

Montgomery Park to Hollywood Transit and Land Use Development Strategy

Equitable Development Report



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THE BUREAU OF
**PLANNING &
SUSTAINABILITY**

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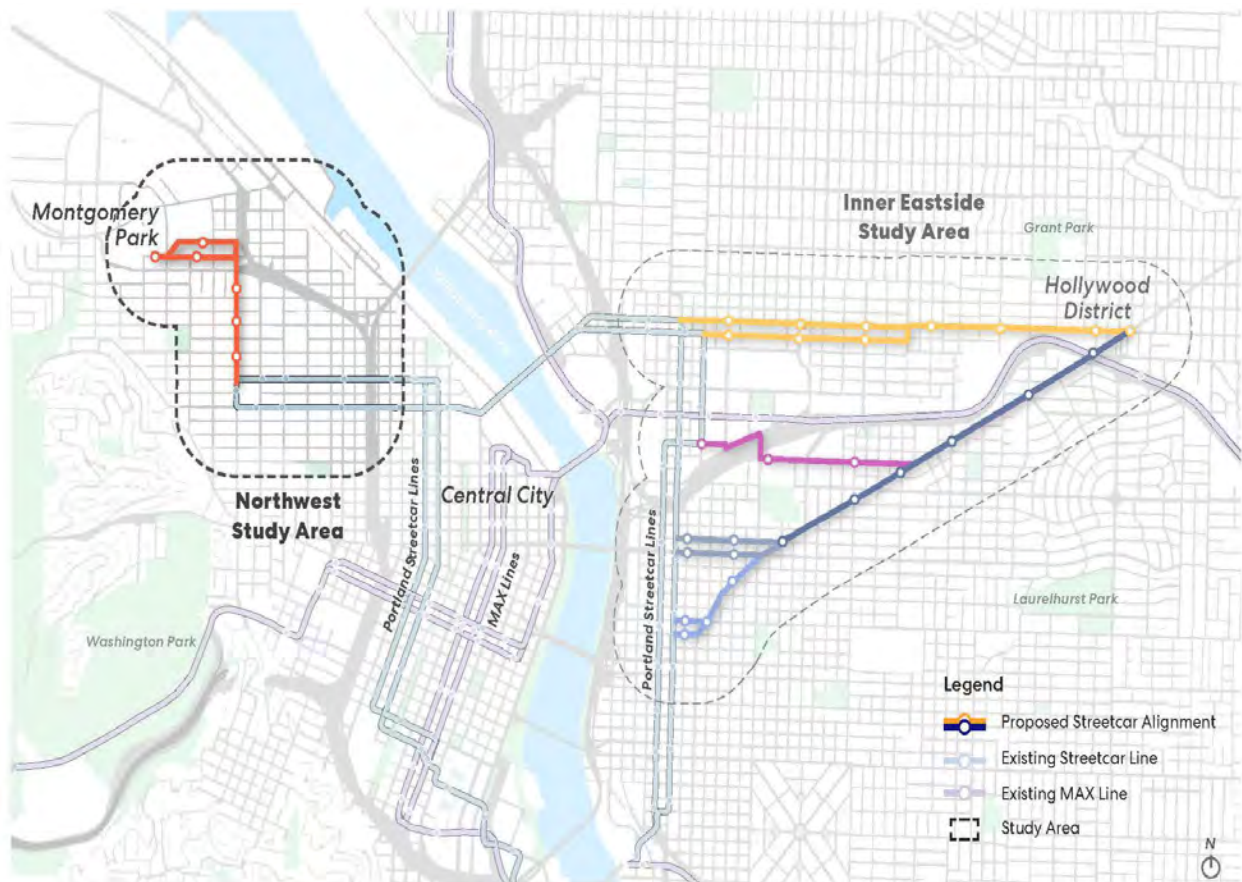
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1. Introduction and Purpose

The Montgomery Park to Hollywood Transit and Land Use Development Strategy (MP2H) studied opportunities to create an equitable development plan for transit-oriented districts in Northwest and Northeast Portland. The MP2H strategy explored several transit-oriented development scenarios in relation to potential extension of the Portland Streetcar system, or other similar transit investment. It considered opportunities to create benefit to the community, including advancing racial justice and equity. It examined the urban design opportunities in these potential new districts and identified potential land use changes. The project also considered how such opportunities could support the City’s climate, economic development, employment, business development, and housing goals. The study is a collaboration between the Bureau of Planning and Sustainability and the Bureau of Transportation. The work was funded in part by a Federal Transit Administration (FTA) grant.



This Equitable Development Report explores the opportunities to create more equitable development outcomes as a result of the planning effort. The report considers the implications for employment and housing in the study area, with a particular emphasis on the Northwest study area where significant land use changes from industrial/employment to a mix of uses with emphasis on new housing are being considered. To support this, the report also includes

an analysis of housing issues in Northwest Portland and evaluates the potential for housing development in Portland more broadly.

This report also outlines the process undertaken for engagement with communities potentially affected by proposed changes and investments in the area. This includes low-income and people of color working and living in the area, as well as residents, employees, and businesses at risk of displacement.

Overall, the report outlines the potential impacts of change, and considers the opportunities and trade-offs of the proposed development, with an emphasis on the housing opportunity created.

This report references studies and analyses conducted by project consultants and staff during the 2019 to early 2022 timeframe. The estimates are based on economic and development models and conditions known and applicable during the analysis timeframe, and are subject to change, based on changing market and other economic conditions. Further evaluation of land use assumptions and market dynamics on key opportunity sites will be undertaken as needed to guide policy and regulatory development to advance equitable development objectives.

2. Summary of Previous Equitable Development Assessments

In 2019, BPS partnered with equity-focused staff in the Portland Bureau of Transportation to draft the *Preliminary Racial Equity Analysis of Northwest Streetcar and Related Land Use Changes*. Supported by contributions by staff from Prosper Portland, Office of Equity and Human Rights, Portland Housing Bureau, and Portland Streetcar Inc., the report sets out to better understand how changes in policy and investments can reduce or exacerbate long-standing racial disparities in the community.

The report identified the following issues/impacts to explore:

Land Value

- Private economic gains derived from land use changes and public transportation investments are a major incentive for development but could exacerbate existing racial wealth disparities.
- Potential land use changes replace up to 90 acres of industrial land with commercially zoned land.
- Zoning changes would result in more land supply of certain zoning categories that are currently oversupplied citywide and could redirect growth from other parts of the city
- Land use changes and redevelopment in the study area could place redevelopment pressure on the industrial land to the north.

Housing

- Streetcar will provide current residents a new transit option and decreases carbon emissions and improves their air quality.
- More housing and affordable housing in a high opportunity area will provide more choices for low-income households of color.
- Housing in the study area will relieve region-wide housing pressures and could relieve pressure in other gentrifying areas.
- The most significant challenge this area faces is if demand for affordable housing is not met, racial disparities of housing cost burdened households will be exacerbated.

Jobs and Businesses

- Displacing industrial jobs disproportionately held by people of color and shifting to a job mix of more professional office and retail service industry jobs will exacerbate racial disparities and income inequality.
- Could worsen or improve commute times for industrial workers.
- Streetcar increases transit options for current workers and provides visibility for existing businesses.

The racial equity report includes several recommendations, including the following:

- Allocate a significant portion of the Federal Transit Administration TOD Grant budget for best practices in equitable planning.

- Develop a Portland Streetcar Inc. organizational racial equity strategy.
- Use the City’s Racial Equity Toolkit to decide whether or not to expand streetcar into Northwest given the transit and economic development needs in other parts of the city.
- Create a role for the Office of Equity and Human Rights on the project team.
- Engage workers and firms in the planning process.
- Engage residents of affordable housing in the Pearl about their experience.
- Resource community-based-organizations involved in housing/transit/land use agendas to do engagement and community-based research.
- Initiate a dialogue with investors and land owners about the City’s racial equity work.

In addition to this report, Prosper Portland, the city’s economic development agency, also participated as a project partner, with a prominent role in the Community Equitable Needs and Opportunities Task of the FTA grant. Prosper assisted with engagement of underserved communities, and also completed a memo summarizing their findings with respect to equitable development and community benefits. The memo included a summary of outreach by Community-Based Organizations (see Section 3, below) and the agency’s perspectives on *Potential Equity Benefits and Structuring Community Benefits*. This memo is included in the Appendix.

3. Participation Goals and Community Based Organization (CBO) Outreach

The MP2H project includes an emphasis on equity and seeks equitable development outcomes as part of the effort. Changes in public policies regarding land use and development, and city or other government investments in transportation infrastructure or other infrastructure or services, can both benefit and burden different communities. An initial charge of the project and a component of the FTA grant included engaging underrepresented communities to better include their perspectives on the project and its potential outcomes.

To better engage communities that could be affected, the Bureau of Planning and Sustainability developed a Request for Proposals (RFP) from community-based organizations, to facilitate grant-funded community outreach and participation, and to convey feedback on the issues from underserved communities. Six proposals were received from various organizations, and from those six, a selection committee identified four organizations to fund to conduct the outreach. The organizations were:

- **MESO (Micro Enterprise Services of Oregon)** – a non-profit service provider with connections to women and minority owned business interests, particularly focused in the eastside study area.
- **Hollywood Senior Center and Urban League of Portland** – a partnership between these two non-profit service organizations which focused on seniors and African American community members in NE Portland.
- **Friendly House, Inc.** – a non-profit service provider focusing on low and moderate income populations and other groups in Northwest Portland.
- **Northwest Industrial Business Association** – an organization that facilitates communication and advocates for industrial businesses and employment in Northwest Portland (this work was sponsored by Columbia Corridor Association as fiscal agent).

The following is a summary of the outreach efforts and recommendations from each organization, which is largely excerpted from the Prosper Portland Memo.

- **MESO's** outreach focused on BIPOC and small business owners, primarily from the eastside area. Participants, in a large majority, pointed to potential property tax increase as a draw back to the project, followed by the displacement of businesses and residents and increases in rent. Many respondents saw the potential development generated by the implementation of a streetcar route as negative. Over 50% of participants see the potential for decreasing traffic and solving parking problems as a potential benefit of this project, followed by the potential to bring customers to the businesses. In terms of preferred route, 43% of respondents chose the Sandy alignment option as their preferred route for the potential extension, and 22% didn't favor any routes, citing that the extension of the streetcar would not be beneficial to the area.

The report shares that BIPOC communities want more than to just give an opinion. Opportunities need to be created, including potential for ownership, access to jobs and wealth creation, mentorship opportunities, and investment opportunities, with the following potential benefits suggested by MESO:

- Affordable commercial spaces based on what BIPOC small businesses can afford.
 - Support to small businesses moving into commercial spaces for the first time.
 - Community Benefit Agreements with private developers.
 - Offer smaller commercial spaces, including office, that support small business needs and are “warm shell”.
 - Create opportunities for local home-based businesses to connect with new businesses in the area to help the home-based businesses grow.
- **The Urban League of Portland and Hollywood Senior Center’s** outreach surveyed seniors, low-income residents, immigrants/ refugee populations and communities of color, renters and small business owners, focused on the eastside. The survey received 102 responses with half of the respondents identifying as white and 44.4% were 75 or older. The majority of respondents prefer the Broadway/ Weidler alignment, believing it will be the most beneficial to economic prosperity, serving existing jobs, advancing equitable outcomes, providing affordable housing and middle-wage jobs, and for future development of the area.

The three biggest concerns raised were the rising housing costs, change in neighborhood character, and safety. Potential benefits of the project included creation of new affordable housing and community amenities (equally), making the neighborhood safer, and opportunities for job creation. They similarly expressed the project could potentially decrease traffic and improve parking in the area as well as support local businesses.

- **Columbia Corridor Association’s** outreach focused on property owners, businesses, employees and “outside of the study area” participants in the broader Northwest industrial area with the lens that employees are potentially the most negatively impacted by the westside project. Their analysis considered split interest amongst property owners as some may be larger beneficiaries of such changes through land value appreciation relative to business impact. The report states the importance of industrial jobs in the region and the large diversity, both racial as well as of gender, within those jobs. It shows that most respondents, whether property owners in the area or employees, prefer to keep the area industrial, enhanced industrial or employment based.

The majority of employees stated that they commute by car, would not use the streetcar, are concerned about potential loss of parking in the area, and do not believe

this would be an equitable project. Although property owners in the area could benefit from up zoning, the majority of property owners believe the area should continue to be industrial or enhanced industrial. 55% do not believe the streetcar expansion will be an equitable project for the city. CCA's report strongly opposes the project due to the potential loss of Industrial land and quality jobs in the area.

- **Friendly House's** outreach focused on elderly and or LGBTQ+ engagement participants in the Northwest study area, with half identifying as BIPOC. The priority identified via this outreach was for affordable housing and addressing concerns around a potential rise of property taxes. The group also raised concerns about the need for parking and potential reduction of existing parking in the area. 61% of respondents believe the streetcar project could potentially decrease traffic and solve parking issues in the area. The group also expressed concerns around safety and their desire to have a safer neighborhood.

MESO and the Urban League's reports conflict in terms of the preferred eastside route. Additional engagement may be needed to further understand the concerns of participants and to support the community in assessing pros and cons of each option. Both reports raise concerns to be addressed with any alignment (including the proposed extension in the Northwest study area), including impact to affordability (for residents and businesses) and potential displacement resulting from those market changes. They both agreed that the project could potentially reduce traffic and help solve parking issues.

CCA and Friendly House's reports resulted in very different input acknowledging a tradeoff between the potential loss of industrial lands, businesses with the potential increase in affordable housing and safety with new land use and infrastructure. This tension helps to inform the timing and sequencing of potential equity benefits and structuring of those benefits discussed below.

Ongoing CBO Engagement

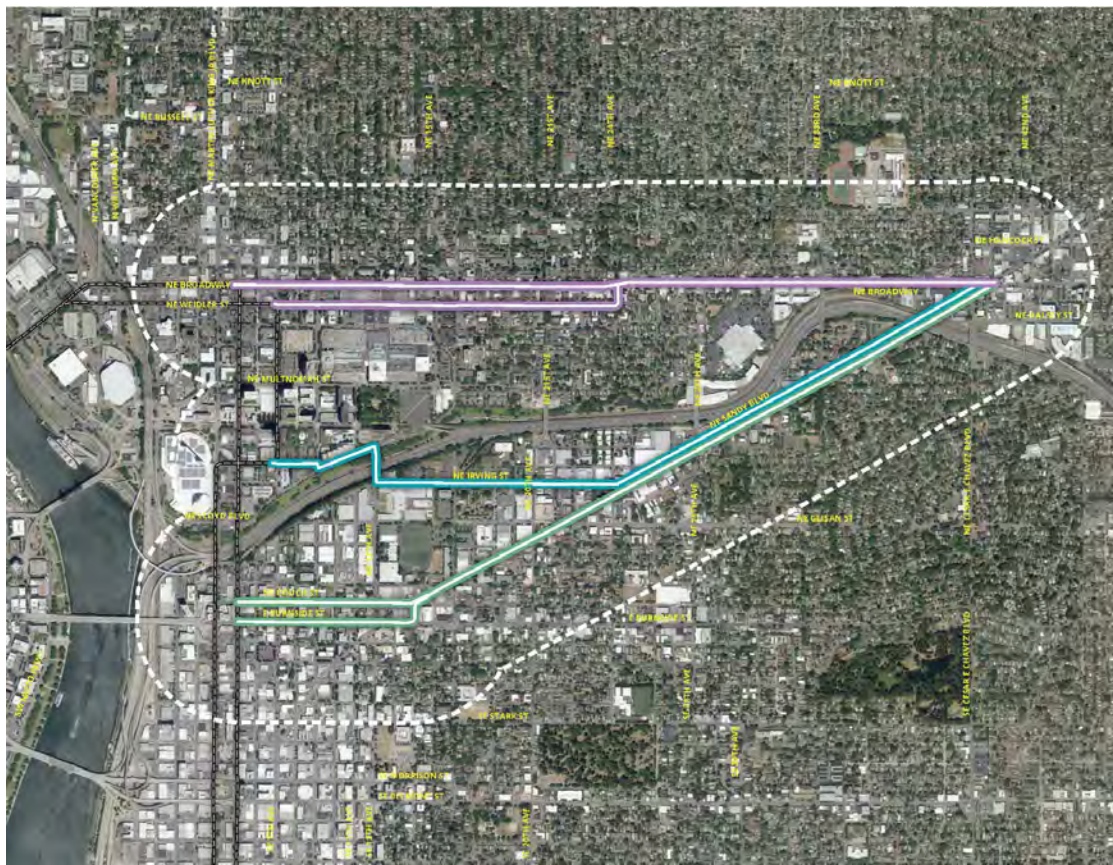
The MP2H effort was also approached by leadership of the Portland Harbor Community Coalition (PHCC). The PHCC membership includes a group of Black Portlanders with interest in exploring opportunities to share information about the legacy of York, an enslaved member of the Lewis and Clark Expedition, and for whom NW York Street in the study area is named. The group is also interested in exploring equitable development and community benefit opportunities in the Northwest study area. The area was home to many Black Portland households during WW II and shortly thereafter. Many lived in Guild's Lake Court housing, constructed for WW II efforts, before these households were displaced to the ill-fated Vanport City, and other locations, to accommodate industrial development in the Northwest study area. The work of this group is proposed to occur during Summer 2022 through December 2022, and may further help inform future city actions and public benefits/equitable development approaches.

4. Approaches to Reduce Harm and Burdens: Alignment, Area of Change

Draft proposals for equitable development approaches were developed in 2021 and focused primarily on the Northwest study area. The proposals considered ways to reduce harm to impacted and potentially burdened communities.

Northeast Study Area. No land use actions are proposed for the northeast study area, and no actions to reduce harm or address burdens are currently proposed. As future planning proceeds, the following issues identified through existing conditions analysis and community outreach should be considered.

- Address the possibility of housing displacement due to rising land values and increased rents. Consider measures to stabilize housing and create more affordable housing.
- Address the possibility of commercial/business displacement and loss of revenue/customer base during construction. Consider measures to minimize displacement and construction impacts. Explore tools that will provide opportunities for affordable commercial spaces that may serve lower income entrepreneurs.



