial Incentives, Metro June 2007



## **Expertise Needed**

The expert panel is intended to help determine if the barriers and challenges identified in this report are the right ones and what tools can be applied locally and regionally to achieve the private investments desired. In doing so, the expert panel will help answer the following question:

- What are the best tools to support a strong public private partnership and achieve the local aspirations for development in centers and corridors?

## **Annotated Bibliography**

This bibliography includes the sources, studies, and reports used for this summary report as well as additional publications that relate to center and corridor development.

*Local Aspirations Summary*, January 2009

Local aspirations were submitted from communities around the region in response to a set of questions developed by Metro. The content of local aspirations from communities around the region is focused on three main topics; their plans for growth in centers and corridors and other areas in the community, their ambitions for the future of their community, and the list of policy and investment choices required for achieving this desired character of their community. Depending on the ambition and character of each jurisdiction's summary in response, their local aspirations were deemed either high medium or low.

<http://www.oregonmetro.gov/index.cfm/go/by.web/id=30756>

*Atlas of Mobility Corridors*, April 2009

Created as part of the RTP update, the Atlas of Mobility Corridors is a way to present land use and transportation conditions for each of the region's twenty-four major travel corridors. Each corridor featured in the Atlas is described according to location in the region, transportation facilities, land use patterns, and gaps in various travel mode such as pedestrian, freight, transit, and bike. The Atlas provides a way to compare circumstances and data between corridors in the region.

(No web link)

*State of the Centers Report*, January 2009

The State of the Centers Report provides the status of the 37 centers identified in the 2040 growth concept and highlights six types of centers that illustrate different points along an activity spectrum. Each profile describes current conditions of regional and town centers including density, jobs-housing balance, and community amenities. The activity spectrum is based on hours and types of activity and density. The report also provides current statistics on each center including information on residents, median age, income and household size, current park and transit services, and key infrastructure for center development.

<http://rim.metro-region.org/webdrawer/rec/194279/view/Metro%20%20Advisory%20Committee%20Records%20-%20Full%20Committee%20Meeting%20Records%20-%20State%20of%20the%20Centers%20Report.PDF>

*Linking Investments with Our Vision - Investment Scenarios, fall 2008*

Metro tested five different investment scenarios to understand how public investments can be made efficiently and promote private investment in centers and corridors to help the region grow in accordance with 2040 growth concept. The five scenarios vary by location, total dollar amount, and timing of the investments in urban centers and corridors categorized under low, medium, and high investment with all other non-investment policy actions left unchanged. The results of the test indicate that investments are most effective when used in a targeted manner and particularly in the central city and in regional centers. Targeted incentives and investments in centers and corridors can be an effective means of attracting additional households to these areas.

(No web link)

*Regional Infrastructure Analysis, June 2008*

This report summarizes costs for eight infrastructure types throughout the region needed to achieve great communities and accommodate growth in the region over the next 30 years, ranging from 27 to 41 billion. Traditional funding sources are expected to cover only about half the estimated costs of infrastructure investment. The report discusses four approaches to infrastructure planning, development and finance strategies including efficient service delivery, demand management, innovative planning and design, and new funding.

<http://library.oregonmetro.gov/files/regionalinfrastructureanalysis.pdf>

*Promoting Vibrant Communities with System Development Charges, Galardi Consulting, Dr. Arthur C. Nelson, Paramatrix, and Beery, Elsner, and Hammond, LLP July 2007*

This report contains model System Development Charges (SDCs) that promote greater financial equity and the region's 2040 Growth Concept. A goal of this study was to explore SDCs that reflect the real costs associated with serving different developments and the report outlines how to calculate SDCs to reflect these differences in infrastructure costs and impacts to the system. The report presents the variety of technical and policy based approaches that local jurisdictions can choose for their SDCs and the considerations for selecting an SDC structure such as impact fees versus full cost recovery, location-specific SDCs, and the impacts of green design on infrastructure costs. It also discusses incorporating 2040 infrastructure types, such as parking garages, into local SDC fee schedules.

[http://library.oregonmetro.gov/files/sdc\\_report.pdf](http://library.oregonmetro.gov/files/sdc_report.pdf)

*Urban Living Infrastructure Report, Johnson Gardner, June 2007*

The Urban Living Infrastructure Report explores whether urban amenities improve the financial feasibility of mixed use urban residential development by resulting in higher prices for residential development. Financial viability remains the primary obstacle to achieving many of the development forms envisioned by the 2040 growth concept. Higher density development forms tend to cost more per square foot to build, and require higher pricing to make them viable. The study uses a hedonic analysis of 2006 home transaction prices adjacent to various urban amenities in five urban metropolitan areas throughout the region (SE Division, Sellwood, Multnomah Village, Lake Oswego, and SW Murray/SW Scholls Ferry). The results show that the availability of certain urban amenities has an impact on pricing for a variety of homes.

(No web link)

*Community Investment Toolkit*, June 2007

The Community Investment Toolkit presents strategies and tools that can be used to stimulate investment in the region's centers, corridors, employment, and industrial areas to implement the 2040 Growth Concept. The strategies include financial incentives, urban design and local zoning and building codes, and employment and industrial areas.

*Volume One: Financial Incentives.*

Volume one of the Community Investment Toolkit provides financial tools that local jurisdictions can use to stimulate private investment and encourage implementation of the 2040 growth concept. The investment tools discussed in this report include the Vertical Housing Program, Transit-Oriented Tax Exemption programs, urban renewal areas, and improvement districts as well as enterprise zones. This toolkit assesses the opportunities and challenges with using each tool as well as tips for local implementation. It also highlights the use of each financial incentive in the region through case studies.

[http://library.oregonmetro.gov/files/financial\\_incentives\\_toolkit\\_final.pdf](http://library.oregonmetro.gov/files/financial_incentives_toolkit_final.pdf)

*Volume Two: Innovative Design and Development Codes:*

Volume two of the Toolkit outlines code changes and design guidelines that can assist in creating better neighborhoods and more efficient use of land. The major strategies featured in the toolkit include design and code fixes to facilitate transitions from suburban to urban style development over time, code flexibility to support building design that fits in the existing neighborhood context, and managing parking to maximize and support the urban form. In addition, this toolkit features strategies to better engage the public and private sector in zoning and the planning and development process.

[http://library.oregonmetro.gov/files/design\\_dev\\_codes\\_toolkit.pdf](http://library.oregonmetro.gov/files/design_dev_codes_toolkit.pdf)

*Regional Housing Choice Implementation Strategy*, April 2006

This report presents the implementation strategy and recommendations of the Housing Choice Task Force formed in 2005. The charge of the Housing Choice Task Force was to assess barriers that hinder work-force housing supply in the 2040 Growth Concept and to compile the experience from local pilot projects that identify the solutions to meet local Affordable Housing Production Goals to develop solutions for increasing housing and affordable housing supply. The report includes recommended solutions to reduce the cost of housing and increase the development of affordable housing and implementation strategies for overcoming traditional barriers to affordable housing development.

[http://library.oregonmetro.gov/files/regional\\_housing\\_choices\\_imp\\_strat\\_032306.pdf](http://library.oregonmetro.gov/files/regional_housing_choices_imp_strat_032306.pdf)

*Metro Summary Report: Metro Corridors Project*, ECO Northwest, Freedman Tung & Bottomly, Kittelson & Associates, Johnson Gardner, and Angelo Eaton, June 2005

The Metro Corridors Report, a product of the Metro Corridors Project, includes a summary report, a land use and analysis report, a case study report and a technical report. The study summarizes the issues and policies in Metro-designated Corridors and evaluates how 2040 goals for Corridors can

be achieved. The adopted Metro goal for Corridors is to make them pedestrian and bike friendly and to increase density. This report describes the varied nature of corridors in the region, the challenges they face in development, and policy options to accelerate development in corridors. Most of Metro's analytical work and policy has focused on the various classifications of Centers identified in the Growth Concept. This report is part of a project that focuses on Corridor development. However, the recommendations presented in this report are mostly targeted to Corridors in suburban locations, and slightly less applicable to Corridors in inner-city locations. (No web link)

*Ten Principles for Achieving Region 2040 Centers*, Leland Consulting Group, Parsons Brinckerhoff, 2002

This report outlines ten proactive strategies to achieve 2040 centers in the region with a focus on creating incentives and removing barriers to center development. The principles cited in the report are general and meant to apply to centers of all size, mix of uses, character and stage of development, regardless of location and timing of development. The report defines what it means to be a center, what elements make up a center, and how a center can best interact with adjacent corridors. The report delineates challenges to investing in centers including financial and regulatory barriers and describes how thoughtful planning and leadership between the public and private sector can serve to address those challenges.

[http://www.oregonmetro.gov/files/planning/centers\\_principles.pdf](http://www.oregonmetro.gov/files/planning/centers_principles.pdf)

*Creating livable streets: Street design guidelines for 2040*, June 2002

The Creating Livable Streets handbook provides regional street design guidelines that support the goals of the 2040 growth concept and regional transportation plan for both new and existing streets. The goals of the handbook are to integrate street design more closely with land use considerations, support multi-modal activity, community livability, and economic activity.

(No web link)

*Green Streets: Innovative Solutions for Stormwater and Stream Crossings*, June 2002

The Green Streets handbook illustrates green street designs for efficient multimodal traffic use while maintaining nature in neighborhoods. The topics covered include the basic concepts of green street design, innovative solutions to stormwater and stream crossings and tree planting. The handbook also features case studies and examples of successful green streets approaches throughout the region and a strategy for implementing green streets.

(No web link)

*Main Street Study: a User's Guide to Main streets*, March 1996

This implementation guide focuses on main streets as a key design type of the 2040 growth concept and as important element for creating local character in a regional context, fostering local business development, and reducing automobile traffic. The handbook provides a variety of tools and strategies for encouraging main streets both old and new as a subset of larger commercial corridors. The handbook features case studies of successful main streets around the region and



delineates five lessons to apply to main streets throughout the region including streetscape design elements, multi-modal transportation and accessibility, desired land use mix, regulatory fixes, and local business organization. Specific recommendations or next steps are provided for both the private and public sector.

(No web link yet)

*Regional Main streets: An Implementation Strategy to Promote Main Street and Corridor Development*, July 1995

This report describes the factors, public and private actions, and physical guidelines that are necessary to making corridors and main streets successful. The report describes an implementation strategy for main streets and corridors that includes regional and local actions as well as government and community roles. Regional standards are developed to provide local jurisdictions with specific code and plan amendments to better implement the policy direction of the 2040 growth concept. Specific standards and guidelines are categorized under land use, density, design, circulation, and parking. The overall conclusion of the report is that regulation is one strategy in an array of implementation strategies that can be utilized to encourage and engage main streets and corridors around the region.

(No web link yet)

yes, Marty please submit the e along with the other communicay you have.

Mailing address is:  
5230 SE 118th Ave  
Portland, Or 97266

thanks so much.  
Pati Hall

On Fri, 2 Dec 2011 10:08:47 -0800 "Stockton, Marty"

<Marty.Stockton@portlandoregon.gov> writes:

> Dear Pati and Matt Hall,

>

> Thank you for your consideration and time involved in offering this  
> feedback.

>

> Would you like for me to submit this email into the formal public  
> record for the Portland Plan? I would be happy to do that - I will  
> need a mailing address in addition to your email address (which I  
have

> below) for your comments to be considered part of the formal public  
> record with legal standing. Once a mailing address is included, City  
> staff can share your comments with the Planning and Sustainability  
> Commission. If you have any additional comments on the Portland Plan  
> you would like to submit, we would welcome them as well.

>

> Thanks again,

> Marty

>

> -----Original Message-----

> From: Dornan, Chris

> Sent: Friday, December 02, 2011 9:51 AM

> To: Stockton, Marty

> Subject: FW: Portland Plan Testimony

>

>

>

> Chris Dornan

> Bureau of Planning and Sustainability

> 503-823-6833

> [chris.dornan@portlandoregon.gov](mailto:chris.dornan@portlandoregon.gov)

>

> -----Original Message-----

> From: Planning and Sustainability Commission

> Sent: Friday, December 02, 2011 8:39 AM

> To: Dornan, Chris

> Subject: FW: Portland Plan Testimony

>

>

>

> -----Original Message-----

> From: [chevylane@juno.com](mailto:chevylane@juno.com) [<mailto:chevylane@juno.com>]

> Sent: Thursday, December 01, 2011 11:54 PM

> To: Planning and Sustainability Commission

> Subject: Portland Plan Testimony

>  
> To whom it may concern,  
>  
> I live in Outer South East Portland. I have been in this area, in the  
> same house for 34 years. Of that 34 yrs, I have been on the  
> Powellhurst/Gilbert Board for 10 of those years. I am now off the  
> board, but still active as an activist for the needs of  
> Powellhurst/Gilbert. I also served on the Lents Urban Renewal Board  
> for 7 of those years.  
>  
> I am aware of the master plan for the city. It was not widely talked  
> about in my earlier involvement, in fact it was a hushed term. Due  
to  
> all my exposure with all the involvement I have some observations.  
>  
> I realize that this is late. I do apologize, but the time got past  
me.  
> I would like this as part of the city testimonies.  
>  
> As a whole I do not agree where the City of Portland is headed. Like  
> it or not the generation that is paying the tax bill for themselves  
> along with all the subsidized low income apartments are the Baby  
> Boomers.  
>  
> All of the improvements including, but not limited to mass transit,  
> are strapped to the backs of the already tax burdened boomers like  
> myself.  
>  
> I bought my property to stay here. My taxes have nearly doubled since  
> I bought here 34 yrs ago.  
>  
> What I see is a difference in the definition of "advancing equity"  
> as  
> well as the definition of prosperous, healthy and equitable.  
>  
> Some folks actually think the more taxes we strap on the backs of the  
> working class, the better. In my mind this does not create any of  
> those items I just mentioned.  
>  
> I know I speak for the people on my street in saying that enough is  
> enough. We are in a tanked economy and its going to take years to  
over  
> come this issue. Its irresponsible to further tax families that can't  
> hardly feed themselves with more projects that we simply do not need.  
>  
> I will be direct. No street car. No more light rail, No more low  
> income housing. No more in fill. No more bicycle lanes. All are  
> complaints I have taken. We are all fed up and broke.  
>  
> We need to concentrate on surviving and not adding anything.  
> Powellhurst/Gilbert is loved as it is by us long timers here. We like  
> the rural setting and don't want it ruined.  
>  
> Thank you for the time to sound off.  
> Sincerely,  
> Pati and Matt Hall  
> 34 yr residents of

> Powellhurst/Gilbert  
>

Julie Ocken  
City of Portland  
Bureau of Planning and Sustainability  
1900 SW 4th Ave, Suite 7100  
Portland, OR 97201  
503-823-6041  
julie.ocken@portlandoregon.gov

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**From:** Don M. [mailto:mcat@teleport.com]  
**Sent:** Sunday, December 04, 2011 1:11 PM  
**To:** Planning and Sustainability Commission  
**Cc:** TPDx Discussion  
**Subject:** Portland Plan testimony submission

The actions below are from page number eleven in the Equity Section. Questions like this can be asked about most if not all the actions in the equity section and many of the other actions throughout the plan. This is why I say there needs to be at least a one page explanation of each action that is much more specific.