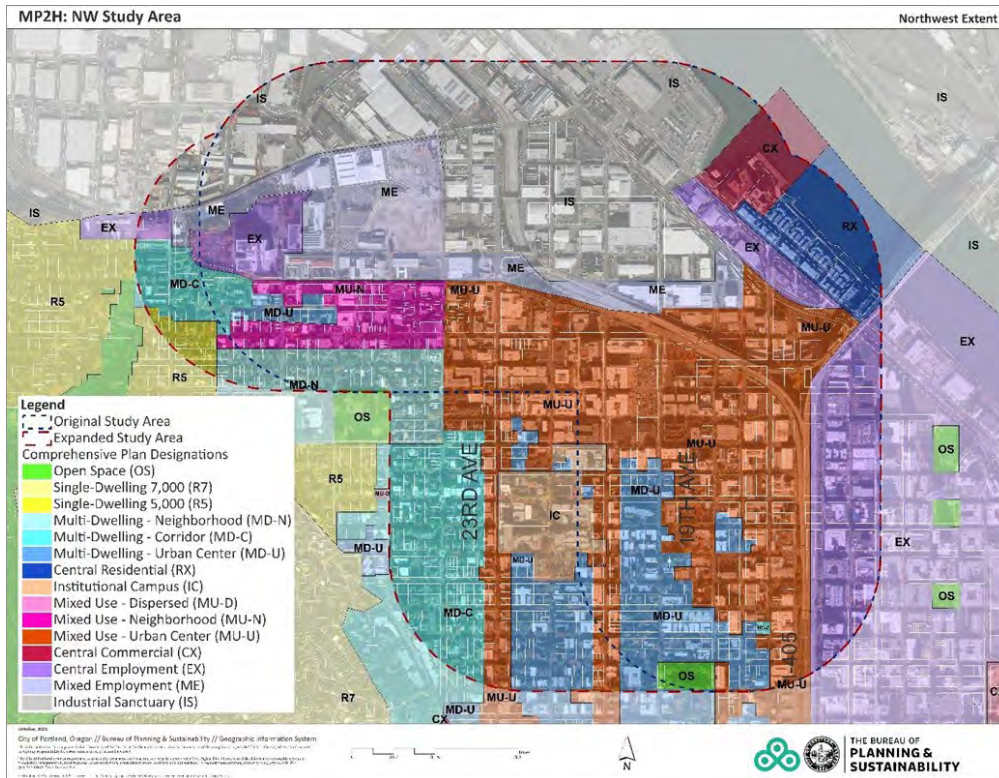
Northeast/Eastside Study Area and Alignment Alternatives

Northwest Study Area. The Northwest study area was initially focused on the area within ¼ mile of a proposed streetcar/transit alignment following NW 18th/NW 19th Avenues north of NW of Northup Street and following NW Wilson/NW York streets west to approximately NW 26th /NW 27th Avenue near the eastern entrance of the Montgomery Park office building. See the Northwest Study Area and Initial Alignment graphic shown below.

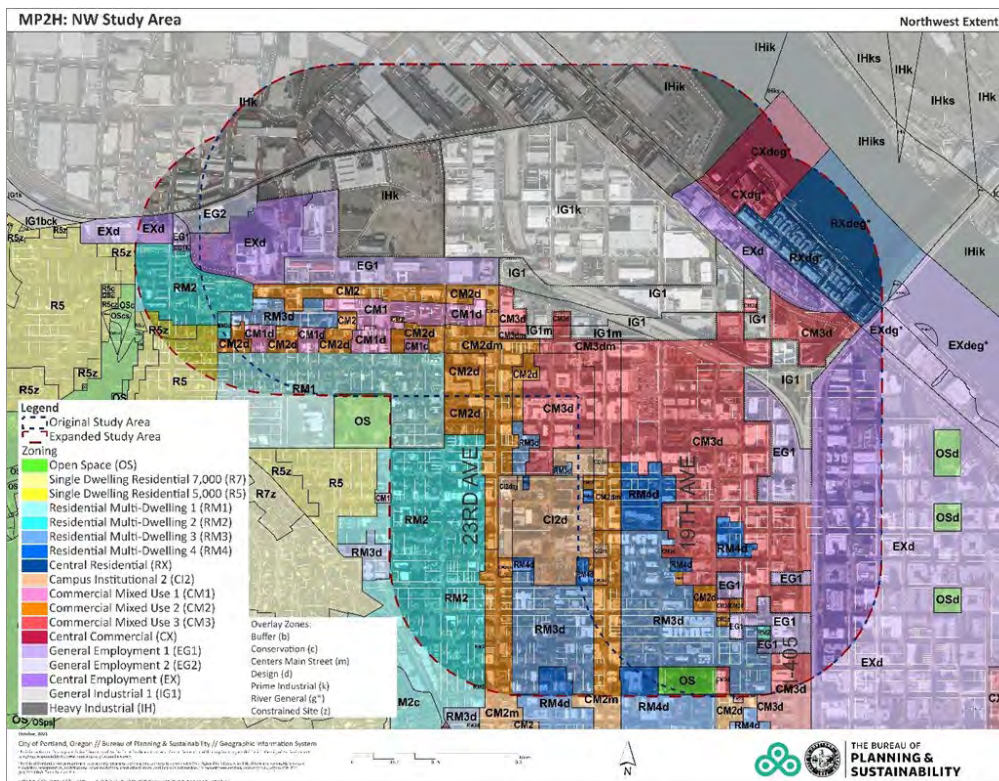


Northwest Study Area and Initial Alignment

The Northwest study area includes a variety of existing land uses including single- and multi-dwelling residential, commercial, mixed-use, and office/employment and industrial land uses. Land use designations in the area support this variety of land uses. See the Comprehensive Plan and Zoning maps below.



Comprehensive Plan Map – NW Study Area

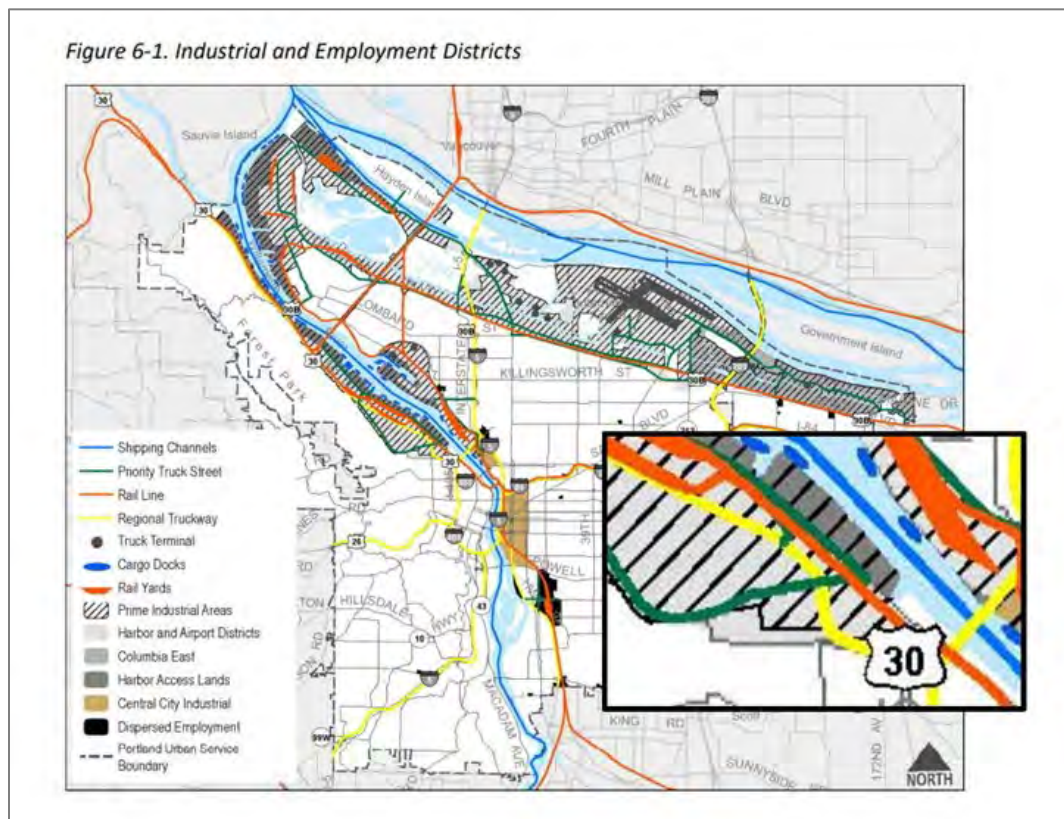


Zoning Map – NW Study Area

Industrial Land and Jobs

The proposal for a transit-oriented equitable development approach in the Northwest study area focused primarily on the future use of land currently planned and zoned for Employment and Industrial uses. The City of Portland 2035 Comprehensive Plan recognizes the value that employment and industrial land provides for the city, both economically, and in terms of the opportunity to accommodate and foster middle-wage jobs. Comprehensive Plan Figure 6-1, below, page shows industrial and employment areas, and the inset image shows the designation of land in the study area near Highway 30 as “prime industrial” land which has key locational characteristics that make it valued.

These types of industrial middle-wage jobs are valued, in that they provide for relatively high income potential, often do not require a four-year college degree, and may benefit BIPOC community members who as a group currently have lower overall levels of education in the City of Portland than non-BIPOC community members. Therefore, changes in the availability of industrial or employment land that can provide these middle-wage jobs is a key equity consideration. On the other hand, industrial and employment land uses do not typically provide the types of activities or intensity of use that would support transit service such as a streetcar, or other forms of fixed-rail/high capacity transit that supports a dense mix of housing and jobs, and help to achieve various climate goals.



Comprehensive Plan Figure 6.1

Development Scenarios, New Alignment, and Reduced Area of Change

As part of the process, economic and other types of evaluation were used to develop proposals that reduced harm/burden and maximized the opportunity for benefits. Three initial development scenarios were considered. These included: Scenario 1, Enhanced Industrial; Scenario 2, Employment; and Scenario 3, Mixed Use. All three presumed the original NW 18th/NW 19th Avenue alignment and are described in more detail below.

Initial Economic Modeling

To assist in evaluating the land use scenarios, ECONorthwest conducted an economic analysis that included development feasibility modelling. The ECONorthwest model assesses highest and best uses under alternate land use scenarios and development allowances to predict the most feasible types of development.

Initial analysis by ECONorthwest evaluated each of four development scenarios for the impact on Housing, Jobs and Residual Land Value (RLV) created. Measuring RLV is a way to estimate the overall economic gain or value generated by real estate development. A summary of findings is captured in the table below. Findings and a detailed explanation of the ECONorthwest model is included in the Opportunities and Challenges Report, which is included in the appendix.

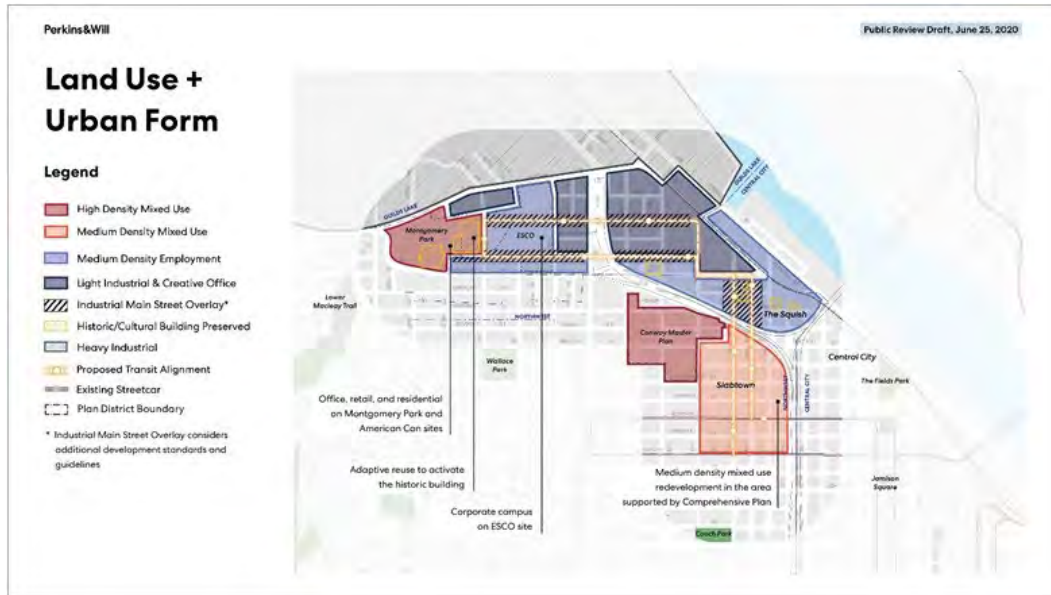
ECONorthwest Preliminary Scenario Modeling Results

	Baseline	Scenario 1: Enhanced Industrial	Scenario 2: Employment	Scenario 3: Mixed Use (10% affordable housing)
Residual Land Value	\$607M	\$629M	\$667M	\$757M
Industrial Jobs	370	1,300	1,300	630
Office Jobs	550	1,940	1,940	1,040
Retail/Restaurant Jobs	400	410	450	730
Market Rate Housing Units	10,810	10,990	11,630	13,920
Affordable Housing Units	940	960	990	1,250

Scenario 1, Enhanced Industrial, proposed retention of current Employment and Industrial land use designations both east and west of Highway 30. The scenario proposed “enhancements” to industrial uses currently allowed, by providing greater allowances for creative industries and industrial office uses.

This scenario was found to generate the lowest amount of increased land value that could be “captured” for public benefits. In addition, the proposal did not result in a tremendous increase in jobs, and the broadening of allowances for creative/industrial office uses was thought to skew new job creation towards those that may require 4-year college degrees or other skill sets that would not necessarily provide middle-wage opportunities for underserved communities

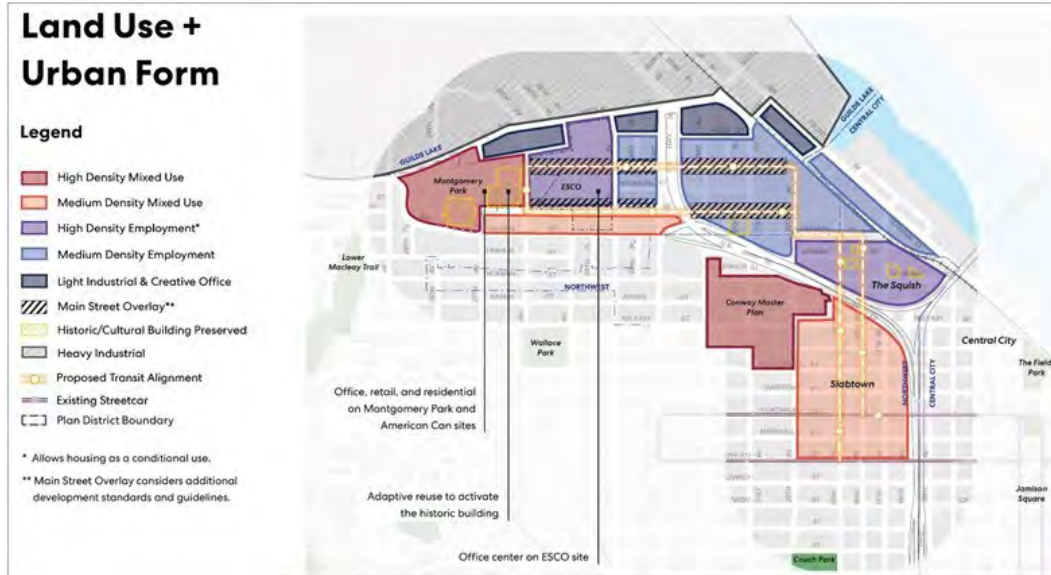
and industrial workers. The scenario was also not seen as being fully supportive of fixed rail transit investments in terms of ridership, or capacity to support financial contributions to a local improvement district.



Scenario 1

Scenario 2, Employment, proposed significant increases in development allowances (floor area and height) and a much broader array of uses, including professional or medical offices, both east and west of Highway 30. Development economic modeling suggested this scenario could generate land value that could be captured for public benefit, and also resulted in an increase in jobs. However the jobs were foreseen to skew toward higher-paying professional jobs or lower-paying retail jobs rather than the well-paying/low barrier to entry jobs that would be foregone by the change from industrial and employment-focused designations.

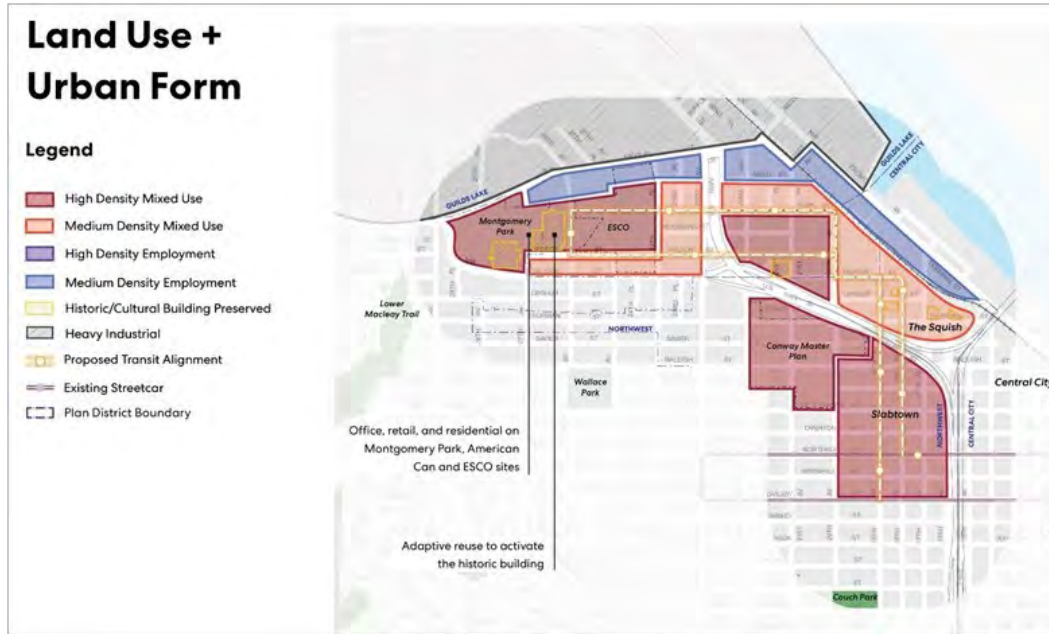
This scenario was seen as being supportive of fixed rail transit investment, but a lack of housing in the district suggested a scenario with high peak-hour travel demand, and significant daytime activity, but less activity in evenings. The onset of the COVID-19 pandemic further clouded the outlook for this type of office environment for the foreseeable future.



Scenario 2

Scenario 3, Mixed Use, also proposed significant increases in development allowances (floor area and height) and a much broader array of uses, including professional or medical offices, and high-density residential uses both east and west of Highway 30. Development economic modeling suggested this scenario could generate a significant amount of land value that could be captured for public benefit, primarily through development of multi-dwelling housing, which was seen as the likely market-driven outcome of zoning that allows such a broad array of uses.

Modeling indicated that the value generated by land use change could produce enough to provide significant public benefits – affordable housing, affordable commercial space, and others – if a means to capture and allocate a portion of the value could be developed. While the allowance for mixed-use and residential development spanned east and west sides of Highway 30, the largest area of change was seen west of Highway 30, where former industrial development on the ESCO site has been razed. East of Highway 30, and in some other areas, redevelopment was tempered by the value embedded in existing development and viable land uses.

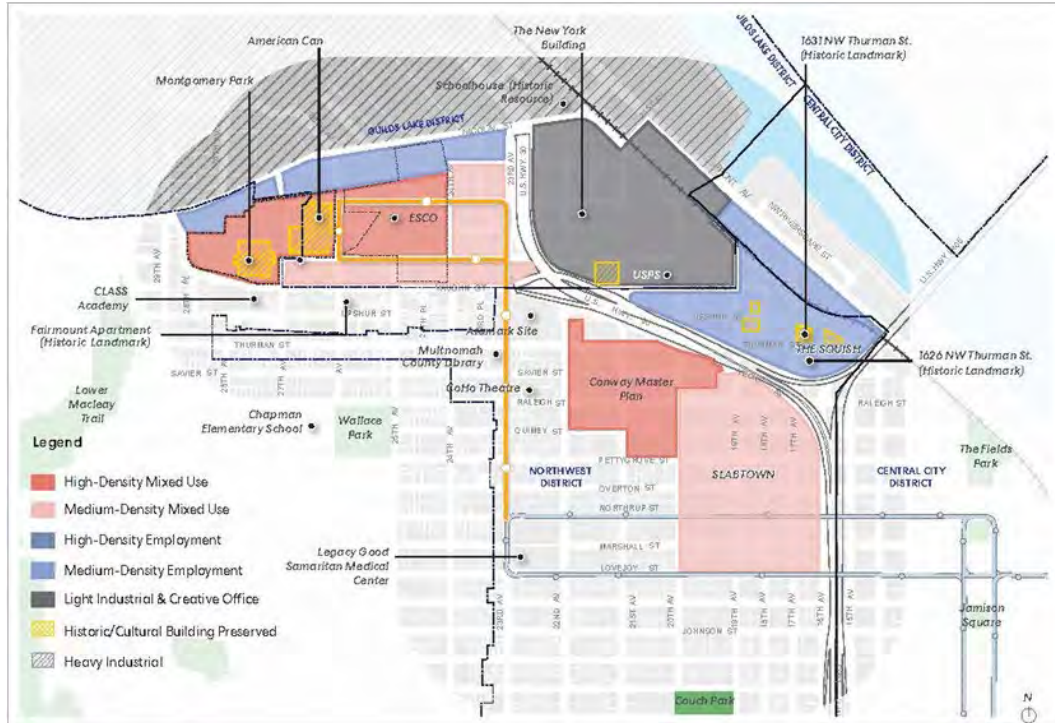


Scenario 3

Alternate Scenario and Alignment Rethinking.

As a result of the scenarios development/economic analysis, staff investigated opportunities to maximize the opportunity for high-value transformative change, while minimizing the impact to industrial land supply, and the middle-wage low barrier to entry jobs that industrial land supports. To that end, staff focused on creating opportunity for change west of Highway 30, where market opportunity for value creation is high, and minimizing change in areas east of Highway 30, where opportunity for change was seen as low, but the value of existing industrial land and jobs is high. Coincident with the shift in land use, staff concluded that a transit alignment running north/south on NW 23rd Avenue was feasible, and resulted in substantial construction and operating costs savings. The new alignment also created the opportunity to complete other planned improvements to NW 23rd Avenue, which could benefit the community.

Scenario 4, Hybrid, is generally a hybrid of Scenario 1 (Enhanced Industrial) and Scenario 3 (Mixed-Use), and results in a substantially reduced area of impact to industrial land and middle-wage job opportunities. Scenario 4 suggests a mixed use development opportunity area west of Highway 30, where transformation could result in land value increases – the benefits of which could potentially be shared between private and public sectors. The scenario included industrially-focused uses east of Highway 30.



Scenario 4

Given the concern about the possible loss of middle wage jobs, the land use scenario was further modified to reduce potential harm and job impacts by retaining industrial land use designation in areas east of Highway 30 as well as in the area north of NW York Street west of Highway 30. However, to better maintain industrial land supply and the correlated middle-wage job opportunity, the provision for creative or industrial office uses in these areas is not proposed to be implemented until future land use needs are evaluated in the update to the city’s Economic Opportunities Analysis (EOA), which is currently underway.

Housing and Middle-wage Jobs Opportunity.

The proposed hybrid land use scenario creates an opportunity for significant housing potential while retaining land for middle-wage jobs. Development economic modeling suggests that several thousand new housing units could be produced in the area west of Highway 30, a substantial number of jobs can be accommodated, and that land use changes could generate tens of millions of dollars in land value that could potentially be directed to some form of public/community benefit.

ECONorthwest Hybrid Scenario Modeling Results

	Baseline	Scenario 4: Hybrid: Industrial & Mixed Use 10% affordable housing
Residual Land Value	\$607M	\$710M
Industrial Jobs	370	930
Office Jobs	550	1,510
Retail/Restaurant Jobs	400	660
Market Rate Housing Units	10,810	12,840
Affordable Housing Units	940	1,130

A primary desired public benefit called for by many community members centered on affordable housing. The proposed scenario provide the opportunity to fulfill this community-stated goal. In addition, the value created may also provide opportunity to provide affordable/discounted commercial space that could be more available to low-income and minority entrepreneurs. It could also potentially create conditions to allow a greater degree of ownership and wealth-building opportunity for those groups.

Importantly, the scenario minimizes harm by retaining over half of the original land area considered for change for industrial uses. These retained industrial areas can provide opportunity for high-paying/low barrier to entry jobs, which may be accessible to a higher percentage of underrepresented and BIPOC community.

5. Potential Land Value, Cost Assumptions, and Public Benefits

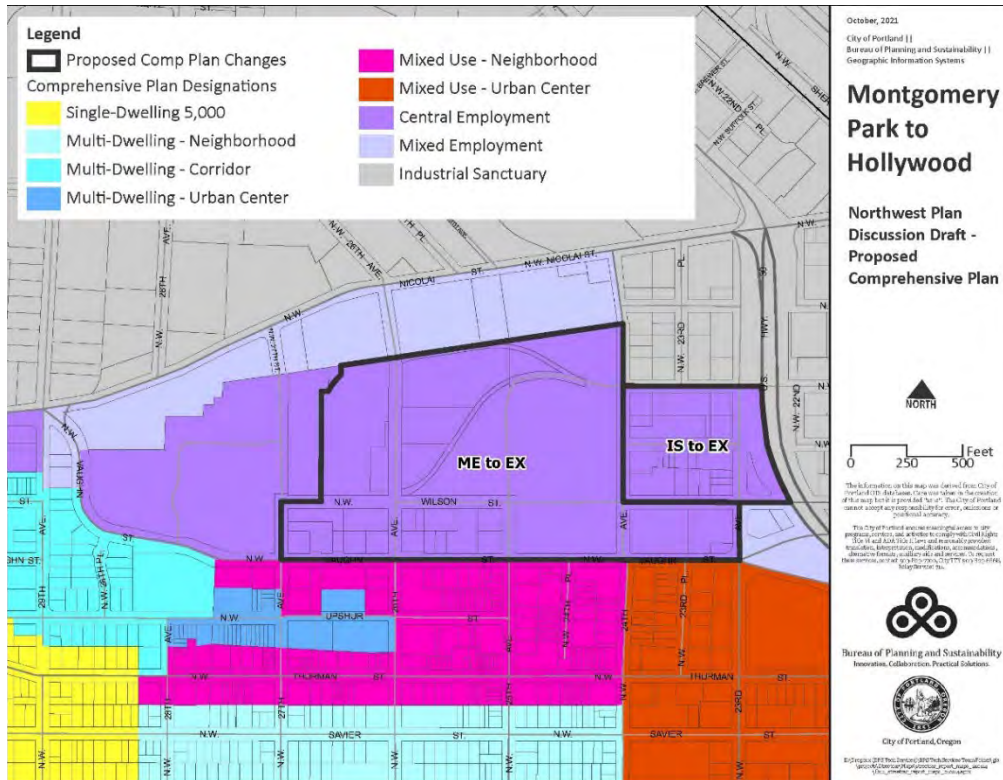
The MP2H NW Plan Discussion Draft was published on December 21, 2021. The draft plan generally proposes a preferred scenario development approach that builds on Scenario 4, Hybrid, described previously. The proposal calls for land use changes to accommodate a high-intensity mix of land uses in the area west of Highway 30 on the Montgomery Park site, the former ESCO Steel site, and other smaller parcels in the area between NW Vaughn and NW Nicolai streets. The proposed change from industrial and employment uses to high intensity mixed use development is expected to create an increase in the value of the land for development. Previously considered land use changes east of Highway 30 are not proposed, thereby reducing impacts to the industrial land supply.

Given the expected value created by land use changes, and the impacts of change to industrial land supply, several types of development/land use action impact costs and potential public benefits were considered in the plan. In a market economy, a private-public development partnership requires some financial incentive for the private partner, and the amount of resources available for public benefits is related to the amount of value being created. The following section estimates potential value creation, project costs, and opportunities for public benefits. The estimates are based on economic analysis and development models and conditions known and applicable during the analysis timeframe, and are subject to change, based on changing market and other economic conditions.

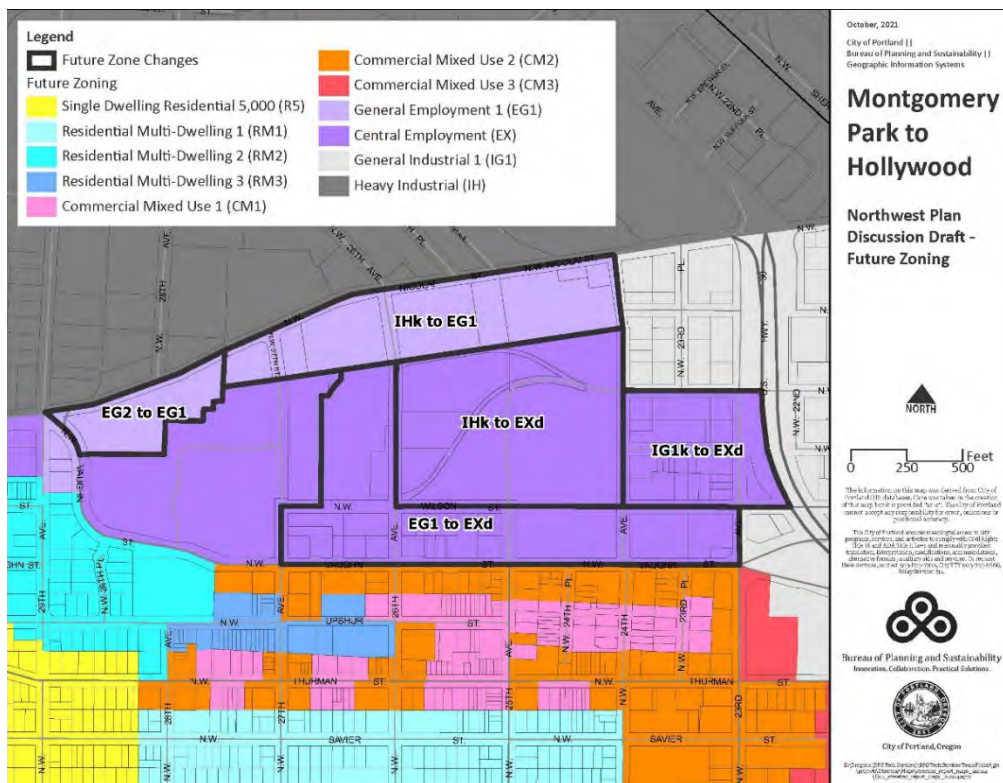
Land Use Changes and Value Creation

The proposed land use approach would change the Comprehensive Plan map on approximately 30 acres in the study area west of Highway 30. These changes would allow a broader array of uses – including residential, commercial and employment - and a significant increase in development intensity in the future. Changes to the Comprehensive Plan would allow for future rezoning that implements the land use vision for the area.

The following maps show the potential future Comprehensive Plan and zoning map changes for the area of change west of U.S. Highway 30. The first map indicates the area of Comprehensive Plan map change, with the solid black line outlining those areas changing from employment and industrial designations (ME and IS) to a mixed use designation (EX). The second map shows the potential zone changes from various industrial zones (IH, IG1) and employment zones (EG1, EG2) zones to an employment zone (EG1) and a mixed use zone (EXd).



Proposed Comprehensive Plan Map

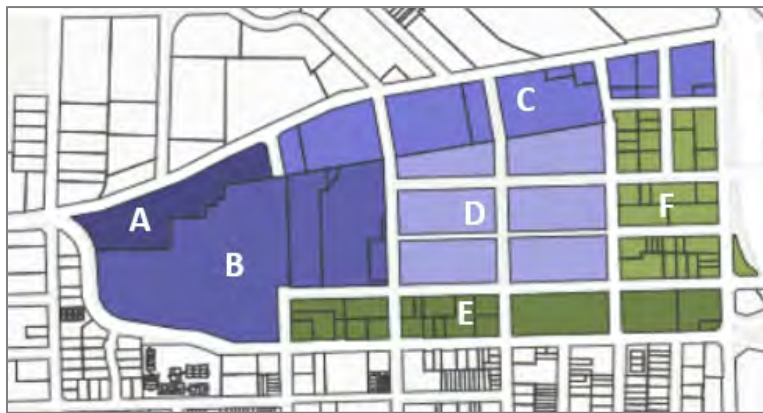


Proposed Future Zoning Map

Additional subarea analysis assessed the impact of the proposed land use changes on the potential housing units, jobs and residual land value in the area of change west of US Highway 30.

The analysis found that the change in land use designations created additional Residual Land Value (RLV), but the value varied significantly among different portions of the study area. RLV is an estimate of what a developer would be able to pay for land given the property’s income from leases or sales, the cost to build as well as operate the building, and the investment returns needed to attract capital for the project. This total remaining value must include enough private financial incentive to justify the development in the first place. In a public-private development model, an increment of the remaining land value increase may be able to be allocated for public benefits.

The analysis used existing land values based on tax assessor data available at the time of analysis. It may not represent actual land values or account for recent transactions, which may result in changes to estimated residual land values.



Subareas west of Highway 30

Subarea Estimates – Baseline Scenario to Hybrid

	Additional RLV	Industrial Jobs	Office Jobs	Retail/ Restaurant Jobs	Market Rate Housing Units	Affordable Housing Units
Subarea B	\$15.1M	0	0	110	1,080	130
Subarea C	\$7.4M	340	580	0	0	0
Subarea D	\$71.5M	0	0	300	2,800	330
Subarea E	\$40.9M	0	0	50	800	50
Subarea F	\$701K	0	0	20	160	20

Further refinement of the inputs resulted in an adjusted residual land value of approximately \$31.9M for Subarea D after accounting for some financial incentives, and revised land costs

based on known recent land transactions. Overall, with a development scenario that maximizes housing and affordable housing units, the analysis estimated roughly \$96M in total aggregate additional residual land value.

Analysis also found that the range of value available for public benefits is variable, and highly dependent on the assumed costs for other project needs such as street improvements and other transportation infrastructure, and the cost associated with industrial land mitigation. Higher costs result in less remaining value for other types of public benefits.

Costs Associated with Land Use Transition

The transition of the study area from current employment and industrial use designations to future to mixed use designations is dependent on the need to address policy and regulatory issues associated with industrial land, and the cost of infrastructure needed to serve the higher intensity land uses. These costs generally must be addressed before any other benefits can be realized. Some of the significant costs are described below.

Industrial Land Supply. The City of Portland and Metro region both recognize a portion of the area west of Highway 30 as part of the city and regional supply of industrial land that is vital to the regional economy and as a potential source of middle-wage jobs. The 2035 Comprehensive Plan designates a portion of the area as “prime industrial” land. A change in land use in such areas is not allowed unless measures to offset such changes are taken. The Discussion Draft plan proposes that such changes could be addressed through:

- Direct offsets: this approach would include replacing the acreage with new industrially zoned land with similar characteristics.
- Mitigation: this approach would establish a fund that would pay for the rehabilitation of underused brownfield industrial lands to improve the viability of existing contaminated lands for industrial redevelopment. Such an approach would need to focus on remediation of the most difficult sites, as the market is likely to address the more easily remediated sites. The cost of this approach is estimated at approximately \$800K per acre, based on studies conducted to inform the city’s 2016 Economic Opportunities Analysis (EOA).

Both of the above approaches could be undertaken by the private or public sectors, or a combination. However, the benefit of value created through land use changes is seen to accrue to property interests in the form of increased land value, and therefore the cost of addressing the change is anticipated to be borne, at least in part, by the private sector.

Transit and Transportation System Improvements. Land use changes in the MP2H Northwest study area are linked to transit and other transportation investments that would support

increased intensity of development, including residential mixed use development. There are two major components:

- An extension of Portland Streetcar is proposed to serve the area. Funding for streetcar is expected to be a combination of federal transit dollars and local contributions, including contributions from property owners that would benefit from such investments. Property owner contributions typically come in the form of a Local Improvement District (LID) assessment. Property interests are expected to participate in such a district.
- A local street network to serve new mixed use development would also be necessary. A local street network serving new development would in many cases be funded primarily by private property interests. However, because the proposal is also linked to fixed rail transit investments, some of the costs may potentially be funded through other sources.

Other Infrastructure System Improvements. Land use changes in the MP2H Northwest study area may trigger the need for enhancements to sanitary sewer and stormwater management systems. Initial analysis indicated that impacts may be partially mitigated by “green solutions” such as ecoroofs or other on-site stormwater management systems that reduce discharge into pipes and the hard infrastructure parts of the system. These solutions may add an increment of cost to development.

Potential Public Benefits

Public policy changes in land use allowances are likely to result in an increase in land value for property interests. Public investments in transit and transportation will also add value. Given that private interests accrue some value from these public actions, the MP2H has explored public benefits that could be sought from property or development entities that offset a portion of the increased value, and mitigate for potential impacts such as increased area-wide rents, loss of middle-wage jobs, and other burdens that may disproportionately impact underserved community members and lower income households. The following are benefits are being considered as part of the Discussion Draft plan. This list was identified based on input gathered from public comments, discussions with elected officials, and work with community based organizations.

Affordable Housing. The project would change current land use designations, which only allow employment and industrial uses, to mixed use designations that allow a full range of uses including commercial office and housing. City code currently requires that residential development in buildings over 19 units meet the city’s inclusionary housing program. Due to the potential value created through public policy changes and investments, and the desire to address the potential burdens, affordable housing in excess of that required by inclusionary housing is sought.

Affordable Commercial Space. The provision of affordable commercial space is another benefit sought. This benefit would provide opportunities for small businesses that may not have the resources to compete for space in new market-rate development without financial assistance. The intent is to provide business opportunities to a broader range of people, focusing on underserved and underrepresented populations.