### **5-Year Action Plan**

**1** Complete and move forward with implementation of the City of Portland Civil Rights Title VI Program Plan to remove barriers and conditions that prevent minority, low-income, limited English proficiency and other disadvantaged groups and persons from receiving access, participation and benefits from City programs, services and activities.

**What are the barriers? Why isn't the implementation of the City of Portland Civil Rights Title VI Program Plan being implemented without this action? Why aren't people that should have access getting access? When you answer these questions then actions can be defined to address the root of the problem. This action is almost meaningless!!!**

**2** Assign responsibilities to City bureaus to identify, track, educate and act on critical disparities in self identified communities.

**Why should they do this? What will be the result? How much will it cost? Who will do it? What are critical disparities? Who are the self identified communities?**

**3** Share data between City and partners. Invite self-identified communities to provide information and sources unique to them.

**Share what data? Who are the City and the partners? Who are the self-identified communities? What information and sources are unique to them? Who will do this? How much will it cost? Who will use the results and for what?**

**4** Develop and apply a set of equity tools to evaluate the development and implementation of all City policies, programs and business operations to close critical disparities

**What are the equity tools? How does one evaluate the development and implementation of all City policies, programs and business operation? How does one close disparities and how does one decide which are critical?**

5 Initiate a racial/ethnic focus, using well-documented disparities. Apply lessons and adapt tools from this initial focus to other historically underrepresented and underserved communities.

**What well documented disparities? What lessons and tools? What historically underrepresented and underserved communities? How much will this cost? Who will do it? What will be the result?**

Submitted by: Don MacGillivray; 2339 SE Yamhill, PDX, 97214

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**From:** Don M. [mailto:mcat@teleport.com]  
**Sent:** Sunday, December 04, 2011 2:40 PM  
**To:** Planning and Sustainability Commission  
**Cc:** TPDX Discussion  
**Subject:** Portland Plan testimony 12-4 Educ. & Econ training

**All of these actions are very similar. TEY #2 and EPA #45 are almost identical. Why have these actions in two different places? I would suggest consolidating these in a single location with a reference in the other location back to where they can be found.**

**I also find these very general and they would benefit from more specifics about what they are and how they will be accomplished as well as the costs / resources involved.**

### **Thriving Educated Youth p. 25**

Equity 1 College and career exposure: Support summer jobs, job training and career and college exposure through strategies such as Summer Youth Connect. City

Equity 2 College access: Develop and expand initiatives that support access to and completion of a minimum of two years of post-secondary education or training leading to a career or technical credential, industry certification and/or associate's degree. City, PCC, MHCC, WSI

Equity 3 College access: Expand access to and participation in college access and dual enrollment programs such as ASPIRE, TRIO and Middle College programs through partnerships between K-12 and Higher Education. School Districts, PCC, MHCC, PSU

5 Career readiness: Develop career readiness certificate programs in partnership with target sector businesses. WSI, School Districts, MHCC, PCC

7 Public-private partnerships: Increase private sector partnerships with schools, and in doing so, the number of career-related learning options and dual-enrollment high school students taking college credit-bearing classes. City, School Districts, MHCC, PCC, PSU

## **Economic Prosperity and Affordability p. 55**

### **5-Year Action Plan**

Equity **41** Training: Focus, align and expand workforce training programs and higher education degree programs to prepare job seekers for long-term employment at a self sufficient wage. WSI, PCC, OUS, MHCC

Equity **44** Higher education system: Involve higher education and workforce development partners in implementing the Cradle to Career Initiative recommendations so that at-risk youth are supported and successfully complete training and university programs. C2C

Equity **45** Post-secondary: Study the feasibility of a program that guarantees public school students access to two years of education or training past high school. C2C

Portland Plan testimony: 12-4-2011, Don MacGillivray, 2339 SE Yamhill, PDX, 97214



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**From:** Don M. [mailto:mcat@teleport.com]  
**Sent:** Sunday, December 04, 2011 6:35 PM  
**To:** Planning and Sustainability Commission  
**Cc:** TPD Discussion  
**Subject:** Portland Plan testimony submission: Actions=Comp. Plan

**TO: BPS & PSC**  
**From: Don MacGillivray**

**Date:** 12-4-2011  
**Subject:** Comprehensive Plan policy as the result of P.P. Actions

The following three actions invoke the Comprehensive Plan as a major feature of the action, if not the entire result.

“Guiding Policies” are used to suggest issues that should be included in the Comprehensive Plan. Therefore these three actions should be made into “Guiding Policies” and removed as “Actions.”

If “Actions” remain as a vehicle to suggest “Comprehensive Plan” policy I have many more that I would like to see included.

## TEY

P. 27 12 Partnerships and investments: Include a policy in *Portland's Comprehensive Plan* that supports partnerships with education organizations and directs City resources toward appropriate and effective tools to enhance the lives of our city's youth. BPS

P. 31 27 Multi-functional facilities: Create new *Comprehensive Plan* policies and zoning for schools, colleges and universities to accommodate multiple community serving functions, while maintaining accountability to neighborhood concerns regarding impacts. BPS

## EPA

P. 47 Equity 22 Growth capacity: Plan for adequate growth capacity to meet projected employment land shortfalls in the *Comprehensive Plan*, including industrial districts, multimodal freight facilities, campus institutions and commercial corridors in underserved neighborhoods. BPS

Portland Plan Testimony from Don MacGillivray, 2339 SE Yamhill, PDX, 97214



Sam  
Adams  
Mayor

Tom  
Miller  
Director

November 23, 2011

Dear Susan:

Thank you for the opportunity for the Bureau of Transportation to submit comments on the Proposed Draft of the Portland Plan.

### **General Comments**

PBOT lauds BPS' efforts to develop a community-supported, long-term vision for our city. The Portland Plan contains a number of important and far-reaching community goals. Many of those goals have direct implications for PBOT; others have indirect implications. The latter point can be exemplified in the education context: efforts to improve the high school graduation rate rely, in part, on ensuring students, teachers, and administrators have safe and reliable access to and from school.

Given the interdisciplinary nature of PBOT's work, we value the Portland Plan's focus on actions involving interagency and cross-bureau coordination. To reference the aforementioned school example, safe and reliable access to schools could require work from PBOT, BES, Water, Parks, BDS, neighborhood coalitions, and neighborhood associations, and sometimes ODOT – in addition to non-governmental coordination.

The long-term goals articulated in the Portland Plan, combined with the highly interdisciplinary nature of the work necessary to meet those goals, provoke a number of observations for PBOT related to implementation. In many respects, meeting these goals will require significant shifts in how PBOT does business.

### **Priorities and Funding**

Perhaps the Portland Plan's most significant transportation-related objective is the call for 70% of Portlanders to take transit, walk, bicycle, or use "less polluting" transportation to get to and from work by 2035. The Plan notes that in 2009 23% of Portlanders were meeting this goal. This shift in travel behavior would have dramatic, positive impacts for our community. Assuming substantial growth in walking and biking as part of our collective efforts to meet this objective, the corresponding growth would result in safer travel outcomes by a healthier population that help reduce both the costs of roadway maintenance and our carbon footprint.

This is a laudable goal. That said, the Plan should acknowledge that PBOT's current funding streams are insufficient and, more importantly, too unstable to create the conditions necessary to achieve this objective. Simultaneously our maintenance-related backlog grows while the community desire for new capital improvements (like sidewalks and bikeways) expands. New, more robust, and more stable revenue streams for PBOT are essential if PBOT is to create the infrastructural conditions upon which this 70% goal is achieved.

The concept of "equity" is a prevailing theme within the Plan. We appreciate its inclusion and note that PBOT has been working internally on an ongoing basis to define this concept as it applies to our mission. Frankly, the concept's application to our work remains somewhat elusive. For instance, a typical definition of equity

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FAX 503-823-7576 or 503-823-7371 • TTY 503-823-6868 • [www.portlandoregon.gov](http://www.portlandoregon.gov)

might suggest that PBOT should provide the same level of service for all travel modes to all citizens and businesses in all parts of the city. However, this application does not account for the diverse – and often cherished – land use distinctions in our city and the transportation infrastructure that follows. How does one account for the diversity of transportation needs (and expenditures) in an equitable manner?

### **Measures of Success**

The Portland Plan includes 12 ‘Measures of Success’. PBOT recognizes that it will have a role to play, to greater or lesser degrees, in meeting all of these measures of success. Some general concerns with all of the measures are that:

- it is not clear which strategies and actions in the plan are tied to which measures of success; and
- It is not clear how PBOT’s implementation of the strategies and actions will or should be altered in the future if it is determined that the objectives of the measures are not being achieved.

In measure #10 “Healthier people”, the Portland Plan could more clearly identify the role bicycle transportation can play in addressing health. Public health organizations and officials across the globe recognize the direct connection between active transportation and health. The Portland Plan should explicitly recognize this as well. Statements about this connection should be included in the discussion section for measure #10.

The Centers for Disease Control have issued statements that directly identify biking as a health factor. Similar statements could be included in the discussion section for measure #10. These statements include “Automobile trips that can be safely replaced by walking or bicycling offer the first target for increased physical activity in communities,” and “Changes in the community environment to promote physical activity may offer the most practical approach to prevent obesity or reduce its co-morbidities. Restoration of physical activity as part of the daily routine represents a critical goal.”


### **Integration of Portland Bicycle Plan for 2030**

The Portland Bicycle Plan for 2030 will be a key element in efforts to increase in the future the share of trips that are made by bicycle. It is not clear how a key concept of the Bicycle Plan, the Major City Bikeway, is integrated into the proposed draft policies and actions. This clarity could be provided by identifying Major City Bikeways as elements on the “Healthy Connected City” network map in the plan, and by including five year action items that identify bikeways as a means of connecting developed and developing neighborhood hubs.

One of the five 2030 Urban Form and Mobility objectives of the *Climate Action Plan* is “Create walkable and bikeable neighborhoods.” The corresponding 2035 Healthy Connected City objective of draft Portland Plan is “90 percent of Portlanders live within a quarter mile of a sidewalk accessible complete neighborhood.” We prefer the broader definition of complete neighborhoods contained in the *Climate Action Plan*.

Please let Paul Smith or me know if you have questions or need clarification.

Sincerely,

A handwritten signature in black ink that reads "Tom Miller". The signature is written in a cursive, slightly slanted style.

Tom Miller  
Director

Attachment: Consolidated list of comments from Bureau Staff

Cc: Paul Smith, Planning Manager  
Courtney Duke, Senior Transportation Planner

Doug Klotz  
2630 SE 43<sup>rd</sup> Ave.  
Portland, OR 97206

December 5, 2011

**Portland Plan Testimony, an enlargement of my testimony on Nov. 29<sup>th</sup>, 2011 to the Planning and Sustainability Commission**

Chairman Baugh and Planning and Sustainability Commission members:

There are a lot of good points to this Plan, including Measure 9: Complete Neighborhoods. Once I saw the corrections document, I applauded the corrected version: “By 2035, 90 percent of Portlanders live within sidewalk-accessible complete neighborhoods.”

I also agree with the testimony of Cathy Galbraith of the Architectural Heritage Center, who noted the almost total lack of attention to Historic Preservation in the Plan. This should be changed, as per her testimony.

My main points are in regards to three Action items in the Healthy Connected City Actions: Actions 28, 30, and 31.

**Healthy Connected City Action 28 (Page 73, and repeated on pages B-7, B-9, B-15, and B-18)**

Action 28, on page 73, labeled “Neighborhood Greenways”, says: “Implement pilot projects for alternative right-of-way improvements and funding approaches for unimproved streets, to provide additional options where traditional approaches are not feasible and to foster street design that is more responsive to community characteristics.” (my underline)

While there are certainly topographic differences between neighborhoods (or “communities”), I’m afraid that this broader language could be used to justify substandard, inferior or completely lacking pedestrian facilities. I can foresee a neighborhood in a relatively flat area, like Outer Southeast, claiming that the “community characteristics” of their neighborhood include streets with no sidewalks, and private yards that extend their planting and fences clear into the public right-of-way, eliminating any space for walking. A street design responsive to these “characteristics” might include only a widened shoulder to walk on. Such facilities do not meet the ADA standards for walkways, which must be constructed so the visually impaired can find where the edge of the walkway is with their cane, but also are dangerous to children and the elderly, who can’t move out of the way of an oncoming car, and will be rejected by a significant portion of the public as unsafe to walk on, even if there are few fatalities recorded in their use.

This is not the way to improve the active transportation mode share, as per Measure 7 and Measure 8 in the Plan. While steep hillsides and drop-offs near the roadway do call for different right-of-way designs, private landscaping encroachments should not be used to reduce the quality of the walking and biking infrastructure. **So, I recommend changing Action 28, to read in part: “.....and to foster street design that is more responsive to neighborhood topography (and delete “community characteristics”).”**

### **Healthy Connected City Action 30 (Page 73, and repeated on pages B-18 and B-19)**

Action 30, on page 73, also labeled “Neighborhood Greenways”, says: “Resolve issues related to pedestrian facilities that do not meet city standards but provide safe pedestrian connections.” This language is not clear, but reads as a code for some issue that the reader is not aware of. It sounds like there are specific “pedestrian facilities” being discussed, without filling the reader in on which they are. This is not the way to write public policy.

It seems that this language was intended to promote ideas for Right-of-Way designs like those in the study report by the Lark cooperative called “Roadway Not Improved”. While several of the ideas in the report are indeed better for pedestrians than the current condition of some unimproved streets in neighborhoods such as Woodstock, there are others that should not be promoted by the city. Specifically, asking pedestrians to walk in the street is not appropriate when there is auto traffic, and there is no option for those uncomfortable with this. Especially, the disabled, including the visually impaired, as well as children and the elderly, will not feel comfortable walking nor be safe in the roadway with cars, no matter how slow the cars are supposed to be going. Even the famed “woonerfs” of The Netherlands actually have traditional sidewalks at the edges of the Right-of-way, as well as areas within the street for all users. It is also concerning that some of the plans show private landscaping seemingly taking over most of the Right-of-way.