Open-Space Amenities. The MP2H NW Plan has the potential to produce up to an estimated 3,000 new housing units in the area. Providing for parks, plazas or other types of open space and connections to public spaces in the area will help serve those living and working in this new neighborhood, and help to minimize the burden on existing nearby facilities in a densely populated area.

Wealth-building/Ownership Opportunities. Project outreach through CBOs suggested that underrepresented, underserved and BIPOC community members lack opportunities for wealth building that would help these community achieve more equity. Discussion with these groups suggested that rather than rental opportunities, ownership opportunities should be part of an equitable development and public/community benefits approach. This applied to residential and commercial opportunities.

Contracting Goals. Another outcome of an equitable development approach could be Minority-Owned, Woman-Owned, or Emerging Small Business (MWESB) contracting requirements for construction on both public and private arenas.

6. Displacement Risks: Housing and Jobs

NW Study Area Demographics

The January 2020 MP2H Existing Conditions report compiled demographic and employment data for the Northwest study area, summarized in the tables and discussion below. This data sets a context for the Northwest study area in relation to the city as a whole and lays the groundwork for determining housing needs and evaluating the vulnerability of housing and jobs to land use changes and infrastructure investments.

In general, the population in the Northwest study area includes fewer families in poverty, and higher income and education levels than Portland as a whole. Overall, there is a lower percentage of people of color than citywide, as well as a significantly lower proportion of children than the city as a whole.

NW Population & Income

Population & Income	NW Area	Portland
Persons	6,735	630,331
Families	1,108	135,543
Median HH Income	\$68,834	\$63,032
Per Capita Income	\$64,295	\$37,382
% Families in Poverty	4%	10%

NW Race & Ethnicity

Persons	NW Area	Portland
People of Color	1,355	182,843
% People of Color	20%	29%
% White	80%	71%
% Asian	10%	10%
% Black	2%	7%
% Native American	2%	2%
% Other	1%	3%
% Nat. Hawaiian/Pac Is.	0%	1%
% Hispanic	8%	10%

NW Age

Age	NW Area	Portland
% under 18	8%	18%
% 18 to 59	75%	64%
% over 59	17%	18%

NW Education

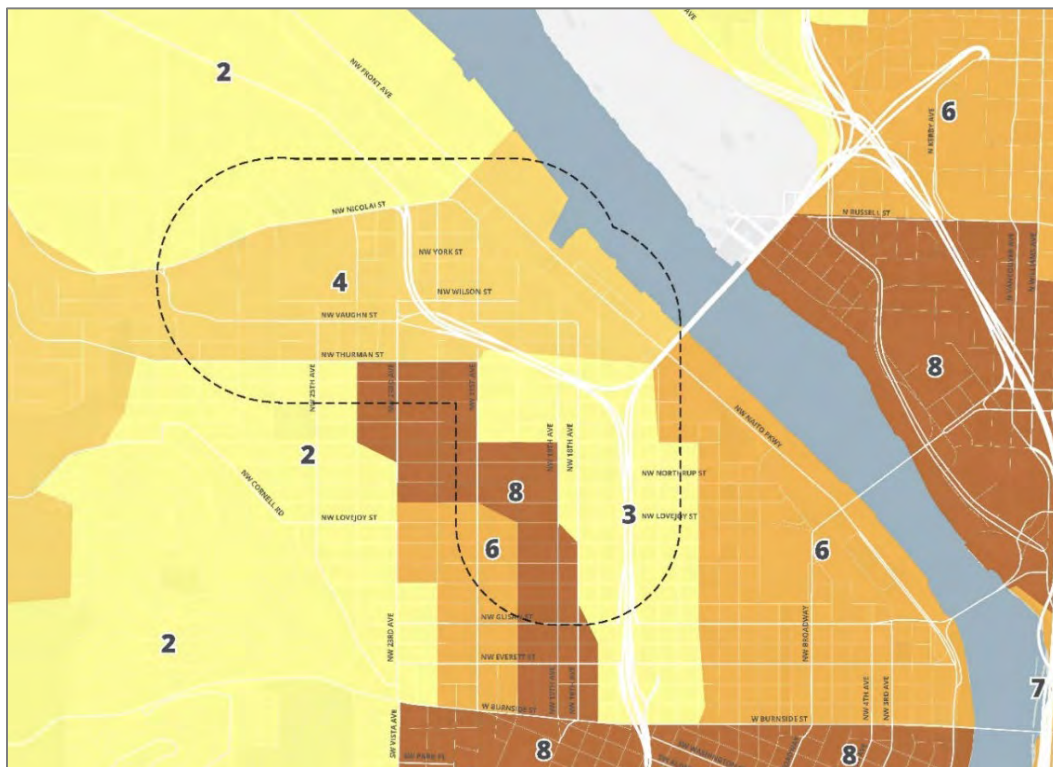
Education	NW Area	Portland
Less than HS	2%	8%
HS diploma	6%	16%
Some college	18%	28%

BA/BS degree	43%	29%
Advanced degree	32%	19%

NW Households & Tenure

Households	NW Area	Portland
Total Households	4,215	260,949
% Owner Occupied	29%	53%
% Renter Occupied	71%	47%

The areas with the highest concentrations of non-white households and lowest income households in the study area live along much of the existing streetcar line that operates on NW Lovejoy and NW Northrup Streets. There are also higher concentrations of these populations in Slabtown, reflecting areas of significant recent residential development. The Equity Index Map below shows the indexes (representing race and income levels) for the area. Higher numbers reflect more diversity and/or lower incomes.



Equity Index Map – the darker colors and larger numbers show higher concentrations of non-white populations and lower household incomes.

NW Portland Affordable Housing

Once a relatively affordable area, Northwest Portland has seen steadily increased residential rents over the past several decades. Although there is no reliable inventory of “naturally

occurring” or unregulated affordable housing in the area, an approximate count can be made by using recent data from CoStar, which rates multi-family buildings for their “quality and desirability” by evaluating the physical attributes and amenities of the buildings.

The CoStar system uses a five star scale, with five being the highest, “luxury end of multi-family buildings.” Single star buildings are “uncompetitive ... may require significant renovation, possibly functionally obsolete.” Structures scoring two or three may be used as an imperfect proxy for unregulated affordable units, as they generally attract lower rents because of average to below average physical characteristics, such as lesser or older finishes, aging building systems, inadequate windows and minimal on-site amenities and open areas.

Note that the rating system does not include neighborhood or market characteristics, allowing consistent comparisons across geographies. Because of this, extra caution should be used in using lower CoStar ratings as a proxy for affordability in highly desirable neighborhoods such as Northwest Portland, where even lower quality and amenity housing may attract premium rents. A summary of the three and two star multi-family buildings and units in the “Uptown Portland” CoStar subarea (Census Tract 45) is below. Not included in the table are 930 subsidized units in 15 buildings also rated two or three stars; these regulated affordable units are essentially not susceptible to displacement risk in the near and medium term.

NW 2 & 3 Star Rated Buildings

CoStar Rating	Buildings	Units
2 Star	188	2,378
3 Star	118	2,560
Total	306	4,938

NW Study Area Employment and Businesses

Compared to Portland as a whole, Northwest has a higher share of employment in office services and production and distribution; it has less employment and businesses in retail and in education and healthcare. The highest share of the employment in the Northwest study area is office services, comprising about 44% of jobs. While production and distributions sectors used to comprise as much as 37% of jobs in 2008, the growth in office-based employment has outpaced production and distribution in Northwest. Production and distribution sectors now comprise about 28% of Northwest jobs. Total employment in these sectors has also declined, from around 5,000 jobs in 2008 to about 4,200 jobs in 2018. However, major employers serving industrial sectors, such as Weir (former ESCO) and XPO Logistics, have their headquarters in the area which are arguably also production and distribution jobs.

Since 2008, the Northwest study area has grown by about 2,800 jobs, or 17%. This is higher than the citywide average of 13%. The largest sector to grow was office services, which added 2,600 jobs. The fastest-growing subsector has been professional, scientific and technical services, which added 800 jobs (a 37% increase) between 2008 and 2018. Production and distribution sectors have struggled to keep pace, having lost about 800 jobs in the last

recession. Even accounting for large employers that vacated, such as ESCO's manufacturing presence, this sector is generally declining in this area. One exception in this sector is small-sized firms with 1-19 employees, which grew by about 5-10% since 2008.

NW Businesses

Sector	NW Area	Portland
Total	1,115	34,401
Production & Distribution	19%	18%
Education & Healthcare	10%	11%
Office Services	45%	35%
Retail & Related Services	26%	36%

NW Jobs

Sector	NW Area	Portland
Total	16,860	455,478
Production & Distribution	28%	22%
Education & Healthcare	10%	24%
Office Services	44%	30%
Retail & Related Services	17%	24%

Jobs and Housing Displacement Risks

Changes in zoning that increase development entitlements coupled with supporting transportation investments and related infrastructure and amenities have the potential to displace existing residents and businesses by encouraging new development and increasing rents over time.

Within the portion of the Northwest study area where land use changes will likely be proposed, the risk of significant displacement of households is relatively low, simply because there are very few housing units there; the area is zoned for industrial use and housing is not allowed. There are a few non-conforming single family homes in the vicinity of NW Roosevelt. If rezoned to mixed-use, these buildings would become conforming under the zoning code, however, over time, they would be at risk of redevelopment to a higher density level (a risk that exists to some extent already).

The CoStar data, discussed above, suggests that a few thousand housing units exist in the larger Northwest Portland area that could be vulnerable to upward remodeling or redevelopment and rent increases following an additional investment in the streetcar system. However, the broader Northwest area is already served by the existing streetcar. Most of the studies about the impact of rail transit on rents and value focus on introduction of rail where it does not exist. It is not clear that a modest extension would create significant additional market pressure on the existing housing stock. In addition, as discussed earlier caution should be used in using low

CoStar ratings as a proxy for affordability in highly desirable neighborhoods such as Northwest Portland, where even lower quality and amenity housing may attract premium rents.

Assessing the study area by the Bureau of Planning & Sustainability's Displacement Risk Typology shows that Census Tract 49 at the southern tip of the alignment is classified as susceptible to gentrification based on having higher shares of vulnerable populations but not yet having experienced demographic change or increasing housing costs. This is driven by the census tract's proximity to the Pearl District's more active real estate market.

Although there is some risk of residential displacement if the MP2H zoning and transportation proposals are adopted, staff believe the risk and extent is relatively low and could be mitigated for by the creation of up to 300-500 affordable housing through the City's Inclusionary Housing requirements and the project's proposed additional affordable housing production tools, including development agreements with property owners and affordable housing zoning bonuses.

Rezoning industrial land to a broader mix of land uses will change the mix of jobs in the study area. Preliminary economic modelling by ECONorthwest shows significant job growth as a result of the proposal, particularly in the office and service sectors. However, industrial jobs will not likely be created in significant numbers and it is likely that, over time, existing industrial businesses in the study area, for instance between NW 23rd and NW 24th south of York Street, could get priced out of the area. While the ESCO site (a large portion of the project area) is vacant, and so can't technically "lose" jobs, rezoning it would reduce the potential for future industrial jobs, which are generally well paying and have low entry requirements. The displacement of large numbers of existing jobs may be unlikely under the proposal, but the land use changes would affect the supply of land for industrial businesses and jobs, as discussed earlier in this report.

7. Housing Need Analysis

In 2011, BPS updated the Housing Needs Analysis with key housing supply and affordability trends. There is a sufficient supply of vacant and underutilized land in the city to accommodate construction of enough housing to meet projected demand through 2035. Based on recent trends in housing construction, the future housing stock will include a much greater proportion of multi-family units in the coming years. However, low- and moderate-income households continue to be challenged when finding “affordable housing units” due to a combination of high housing costs, rising energy prices and stagnant household income. The cost of new housing is impacted by land supply and the costs of financing, materials, and labor.

Montgomery Park and the nearby area is part of the city’s West Portland subarea in the Housing Needs Analysis, which accounts for roughly 18 percent of the city’s total housing stock. This West Portland subarea also contains a large share of the city’s substandard units (units without plumbing or kitchen facilities). Overall, the number of affordable rental units declined substantially throughout the city, and the use of Section 8 vouchers has been increasing in areas far from the city center (between the years 2000-2007). While the data from the Housing Needs Analysis is older, the trend of rising housing costs, decreasing supply of affordable housing stock, and more households at risk of displacement or homelessness is reflected in recent community engagement conducted through the recently updated Portland Plan, the PAALF People’s Plan, and COVID-19 Equity Toolkit.

The 2011 Housing Needs Analysis findings show that household growth in Portland will increase at an annual percent rate change of 1.2-1.6 percent, resulting in approximately 344,800 to 376,300 households by 2035. This annual percent growth rate translates into a need for 3,500 - 4,500 housing units to be added each year for the 30-year timeframe to 2035. Land capacity for new Portland housing units is projected to range between 112,000 and 262,000 new units by 2035, per the City of Portland Buildable Lands Inventory model. That figure is well above the projected need by 2035 for 105,000 to 136,000 new units.

While zoned capacity exists, the lack of supply of affordable units may continue to exacerbate conditions for low- to moderate-income renters. According to the Metroscope model used for the Housing Needs Analysis, the most significant concentrations are forecast to be in West Portland (with about half of the city’s highest income households) which is the same subarea that the Montgomery Park site is located in. Of all the subareas, the Central Business subarea is expected to see the greatest growth in households and the most dramatic forecasted changes. At the time that the Housing Needs Analysis was conducted, the downtown area rents were nearly twice and sometimes three times as much as other parts of the city. While Montgomery Park and the nearby area lies within the West Portland subarea, it is directly adjacent to the Central Business subarea and may experience some of these forecasted changes due to that proximity.

The following table compares existing households making 0 to 100 percent of Area Median Household Income (AMI) with forecasted growth for the census tracts that fall within or are a part of the MP2H Northwest study area. The data was compared to future household growth by assuming that the proportion of the population falling within these AMI categories or experiencing severe cost burden stays the same through 2035 (paying 50 percent or more of household income towards gross rent). The analysis relies on the 2020 Census American Community Survey (ACS) data which has high margins of error when dialed into smaller geographies. This information would need additional ground-truthing if intended to help inform policy decisions, but it is presented here to help provide some insight into the types of affordable units needed citywide and within the Northwest study area.

By reviewing the number of households living within the Northwest study area and assuming cost-burdened households experience the same percentage of growth as the rest of the city by 2035, anticipated housing need can be analyzed for different income levels (below 65% AMI and 65-100% AMI). About 1,100 units will be needed for the 65% AMI or below category by 2035. For the 65-100% AMI level category, far fewer units are needed but further ground truthing is necessary to understand if this data is accurate. Specific findings from this analysis are included below the table.

Existing & Future Households Earning 0-100% AMI

Income Level	2020		2035	
	NW Households	Portland Households	NW Households	Portland Households
0-65% AMI	2,794	65,526	3,476 - 3,850	81,522 - 90,312*
0-65% AMI & Severely Cost-Burdened	891** (32%)	30,570 (47%)	1,112 - 1,232†	38,315 - 42,447†
65-100% AMI	1,229	23,572	1,529 - 1,663	29,327 - 31,986††
65-100% AMI & Severely Cost-Burdened	14‡ (1%)	787 (3%)	15-17†	880 - 960†
Total 0-100% AMI	4,023	89,098	5,005 - 5,513	110,879 - 122,298

*Assuming 24% of total households are 65% AMI or below

**Margin of Error: 298.5

†Assumes % of severely cost-burdened households doesn't change

††Assuming 8.5% of total households are 65-100% AMI

‡Margin of Error: 26.5

Assuming that the percentage of households that are cost-burdened doesn't change by 2035, future housing need for the MP2H Northwest study area will be:

- **1,112 to 1,232 cost-burdened households earning 0-65% AMI will need units**
- **15-17 cost-burdened households earning 65-100% AMI will need units**

Although the ACS data provides an idea of anticipated need, the high margin of error for the number of severely cost-burdened households in the study area requires additional analysis through surveys or other data collection methods to produce more reliable data.

Inclusionary Housing in Montgomery Park Study Area

The EcoNorthwest report indicates the MP2H Northwest study area may feasibly result in 3,000 – 5,000 market rate units and 300-500 affordable housing units (based on the current inclusionary housing requirements of 10% of total units deed-restricted at 60% MFI). The 300 - 500 affordable housing units would satisfy 27 to 41 percent of the housing need for severely cost-burdened households at 65% AMI or below in the study area. The potential development would also be adding affordable housing stock to a neighborhood identified by the [Portland Housing Bureau's opportunity area analysis](#) as a “high opportunity area” close to high quality amenities and job centers.

The Northwest neighborhood (as defined by the Portland Housing Bureau's analysis neighborhoods) has produced about 2.4 percent of the city's affordable inclusionary housing units since 2018. In comparison, the Interstate Corridor produced about 20 percent of the city's affordable inclusionary housing units and the Central City area produced about 14 percent of the city's affordable inclusionary housing units. Both the Interstate Corridor and Central City areas are also considered “high opportunity areas” as well. Neighborhoods that produced a similar percentage of inclusionary housing units to the Northwest are Montavilla (2.7%), Hayden Island (2.5%), and Roseway-Cully (2.1%). However, Montavilla, Hayden Island, and Roseway-Cully do not fall into the same “high opportunity” areas that the Northwest is a part of. The Northwest area also has a greater capacity for housing units than Hayden Island and Roseway-Cully (calculated using the Buildable Land Inventory). In summary, Northwest Portland is under-producing affordable housing relative to other high opportunity areas in the city.

8. Citywide Housing Supply Context

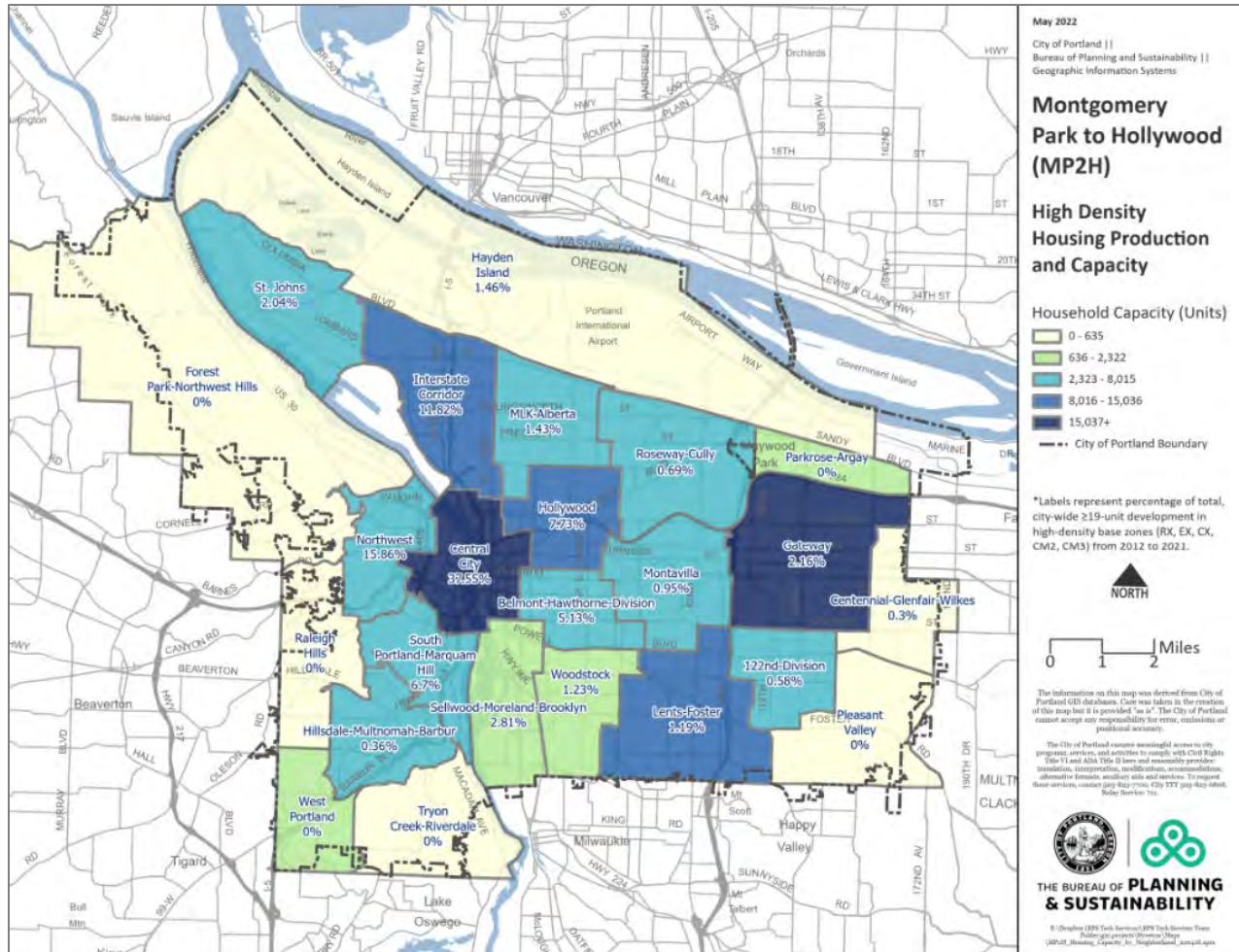
Housing Production in the Past 10 Years

In the past ten years, a little over 50,500 housing units were built in the city of Portland. About 24 percent of that total production occurred within the Central City neighborhood, with the Interstate Corridor following at 14 percent and the Northwest neighborhood at 11 percent of total production. When comparing housing production by building size, the Northwest neighborhood produced about 16 percent the city's large developments of 19 units or larger in the past ten years. The only other neighborhood that exceeded in building denser developments over the last ten years is the Central City area, which produced about 38 percent of the city's buildings of 19 units or larger.

Comparing Production to Capacity

While the Northwest neighborhood produced the second highest amount of housing units within buildings of 19 units or larger, the actual capacity in the Northwest for high density buildings is much lower than other neighborhoods, like Gateway (which has capacity for 24,500 units within high-density zoning areas) or Interstate (which has capacity for 15,000 units within high-density zoning areas). The Northwest, by comparison, has capacity for about 6,100 units within high-density zoning in the neighborhood. Despite not having as much capacity for high density buildings as other neighborhoods, the Northwest continues to produce larger developments possibly due to greater development interest and proximity to high-quality amenities and job centers.

The map below shows the amount of capacity for high-density housing each neighborhood currently has (the darker the blue, the higher the capacity in housing units). Below each neighborhood name is the portion of high-density housing built within these high-density zones (RX, EX, CX, CM2, CM3) from 2012 to 2021.



High Density Housing Production and Capacity

Comparison of Large Opportunity Sites

The table below describes the capacity for housing units on several large opportunity sites in and near the Central City. Opportunity sites are areas of the city that have been part of large master planning processes and/or public-private land use negotiations involving the City of Portland. Collectively, these large opportunity sites make up approximately 30 percent of the Central City’s potential growth.

In addition to the large opportunity sites, the chart also includes the development capacity and percentage of the city’s past production generated within a quarter mile of the Portland Streetcar Loop.

Large Opportunity Site Housing Potential*

Site	Unit Capacity	Potential Affordable Housing Units‡	% of Citywide Housing Need by 2035	% of Citywide Housing Built in Past 10 Years in Same Area‡‡	% of Citywide Hi-Density Housing Built in Past 10 Years in Same Area‡‡
MP2H-NW	3,000 – 5,000	300-500	2.9-3.7%	10.8%	15.2%
Lloyd District**	5,000	500	3.7-4.8%	23.5%	35.9%
Broadway Corridor†	2,620	720	1.9-2.5%		
OMSI	1,200	240	0.8-1.1%		
RiverPlace††	915 – 1,015	91	<1%		
<i>Total</i>	12,735 - 14,835	1,851	11-12%	NA	NA
Area w/in ¼ mile of Streetcar	≈ 30,000 Units	≈ 3,000	22-29%	26.5%	37.2%

*All sites are within High Opportunity Areas, see <https://www.portland.gov/phb/opportunity-mapping>

**https://www.portland.gov/sites/default/files/2020-01/complete-adopted-plan_lores_0.pdf

†<https://prosperportland.us/wp-content/uploads/2017/04/NNECDI-BDWYCORR-PPT-2018-6-21.pdf>

††<https://www.portlandoregon.gov/bds/article/796394>

‡Assuming 10% of units built under Inclusionary Housing requirements, with higher goals for the Broadway Corridor and OMSI areas.

‡‡ Analysis area boundaries as shown on map above.

According to the Housing Needs Analysis, there will need to be an additional 105,000 to 136,000 new units by 2035 to accommodate population growth. Counting the large opportunity sites listed in the table above, if all sites were to develop then they would address about 11-12 percent of this total need by 2035. Comparing each large opportunity site, Lloyd and Montgomery Park make up the largest proportion of this anticipated need because each site has the potential to generate far more housing units than the other opportunity sites.

Housing development within a quarter mile of the Portland Streetcar Loop made up 26.5 percent of the housing produced within the last ten years. A little over 37 percent of buildings made up of 19 units or more were built within a quarter mile of the Portland Streetcar Loop. The capacity for additional housing within this same distance of the Streetcar Loop is more than twice the capacity of the five large opportunity sites listed in the same table above. Expanding the Portland Streetcar to the study area connects future residents of the opportunity site to other areas of the city by way of frequent and reliable rail transit.

Including the MP2H Northwest area in addressing anticipated needs and opportunities will help achieve housing goals for both the Central City and for the city overall. According to the Housing Needs Analysis, annual population percent growth rate translates into a need for 3,500 - 4,500 housing units to be added each year for the 30-year timeframe to 2035. If the MP2H-Northwest study area were to develop at the anticipated capacity of 3,000-5,000 housing units, the site itself could address an entire year's worth of housing production needs. The 300-500

units of deed-restricted affordable housing produced through inclusionary housing requirements itself would be about a third of all inclusionary housing produced since 2018.

The Central City housing goal is approximately 60,000 total housing units by 2035 (including 35,300 new units). As of 2021, 13,473 housing units have been produced since 2010; the Central City area is not producing as many housing units as initially expected. The study area's opportunity site supplements housing production by contributing almost 10 percent of the housing production goal for Central City.

Comparing the residual land value across all the large opportunity sites is more difficult as the analyses for land value was done at different times for each project or site. Almost every site in the table, except for the MP2H Northwest study area, has been already zoned for high density housing. The land values on these other large opportunity sites already reflect the sites' existing land use and zoning. The MP2H area is the only location with considerations for re-zoning from industrial land uses to high density housing. As Section 5 of this report details, the residual land values resulting from re-zoning the MP2H site to accommodate more housing could also generate greater community benefits such as additional affordable housing units. The MP2H Northwest study area presents the greatest potential among these opportunity sites where the value has not already been fully absorbed into the land price, and therefore offers higher potential to achieve public benefit with fewer public investments.

9. Conclusions

This report describes the proposal for land use change in the Montgomery Park to Hollywood study area and focuses on equitable development issues associated with potential for change. Because change is not proposed for the Northeast/eastside part of the study area, the report does not address equitable development issues in depth for that area. The Northwest portion of the study area is identified as an area that could be subject to substantial change as a result of city policy changes and investments. Therefore this report focuses on and identifies equitable development issues associated with in the Northwest study area.

There is a significant need in Portland for both industrial land, and the related jobs that this land can accommodate, and housing, particularly affordable housing. These types of land uses provide for development that may serve underrepresented communities to a significant degree. The report focuses on how the impacts to communities can be addressed in terms of industrial land consideration and middle-wage jobs, and housing. The report also identifies the potential for value creation through public actions, and addresses approaches to better balance the financial benefits of such actions that accrue to private interests with public good.

Key Takeaways:

- The proposal for Northwest Portland would facilitate the transition of a portion of needed prime industrial land to an area that can accommodate a broader mix of land uses, including the potential for multi-dwelling housing or more intense office-oriented employment uses. There are burdens associated with such a transition, specifically the loss of industrial land for jobs.
- City of Portland, regional and state policies dictate that the city maintain an adequate supply of different land use types to meet growth needs. Because of the limited supply of the type of industrial land subject to change, a strategy is needed to help offset the loss of this designated land use type. If the area is to change, industrial land losses would need to be offset or mitigated through other measures, which have a cost associated with them.
- A change in land use allowances would create significant new development potential and result in an increase in residual land value in the area of change. This increase in land value would benefit private property interests. Through a public-private partnership model, some of that value increase can be reallocated to create more widely shared public benefits.
- The housing opportunity created by a potential change in land use is significant. While capacity for needed housing exists in other locations, market conditions are favorable to housing development in the Northwest Portland study area. This may facilitate development of housing more rapidly in Northwest Portland than in other parts of the city.

- The surrounding land use context is industrial land to the north and high density mixed use residential to the south. Changes in the study area, and introduction of residential and mixed use development could impact the viability of industrial uses at the northern edge of the proposed area of change.
- New investment in the Northwest study area could potentially affect rent levels in the area or precipitate other new development that could affect existing residents. While the overall supply of housing units and regulated affordable housing units would be expected to increase under the proposal, some residents in lower value structures could be at-risk for displacement due to changing market factors. Residential displacement within the actual area of proposed land use change could occur, but the number of residents affected would be low because very few housing units currently exist in the area.
- At the citywide scale, Portland does not need additional land for mixed use residential development; there is enough vacant and underutilized land in that zoning category to meet expected market demand over the next 20 years. However, there is strong demand for new housing in inner Northwest Portland. That area of the city has less available land than many other areas of the city, and achievable rents are higher. The stronger market, and localized land scarcity, provides stronger market feasibility than some other large opportunity sites near the Central City, and potentially a larger increase in land value with rezoning. The increase in land value creates more space for a discussion of public benefits while still producing profit for private partners.
- Development of the land in a more intense form will result in additional costs for transportation and other urban infrastructure – this includes costs for construction of new streets, and local match obligations for streetcar extension infrastructure. These costs may potentially be addressed through value creation or other means.
- A portion of the value created through land use policy changes could be used to provide public benefits such as additional affordable housing, or deeper affordability of future units. Affordable housing has been identified by City Council, as well as MP2H project stakeholders, as a policy priority.
- A portion of the value created could potentially be used to provide other public benefits such as affordable commercial space, parks/open spaces, or address other costs for “green features” such as ecoroofs, but the total amount of potential benefits associated with increases in land value is limited. Some public benefits may not be financially feasible, based on value creation alone.

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Montgomery Park to Hollywood Transit and Land Use Development Strategy

Equitable Development Report

Appendix

- A. Community Based Organization (CBO) Reports
 - 1. Friendly House, Inc.
 - 2. Northwest Industrial Business Association/Columbia Corridor Association
 - 3. Hollywood Senior Center/Urban League of Portland
 - 4. Micro Enterprise Services of Oregon (MESO)
- B. Prosper Portland Memo/IGA Close Out
- C. Northwest Portland Opportunities and Challenges Report, EcoNorthwest

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**A.1: Community Based Organization (CBO) Report:
Friendly House, Inc.**

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Montgomery Park to Hollywood Study – Interim Outreach Report Grantee: Friendly House, Inc.; December 2020

Friendly House is proud to participate in the Montgomery Park to Hollywood Study (MP2H) as grantee for outreach and a member of the Project Working Group. Despite challenges of pandemic proportions, Friendly House has made progress toward engaging the NW community and creating meaningful and informative discussions. Our goal has been and continues to be the amplification of underrepresented community members.

Throughout its history Friendly House has adapted to meet the needs of people living in Northwest Portland and the urban core. This approach has allowed Friendly House to remain nimble over the years, responding to new needs as they arise. Today, Friendly House is a modern-day settlement house whose primary goal is to build community from the ground up. The purpose of our involvement in this project is to serve through representation.

Grant Background/Purpose

The City of Portland released a request for grant-funded outreach proposals to help inform the Montgomery Park to Hollywood Transit and Land Use Development Strategy (MP2H). The MP2H is a city effort to create an equitable development plan for transit-oriented districts in NW Portland and NE Portland. The MP2H study will consider land use and urban design, economic development, and opportunities for community benefits possible with a transit-oriented development scenario, including a potential streetcar extension. The project will also consider how such opportunities could support the City's racial equity, climate justice, employment and housing goals. The work is funded in part by a Federal Transit Administration (FTA) grant. In NW Portland, the study is exploring alternative land use scenarios to support a transit investment or future streetcar extension to Montgomery Park.

The main purpose of the grant-funded outreach was to broaden outreach to underrepresented communities (BIPOC, low-income, seniors, immigrant and refugee communities) through community-based organizations. Friendly House submitted a

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grant proposal to provide outreach to the communities they serve. The Friendly House proposal was selected by the City in Spring 2020 and work began on finalizing a grant agreement.

Project Staff

Joy Pearson, Volunteer Manager
Denise Lafond, Director of Operations

Methodology

Our methodology for reaching these community members went through many adjustments as COVID-19 unfolded. Our initial plans for in-person outreach and discussion gave way to three online forums, write ups in Friendly House newsletters, and emails. More specifically:

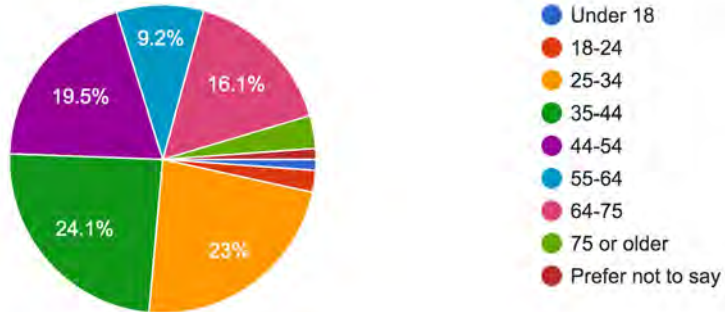
- Virtual newsletter with MP2H information sent to 2,500+ households in June and August
- Newsletter sent by mail to 2,000 older adults and elderly LGBTQ members
- 100 survey responses from members of the NW community
- 70 community members who had requested and received more information about the MP2H Study
- 3 Virtual Community Forums on July 5th, June 10th, and August 21st

The Virtual Community Forums yielded the most information from the participants, with conversations that brought up information not included in the surveys we provided—the scope of the potential project's impact on the houseless community, for instance.

Below you will find more detailed information that we have gathered from these efforts. Graphs included are from the electronic survey, and quotes are taken from participants from all platforms.

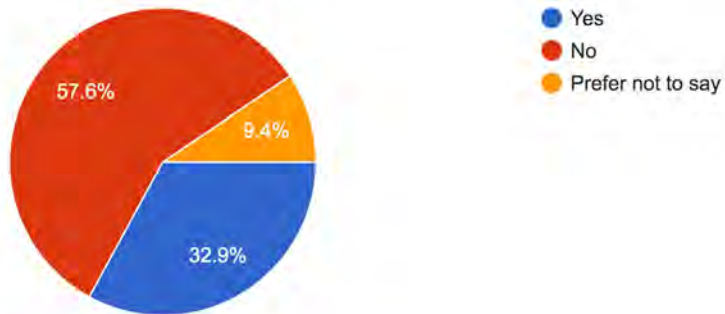
What is your age range

87 responses



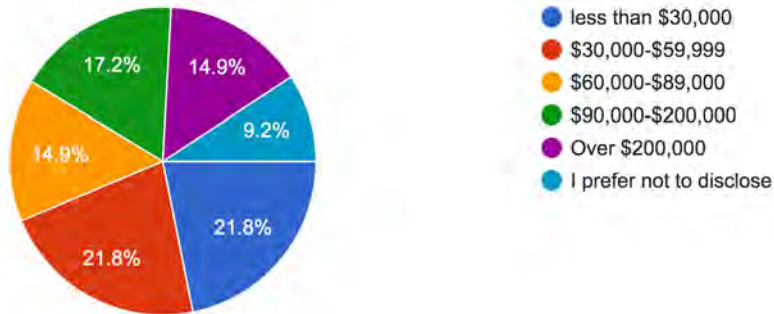
Do you identify as a member of the LGBTQ+ community?

85 responses



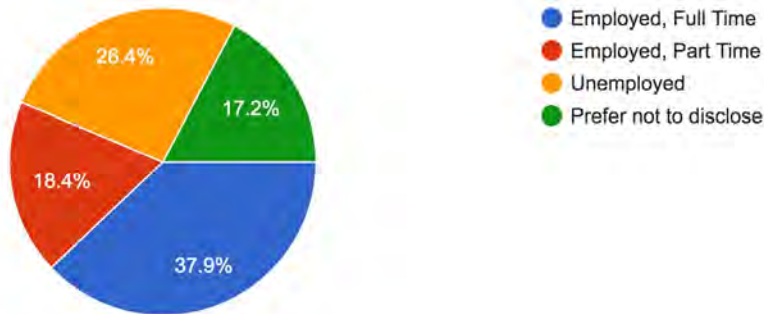
What is your household income?

87 responses



What is your employment status?