**I suggest the following language as a replacement for that in the Proposed Draft: “Develop new city standards for unimproved Rights-of-way that get little vehicle traffic, but complete the street grid, to provide separated pedestrian facilities that are ADA compliant, as well as safely usable by those of all abilities, as well as safe bicycle facilities through these Rights-of-way. Allow non-transportation uses such as gardens, provided that the edge of the public Right-of-way is clearly delineated and not encroached on by private landscaping.”**

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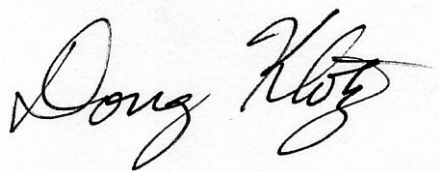
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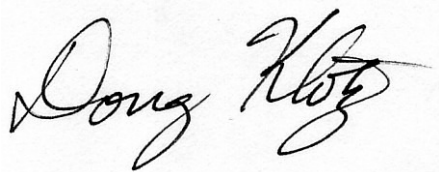
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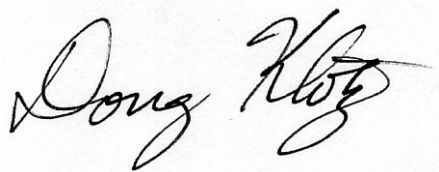
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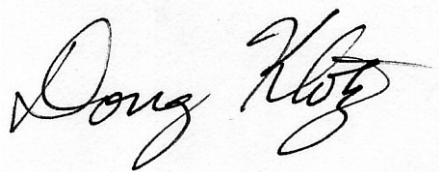
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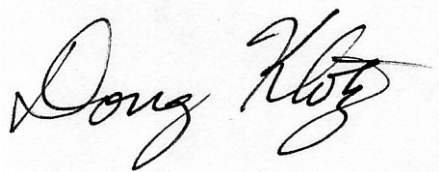
While I agree with most of this language, **I propose deleting “landscaped stormwater management” from the list of features of these Corridors.** I realize that stormwater swales have been incorporated into streets like Lower East Burnside, and Sandy Blvd. recently. However, if the intent of the Plan (and so many regional and state land use plans) is to concentrate pedestrian activity along Transit Streets, and indeed, in Civic Corridors, there is a need to provide space for pedestrians. To provide the sort of “place-making” that is spoken of, the street right-of-way needs not only space for people to walk, but places for people to stop and talk, to window-shop, and to contemplate. There needs to be room for sidewalk cafes, for bike racks, and for large canopy trees. In addition, for the time being, there is a need for auto parking to help the viability of local businesses.

While stormwater facilities do necessary work capturing and filtering stormwater runoff, as well as providing a visual and chemical relief from hardscape, they work against the density of people that commercial and Transit streets need. Putting the facilities on these streets may actually have the opposite effect, if the sidewalks are narrowed, and walking becomes difficult because of them, perhaps encouraging auto trips instead. In plan for the upcoming Division Streetscape project, several commercial areas have seen their sidewalks narrowed from 10 feet to 6 feet to accommodate these swales, making sidewalk cafes impossible.

I propose that there are hundreds of miles of residential streets in the City of Portland, some directly adjacent to these Civic Corridors. I urge that Stormwater Management facilities be placed on most of these residential streets, where there is room in the Right-of-way for them. Indeed, these facilities can often be place just “around the corner” from the Commercial and the Civic streets, and actually serve the stormwater management needs of these streets. This should be done as much as is hydrologically possible. If 98 percent of all runoff can be captured without using Civic and Commercial street space, and these corridors are vibrant “people places” the city will be better off indeed.

Thank you for your time at the hearing, and I look forward to further steps in this process.

Sincerely,

A handwritten signature in black ink, appearing to read "Doug Klotz". The signature is written in a cursive, flowing style with some loops and flourishes.

Doug Klotz

Sam  
Adams  
Mayor

Tom  
Miller  
Director

November 23, 2011

Dear Susan:

Thank you for the opportunity for the Bureau of Transportation to submit comments on the Proposed Draft of the Portland Plan.

### **General Comments**

PBOT lauds BPS' efforts to develop a community-supported, long-term vision for our city. The Portland Plan contains a number of important and far-reaching community goals. Many of those goals have direct implications for PBOT; others have indirect implications. The latter point can be exemplified in the education context: efforts to improve the high school graduation rate rely, in part, on ensuring students, teachers, and administrators have safe and reliable access to and from school.

Given the interdisciplinary nature of PBOT's work, we value the Portland Plan's focus on actions involving interagency and cross-bureau coordination. To reference the aforementioned school example, safe and reliable access to schools could require work from PBOT, BES, Water, Parks, BDS, neighborhood coalitions, and neighborhood associations, and sometimes ODOT – in addition to non-governmental coordination.

The long-term goals articulated in the Portland Plan, combined with the highly interdisciplinary nature of the work necessary to meet those goals, provoke a number of observations for PBOT related to implementation. In many respects, meeting these goals will require significant shifts in how PBOT does business.

### **Priorities and Funding**

Perhaps the Portland Plan's most significant transportation-related objective is the call for 70% of Portlanders to take transit, walk, bicycle, or use "less polluting" transportation to get to and from work by 2035. The Plan notes that in 2009 23% of Portlanders were meeting this goal. This shift in travel behavior would have dramatic, positive impacts for our community. Assuming substantial growth in walking and biking as part of our collective efforts to meet this objective, the corresponding growth would result in safer travel outcomes by a healthier population that help reduce both the costs of roadway maintenance and our carbon footprint.

This is a laudable goal. That said, the Plan should acknowledge that PBOT's current funding streams are insufficient and, more importantly, too unstable to create the conditions necessary to achieve this objective. Simultaneously our maintenance-related backlog grows while the community desire for new capital improvements (like sidewalks and bikeways) expands. New, more robust, and more stable revenue streams for PBOT are essential if PBOT is to create the infrastructural conditions upon which this 70% goal is achieved.

The concept of "equity" is a prevailing theme within the Plan. We appreciate its inclusion and note that PBOT has been working internally on an ongoing basis to define this concept as it applies to our mission. Frankly, the concept's application to our work remains somewhat elusive. For instance, a typical definition of equity

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might suggest that PBOT should provide the same level of service for all travel modes to all citizens and businesses in all parts of the city. However, this application does not account for the diverse – and often cherished – land use distinctions in our city and the transportation infrastructure that follows. How does one account for the diversity of transportation needs (and expenditures) in an equitable manner?

### **Measures of Success**

The Portland Plan includes 12 ‘Measures of Success’. PBOT recognizes that it will have a role to play, to greater or lesser degrees, in meeting all of these measures of success. Some general concerns with all of the measures are that:

- it is not clear which strategies and actions in the plan are tied to which measures of success; and
- It is not clear how PBOT’s implementation of the strategies and actions will or should be altered in the future if it is determined that the objectives of the measures are not being achieved.

In measure #10 “Healthier people”, the Portland Plan could more clearly identify the role bicycle transportation can play in addressing health. Public health organizations and officials across the globe recognize the direct connection between active transportation and health. The Portland Plan should explicitly recognize this as well. Statements about this connection should be included in the discussion section for measure #10.

The Centers for Disease Control have issued statements that directly identify biking as a health factor. Similar statements could be included in the discussion section for measure #10. These statements include “Automobile trips that can be safely replaced by walking or bicycling offer the first target for increased physical activity in communities,” and “Changes in the community environment to promote physical activity may offer the most practical approach to prevent obesity or reduce its co-morbidities. Restoration of physical activity as part of the daily routine represents a critical goal.”


### **Integration of Portland Bicycle Plan for 2030**

The Portland Bicycle Plan for 2030 will be a key element in efforts to increase in the future the share of trips that are made by bicycle. It is not clear how a key concept of the Bicycle Plan, the Major City Bikeway, is integrated into the proposed draft policies and actions. This clarity could be provided by identifying Major City Bikeways as elements on the “Healthy Connected City” network map in the plan, and by including five year action items that identify bikeways as a means of connecting developed and developing neighborhood hubs.

One of the five 2030 Urban Form and Mobility objectives of the *Climate Action Plan* is “Create walkable and bikeable neighborhoods.” The corresponding 2035 Healthy Connected City objective of draft Portland Plan is “90 percent of Portlanders live within a quarter mile of a sidewalk accessible complete neighborhood.” We prefer the broader definition of complete neighborhoods contained in the *Climate Action Plan*.

Please let Paul Smith or me know if you have questions or need clarification.

Sincerely,

A handwritten signature in black ink that reads "Tom Miller". The signature is written in a cursive, slightly slanted style.

Tom Miller  
Director

Attachment: Consolidated list of comments from Bureau Staff

Cc: Paul Smith, Planning Manager  
Courtney Duke, Senior Transportation Planner



Architectural Heritage Center  
701 SE Grand Avenue  
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503 231-7311 fax  
www.VisitAHC.org



**COMMENTS TO: Portland Planning & Sustainability Commission**

**FROM: Cathy Galbraith, Executive Director – *Bosco-Milligan Foundation/*  
*Architectural Heritage Center***

**RE: COMMENTS ON *DRAFT PORTLAND PLAN* – November 29, 2011**

The draft Portland Plan reflects a great deal of work. Obviously, the effort to include 17,000 comments received during 2008's "Vision PDX" has resulted in a document that is unlike any previous plan for our city. But a more basic concern is the vague nature of many of the "guiding principles" and even the "strategic steps" for the next five years – *much more definitive "action steps"* (as is typical in strategic plans) are warranted if many of the Plan's primary goals are to move toward achievement. A larger concern is what is NOT included – any effort to include/address the city's responsibilities for acknowledging and protecting Portland's irreplaceable historic resources. We do understand that the upcoming *Comprehensive Plan* will address many more specifics typically included in city-wide planning documents; however, our experience is that adding issues is much more problematic than expanding issues already included in the Portland Plan.

The term "Historic Preservation" is entirely absent in the draft Portland Plan. The terms "Historic Resources" and "Historic Resource Inventory" appear once in the Plan – where an *inventory of historic resources is called for in the "neighborhood hubs and civic greenways and develop a strategy to preserve key resources."* (page 79) Entirely absent from the Plan is any acknowledgement of the existing Historic Resources Inventory of 5,000+ properties, dating back to 1983 (updated in 1993 for the Albina Community plan neighborhoods.) The Portland Plan needs to acknowledge the HRI and give it standing, especially given the demolition of scores of HRI properties since the inventory was done. Many of the commercial corridors in established neighborhoods are fully built and include abundant potentially historic houses and low-scale multi-family structures. But – the commercial and high-density residential zoning of these properties is a significant disconnect from the long-established land uses, and the investments they embody. Instead, the Plan proposes (page 30) to *"Fill gaps in under-served neighborhoods – and consider zone changes to fill commercial gaps."* But the draft Plan itself acknowledges that *zoning has not been successful in producing even results* (page 66). The bigger issue is the need to stimulate high-quality neighborhood-compatible commercial development in the overabundant areas that are already commercially developed and zoned. Waiting for the new Comprehensive Plan (for which the Portland Plan sets the stage) to even mention these concerns is a risk that many property owners and residents do not want to take.

The issue of "community character" in the traditional neighborhoods is a concern that was raised time and time again in the earlier Portland Plan workshops. The omission of this concern throughout most of the Plan is an oversight that needs to be addressed now. Inappropriate zoning, lack of design review (and appropriate guidelines), and the overarching principle of



meeting density goals are the primary and continuing threats to the celebrated character of many Portland neighborhoods.

The Portland Plan (in the segment on Connected City Hubs and in Appendix B) describes the characteristics of multiple sub-areas of the city. The Inner Neighborhoods are described (page 77) as “*great potential to be places where most residents can walk or bike to hubs.*” Appendix B describes them as “*developed in a historical “streetcar-era” pattern, with interconnected street grids, improved with sidewalks and street trees, a system of “commercial main streets” where more than half of Portlanders live, in 140,000+ households...since there are few vacant lots, growth over the next 25 years is expected to occur through infill development and redevelopment.*” But the Plan states (page 77) that “*Improvements might focus on minimizing displacement and providing affordable housing options.*” This hardly acknowledges the issue of displacement that is so strong in the Plan’s Framework for Equity, ignores the decline of diversity through displacement of the past decade in inner North and Northeast (page 85 & 87), ignores already existing affordable housing, and ignores the goal of “*complete neighborhoods*” that these areas already meet.

The Plan’s segment on Complete Neighborhoods cites (page 101) the need to “*increase housing in areas with services*” while ignoring the earlier description that these areas are primarily built out. The greater emphasis should be on the statement (page 101) of “*bringing services to areas that don’t have them*” – nearly half of the city’s area in the densely populated Eastern Neighborhoods that have poor transit (Tri-Met’s job), lack of sidewalks and so many other service needs. The Portland Plan notes (page B-12) that “*Many people in this area are also concerned about retaining the area’s distinct character.*” Unfortunately, the proposed “Local Actions” (Appendix B) for the five Outer East sub-areas include nothing to address that concern.

Additionally, the statement of concern for distinct character must be added to the views and critical concerns of residents in the Central City and Inner Neighborhoods as well. And despite the Plan’s assessment of these neighborhoods as somehow “incomplete”, most residents fully disagree with that assessment.

The inclusion of a Framework for Equity is welcome and warranted, for all of the reasons and justification in the draft plan. BUT, if we are to truly close the disparity gap, and achieve equitable outcomes, the Plan must do more than merely include strategies such as “*connect MWESB firms to target industry clusters*” (page 41) and to connect them to “*trade gateway infrastructure projects*” (page 42), and “*increase targeted contracts, workforce agreements, ...to reduce racial and ethnic disparities*” (page 57) – hardly steps that are sufficiently aggressive to pursue an Equity agenda.

The bottom line in many traditionally diverse city neighborhoods with a high degree of ethnic history is: *How are the burdens and potential benefits of growth and development to be shared across ALL neighborhoods, rather than the practice of encouraging new developments in established neighborhoods with perceived “problems and opportunities” where the new development replaces long-standing properties with cultural significance, and impacts residents?* Page 10 addresses the “*benefits of growth and change*”, but there are clearly burdens of that change that have disproportionately impacted the ethnically diverse areas of North,

Northeast, and outer SE Portland, sometimes through “urban renewal” programs (page 12.) Will the proposed “racial and ethnic justice initiative” (page 9) be sufficiently detailed and actually followed, in the pursuit of the equity agenda? We do want Portland to at long last be a leader in social sustainability (page 10) – as important as and equal to environmental sustainability that has been the focus of much of the city’s efforts. *Avoiding displacement and understanding and preserving historic and cultural connections should be an overriding goal of any equity agenda.* The once-celebrated Albina Community Plan (1993) led to the start of displacement in N/NE; it was well-intentioned, but has long been described as “aspirational.” What’s relevant for the Portland Plan is that many of the lofty “action steps” that have gone unfulfilled in the Albina Community Plan read much like those in the proposed Portland Plan.

The Local Actions segment of the Plan (Appendix B) includes action-steps for the five swaths of the city’s geographic sub-areas. As cited above, the Inner and Central City Neighborhoods already embody the desired “Twenty Minute Neighborhood” characteristics. The inadequacies of infrastructure and service needs of the Eastern Neighborhoods are identified and addressed somewhat in the Local Actions. But the thoroughly described inadequacies of the Western Neighborhoods (page B-16) – “*some of the lowest levels of racial and ethnic diversity, relatively small numbers of commercial areas, less walkable, lower bike riding and transit use, and high household energy use*”(excepting Linnton) are not addressed in Local Actions. There is no inclusion of any needed workforce housing, nothing related to providing commercial services to achieve anything resembling “20 minute neighborhoods” and “complete neighborhoods” and none of the Equity Agenda action steps. This is hardly evidence of the Plan’s stated intent of equitably sharing responsibilities and providing opportunities to meet equity needs, across the entire city.