87 responses



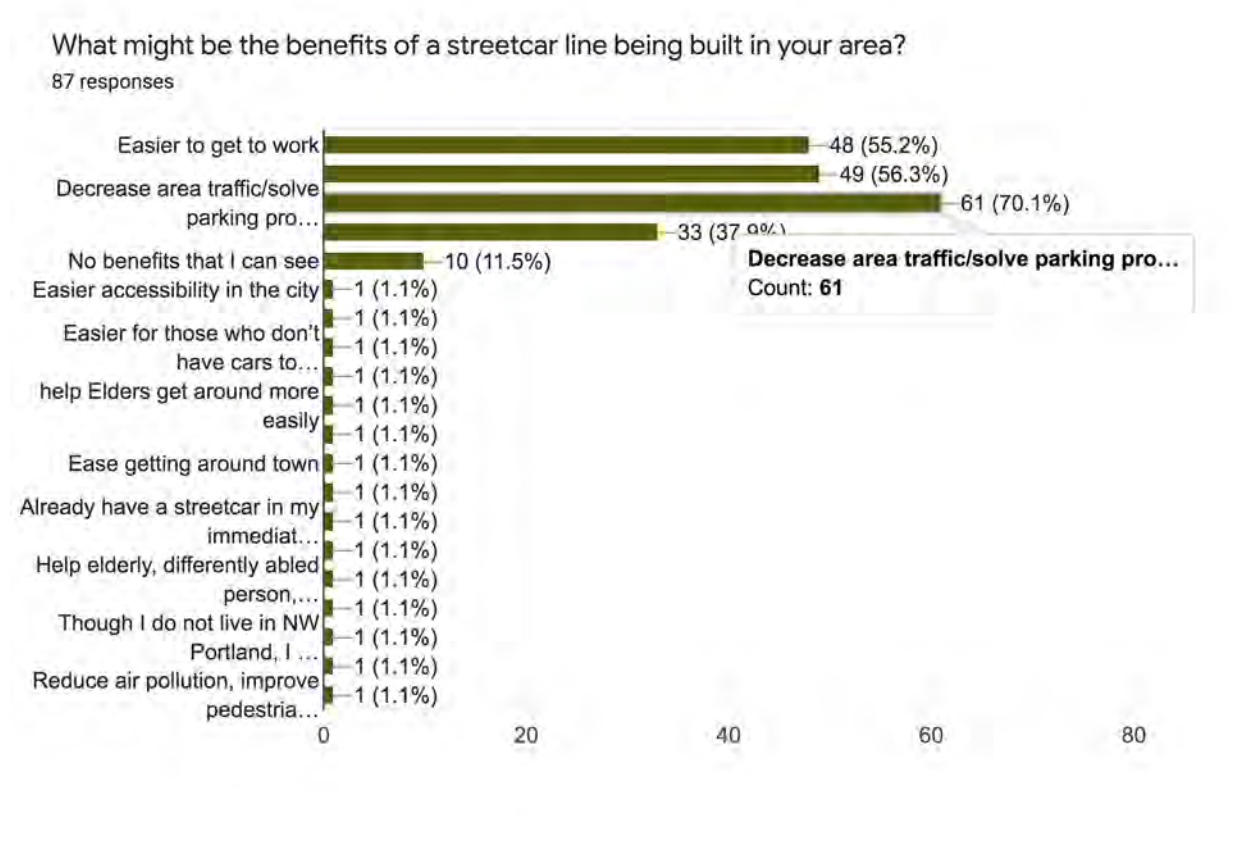
Our Virtual Community Forums offered more diversity, with exactly half of the participants coming from the BIPOC community, and a more comprehensive age range. The turn out for these events was more modest than we had anticipated, with our largest group being six participants. Twenty people in total attended the forums over the three dates. Roughly 25% of participants chose not to share demographic information.

Findings

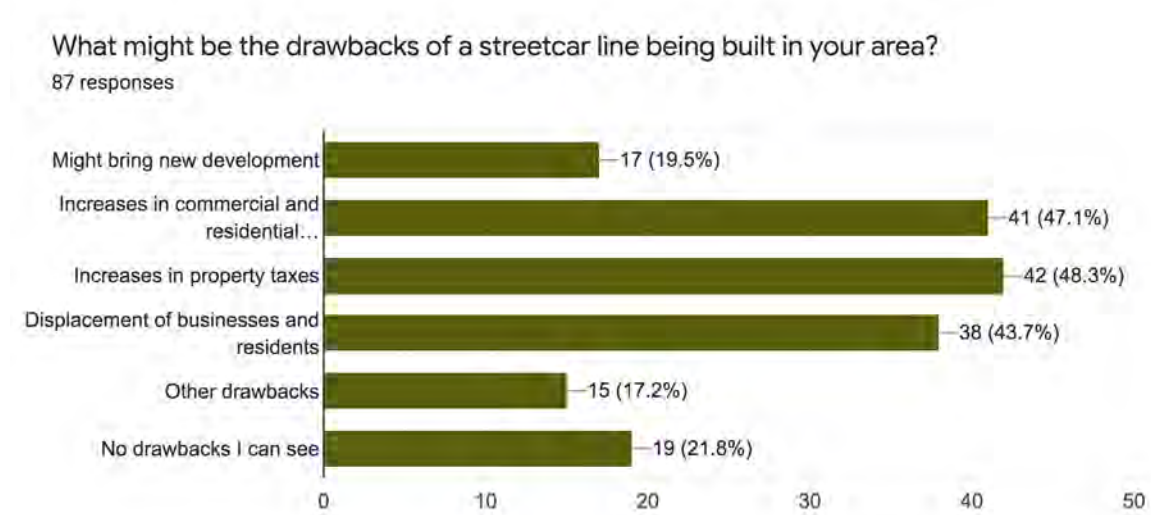
The following is a summary of findings from Friendly House outreach efforts to date. The tables represent responses from the email survey. This survey was given to the Virtual Forum participants, as well as those who inquired but were unable to attend the forums. These questions do not represent the scope of the conversations however, so notes have been attached from those meetings.

Survey Questions and Results

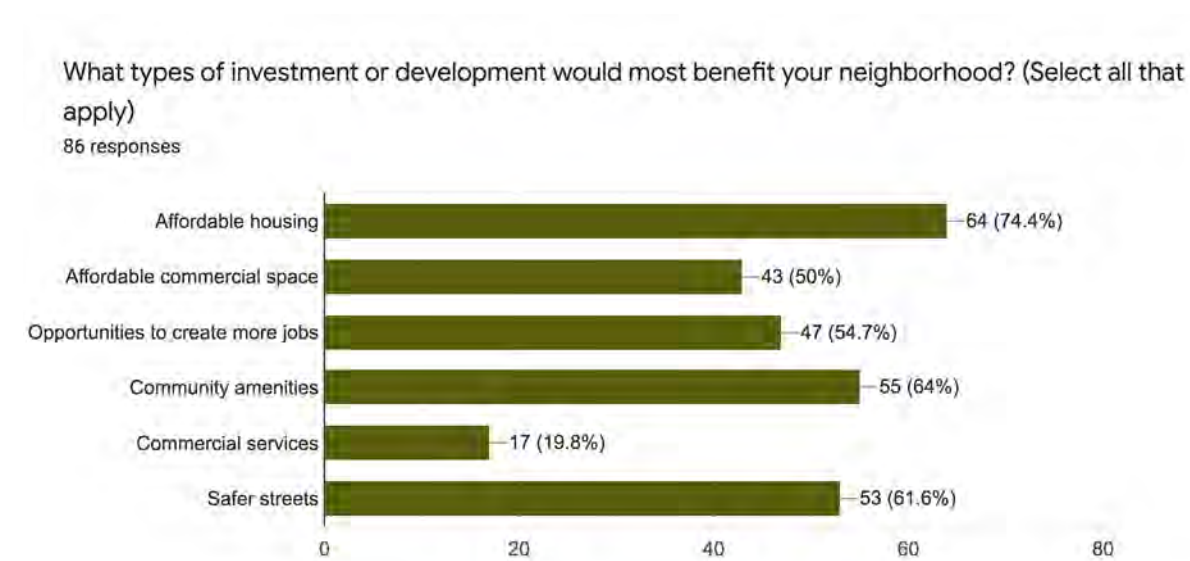
What might be the benefits of a streetcar line being built in your area?



What might be the drawbacks of a streetcar line being built in your area?



What types of investment or development would most benefit your neighborhood?



The most provoking topic has consistently been housing: the cost, the impact on the community, and the houseless in NW Portland. It is clear that the views and ideas around the topic vary, but most participants consistently express a few solidified ideas.

Roughly 75% of the members of the study share the desire for affordable housing. This statistic falls in line with the consistent expressed desire to see NW Portland approach the future with equity in mind. Other things we have heard regarding housing options:

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"I want to see rent control, we are facing a housing crisis in Portland, and it needs to be dealt with".

"Affordability is my main concern. I see rents that near \$4000 a month for a very modest home. There needs to be better rent control."

"Given that further development is almost inevitable, I'd like to see smaller, more architecturally varied (and environmentally sound) apartment complexes broken up by preserved green spaces. These buildings should offer a certain number of units for low-income residents as well as some integrated parking. The tendency toward apartment/mixed use complexes that devour half or even an entire city block undermines the livability of the neighborhood. What has drawn people to NW Portland has always been its intimate, slightly idiosyncratic character, and that is rapidly being destroyed by enormous new buildings. Meanwhile, the uniformly high housing costs deter many potential residents and businesses."

"Something done about the incredible rise in homelessness!"

"With rising rents and burdens of student loan debt, it would be nice to see housing options for college graduates who carry loans. This will draw young, educated individuals to the area who may otherwise not be able to afford it."

"All of Portland, including NW Portland need affordable housing now! This would prevent adding to the current homeless crisis our city is afflicted with that is evident throughout every part of our city. We don't need another street car...we need to get people off the street by creating resources, especially affordable housing."

"Don't want developers offering housing that is NOT affordable."

"Further gentrification is a serious problem. Steps need to be taken to ensure equity, diversity and justice for people of color (and other marginalized and/or low-income folks) are foremost among considerations for any development projects."

In both the virtual forums and the stand-alone survey responses, housing was a leading topic. In the forums, conversations about this particular issue were sprawling and energetic, with very passionate opinions being expressed.

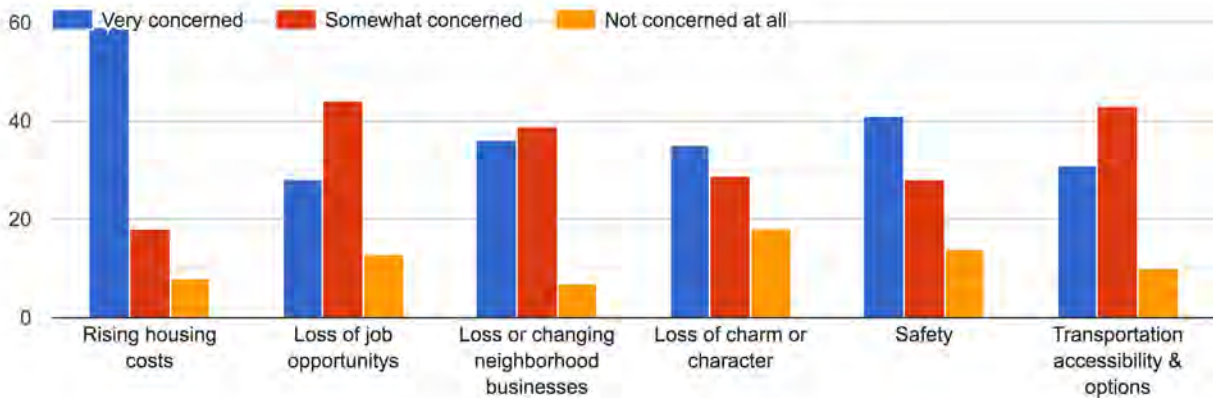
In addition to affordable housing, access to parking, specifically in light of possible changes to the area, was referenced multiple times.

"New apartment buildings keep going up while parking stays the same or decreases. Personally, I have seen the loss of 8 parking spots on the two streets directly adjacent to my apartment and know that more will be lost in the upcoming changes to the bus line. This is very frustrating, especially with the high rents we pay in this area."

“There is already too much traffic and parking issues. And this would not solve the problem as more build will then occur, which will increase traffic. For some reason, the city seems to think people will use public transportation. It seems to be shown that the opposite is true!”

What are your greatest concerns for NW Portland?

What are your greatest concerns for NW Portland?



This graph shows the recurrent concern in neighborhood safety. Many people expressed concern about this topic, and in one particular Zoom Community Forum we held, 4 out of 6 participants cited “feeling safer” as a desire for the neighborhood. Participants have noted zoning changes and public transportation as both the medicine and the cure.

“I’d like to see a return to community policing efforts, more affordable/ subsidized housing opportunities, programs that include increasing opportunities for people of color to have economic success and embracing differences. Friendly House could be central to these efforts.”

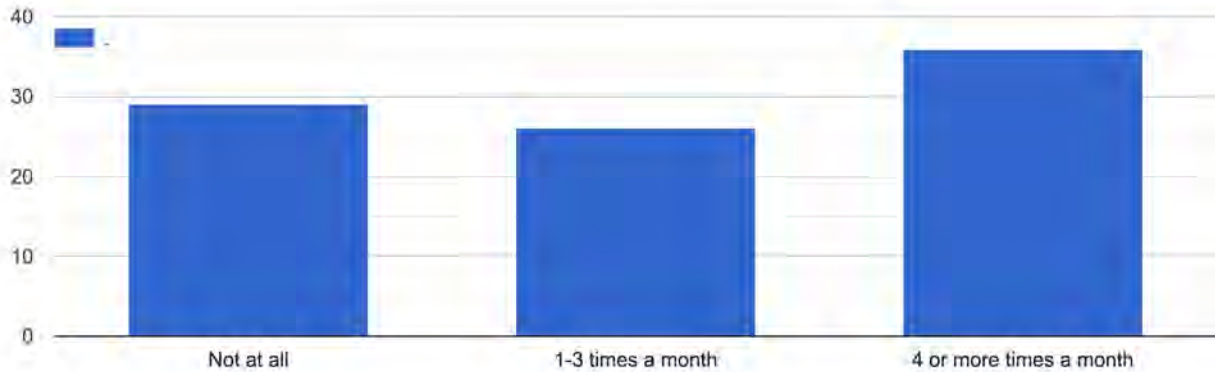
“Great concern about garage/car/residence break-ins, and increasing homeless camp issues (drugs, garbage, safety).”

“The streetcar expansion will bring more people and crime into the neighborhood!”

“Having more affordable housing will help cut down on crime and get people off the streets.”

How many times a month do you use public transportation?

How many times a month do you use public transportation?



Conclusion

While the potential for change is exciting to many individuals who participated in this study, the overall conclusion Friendly House has drawn is the community will require more concrete solutions to existing issues in order to see a majority support from local residents. The challenges we faced in engaging the most vulnerable communities prevented us from gathering the amount of information we were trying to collect, although we do feel the findings are legitimate and fair. While Friendly House is pleased with the community participation to date, given the current circumstances, we are continuing to reach out to the marginalized communities in our area and share information regarding MP2H.

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Appendix

AMPLIFY YOUR VOICE



**THE CITY OF PORTLAND IS LOOKING TO THE COMMUNITY FEEDBACK
ON POSSIBLE STREETCAR EXPANSION IN NW PORTLAND**

**THE EXPANSION WILL IMPACT OUR NEIGHBORHOOD WE WANT TO
HEAR YOUR VOICE! FRIENDLY HOUSE IS INVITING YOU TO
PARTICIPATE IN A QUICK SURVEY (10 MINUTES MAX).
YOUR PARTICIPATION WILL MAKE SURE YOUR
HOPES AND CONCERNS ARE HEARD!**

**EVERYONE WHO FILLS OUT THE SURVEY WILL BE ENTERED IN A
DRAWING FOR GIFT CARDS AT SAFEWAY OR FRED MEYERS.**

INTERESTED?

EMAIL [JPEARSON@FRIENDLYHOUSEINC.ORG](mailto:jpearson@friendlyhouseinc.org) OR TEXT 503-482-2113



**THIS SURVEY IS BEING RUN BY FRIENDLY HOUSE, INC. IN PARTNERSHIP WITH
THE CITY OF PORTLAND. PLEASE CONTACT JOY PEARSON FOR MORE
INFORMATION ABOUT THIS PROJECT**

[Here is a link to the survey questions and responses in spreadsheet format.](#)

Wording used for Friendly House Flyer, email and physical copy

How would new or improved transit lines in NW Portland and changes in land use serve you?

The [Montgomery Park to Hollywood Transit and Land Use Development Strategy](#) (MP2H study) is exploring future transit options and possible streetcar expansion in NW and NE Portland. The City of Portland's bureaus of Planning and Sustainability (BPS) and Transportation (PBOT) are conducting the study over the next 12-18 months.

The NW portion of the study will focus on a possible transit line extension to Montgomery Park, including changes in land use to support potential transit improvements. The NE study is evaluating alternative routes to the Hollywood District.

Friendly House invites you to learn more and share your thoughts about these potential future changes!

We are looking for community feedback. For more information about the MP2H project or to participate in an upcoming survey or focus group, please register here: <https://tinyurl.com/FHsurvey52020>

Learn more about the MP2H study on the web: <https://beta.portland.gov/bps/mp2h>

NW Portland Streetcar Expansion

North West Portland is a unique part of Portland with charm and warmth unique to itself. As the City of Portland considers potential Streetcar expansion, they are seeking the opinions of the people who will be directly impacted by any changes, or lack of changes. By sharing your hopes, concerns, and wants, you will be providing critical information that will influence the decisions ultimately made. Let your voice be heard!

This survey is brought to you by Friendly House, a community and resource center located right here in North West Portland for over 90 years. We are committed to continuing our legacy of service by helping our community voice be heard about these significant issues. If you are interested in learning more about Friendly House, please visit our website friendlyhouseinc.org.

* Required

Email address *

Your email

Would you like more information about possible streetcar expansion in NW Portland?

- Yes
- No
- Maybe



What is your zip code? *

Your answer

What might be the benefits of a streetcar line being built in your area?

- Easier to get to work
- Bring more customers to local business
- Decrease area traffic/solve parking problems
- Might bring new development
- No benefits that I can see
- Other:

What types of investment or development would most benefit your neighborhood? (Select all that apply)

- Affordable housing
- Affordable commercial space
- Opportunities to create more jobs
- Community amenities
- Commercial services
- Safer streets



What might be the drawbacks of a streetcar line being built in your area?

- Might bring new development
- Increases in commercial and residential rents
- Increases in property taxes
- Displacement of businesses and residents
- Other drawbacks
- No drawbacks I can see

What are your greatest concerns for NW Portland?

	Very concerned	Somewhat concerned	Not concerned at all
Rising housing costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss of job opportunitys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss or changing neighborhood businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loss of charm or character	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation accessibility & options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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How many times a month do you use public transportation?