The Education segment of the draft plan leaves many questioning if the city of Portland is stepping into the roles and responsibilities of Portland-area public school boards. The more typical planning-related education issues we are concerned about refer to expansion of Portland college campuses, specifically PSU and PCC-Cascade and Southeast Center. The Plan includes a city role in “*helping to catalyze complementary local development*” (page 25) for expansion of PCC Cascade, and “*Develop new land use investment approaches to support the growth & neighborhood compatibility of college and hospital campuses in the comprehensive plan update*” (page 47.) Our concern is the expansion through demolition and displacement that has been typically practiced by these institutions. A more important first step should be the public deliberation and adoption of institutional “master plans”, before it’s presumed that college and hospital campus expansions will be undertaken without detriment to the surrounding neighborhoods.

The Economic Prosperity segment of the draft plan includes much that would be expected in pursuit of more successful economic development efforts. But this segment jumps from discussion of affordability challenges (especially for housing), to targeted-industries and more typical economic development issues, and then to (page 40) “*Enhance the vitality of the Central city to support job growth and high-medium density development...and attract educated talent*” with supporting statements in Appendix B that reach sweeping conclusions like “*Central City housing is either subsidized low income or high-end market rate.*” There is no mention of retaining existing affordable housing in the Central City, nor any recognition that the Central

City includes portions of South Portland, the West End, Skidmore/Old Town, and portions of the Eliot and Buckman neighborhoods – where long-standing affordable housing does exist and should be protected. The Central City is *not* just the expensive high-rise condos of the Pearl District and downtown. Finally, Portland has already attracted many talented people in pursuit of professional success; the bigger issue is the lack of jobs for those who already live in Portland.

Other issues in the Growing Employment Districts segment of the plan include recognition of the need for B and C class office space in the Central City (page 47) where incentives are rightfully needed – including for rehab of existing historic multi-story office and commercial B and C class buildings. The issue of the city's Fee structure is included on page 46, as "*Foster regulatory and fee approaches that keep Portland competitive for business and job growth.*" The Portland fee structure is a significant city-wide concern that needs to be upgraded to a five-year Action step. The historic preservation community, property owners in Portland's Historic Districts, and developers are *now* assertively raising the issue of the city's unreasonably high historic design review fees, in particular; the \$3,000+ application fee for individual landmark designation has already proven to be a disincentive for designation, with a total of *two* such applications in the past nine years. Portland's historic design review (and landmarks designation) fees are higher than all other Oregon jurisdictions and higher than for any comparably sized municipality throughout the U.S. These fees are genuine obstacles for private building rehab and adaptive re-use projects – both residential and commercial – and discourage the potential economic investments they represent.

The Area Scorecard segment of the Portland Plan (pages 114-115) rates performance against strategy goals, for all sub-areas of the City. The growth projections for the Central City and Inner Neighborhoods are especially concerning. How do you nearly double population in the Central City (proposed to grow from 21,726 to 50,948); increase from 15,152 to 26,448 in Interstate; grow from 17,796 to 24,146 in Lents/Foster; grow from 14,732 to 19,027 in Hollywood; and grow from 9,471 to 15,834 in Hillsdale/Multnomah – all where there is acknowledged little vacant land? How can the irreparable damage to existing community character – and to potentially historic buildings – be avoided? Clearly, the Portland Plan's call to finally include the consideration of social impacts in the review of land use actions will be essential. But the projections themselves are unlikely to be achieved without substantial impacts, and they demonstrate the likelihood of continuing to saddle the same areas with the burdens of growth as has been done in the past. The Portland Plan was to address this "inequity" but the numbers speak for themselves.

November 28, 2011

**Attn: Portland Planning and Sustainability Commission**

As a Woodstock resident, I am both charmed and dismayed by our many unimproved roadways. I enjoy the rural feel of the neighborhood, but many roads are in dire need of care. Residents cannot afford to renovate the roads to City's standards and many fear reprisal if they take matters into their own hands. So here's what happens:

- A few roads are being gardened, but people fear that if the City finds out, they'll be forced to give up the gardens or space they are using, so they don't want to touch other issues – like dealing with potholes.
- Consequently, many roads become a kind of uncared for, no-man's-land that encourages crime, including drug use, break-ins, and garbage dumping. These roads are also popular ATV destinations.
- Some Woodstock roads are so rough that residents can barely make it to their driveways. Ironically, in a nearby, more affluent neighborhood, City funds are used for curb cuts and street sweeping. Hmm.
- Other roads, like SE 44<sup>th</sup> Ave. adjacent to Lewis Elementary, are used daily by children walking to school, but become dangerous during the rainy winter months as the kids try to navigate slippery clay and deep puddles, while dodging the 4WD vehicles that plow through.

My neighbors and I seek alternate ways to make these roads safe for children and other pedestrians, navigable for bikes and cars (without increasing vehicular speed), and generally more attractive so that our neighborhood feels friendly and cared for.

I urge you to support Portland Plan action items #28 and #29, and to provide the resources and flexibility to help citizens improve the roads in their neighborhoods in a way that is environmentally and economically feasible.

Thank you!

Erin Inclán  
7020 SE 42<sup>nd</sup> Ave, Portland, OR 97206  
503-774-1743

URBAN FORESTRY COMMISSION



PORTLAND PARKS & RECREATION

Healthy Parks, Healthy Portland



November 26<sup>th</sup>, 2011

• Nick Fish, Commissioner • Mike Abbaté, Director

Office of Planning and Sustainability  
Susan Anderson, Director  
City of Portland  
1900 SW 4<sup>th</sup> Ave  
Portland, Oregon 97201

Dear Ms. Anderson,

Thank you for giving the Urban Forestry Commission an opportunity to review the final draft of the Portland Plan and present comments for your consideration. We have read through the document and want to commend you and your staff for the exceptional work that went into developing and crafting this document. The Portland Plan showcases all that is wonderful about our city and what still requires our attention.

We appreciate the thoughtfulness and depth that was devoted to natural resource management and conservation. However, we do have a few suggestions related to street trees that we would like to see incorporated into the plan before its final adoption. Specifically;

**Under the Economic Prosperity & Affordability Section**

- 5 year action plan #25 – Portland Main Street, pg 49. –add: All district revitalization plans must include a comprehensive and sustainable street tree planting and maintenance component, with language that includes preservation of large trees.
- 5 year action plan #38- Housing Strategy, pg 53-add: Street/yard tree plan as part of neighborhood attractiveness, cohesion and housing value with language that includes preservation of large trees.
- 5 year action plan #42- Youth Employment, pg 55- **include:** the non-profit sector to the business sector to support career- related learning experiences. There are good opportunities for young adults to get practical arboriculture experience, provide the city with a cadre of tree care professionals as the canopy ages.

**Under the Healthy Connected City Section**

- 5 year action plan #18 Resource Conservation, pg 69- call out street trees/urban forestry or green infrastructure in the content statement and include language about planting large canopy trees where appropriate.

- 5 year action plan #26 -30 Connections, pg 73 - call out street trees as components of greenways (are these bioswales where larger trees may or may not be present?). Include comprehensive tree planting and maintenance plan for greenways.

Once again, thank you for giving us this opportunity to submit comments. We recognize the many competing issues that you faced while trying to produce an inspirational and achievable plan that Portland residents can embrace.

Sincerely,

Joe Poracsky, Chair  
Dave Odom, Vice- Chair  
Catherine Mushel, Secretary  
Brian Krieg  
Meryl A. Redisch  
Kendra Smith  
Michael.McCloskey,  
Stephen Peacock  
John Warner  
Diana Shurvey  
Dick Pugh

**Mission:** To enhance the region's economy and quality of life by providing efficient cargo and air passenger access to national and global markets.



November 29, 2011

Andre' Baugh, Chair  
Portland Planning and Sustainability Commission  
c/o Portland Bureau of Planning and Sustainability  
1900 SW Fourth Avenue, Suite 7100  
Portland, Oregon 97201

Dear Chair Baugh and Portland Planning and Sustainability Commission Members:

Thank you for the opportunity to comment on *The Portland Plan Proposed Draft*. The Port of Portland (Port) has been a partner in this process with the Bureau of Planning and Sustainability and appreciates the challenge of creating focus around the diverse interests in our city. From our perspective, the plan does a great job of describing the current economic context, some of the current challenges and the 2035 objectives. Our region's record unemployment resulting in the critical loss of both jobs for our citizens and the tax base to support the services they need will continue to challenge us all.

For this reason, our comments are centered on the Economic Prosperity and Affordability strategy. This strategy addresses the lack of jobs, relative decline in personal income, decline in tax and other public revenue and the lack of business investment in Portland. Unless these issues are addressed, none of the other strategies in the plan can be successfully implemented.

We offer the following recommendations:

- **Prioritize the strategies in the plan.** The current strategies are broad and actual implementation of the 2035 Objectives and the 5 Year Actions within each will be difficult without some sense of the priority and relative timing of the actions. Prioritization and an approach to address conflicting actions will be key for successful implementation and tangible results in a time of constrained resources.
- **Make economic prosperity and affordability the priority focus of the first three years of the five year action plan.** As an income tax-dependent state, our weak employment growth and stagnant income growth in Portland over the past decade has translated to fewer resources available to fund many services that Portlanders need and have come to expect. Recent examples include: TriMet's fare increases and service cuts over the last few years as a result of decreasing payroll taxes; the City of Portland's recent deferral of \$3.2 million in pedestrian projects (mostly in east Portland) due to budget shortfalls; likely reduction in contributions to the Lake Oswego Streetcar and Sellwood Bridge projects; and Multnomah County's social services budget declines impacting some of the city's most vulnerable residents.

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For this reason, the Port believes the strategic plan focus must be on job growth and investment first so that results of those efforts can help improve our resource outlook. Specifically, we suggest undertaking the following Economic Prosperity and Affordability actions (*as modified*) as priorities in the first three years of the action plan for the City and its partners. Please consider the Port of Portland a partner in particular for actions 1, 2, 8, 15, 16, 17, 18, 20, 20A, and 21. Text in italics and underlined reflects changes or additions:

1. **Business development:** Focus business development resources on enhancing the competitiveness of the five target clusters and other manufacturing industries which provide higher wage and broader employment opportunities for Portland residents.
2. **International business:** Implement an international business development, trade and investment strategy that emphasizes job creation with coordinated promotion of both the region and local firms, and supports the regional export initiative.
8. **Economic development:** Complete the formation of a regional economic development corporation that will be responsible for a regional brand strategy, recruitment and retention, marketing, and regional strategy coordination.
15. **Develop a regional freight rail strategy:** Develop a regional freight rail strategy to enhance and improve rail access, travel time and the efficiency of rail operations within the Portland region to support growth and operations of the industries here and ultimately movement of goods to market.
16. **Strategic investments:** Update and give priority to implementation of the next five-year increment of the Tier 1 and 2 projects in the Freight Master Plan and Working Harbor Reinvestment Strategy to improve freight mobility.
17. **International Service:** Implement strategic investments to maintain competitive international market access and service at Portland's marine terminals and PDX.
18. **Sustainable freight:** Implement Portland's Sustainable Freight Strategy to support efficient freight mobility on the entire freight system.
20. **Brownfield investment:** Pursue legislative changes and funding sources to accelerate clean up of brownfields, in particular superfund sites. Develop a strategy to address the impediments to redevelopment of brownfields. Lead effort with Metro and regional partners to include brownfield redevelopment assistance in the regional investment strategy.
- 20A. **Willamette River Superfund:** Work collaboratively to develop a clean-up that is cost effective and environmentally protective and supports existing and future job growth and environmental enhancement opportunities.
21. **Industrial site readiness:** Assemble and improve market readiness of at least one new shovel-ready 25-acre or larger site and up to four smaller sites for business expansion or recruitment. One or more of the smaller sites could serve as a pilot project for advancing both economic and natural resource goals in industrial areas. (*Modify action 25 in the Healthy Connected City to be consistent with proposed new language or delete.*)

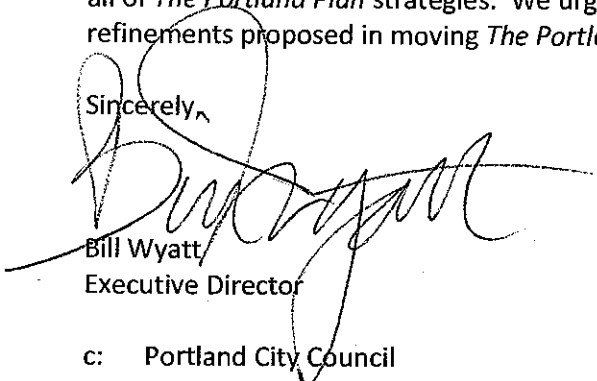


Andre' Baugh  
November 29, 2011  
Page 3

- **Make the range of aspirations for the Measures of Success consistent and focus them on improving the economic climate in Portland.** Current and impending public deficits make achieving measures of success challenging. Because this strategic plan provides direction to the City's comprehensive plan, infrastructure planning and investment, and related policy documents that flow from these, the Port encourages the City to focus on and measure actions that support improving the economic climate in Portland. We suggest the following changes (underline and italics are additions):
  5. **Growing businesses objective:** By 2035, the Portland region ranks 10 or better among U.S. cities, in terms of export value; has fully implemented the Metropolitan Export Initiative (MEI); has increased the number of businesses exporting to international markets; and has the industrial land supply to meet job growth needs.
  6. **Creating jobs objective:** By 2035, Portland will be home to over 515,000 quality jobs, providing a diverse and robust job base for Portlanders with regional per capita income at least 10% above the national average.
  7. **Freight, transit and active transportation objective:** By 2035, 50 percent of Portlanders take alternative modes of transportation to work and freight in Portland moves seamlessly and reliably to markets beyond the region.

It is through a focus on Portland's economic health as a critical first step that we will be able to address all of *The Portland Plan* strategies. We urge the Commission and Council to consider the priorities and refinements proposed in moving *The Portland Plan* forward.

Sincerely,



Bill Wyatt  
Executive Director

c: Portland City Council  
Susan Anderson  
Joe Zehnder  
Eric Engstrom

Testimony to the Planning and Sustainability Commission  
On the Draft Portland Plan 11/29/11

My name is Terry Griffiths and I am the chair of the Woodstock Neighborhood Association Land Use Committee. I am here to state the Woodstock Neighborhood Association's strong support for Actions #28 and #29 on page 73 in the full draft of the Portland Plan. The actions are entitled **Neighborhood Greenways**. Action #28 reads as follows:

"Implement pilot projects for alternative right-of-way improvements and funding approaches for unimproved streets, to provide additional options where traditional approaches are not feasible and to foster street design that is more responsive to community characteristics."

Woodstock has over two miles of unimproved right-of-way segments. Approximately 8% of roadway in the neighborhood is unimproved, as compared to 2% citywide.

In the winter and spring terms of 2010, five PSU Urban Planning Graduate Students investigated the issues surrounding unimproved streets with the Woodstock Neighborhood as their case study. On January 11 of this year, the PSU group presented their findings to this Planning and Sustainability Commission. I would like to remind you of some of their discoveries:

- 1.) At present, the only way the city will take responsibility for improving an unimproved street is through the formation of a Local Improvement District or LID. An LID is an agreement by the property owners adjacent to an unimproved street segment to pay for having that street segment improved to fully engineered city standards.
- 2.) From time to time, groups of residents have contacted the city about the possibility of having their street improved. When they learn the cost entailed in bringing the street up to city standards, the groups invariably walk away. The cost to a property owner with the most minimal unimproved street frontage would be about \$20,000.
- 3.) Many residents have no interest in having all streets improved to full city standards. In response to a survey question that asked, "If money were not a concern, would you prefer that all streets in the Woodstock neighborhood were paved with curbs and sidewalks?," 39 of 59 respondents said they would not.

Providing incentives to explore alternative ways to develop unimproved rights-of-way would benefit neighborhoods like ours as well as the city as a whole. Some street segments could be both linear parks and bicycle/pedestrian paths. Others could include space for urban gardens – in fact some are already used that way.

At the same time, there is a pressing need to develop a long-range, over-all plan with priorities as to how some unimproved streets will need to be developed.

After all, some of them are only a block or two away from Woodstock Boulevard, a major transit corridor and a 2040 Main Street. As the Portland Plan is fleshed out over the next 25 years, surely such streets will demand careful consideration and a high level of attention.







Suzanne Myers Harold  
6206 SE 45<sup>th</sup> Ave.  
Portland, Oregon 97206

Planning and Sustainability Commission  
1900 SE 4th, Suite 7100  
Portland, Oregon 97201  
November 29, 2011

Re: Portland Plan Testimony

Dear Planning and Sustainability Commission:

My name is Suzanne Harold. I'm here representing the Lake Carlton group in Woodstock. I'm speaking in support of Actions #28 and #29 of the Portland Plan, and want to briefly share our success story.

Here's a photo of SE Carlton between 44<sup>th</sup> and 45<sup>th</sup> Ave, taken in January 2010. The street was nicknamed Lake Carlton due to the standing body of water eight months out of the year, and the two Mallard ducks who called it home. It collected trash, attracted speeding 4-wheel drive trucks, and was a breeding ground for mosquitoes.

This year, with the support of the Woodstock Neighborhood Association, the PSU student group LARKE, and a \$2,000 grant from SE Uplift, we transformed Lake Carlton from a mud pit into a family-friendly thoroughfare. We graded and graveled a narrow, serpentine road and held a community work day for planting. The result is an easily maintained road frequented by pedestrians, bicyclists and the occasional slow-moving vehicle.

Official support from the City of Portland for this type of project will make it easier for other groups of neighbors to come together and improve their neighborhoods on a small budget. It builds community and turns public nuisances into things of beauty. I urge you to support Actions #28 and #29.

Sincerely,

  
Suzanne Myers Harold







Julie Ocken  
City of Portland  
Bureau of Planning and Sustainability  
1900 SW 4th Ave, Suite 7100  
Portland, OR 97201  
503-823-6041  
julie.ocken@portlandoregon.gov

---

**From:** Don M. [mailto:mcat@teleport.com]  
**Sent:** Wednesday, December 07, 2011 12:08 AM  
**To:** Planning and Sustainability Commission  
**Cc:** TPDx Discussion  
**Subject:** PDX Plan testimony - Trees

## **Trees**

**Trees are very popular and the City seems to promote their use without mentioning the challenges they create.**

**The shade that trees provide can reduce the locations that solar collectors can be placed on roofs.**

**The shade that trees provide can reduce the portions of yards that can be used to grow vegetable and fruits that often require six hours of sunlight to thrive.**

**Trees can also cause expensive problems for the owners on whose property they are located. We are dealing with the leaves on the streets and clogging drains in the fall. Many trees require trimming and suffer from disease and pest infestations (Dutch elm disease). Tree roots can lift sidewalks and clog water and sewer pipes.**

**My experience is a good example. Our street tree was free from PDC in 1977. It is a Sycamore-Maple. The parking strip is 3'-6" deep and now the tree is 22" in diameter. In the last 34 years it has caused us to repair the sidewalk three times at a cost of about \$2,000. A few years ago the roots of the tree clogged our sewer line and this cost about \$3,000. Before the tree was planted in 1977 I asked if the tree would cause these types of problems and I was assured by the City forester that the variety was selected so they it would be trouble free. We have also paid to have the tree trimmed twice over its life which cost several hundred dollars. I suggest that trees are not always the benefit they seem. If the City would pay the bills like this I might feel differently.**

**Along business districts street trees can cause sight lines to be blocked such that business signs are less effective. In my opinion this should not be a problem and the shade and greenery from trees are important in making the area more attractive. But some business owners don't agree.**

**Habitat connections, green streets, and civic corridors all imply the likelihood of green tree canopy to be placed along city streets. Great care must be taken around the specific varieties selected and its location.**

**I have also been advocating that street trees be some form of edible fruit or nut that can make them more useful to the people living nearby. However, disease and insect problems are an issue as is the necessity to harvest the fruit and otherwise see that it is disposed of.**

**This also relates to the issue about building new sidewalks. Historically sidewalks are build and maintained by the property owners. If the City builds sidewalks will the City maintain them or will the property owner maintain them? And if the City maintains them is this a precedent for the maintenance of all the sidewalks of the City?**

**I would also suggest that the urban design philosophies of permaculture be adopted as often as possible in the design and care of urban spaces.**

**Guiding Policies**

p. 70 Design neighborhood greenways and civic corridors to integrate safe and accessible facilities for pedestrians and cyclists, sustainable stormwater facilities, **tree planting** and community amenities.

**5-Year Action Plan**

p. 71 Equity **22** **Habitat connections:** Identify key locations for preserving and enhancing **neighborhood tree canopy** for stormwater management, hazard mitigation, wildlife habitat benefits, air quality and climate change adaptation. PP&R, BES, NGOs

p. 75 Equity **31** **Civic corridors:** Identify and develop new right-of-way designs for key transit streets that integrate frequent transit and bike facilities, pedestrian crossings, landscaped stormwater management, **large canopy trees** and placemaking amenities (e.g. benches, lighting and signage). PBOT, BES

p. 110 **Tree Canopy**

p. 115 **Tree Canopy**

p. C-13 **Tree Canopy**

Portland Plan testimony, Dec. 6, 2011, Don MacGillivray, 2339 SE Yamhill, 97214





## East Portland Parks Coalition



Planning and Sustainability Commission,  
Attn: Portland Plan testimony  
1900 SW 4th Ave.  
Portland, OR 97201-5380

November 30, 2011

RE: Draft Portland Plan Healthy Connected City

Planning and Sustainability Commission,

These comments on the Draft Portland Plan were prepared by the East Portland Parks Coalition, in partnership with the East Portland Action Plan (EPAP). We are commenting to address specific items in the Healthy Connected City section of the Portland Plan. There are specific “Actions and Strategies” in the City adopted East Portland Action Plan that should be prioritized as Portland Plan “5-year Actions.” The Healthy Connected City section of the Portland Plan could have significant impacts as it relates to East Portland’s parks, trails, natural areas, tree canopy, streetscape, and overall livability. While not addressed here, we want to acknowledge that other sections of the Portland Plan may also need to incorporate East Portland Action Plan “Actions and Strategies”<sup>1</sup> and thereby more fully realize the stated goals of prosperity, health, and equity.

The Healthy Connected City section of the Portland Plan will serve people, water, and wildlife by helping knit the city together socially, ecologically, and geographically. Under-investment in parks, lack of natural resource conservation, and poor street connectivity that has characterized past urbanization, left East Portland neighborhoods with poor access to parks and nature. There is an urgent need to improve the quality of access to existing park land. In addition, new acquisitions are still needed to address the gaps in access.<sup>2</sup> Commissioner Fish’s E-205 initiative is an effort to begin addressing these deficiencies in small but significant ways; the Portland Plan needs to build on this and other efforts.

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<sup>1</sup> East Portland Action Plan: <http://www.portlandonline.com/shared/cfm/image.cfm?id=214221>

<sup>2</sup> Regional Equity Atlas, [www.equityatlas.org](http://www.equityatlas.org); Parks 2020 Vision, <http://www.portlandonline.com/parks/index.cfm?c=40182&a=89448>

The Portland Plan's 5-year Actions should include and/or incorporate East Portland Action Plan actions and strategies from the Parks and Open Space (pg. 12-13) and Natural Areas and Environment (pg. 14) sections, prioritizing the following for inclusion:

1. **Prioritize capital funding for unimproved parkland in East Portland** especially the master planned sites of Parklane, Clatsop, Beech, and East Holladay (P.2.7, P.4.1, P.4.6). Development of Parklane Park is particularly urgent and should be specifically identified in the Portland Plan as a 5-year Action Item. Gateway Park and Gateway Green (P.4.4, P.4.9) also represent capital improvement projects that can significantly expand the quality and quantity of access to parks and nature in East Portland.
2. **E-205 Funding.** Fund the E-205 Initiative annually over the next five years in order to develop and improve facilities in East Portland Parks that are currently underdeveloped and to leverage private funding for park improvements. These E-205 objectives are essentially the same as EPAP actions and strategies P2.1 and P2.2.
3. **Natural Area Acquisition/Access and Watershed Stewardship/Restoration:** East Portland presents some of the best natural area acquisition and watershed stewardship opportunities in the City and will support key priorities in both Portland's Natural Areas Acquisition Strategy and Watershed Management Plan. These opportunities deserve mention as 5-year action items in the Portland Plan. East Portland Action Plan acquisition priorities include all East Buttes (NA.3.3), Restoration priorities include the Johnson Creek Floodplain (NA.2.1) and East Portland Natural Areas are in need of invasive species removal and management (NA.2.3). Priorities for expanded access to natural areas include: Kelly Butte; Wilkes Creek Headwaters; Clatsop Butte; and BES properties like the Springwater Wetlands and the East Lents Floodplain (NA.3.2).
4. **Trails:** Progress in filling gaps in key regional trails in East Portland can serve the entire City, while improving access to parks and active transportation routes in East Portland neighborhoods. The Portland Plan 5-year Action Items should include East Portland Action Plan actions and strategies for the Columbia Slough Trail (P.3.2); Springwater Trail (P.3.1); and Sullivan Gulch Trail (P.5.2), including the one mile east of I-205.

East Portland Parks Coalition and EPAP support the Portland Plan actions that hold promise for East Portland and advance the equity goals for the entire City of Portland. Specifically, 5-year Actions #15 and #29 that focus on re-purposing the public right-of-way for community or public uses such as "pedestrian and bikeways, community gardens, rain gardens, park spaces or neighborhood habitat corridors" are consistent with several East Portland Action Plan actions and strategies (T.6.2, P.5.1, NA.1.1-1.3). Given the number of partly or entirely unimproved streets and lack of land available for park acquisition in East Portland, these public right-of-way improvements will be an important strategy to create places for people to interact with each other and nature in some neighborhoods. The goal of building one demonstration project seems overly modest (PP 5-year Action #15); we ask that at least one demonstration site be in East Portland within 5-years to meet the exceptional needs and opportunities in East Portland.

The Portland Plan's emphasis on "schools as community gathering places" is laudable and appropriate for East Portland (P.1). This guiding principle should be more explicit in referencing improved access to recreational opportunities, nature and urban agriculture in all school districts.

In addition, the Portland Plan has an opportunity to make specific reference to the need for improved tree preservation in or near the public right-of-way. The 'City-wide Tree Project' includes actions that will need continued attention and follow-through and are particularly urgent for East Portland (NA.1.4). New sidewalks are a needed and welcomed addition to neighborhood livability, but one-size does not fit all -- especially when it comes to trees. It is important that new public and private investments incorporate East Portland's existing neighborhood tree assets. This is an area of needed coordination and innovation between PBOT and Urban Forestry.

Thank you for considering our comments. A vibrant and well-cared for system of parks, natural areas, and neighborhood centers connected by trails, neighborhood greenways, and wildlife corridors is vital to all Portlanders, but especially urgent for East Portland neighborhoods.

Sincerely,

Alesia Reese  
East Portland Parks Coalition

Arlene Kimura  
East Portland Action Plan

CC: Mayor Adams and Portland City Council



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CITY OF  
**PORTLAND, OREGON**

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PORTLAND HOUSING BUREAU

---

Nick Fish, Commissioner  
Traci Manning, Director  
421 SW 6<sup>th</sup> Avenue, Suite 500  
Portland OR 97204  
(503) 823-2375  
Fax (503) 823-2387  
[www.portlandonline.com/PHB](http://www.portlandonline.com/PHB)

DATE: November 29, 2011

TO: Alex Howard, BPS

FROM: Daniel Ledezma, Manager  
Kim McCarty, Program Coordinator

CC: Commissioner Nick Fish

RE: Comments on the October 2011 Draft Portland Plan

---

Thank you for the opportunity to provide feedback on the draft Portland Plan. We appreciate the opportunities for engagement BPS has provided PHB at every step of this planning process. We have carefully reviewed the draft Plan and have discussed it with our Portland Housing Advisory Commission. This memo sets forth our initial comments.

**A. General Comments**

Throughout the Plan's development, the data sets and maps have been very valuable in our work. We appreciate the depth of information used to produce the Plan, and we will continue to refer to your data in our work.

We applaud the overall Framework for Equity in the Portland Plan, and are committed to moving the City's equity goals forward.

Housing projects and programs can integrate multiple community objectives, including economic prosperity, health, education, social support, and a healthy environment. We would like to see more emphasis on connecting housing with other economic development investments.

There are a number of specific projects listed in the Plan; we recommend clarifying that these are examples of investments, rather than suggesting they are the priority investments over the life of the Plan. For example, in the *proposed actions* for Sub-Area 14 of the Plan (Gateway), the Gateway-Glisan mixed-use development offers a good example, but is not the only target for transit-oriented development.

We recommend additional emphasis or details on the implementation of this Plan to increase its utility as a long-term framework. We recommend including specific information regarding future public involvement opportunities, as well as how the Plan links to other policy and planning documents in the City, including the Comprehensive Plan.

## **B. Citywide & Local Measures of Success**

We endorse the Plan's citywide and local measures of success. To align these measures of success with the Framework for Equity, we recommend emphasizing that *resources and efforts must be distributed equitably* in the City, including among communities of color, neighborhoods, and businesses. This emphasis will help the City be successful in serving its most vulnerable and underrepresented populations.

## **C. Key Concerns and Suggestions**

### **1. Portland Housing Bureau Strategic Plan**

The Portland Housing Bureau's Mission is to "solve the unmet housing needs of the people of Portland." Many of our existing strategies and values align directly with Portland Plan goals. We value and prioritize equity, stewardship, transparency and innovation.