Not at all

1-3 times a month

4 or more times a month

Please express any additional ideas you have for NW Portland? What would you like to see? What are you afraid of seeing?

Your answer

What is your ethnicity? Feel free to leave blank if you prefer not to answer.

Your answer

What languages are spoken in your home?

Your answer



Are you a person living with a disability?

- Yes
- No
- Prefer not to say

What is your age range

- Under 18
- 18-24
- 25-34
- 35-44
- 44-54
- 55-64
- 64-75
- 75 or older
- Prefer not to say

Do you identify as a member of the LGBTQ+ community?

- Yes



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- NO
- Prefer not to say

What is your household income?

- less than \$30,000
- \$30,000-\$59,999
- \$60,000-\$89,000
- \$90,000-\$200,000
- Over \$200,000
- I prefer not to disclose

What is your employment status?

- Employed, Full Time
- Employed, Part Time
- Unemployed
- Prefer not to disclose

What form of transportation do you use?

Your answer



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A copy of your responses will be emailed to the address you provided.

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This form was created inside of Friendly House, Inc.. [Report Abuse](#)

Google Forms



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**A.2: Community Based Organization (CBO) Report:
Northwest Industrial Business Association/Columbia Corridor
Association**

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Findings from the Northwest Streetcar Extension Surveys

Conducted cooperatively between Northwest Industrial Business Association,
Columbia Corridor Association, and Working Waterfront Coalition

December 2020

Introduction

The extension of the Portland Streetcar into the Northwest Industrial Business district would permanently change the nature of the Guilds Lake Industrial Sanctuary. The streetcar has long been acknowledged as a development tool, which generally requires rezoning. Even if no rezoning occurs, development of the streetcar would remove freight loading areas and would bring residential development closer to industrial uses resulting in conflicts between the different types of uses, such as noise and traffic.

While the loss of truck loading areas and residential buffers would create problems for industrial businesses, the major concerns are economic, not transportation oriented. The Portland Bureau of Transportation (PBOT) report "Preliminary Racial Equity Analysis of NW Streetcar Expansion and Related Land Use Changes" suggested that national statistics of industrial jobs be verified with those jobs in the Northwest (NW) study area. Portland's industrial sector employs more people of color in family or middle wage jobs than any other sector. The survey responses verify this fact for the NW streetcar study area. In addition to high percentages of Black, Indigenous, and People of Color (BIPOC), our survey respondents were twice as likely to be lesbian, gay, bisexual, transgender, queer, or questioning (LGBTQ) as the general Portland population.

As you evaluate the economic impacts of the NW Streetcar extension, keep in mind that Portland has essentially no available industrial land. If an industrial business must relocate from NW Portland, they will almost certainly be forced out of the City of Portland. This would likely result in a loss of traded sector income for the city, which would have much more impact on the city's economy than non-traded sector income. More importantly, it would be a threat to family or middle wage jobs for employees that are disproportionately BIPOC and LGBTQ. This raises serious equity concerns that must be addressed.

For further information on how Portland's industrial sector reduces the middle wage job gap and employs higher percentages of people of color, refer to the Portland Bureau of Planning and Sustainability report on "The Industrial Middle of Portland's Changing Income Distribution." This 2014 report is expected to be updated in 2021 to show continuing trends.

While it is possible for a business to relocate to a different county which may also be where the employee lives, we were unable to make such conclusions. Instead, we asked employees if this extension would connect housing with jobs and if it would expand job access for minority and marginalized communities.

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Project Staff

Craig Hamilton; Northwest industrial Business Association
Greg Madden; Northwest industrial Business Association
Ellen Wax; Working Waterfront Coalition
Molly Taylor; Columbia Corridor Association
Marissa King; Columbia Corridor Association
Corky Collier; Columbia Corridor Association

Purpose & Background

The City of Portland released a request for grant-funded outreach proposals to help inform the Montgomery Park to Hollywood Transit and Land Use Development Strategy (MP2H). The MP2H is a city effort to create an equitable development plan for transit-oriented districts in NW Portland and NE Portland. The MP2H study will consider land use and urban design, economic development, and opportunities for community benefits possible with a transit-oriented development scenario, including a potential streetcar extension. The project will also consider how such opportunities could support the City's racial equity, climate justice, employment and housing goals. The work is funded in part by a Federal Transit Administration (FTA) grant. In NW Portland, the study is exploring alternative land use scenarios to support a transit investment or future streetcar extension to Montgomery Park.

The main purpose of the grant-funded outreach was to broaden outreach to underrepresented communities through community-based organizations. Northwest Industrial Business Association (NIBA) submitted a grant proposal to provide outreach to the communities they serve – primarily industrial workers and firms in the NW industrial area. Workers in industrial firms typically benefit from middle wage employment that does not require a four-year college degree. In addition, these jobs are filled by significantly higher percentages of underrepresented communities including the BIPOC and LGBTQ communities. The NIBA grant proposal was selected by the City in Spring 2020 and work began on finalizing a grant agreement. The Columbia Corridor Association (CCA) later became the fiscal agent for the NIBA grant, and the official grantee, in partnership with NIBA.

Approach

Our original strategy was to walk the streets of the project area and set up survey workshops. COVID-19 limited us to digital and phone communications.

We began with lists of businesses and property owners provided by the Bureau of Planning and Sustainability staff. We then added business lists provided by Northwest Industrial Business Association (NIBA) and Working Waterfront Coalition (WWC). We then collated the list and confirmed which contacts were in the project area.

Outreach began with emails to all the addresses we had on the collated list and publicity on our respective websites. Then we made phone calls to as many on the list as possible. Many of the phone numbers were incorrect, requiring internet searches and queries to individual companies. Once contact was made with a company, we stressed the desire for responses from employees.

Other than requesting that employees fill out the survey, there was no prioritization of which companies or individuals were called. We simply called as many as possible and referred them to the four surveys.

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Four surveys

We created four surveys that paralleled each other. Most questions were the same or slightly reworded. Some questions were focused on the target audience. For example, we asked business owners about the average wage at their site; however, we asked employees about their specific wage.

We had a total of 92 responses. Response summaries are available at these links.

- [Employees](#): our main focus and highest response rate of 44.
- [Business Owners](#): 27 responses.
- [Property Owners](#): the group with the most to gain from an extension, 11 responses.
- [Outside the study area](#): in NW Portland but not in the defined project area, 10 responses.
- [Comments from all respondents](#): collated open-ended comments from all four surveys.

All four summary documents are available at the links above or at www.cca.works/#news/409.

General Findings

The four survey groups responses were remarkably similar and the early survey responses were very similar to the later responses. In addition, employee demographics mirrored known industrial employee demographics in the City of Portland. The lack of wide variability and mirroring of demographics provides validity that the data is reliable.

Property Owner responses surprised us a little. This is the group with the most to gain from a streetcar extension. The fact that their answers did not deviate significantly from the other groups gives credence to the overall results. For example:

- We asked: “In the long term, what do you think is the best use of land in the study area between NW Vaughn and NW Nicolai?” You would expect the property owners to lean strongly toward mixed use or employment because these result in higher rents and property values. However, property owners responded with 36% for Industrial and another 36% for Enhanced Industrial, with only 9% for Employment and 18% for Mixed Use. Other groups were solidly in favor of Industrial or Enhanced Industrial. Property owners showed slightly more tendency toward change, but still wanted to maintain industrial.
- Another good example is Property Owners response to: “From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?” Property Owners responded with a higher percentage of “yes” responses than the three other groups, but was still less than half. Fifty-five percent of Property Owners felt this streetcar extension was not an equitable investment.

Most of our focus was on the Employee responses for a number of reasons:

1. Business and property owners have bigger investments in property and more reason to have a biased perspective.
2. The point of connecting housing with jobs is primarily for employees.
3. There are far more employees than business or property owners.
4. Industrial wages average over \$50,000/year, with a low number of high or low wages. This means that industrial jobs are our best tool to slow the growing wage gap.
5. The industrial workforce has higher percentages of minority employees than most other sectors.
6. The other sectors with high percentages of minority employees have much lower wages (service

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and retail sectors). The industrial sector employs more people of color in family or middle wage jobs than any other sector.

We knew these general facts in advance; however, we did not have data specific to the streetcar project area. The survey responses did not surprise.

- 43% of employees earn **over** \$27/hour; only 4.5% earn less than \$20/hour
 - Yet only one out of 44 lived in NW Portland.
 - Pretty evenly spread across the metro area, with higher numbers residing in other counties.
- 84% commute by car
 - The reason is evident in the comments we read about the challenging transit commutes, including very long transit commutes and multiple transit transfers.
 - Several suggested improving bus service instead of adding streetcar as a better improvement to their commutes.
- Would you use a streetcar? 75% said no.
- Would the loss of on-street parking be bad? 70% said yes.
- Would a streetcar help connect housing to jobs? 86% said no.
- Would this expansion improve equity? 72% said no.

Overall, results were not surprising. A streetcar extension is a land development tool. Changing the land use can only result in a loss of industrial land, which inevitably leads to a loss of middle wage jobs, bigger middle wage gap in the city, and less equity for BIPOC and LGBTQ communities.

Demographics of the Employee respondents

With 44 employee respondents, the statistical deviation is likely to be significant. Demographic data for the other survey groups is available on the raw data. We did not include it here because our concern is primarily for the employees.

	National Average	Portland	Employee Responses
White		77%	50%
Black		5.8%	9%
Hispanic		9.7%	25%
Asian		8.1%	9%
LGBTQ	4.1%	(6.2% in San Fran) 5.5%	9% + 6.8% uncertain
Disability	(under 65) 9.2%	Unknown	4.5%

Ethnicity data is from US Census Bureau, 2019 estimates.

LGBTQ data is from The Oregonian, January 9, 2019; and The Street, May 31, 2018.

Disability data is from US Census Bureau, Americans with Disabilities, 2010; and 2019 estimates.

Demographic results mirrored industrial sector demographics for the City of Portland. The percentage of BIPOC that work in the industrial sector is roughly twice as high as the general City population.

The only demographic surprise was the high number of LGBTQ industrial employees. We are not aware of any similar data. Portland has the second highest LGBTQ percentages in the country at 5.5%. Our

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respondents were 9%, plus another 6.8% that said they were questioning their identity.

We were not able to find adequate data on employees living with disability. We have no data for Portland. The closest we could find was the general U.S. population under 65, which includes employed and unemployed. This is clearly the weakest correlation in any of our data.

Conclusion

The Portland MP2H project is proposed as an equitable development plan; however, should the industrial land in the study area be rezoned, there will be proportionally fewer BIPOC and LGBTQ employees earning middle income wages (approximately \$50,000 annually). Depending on how much retail and service sector moves into the study area, it's possible that high BIPOC and LGBTQ percentages will get jobs, but the average wage will be slightly less than \$30,000 annually. It's reasonable to say that replacing a \$50,000/year job with a \$30,000/year job is not in the spirit of equity.

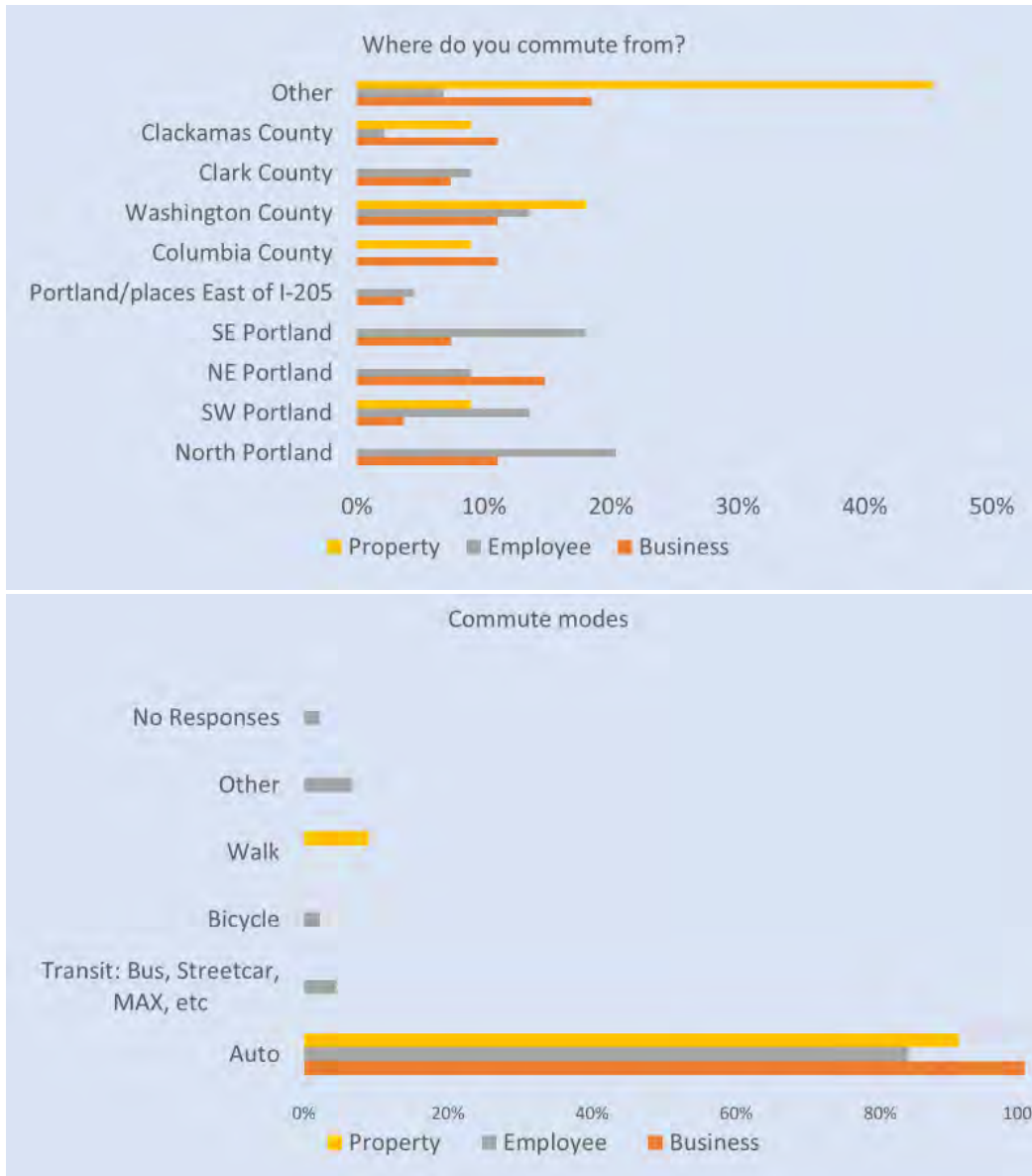
A common claim is that redevelopment will result in more high wage jobs. While this is accurate, it's also true that the percentage of BIPOC employees in those jobs is dramatically lower, not to mention the negative impact on people without four-year college degrees. In addition, BPS data shows there would be few new jobs in the NW study area—most would be transferred from other parts of the city. We can find little to applaud in a proposal that would result in fewer overall jobs and dramatically fewer BIPOC employees earning family or middle wages. Not only would the NW streetcar extension bring a negative financial impact to the city, it would be contradictory to our desire for improved equity. The only group that is likely to benefit are businesses that recently purchased property in the study area, in anticipation of windfall profits that come from rezoning.

While it's possible that some industrial activity will remain in the area, experience in other parts of the city such as Central Eastside show the obvious: industrial activity cannot be sustained on land that is zoned for higher value, such as office and residential. First, there is pressure to earn the highest rent potential for each type of zoning—most property owners would opt for whatever type of tenant will pay more. Second, reduction of parking and loading/unloading makes it difficult for industrial activities to continue use of large trucks and equipment. Third, noise complaints are common when industrial zoning is in close proximity to office, retail or residential. It is unreasonable to think industrial activity will remain at current levels if the project area is rezoned.

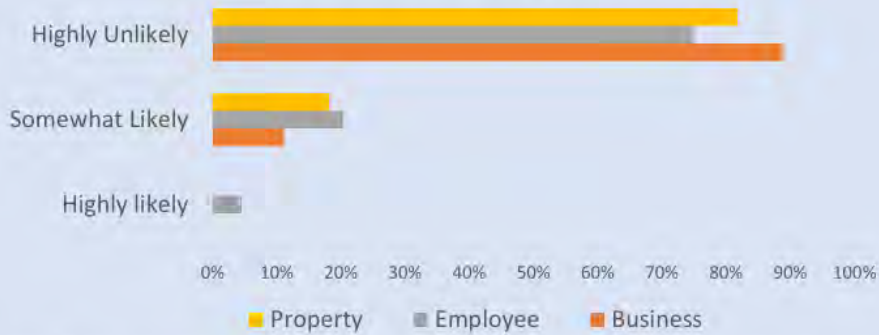
The additional concern for the City of Portland is that there is virtually no available industrial land remaining in the city. Any industrial businesses that move from the study area will almost certainly be forced out of the city. This is reinforced by the survey answers and comments. The result is increased inequity (loss of middle wage jobs for BIPOC and LGBTQ communities) and the likely decrease in traded sector.

It's undeniable that the result of a streetcar extension and the requisite rezoning in NW Portland will be a lower percentage of BIPOC and LGBTQ employees making middle wages in the City of Portland. Should this proposal move forward, we recommend mitigation for the negative equity impacts. Development that profits on the backs of BIPOC and LGBTQ employees should not be acceptable.

Survey Highlights

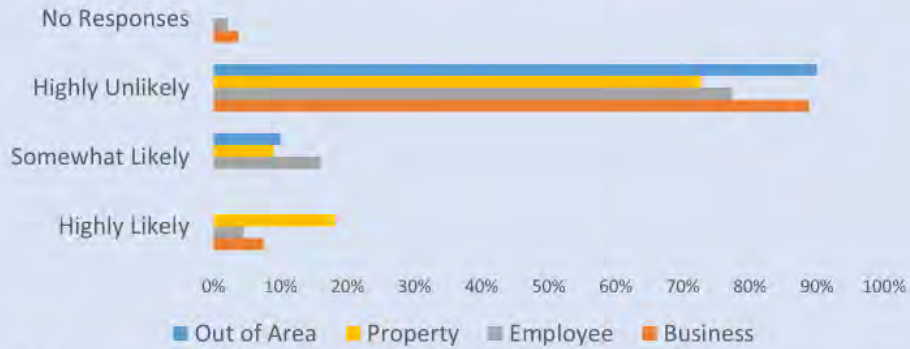


Would you use the streetcar for your commute?



Note: Written comments pointed to a desire for better bus connections rather than adding a streetcar. There was little opposition to the streetcar as a commute mode as well as little support.

Would you use the streetcar for meetings or lunch?