PHB completed its three-year Strategic Plan in early 2011; we recommend that the Portland Plan be updated to integrate the goals laid out in the Strategic Plan.

The Strategic Plan is available online: [www.portlandonline.com/phb/strategy](http://www.portlandonline.com/phb/strategy).

Part C of the *Economic Prosperity and Affordability* section lays out several actions to achieve "broadly accessible household prosperity and affordability." The actions will help achieve the goal of prosperity and affordability, but the Guiding Policies should better align with the PHB Strategic Plan goals:

- Meet Portland's need for quality, affordable homes for its residents.
- Ensure equitable access to housing.
- Develop, leverage and allocate housing funds to meet needs, sustain our assets, and strengthen the housing industry.
- Build a strong, dynamic Housing Bureau that provides the highest level of leadership and service to our customers, stakeholders, employees, and the community.

The PHB Strategic Plan also outlines investment priorities:

- Provide more rental housing for our most vulnerable residents.
- Move people quickly from homelessness to permanent housing while preventing families from losing their homes.
- Help Portlanders from communities of color buy a home or keep the home they already own.
- Provide a safety net that includes shelters and other short-term help for low-income Portlanders who are homeless or at risk of homelessness.

## 2. Framework for Equity

Many of the Plan's Equity principles refer to accurate measurement, evaluation, and recognition of disparities, but don't describe *actions* to address disparities.

The City has explicitly committed to a focus on equity through the creation of the Office of Equity, and many city bureaus, including PHB, have dedicated resources to measuring disparities.

Because the City is equipped to measure disparities, we recommend that the Plan focus on specific actions; for example, increasing youth access to target industry jobs and ensuring that Main Street investments are accessible to communities most in need.

A strategy to *coordinate* evaluation measures would strengthen the Plan by allowing the City to quickly move to implementation.

## 3. Healthy Connected City Strategy

We agree with the opportunities highlighted in this section, specifically regarding equity within the larger infrastructures of housing, streets, transportation, and access to services. All of these structures ensure that people have the opportunity to exercise choice in where they live.

## 4. Economic Prosperity & Affordability Strategy

We suggest that the Portland Plan better describe how housing developments strategically support other infrastructure and systems. We would like to see

increased focus on how economic development strategies can enhance access to housing.

For example, housing as an industry provides living-wage jobs (realty, construction, lending), as well as a tool to leverage other development opportunities; healthy housing reduces economic burdens on household productivity and our healthcare system; and sustainable housing reduces financial burdens on water management and energy infrastructure.

## 5. Thriving, Educated Youth

We applaud the Thriving, Educated Youth strategy, as it has strong links to housing goals. Housing is an excellent connection to entry-level jobs and training, co-location of schools or programs such as the SUN School programs, healthy living, family support, stable home life, and early childhood education.

## D. **Proposed Changes**

### Economic Prosperity and Affordability Actions

1. Actions 14 & 18: Emphasize placing housing near services and activities such as employment, education, groceries, and transportation.
2. Action 14: Make investments in current low-income neighborhoods with rehab loans; connect neighborhoods with frequent bus service.
3. Action 37: Emphasize that ownership housing is one strategy of creating household economic stability and prosperity.
4. Action 38: For the Housing Strategy, we suggest including at least one housing development example from each quadrant of the City.
5. Action 38: Acknowledgement of housing construction as a gateway industry for creating a diverse workforce trained for living wage jobs.
6. Action 39: It is essential that Fair Housing activities and the implementation of the Fair Housing Action Plan be a *citywide* strategy, and not narrowed to one neighborhood or area of the city.

## Healthy Connected City Actions

1. Action 9: Link people not only to nature and recreation, but also to work, food, education, and housing.
2. Action 9: Emphasize integrated approaches to infrastructure investments such as transportation that take housing and institutional investments into account.

## Overall Action Comments

1. Include affordable housing in the Main Streets program to encourage an economically diverse community.
2. Add strategies beyond code changes for filling gaps in underserved neighborhoods
3. Give examples of housing transportation investments in addition to Barbur Boulevard., such as Milwaukie Light Rail, Interstate Light Rail, and frequent bus service.

## **E. Next Steps**

Thank you again for the opportunity to comment. We applaud your excellent work. Please contact Director of Equity, Policy, and Communication Daniel Ledezma at (503) 823-3607 or [Daniel.Ledezma@portlandoregon.gov](mailto:Daniel.Ledezma@portlandoregon.gov) with questions.



Stockton, Marty

**From:** Planning and Sustainability Commission  
**Sent:** Thursday, December 08, 2011 10:35 AM  
**To:** Stockton, Marty  
**Subject:** FW: [Approved Sender] PSC testimony on the Portland Plan - PDX a Renters Hell

Julie Ocken  
City of Portland  
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1900 SW 4th Ave, Suite 7100  
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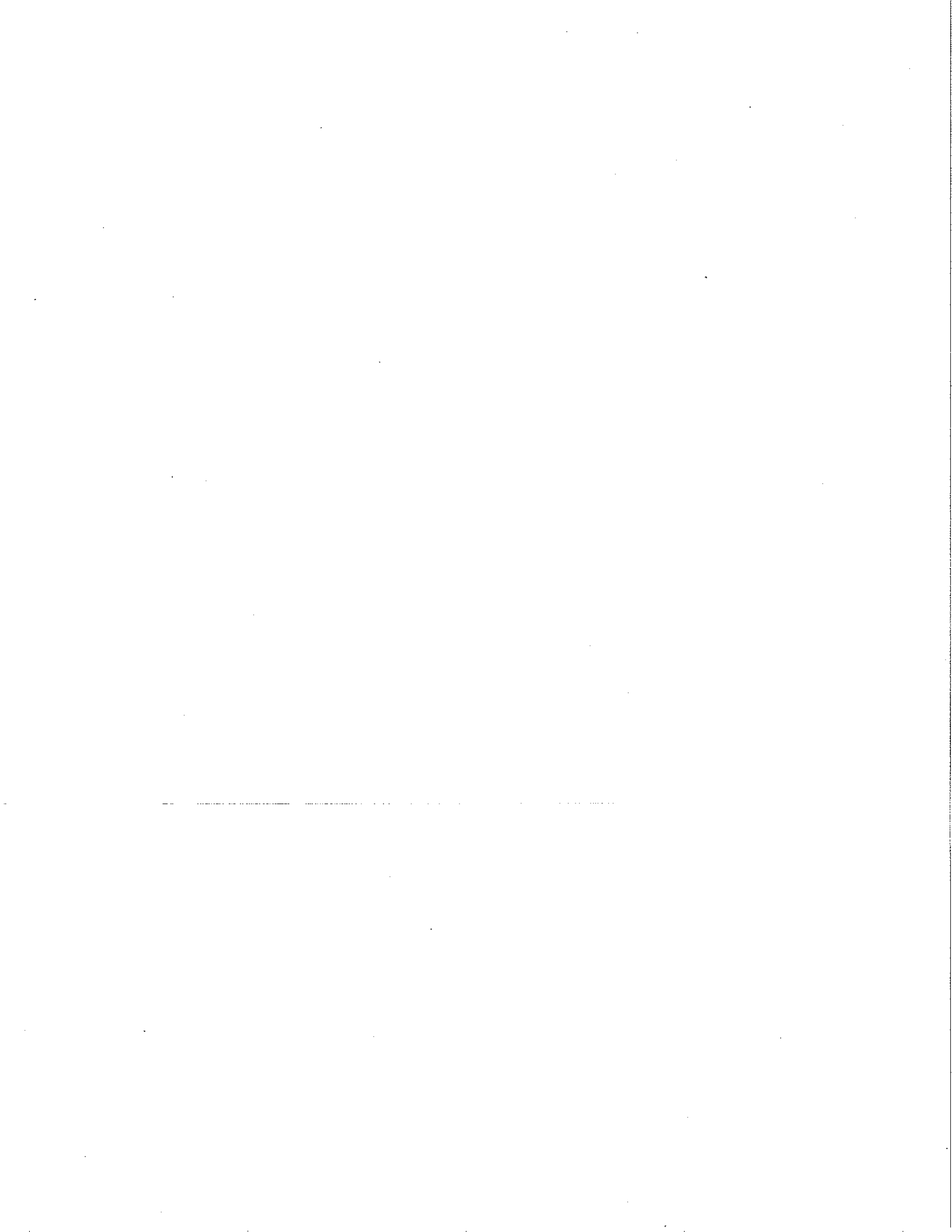
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**From:** Don M. [mailto:mcat@teleport.com]  
**Sent:** Thursday, December 08, 2011 10:00 AM  
**To:** Planning and Sustainability Commission  
**Cc:** TPDx Discussion  
**Subject:** [Approved Sender] PSC testimony on the Portland Plan - PDX a Renters Hell

How does the Portland Plan address this issue around affordable housing and living wage jobs?

-----Forwarded Message-----

Renter's Hell





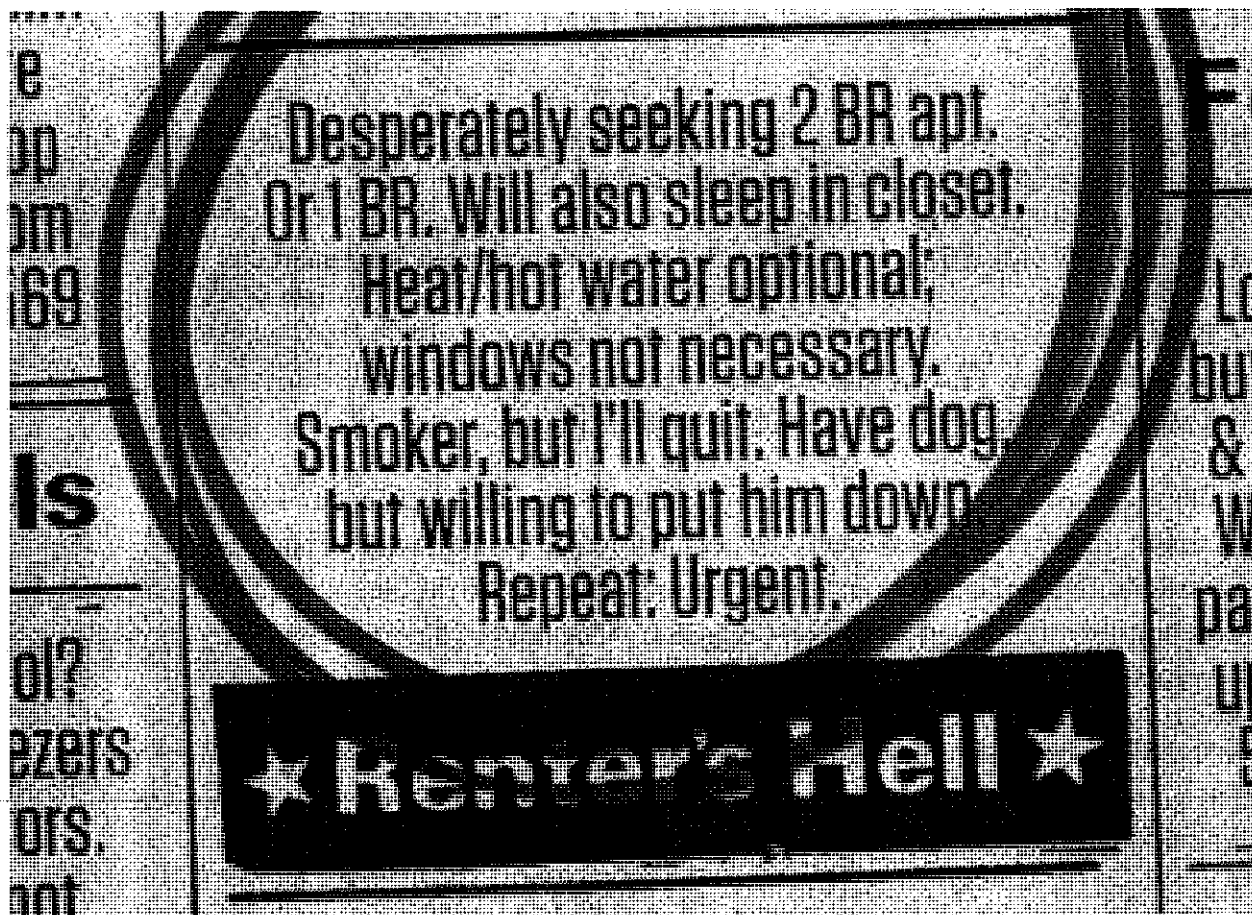
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December 7th, 2011 HANNAH HOFFMAN | Cover Story

## Renter's Hell

Portlanders pay a steep price in the nation's toughest rental market.



Out of Pocket

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The first place Lindsay Bozanich finally found to rent this year came with fingernail clippings in the bed.

They probably belonged to the former resident of her \$800 Murphy bed-equipped studio apartment on Northwest 22nd Avenue and Glisan Street—the person who painted the walls bright yellow and left the kitchen and bathroom coated in so much grime they took hours to clean.

But Bozanich, 29, was thrilled. Not with the filth, of course, but with the fact that after several weeks of searching, she had finally found an apartment.

When her short-term lease ran out, it took even longer to find another place—she and her future roommates spent two months looking. They finally found a house in the Concordia neighborhood that, on their initial visit, contained seven aquariums of assorted reptiles. They grabbed it. (The reptiles later moved out.)

“I couldn’t believe how fortunate we were,” Bozanich says, noting that friends have looked even longer without finding a place that fit their budget. “We really counted our blessings on this one.”

Portland has long had a reputation as an affordable West Coast city, boasting rents that are lower on average than in Seattle or San Francisco.

But affordability only matters to people who can actually find an apartment.

The Portland area has the tightest rental market of any major city in the United States, according to the U.S. Census Bureau. Only 3 percent of apartments here are vacant at any given time—half as many as were available three years ago.

The days of apartment companies offering a month off or free parking are long gone. Apartment managers and landlords see people lined up outside rentals, many with applications and blank checks in hand. Desperate renters are finding places have been rented within minutes after being posted on Craigslist. Some renters have offered to pay above the advertised rent if it means they can land the place.

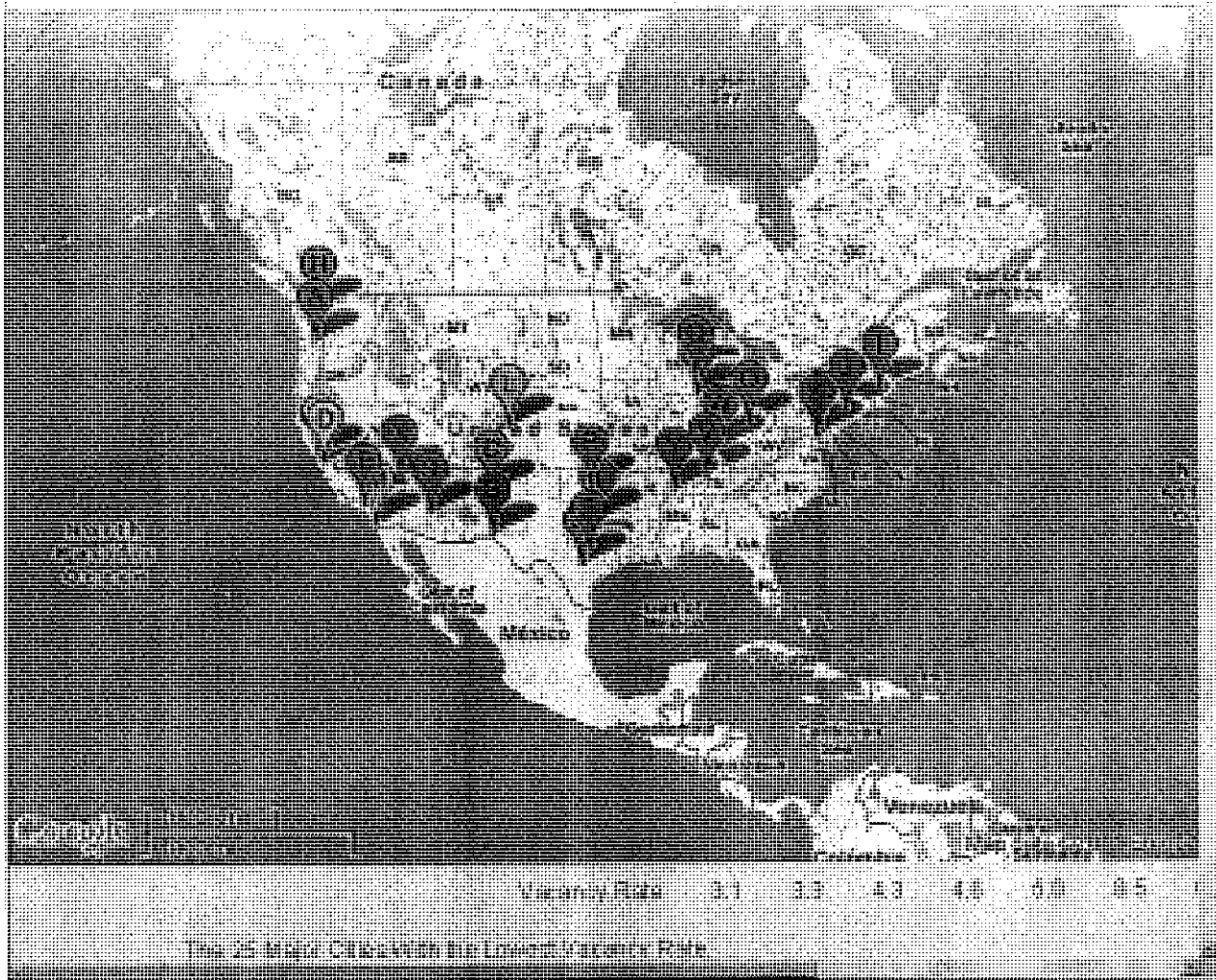
“We’ll put something up and hear within five minutes they’ve heard about a property and want to have a viewing,” says Bette Durham, a broker at Mainlander Property Management. “Unfortunately, we can’t pull extra properties out of our hats.”

The fierce demand for apartments in short supply is causing Portland’s reputation for affordability to slip away.

Rents have risen 17 percent in the last five years in the Portland metro area, according to the Metro Multifamily Housing Association, a trade group of landlords and rental managers. That’s well above the national average of 12 percent during that same time.

**No Rooms to Spare: The 25 Major US Cities with the Lowest Vacancy Rate:**

## No Rooms to Spare



View *No Rooms to Spare* in a full screen map. **Source:** The U.S. Census Bureau measures vacancy rates in 75 markets nationwide. These are the 25 lowest rates of cities that have at least 500,000 people.

And rents have jumped 8 percent this year—more than three times faster than the nationwide rate.

Rents are climbing even faster in downtown and the Pearl District, where they've jumped 16 percent this year, according to the records.

As a result, many people are being pushed to the edges of the city, adding to the hidden costs of housing, including more money and time spent commuting to jobs.

“If we care about people having choices about where they live, if we don't want to concentrate poverty on the edges of our city, then we need a range of housing choices in each

neighborhood," says City Commissioner Nick Fish, who oversees the Housing Bureau. "We're limiting people's choices about where they can live and raise a family."

In a market where demand is so high, developers should be lining up to build more rental properties. But many say they face a dilemma. High-end projects still can't charge the rents they need to make them pencil out. And more modest building projects, where the rents are lower, are having trouble getting financing.

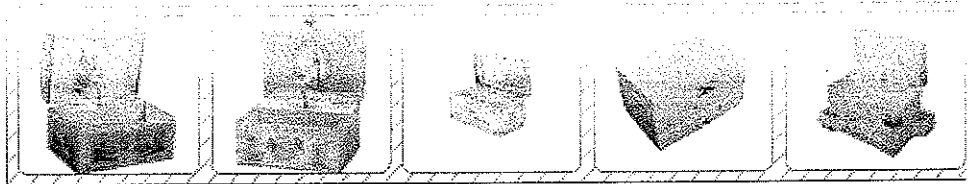
That might also be true in other cities. But in Portland, even during the building boom in the last decade, few developers had any interest in apartments—they built condos instead. That left the city short on rentals as the demand grew—from people who cannot afford to buy a house, those who had to give up the houses they owned, and a steady stream of newcomers who moved here despite the recession.

Mark McMullen, the interim state economist, says the influx was mostly young people willing to move here without jobs.

"Portland is still a magnet," he says. "And that's a good thing."

Except if you can't find an affordable place to live—in some cases, any place to live.

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December 7th, 2011 HANNAH HOFFMAN | Cover Story

# Renter's Hell

Portlanders pay a steep price in the nation's toughest rental market.

17 Comments

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**LUCKY TO HAVE A HOUSE:** Lindsay Bozanich, 29, and her roommates Tony Murray (left), John Manlove and Skye Dorsett (not pictured) searched for two months to find a rental house in Northeast Portland. The city's rents have gone up so much, Bozanich says, "It seems like Portland is getting too big for its britches."

IMAGE: robertdelahanty.net

Portlanders traditionally have tended to buy homes, not rent. About 55 percent of Portland-area residents own their homes, compared to 50 percent in Seattle and 38 percent in San Francisco, according to the U.S. Census Bureau.

That's because even as home price have risen here in the past two decades, they've remained low compared to those in other big West Coast cities.

As a result, the relatively soft demand for rentals meant the city simply did not need as many apartment units—until now.

Developer Dwight Unti, head of Tokola Properties in Gresham, says Portland has traditionally needed about 4,000 new units of housing per year to keep up with growth in the metro area, but says that need hasn't been met for the past five years. "We're way behind the curve," he says.

Today, the area including Portland, Vancouver and Beaverton has about 97,000 rental units.



As recently as 2005, a lot of those units were available—one out of every 10, according to Census Bureau records.

The rental market suddenly got tighter in 2007. The reason? The national economy was surging, more and more people wanted to buy homes, and credit was readily available. In Portland, developers started taking rental units off the market and converting them to condos.

McMullen says the low vacancy rate four years ago was a symptom of a very different kind of rental market—a “supply phenomenon,” he calls it.

When the economy tanked in 2008, vacancy rates shot up again—to 7 percent. McMullen says more condos went on the market as rentals because people couldn’t sell them.

But the whipsawing continued. Two years later, the vacancy rate dropped closer to pre-recession levels—but for far different reasons.

Banks tightened their credit rules, making it tougher to buy homes, and many people couldn’t afford to stay in the homes or faced foreclosure.

That’s left far more people chasing the too few apartments left in the city.

Joe Colasurdo moved to Portland from Bellingham, Wash., nearly two months ago and still hasn’t found his own place to live. He’s staying with his girlfriend, Renee, and her two roommates, but the situation has worn thin.

In a Gladstone apartment Colasurdo, 25, viewed last month, black mold coated the shower tiles—except where duct tape clung to keep other tiles in place. “I’m surprised the landlord even had me come over,” he says.


It wasn’t the only time he looked at what turned out to be a dump. “They would have pictures online and it would look really nice, and I would go there and it would be like, ‘Wow, I’d rather live in my mom’s basement.’”

Many people say they have faced similar situations looking for an apartment, with little or no choice when it comes to quality.


In September, Zac Thayer, a 20-year-old punk-rock musician, started trolling Craigslist for a house or an apartment to share that would cost him no more than \$500 a month. It took two months, including weeks spent sleeping on friends’ couches.

“I got pretty panicked,” Thayer says.


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Most places he saw were disgusting, he says. The worst was a house near Southeast 52nd Avenue and Belmont Street—like a sauna inside, with a once-white carpet turned brown from cat feces smashed into the carpet.

“It’s almost impossible to find somewhere livable in my price range,” he says.

The search becomes more complicated for people who need to live in a specific neighborhood, especially if it’s close in.

Bozanich, the woman who found fingernails in her new apartment’s bed, needed to live close to the city center. She’d been living with her parents in North Plains, but she was undergoing chemotherapy for breast cancer and wanted to be nearer to her clinic in North Portland.

The neighborhoods Bozanich desired—inner Northeast and Southeast, downtown and Northwest—have vacancy rates lower than the city as a whole—from 2.1 percent to 2.5 percent.

That demand means rents are increasing faster than in places such as Oregon City, Gladstone and Gresham, where the vacancy rates range from 5 to 5.5 percent. (Rents in Gladstone and Oregon City have actually dropped in the past year.)



Bozanich saw this firsthand. She looked for a month but couldn’t find a place for less than \$1,200 a month.

She found her Northwest Portland studio in March. Six months later, she was looking with three other people to rent a house. They waged a daily search for two months, spending hours hitting the refresh button on Craigslist.

But the places they liked were snapped up within minutes. They prepared stacks of rental applications and arrived early at open houses, only to find a line had already formed.

“We got really frustrated,” Bozanich says. “We’d draw out a map of different neighborhoods and just start bickering about just having to live farther out, and I would be like, ‘I don’t want to spend money to live in a place I don’t really like.’”

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December 7th, 2011 HANNAH HOFFMAN | Cover Story

# Renter's Hell

Portlanders pay a steep price in the nation's toughest rental market.

17 Comments

Out of Pocket

Related to: rent rental market real estate

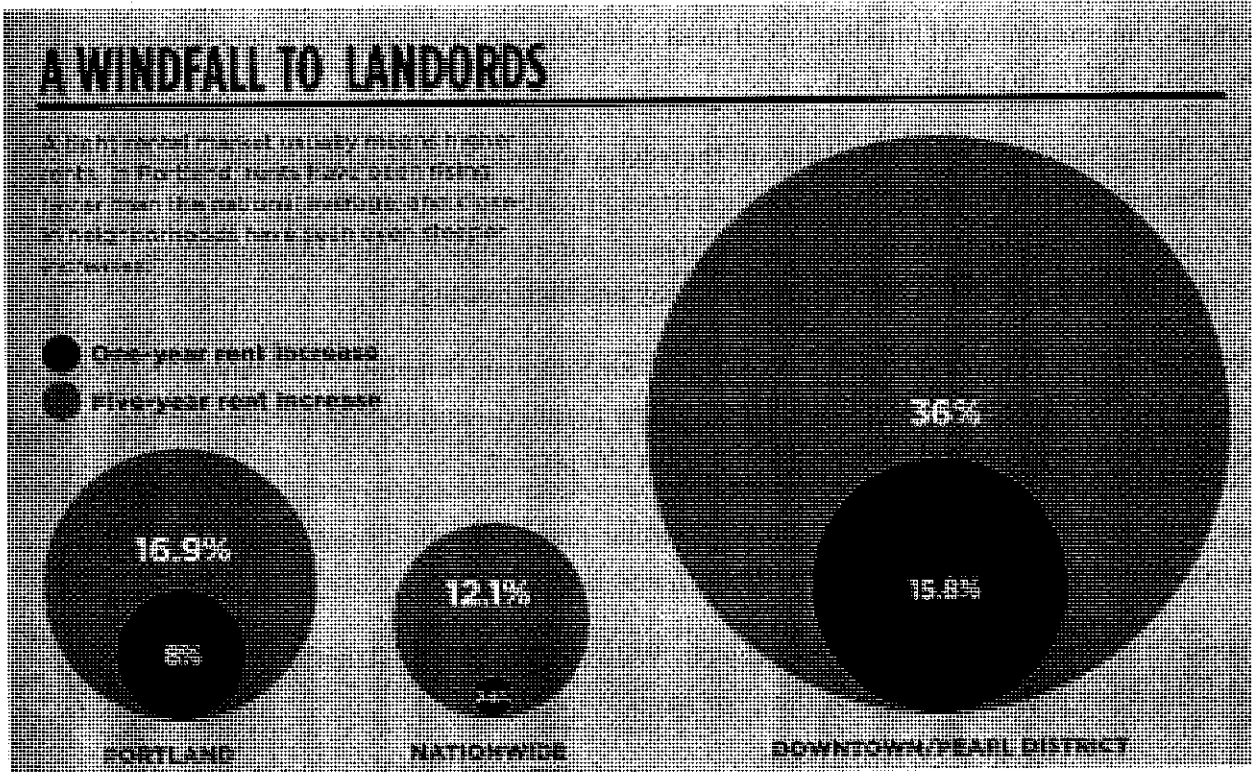
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SOURCE: U.S. Bureau of Labor Statistics and the Metro Multifamily Housing Association

Landlords say they need to do very little now to attract tenants. Nina Lyski--the building manager for Jeanne Manor, a historic 67-unit building in the South Park Blocks owned by KBC Management--says there are 15 people on a waiting list.

"I rented about eight apartments last year sight unseen," she says.

Nancy Swann, who runs the complaint hotline for the Community Alliance of Tenants, says most of the criteria landlords use to reject tenants aren't new: Credit history, rental history, pet ownership and employment have been application questions for years.

The difference today is that landlords can afford to be picky. The slightest blemish on a credit history can doom a would-be renter's chances.

Swann says landlords who in the past have been willing to work through problems with tenants are far less inclined to do so in this market.

She has heard complaints from people who lost their jobs and whose landlords refused to wait for the tenants' unemployment benefits to start before evicting them.

"A lot of landlords are like, 'Pay the rent or get out,'" Swann says.

Developers say the economics of building apartment complexes in Portland don't pencil out right now, even with rents climbing fast.

High-rise buildings need higher rents to pay off their large upfront construction costs, which tend to run higher per unit than the low-slung apartment buildings outside the city's core. There are only a few places in the city--the Pearl District, for example--where landlords can demand especially high rents, but some developers say not high enough.

Spencer Welton, senior vice president of development for Simpson Housing LLLP, says apartment towers like the 15-story building his company planned--and then canceled--for the Pearl District can't charge rents high enough to pay for the project.

Welton says his company, after looking at rents in similar-sized Pearl buildings, planned to charge an average of \$1,700 to \$1,800 a month for a one-bedroom unit.

It didn't pencil out to cover the \$56 million project. "With the kind of construction we were trying to do, the rents just didn't support that," he says.

Portland developer Bob Ball says he can make a new Pearl District building work. He recently announced plans for a six-story, white-brick apartment complex called The Parker on



Northwest 15th Avenue between Pettygrove and Quimby streets, with a planned opening of 2013.

Ball says the key is constructing a shorter building with slightly smaller units, thus reducing the building costs while allowing him (he hopes) to charge about the same rents Simpson considered.

"If you have the right product and the right amount of land, I think the rents are there to support it," he says. "But if you're building anything with many stories, you're going to have to have the rents to pay for it."

Pearl District rents are beyond the means of most Portlanders. Yet developers are not building the low-slung apartment complexes that are cheaper on a square-foot basis to develop and, in turn, rent for less money.

Tokola Properties' Unti says the region's available land for stick-built, horizontal, suburban apartments has pretty much been used up, and the area's urban-growth boundary has limited where new construction can be built.

Unti also says banks cut way back on lending for real-estate development, especially those for apartments that charge mid- to low-range rents.

"In the past, I could borrow about 85 to 90 percent of the cost to build a new apartment," he says. "Now, I can borrow about 60 percent. Everyone is more risk sensitive, more risk averse."

Unti says public-private partnerships, such as subsidies in urban-renewal areas, could help.

Fish says the city has tried to find ways to help, but he admits it hasn't been enough. According to the Housing Bureau, the city since 2006 has paid \$150 million to help add 4,500 units of affordable housing through construction and aid to renters making down payments when they buy a home.

Fish says the subsidized units go to households that make 60 percent or less of Portland's median family income. That means a family of four that makes less than \$43,200 would qualify. A single person needs to make less than \$30,240.

Even with this housing available, Fish says more than 50 percent of Portland renters are "cost-burdened," which means they pay more than 30 percent of their monthly incomes on rent.

"On paper, we're doing a pretty good job, but the demand just keeps growing," Fish says. "We're going to have an impact, but on the margins. The market is going to provide the bulk of the housing."

No one has a good answer for satisfying the demand.

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"It's absolutely true we won't be able to build our way out of our housing crisis," says Mary Li, Multnomah County community services director.

Li, who works with several programs designed to help people find housing, says she sees the shortage on a daily basis.

She says the city and county provide financial help for people to rent, from short-term rent assistance to cosigning leases if the renter has bad credit. But those programs don't address the rental shortage.

That means higher rents—the only way developers will get the cash they need to qualify for financing. And rents have already risen too high for the average Portlander.

Elisa Harrigan, executive director of the Community Alliance of Tenants, says she's already seeing the impact of high rents.

"We're seeing the burden be higher on tenants to maintain their housing," she says. "People's incomes aren't growing at the same rate as the rental price, and government services are getting cut.

"Things were bad before, but they're worse now."

Bozanich hopes the city and developers figure it out.

"I know that community is really important to Portland," she says. "I hope we get to keep living that way instead of being pushed out and separated."

**Continue reading:** [Page 1](#) | [Page 2](#) | **[Page 3](#)** |

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SHARE PRINT COMMENT FONT SIZE RATE

12.07.2011 at 10:24

Reply

BOZ!!!! ;)



Greg

12.07.2011 at 10:29

Two months doesn't seem like a long at all to find an apt! Maybe it's just me, but have a little patience. Here's some advice:

1. check listings every single day
2. sign up for waiting lists
3. drive around, you'll be surprised at what you find
4. call every number you see
5. consider other buildings in PDX that are owned by your current rental company

Good luck! You can do it ;)



BusyBee

12.07.2011 at 11:46

Reply

There are parts of town that are tight and other parts of town where we are offereing half off and \$200 off of the first months rent as concessions.

The market place for rentals is tightening particularly in the city core area but we still have significant vacancy rates in the suburbs.

You can log onto [www.bluestonehockley.com](http://www.bluestonehockley.com) and view our vacancies.

Cliff Hockley, President, Bluestone and Hockley Real Estate Services



Cliff Hockley

12.07.2011 at 12:05

Reply

If you want to live close-in, try the Overlook and Arbor Lodge neighborhoods in North Portland. I know people renting houses who need roommates but no one is applying.



jj

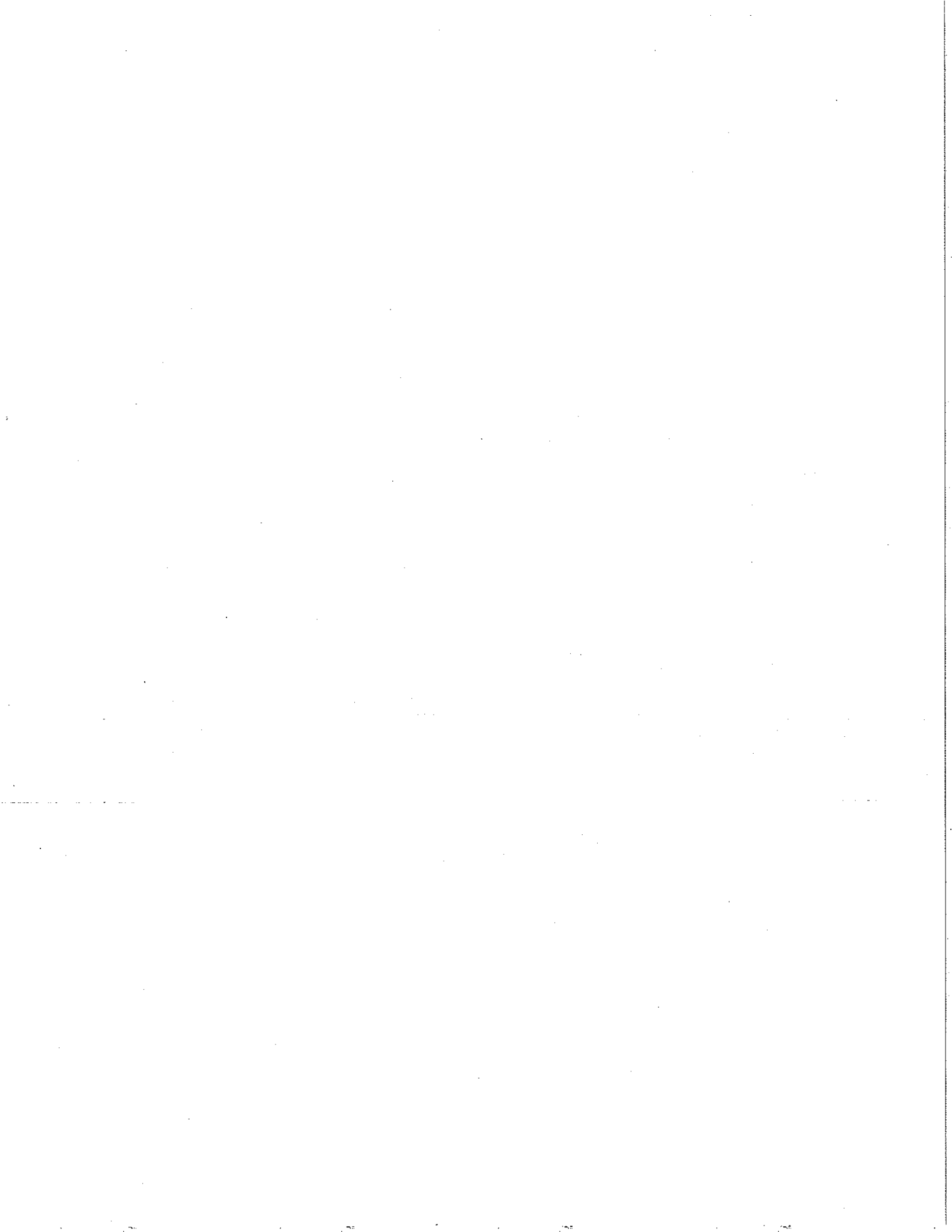
12.07.2011 at 01:02

Reply

Try Goose Hollow. I used to live there, there is always someone looking for a room mate. Also I used to be able to charge other room mates (I had a studio, and 2 room mates) \$200 a week rent just for a place to put a sleeping bag on the floor, they wanted to be close to work and school and practically forced the money in my hands.



Michelle







**Commissioner Judy Shiprack**  
**MULTNOMAH COUNTY OREGON**

District 3

501 SE Hawthorne Blvd., Suite 600  
Portland, Oregon 97214  
**(503) 988-5217 Phone**  
(503) 988-5262 Fax

December 8, 2011

Planning and Sustainability Commission  
1900 SW Fourth Ave.  
Portland, OR 97201

Dear Planning and Sustainability Commissioners,

Congratulations on producing a proposed draft of the Portland Plan. I know it took a tremendous amount of effort and public involvement.

I am particularly interested in plans for East Portland. I believe the role its residents will play in the long-term viability of our city and region warrant equitable allocation of resources. As you know, East Portland faces challenges from increasing poverty, inadequate amounts and types of infrastructure, insufficient economic and workforce development, and a lack of quality and mix of housing. These challenges suggest that increasing capital and human investment in East Portland is the necessary strategy that will bring satisfying and positive outcomes.

Below are some specific outcomes within the Plan strategies I would like to see occur for residents and businesses of East Portland:

PP Strategy 3. Connection for People and Places

A built environment promoting health and active living including:

- Sidewalks that facilitate walkable neighborhoods, provide access to work, school, community amenities and services and public transportation. Sidewalks also accommodate physical exercise needed for better health outcomes.
- Parks and greenways connecting people to places and providing recreational and community building opportunities for individuals, families and neighbors.

PP Strategy 2. Economic Prosperity and Affordability

- East Portland is designated, through the Focus Area Grant Program, as an economically challenged area to participate in community driven business development and revitalization.

- The Gateway Education Center with its focus of creating and sustaining family-wage jobs by preparing the workforce to fill them.
- Healthy food access in the form of grocery stores, community gardens, and produce isles that provide healthy affordable and locally grown food for residents within a reasonable distance from home.

#### PP Strategy 1. Thriving Educated Youth

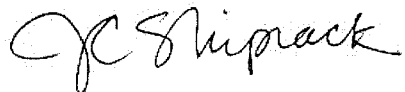
- Early Childhood learning opportunities that successfully prepare kids for school.
- Increased and targeted rental assistance to low income households with students. One of the hardest problems for low-income students is constantly relocating because families are rent-burdened.

#### PP Strategy 4. Coordinated Inter-Agency Approach

- Effective partnering between agencies and jurisdictions which meets the human, economic, educational and safety needs of Portland residents.
- Coordination between jurisdictions and school districts in meeting the social needs of East Portland families. County Sun School programs and health clinics at several high-need schools as well as City parks adjacent to schools are excellent examples of this.

I appreciate your serious consideration of these outcomes and other recommendations forwarded by the East Portland residents and stakeholders as you finalize recommendations for the Portland Plan. If you would like to explore any of these ideas further with me please contact Allyson Spencer of my staff at [allyson.spencer@multco.us](mailto:allyson.spencer@multco.us) or 503. 988-5126.

Sincerely,



Judy Shiprack  
Multnomah County Commissioner, District 3

Stockton, Marty

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**From:** Don M. [mcai@teleport.com]  
**Sent:** Thursday, December 08, 2011 10:04 PM  
**To:** Planning and Sustainability Commission  
**Cc:** TPDX Discussion  
**Subject:** PDX Plan Testimony - Additional Key Related Plans

PDX Plan Testimony on Key Related Plans p. F1

There are a number of Plans that should be referenced on p. F1 - Key Related Plans

These include:

- Housing Strategic Plan Portland Housing Bureau circa 2011
- Multnomah Food Action Plan City of Portland -Multnomah County circa 2010
- Portland Area Neighborhoods Plans - 100+ from 1988 to 2008
- The Portland Plan Atlas, BPS, circa 2009
- The Equity Atlas CLF circa 2007
- Portland Plan Background Reports - approx. thirty - BPS 2009-11

Portland Plan Testimony, Don MacGillivray 23-SE Yamhill PDX, 97214

Stockton, Marty

From: Don M. [mcat@teleport.com]  
 Sent: Friday, December 09, 2011 12:19 AM  
 To: Planning and Sustainability Commission  
 Cc: TPDX Discussion  
 Subject: PDX Plan testimony - Transit Operations

PDX Plan Testimony Transit Operations

**For three years transit, especially bus lines, have been reduced and eliminated while fares have increased. This is likely to continue if something isn't done to change the funding for transit operations.**

**For transit and buses to be used as a major source of transportation, replacing the auto, it will need to be both affordable and convenient. Fares must be reasonable and bus headways must be adequately frequent.**

**The fares for transit are designed for long trips; travel to and from employment. If hubs are to be successful shorter bus and transit trips will need to be less expensive. Trips of one or two miles are likely to be common.**

**About ten years ago Mayor Katz suggested in a State of the City speech that transit should be free. While this is impractical lower fares than we have today would increase usage which would increase frequency and help to implement the transit goals of the Portland Plan.**

**Tri-Met is listed as a Portland Plan Partners on the inside cover, but it is not listed as a partner on the Plan Actions or in the list of abbreviations. Why?**

**I am also somewhat concerned about the capital cost of the projects listed below. At the current time the City is not flush with available revenue.**

p. 78 Maintenance and **preservation of existing transportation**, park and recreation, and stormwater infrastructure, which will serve as a foundation for the network.

p. 78 Continued and expanded support of programs and community initiatives that support a vibrant network, environmental stewardship, and that encourage people to walk, bike and **take transit**, recreate, and make other healthy choices.

p. 75 **32 Civic corridors**: Incorporate civic corridors concepts, including green infrastructure investment, **active transportation improvements, transit service**, environmental stewardship and strategic redevelopment in the following efforts to provide a model for future projects:

a. 122nd Avenue planning — to **enhance transit service** and connections to east Portland and citywide destinations.

b. **Portland-Milwaukie Light Rail Tacoma Street Station** —to restore the adjacent section of Johnson Creek and provide connections to the Springwater Corridor.

c. Foster Lents Integration Partnership — to **coordinate transportation investments**, stormwater management improvements, open space, flood plain restoration and private development and investment.

d. Barbur Concept Plan — to create a long-term vision for the Barbur corridor between Portland's central city and the Tigard city limit in anticipation **for future high capacity transit** in the Southwest Corridor. PBOT, TriMet, Metro

p. 79 **36 Planning and investment**: Establish a **transportation policy** that prioritizes creating

transportation systems that support active transportation modes – walking, biking and transit. Develop and promote telework resources and incentives. PBOT, BPS

Equity

p. 79 **37 Planning and investment:** Develop a strategy for more adequate, **stable and equitable funding** for development, long-term maintenance and management of **transportation** and green infrastructure systems. PBOT, BES

Portland Plan Testimony, Don MacGillivray, 23— SE Yamhill, PDX, 97214