Note: In a recent meeting with the CCA Board of Directors, the Executive Director of Portland Streetcar Inc. pointed out that the “likely” responses were much higher than the current daily ridership. Unfortunately, this is a misinterpretation of the data. The question asked if they would ever use the streetcar, not if they would use it daily. It would be inappropriate to translate these responses into daily ridership.

Do you think adding streetcar access and rezoning land for residential use in the NW Industrial district study area helps connect housing and jobs with transit services?

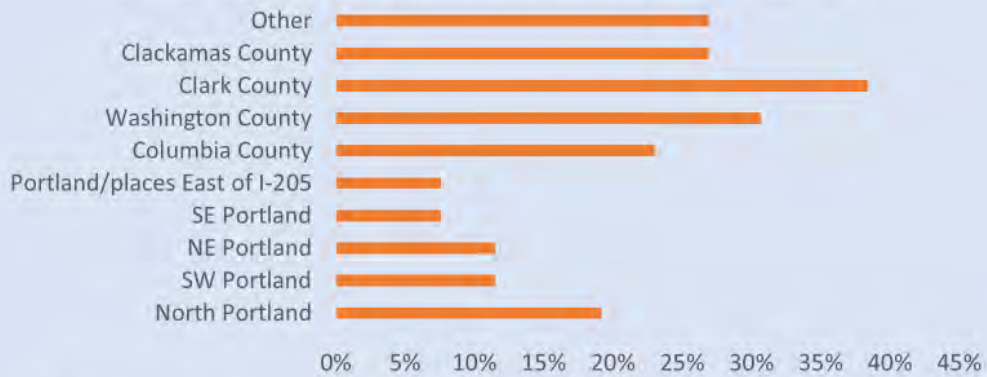
Percentages who answered “no.”



"From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?"
 Percentages who answered "no."

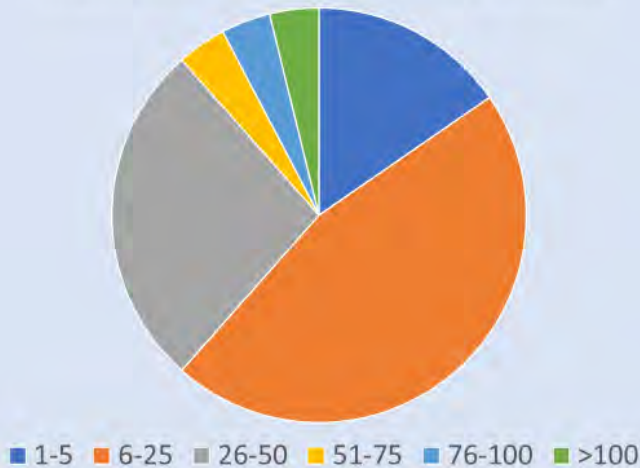


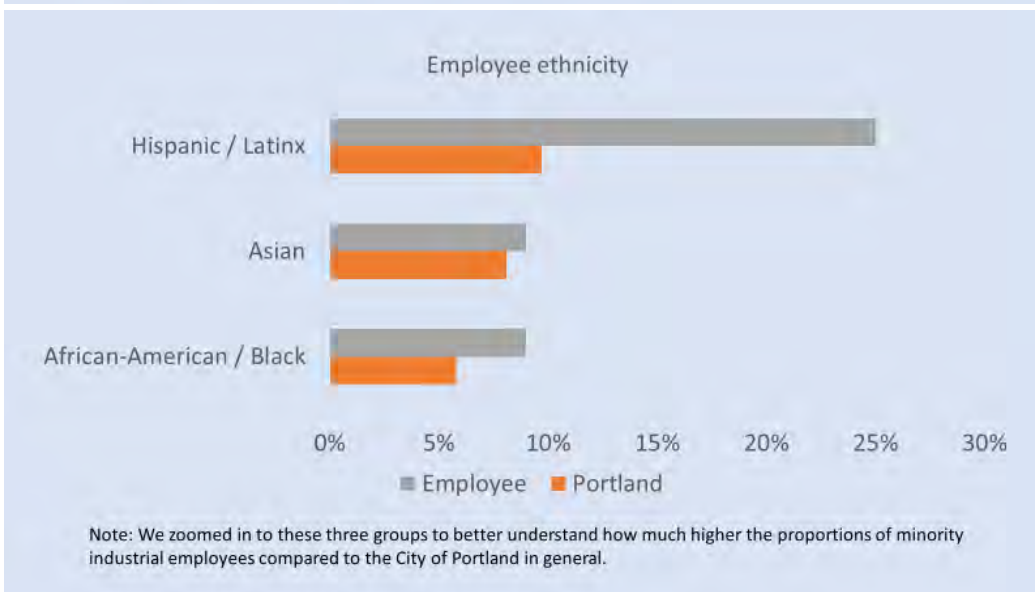
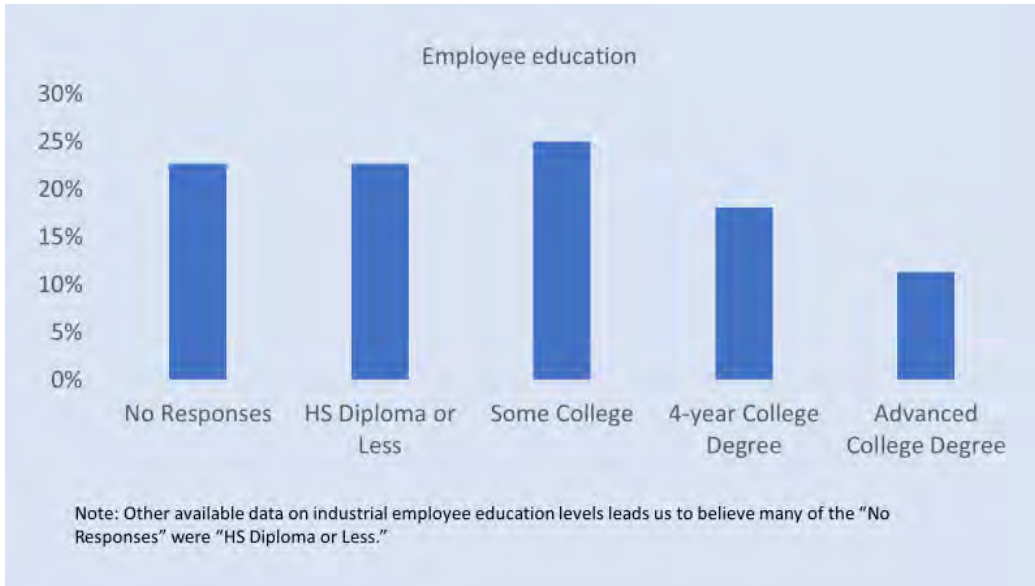
We asked business owners, what locations are viable for industrial firms?

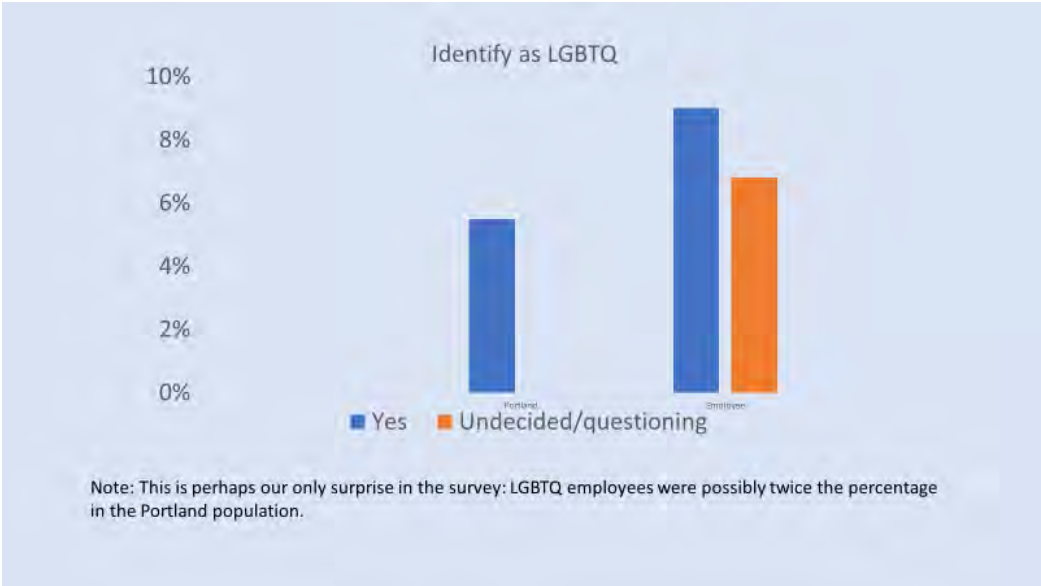
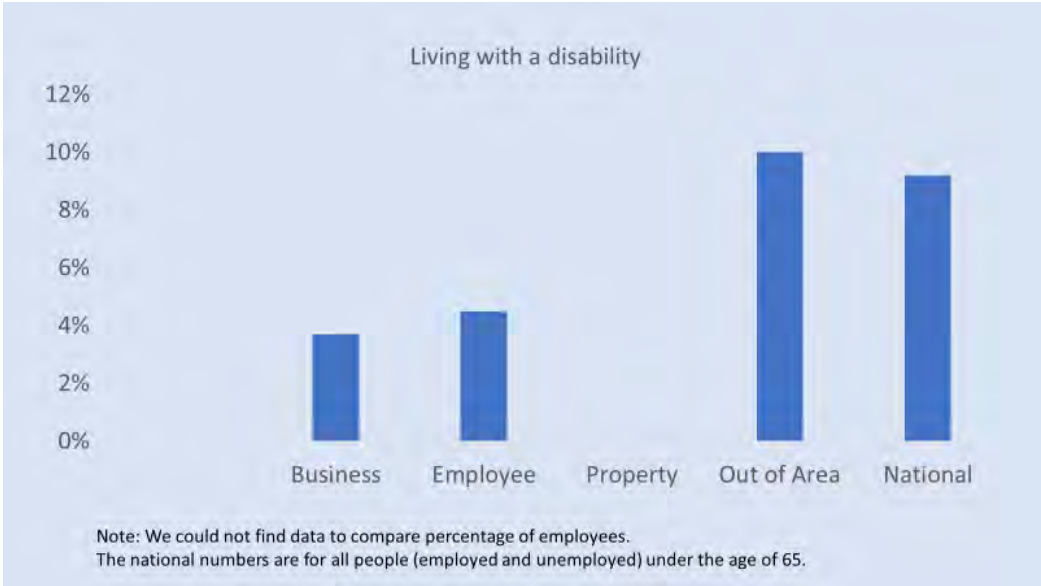


Note: The City of Portland's 20 year industrial land forecast shows virtually no excess land. The number is likely to be worse because that forecast was based on 60% brownfield redevelopment, which is not being achieved. While 20% of respondents may think North Portland is viable, less than 5% would be able to relocate there.

Respondents are mostly very small businesses







NIBA/CCA MP2H Survey

Open-Ended Responses to Survey Questions

Q1: Would you use the Northwest extension of the Portland Streetcar to commute to work?

Employee Comment:

- My commute now (before COVID) is home to MAX by bike, MAX to Providence Park, then bike on the NW 18th/19th corridor. I might modify my commute to use the streetcar.
- I would if it ran up Burnside, but I think we all know that isn't likely. I'd take transit, but we have a kid in school that I have to pick up after work.
- My place of business would no longer exist
- I live at a NW Portland address in WA county. Driving to work (in NW Industrial area) takes me 20 min or less. The trimet trip planner shows it would take me 75 min to get there by public transport-that's if I am willing and able to walk a total of 2.8 miles, half of that along a road with no sidewalk. Having a streetcar line take me a short part of the end of that trip would not make a difference.

Business Owner Comment:

- I oppose the "gentrification" of the NW Industrial Area. Recent "improvements" to N.W. Industrial Street have significantly created safety issues that were not in evidence before the "improvement" of the street.
- Never. One of my roles is visiting customers and I need an auto to do this.
- I'd use it to travel between the office & area restaurants/shops once COVID is a bit more contained.
- no because it does not drop me off at my office

Property Owner Comment:

- No, not ever

Out of Project Area Comment:

- No responses

Q2: Would you use the streetcar to go to lunch, get to meetings, etc.?

Employee Comment:

- I love exploring NW on my lunch hours and after work, having the streetcar available would be wonderful. I would also use it after work to get to the east side once per week for an evening class.
- Love being able to hop on the streetcar as it is, this would make lunch errands and getting around even easier.

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- My place of business would no longer exist
- Most of our job sites are in the West Hills and there is effectively no public transportation access to them, so having it near our office would not help for meetings.

Business Owner Comment:

- No responses

Property Owner Comment:

- My staff and myself would absolutely use the streetcar to access restaurants and other businesses in NW and downtown.

Out of Project Area Comment:

- No responses

Q3: Do you think your firm or others in the study area would continue operations in this type of environment?

Employee Comment:

- We would move operations, potentially to out of state

Business Owner Comment:

- Depending on how it's done. Protect the industrial zoning - do not allow properties to change zone. The value rises because a new alternative use of the land is offered by the city when they re-zone. Just don't change the zoning and the values will stay stable for the industrial function. A very narrow transit corridor with very limited zoning change directly adjacent to the corridor might be a viable compromise, but rezone of properties a block or more away from the corridor should be avoided.
- Short term yes, long term unlikely.
- I think eventually many industrial users will be forced to leave the sanctuary due to encroachment of non-industrial parties. Increased property values will mean increased property taxes. At some point the land owner will figure out the land value/building potential is higher than profit from the current operation.
- Impacts from traffic flow has resulted in companies in similar situations moving already. Relocation is a possibility.

Property Owner Comment:

- Yes our business and our tenant's business is in the area for the long haul.
- trucks can't off load or load materials with streetcar on our street.

Out of Project Area Comment:

- Big money property owners are already lining up to resell their land for higher, residential zoned prices. Industrial uses would go away, voluntarily or involuntarily, depending on whether they

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own or lease their property. Employment would go from people making \$60,000 to \$80,000 a year, with benefits, to part timers making \$20,000 to \$30,000 and no benefits. Is that what the City wants?

Q4: How might loss of on-street parking and freight loading affect your operations?

Employee Comment:

- Street parking is difficult currently. My company receives semi truck deliveries on a regular basis and this would be negatively affected by a streetcar in the area.
- We have people from all over the PDX area come to shop, as we are a retail business. We are already strapped for parking as it is. I would love to see a parking garage in NW if streetcar construction affects current parking availability.
- I don't use the parking. We have talked about moving freight loading from the front of the building to the back (2350 NW York) and building a new freight dock on the back of the building. The business (Trial Guides) is not retail, there are about 10 employees and a warehouse full of books.

Business Owner Comment:

- This very issue drove our business out of the Pearl district, after three plus decades in that area. If the same policies are applied here, it will happen again.
- we need more parking. Many employees commute by car from other counties because housing costs are so high in PDX.
- Even with zone changes to match the needs and uses, it is still very important to provide enough freight loading/unloading area due to its importance
- If the streetcar is just the beginning of taking over the GLIS, this will certainly affect traffic and parking in the future. Nicolai is already a challenge for trucks and autos during peak periods. The intersection at 23rd and Vaughn is a nightmare and bottleneck!

Property Owner Comment:

- Our building is an industrial facility and relies on street parking and truck dock loading and the proposed street car line could impact and some investment would likely be needed in the building to adapt to new uses.
- workers to our sites do not live on a rail line
- I own a parking lot in the area.

Out of Project Area Comment:

- No responses

Q5: Do you think adding streetcar access and rezoning land for residential use in the NW Industrial district will help workers live near where they work and/or provide a viable commute option?

Employee Comment:

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- Part of the goal of streetcar expansion is to connect housing and jobs with transit services to help workers live near where they work. But if family wage industrial jobs get replaced by residential, then you fail to meet that goal.
- I am all for streetcar expansion! But please still seek to accommodate those who MUST commute or come into NW PDX by car because a bus or streetcar doesn't reach their area.
- Yes. We will soon be empty nesters, and are thinking of moving to NW Portland nearer my (and my husband's) work. More housing will hopefully make it more affordable.
- Housing costs in close-in NW are too high for our employees, additional street car wouldn't help that.
- Already have employees using public transportation to get to/from work within the proposed area

Business Owner Comment:

- Unless "affordable housing" is built this will not benefit my employees. I lived in this neighborhood for 2.5 years and know that existing rent is very high.
- Our employees need vehicles to get to work, and to job sites or work sites, the streetcar would not be able to replace the need for vehicles.
- Most employees come in from Vancouver. 95%.
- Not necessarily - if your justification is to bring workers to jobs, but in the process the jobs leave the area, it is pointless. Does the transition have to favor one or the other (residential vs industrial)? Why not a very narrow transit corridor, limiting any new residential development to a narrow zone, while maintaining traffic facilities adequate for trucks and private vehicles.
- All our employees like to drive. Adding streetcar will not change behavior.
- None of our employees live in an area that would benefit by the addition of the streetcar. None currently use public transportation nor would they likely do so in the future.

Property Owner Comment:

- most of my tenant employees work outside the area and wouldn't rely on a streetcar to work. Also swing shifts probably couldn't use it due to hours of operation.
- Our business is light industrial and adding the streetcar would absolutely help keep employees close and happy being able to move around without the use of a car and would allow them to enjoy a more lively neighborhood that supports better food and social gathering opportunities. NW Industrial feels like a wasteland right now.
- Which jobs are they talking about? There are already jobs in the NW Ind. area. if they rezone it for residential, they are killing those jobs and or sending them somewhere else.
- probably good on balance.
- housing costs will be too high for most of our industrial workers. Most employees commute from other counties.

Out of Project Area Comment:

- There is already bus service into the area. Ridership is low. A streetcar stopping every few blocks will only make transit times longer.

Q6: Will it help expand middle-wage jobs for marginalized community members?

Employee Comment:

- Expanding street car and residential zoning into the NW Industrial area will push industrial businesses out of this area of Portland. Which means jobs will be lost as businesses move to other locations- most likely Washington County, Clackamas County or Vancouver, WA. This is the opposite of the stated goal in question #8 above.
- I'm not well-informed enough about the industrial jobs currently available in NW to truly comment "yes" or "no" on this, but I believe streetcar access does help people with access to jobs.

Business Owner Comment:

- Industrial land inventory would be reduced but we should look to expand the industrial land throughout the entire Metro area. Try to make the use match the location and all other infrastructure requirements.
- No more than busses or other public transportation options.
- Definitely not! This will lead to further erosion of the GLIS!
- The more industrial land you take away, the more jobs of this nature are lost.

Property Owner Comment:

- Less land is now needed for industrial purposes. Much of this area isn't even being used for industrial purposes anyway. It is used by ecommerce companies or office work. Industrial companies will be well compensated with rezoning, allowing for relocation in an area without such significant potential for higher density use. Industrial and transportation hubs should be near airports where people are less likely to want to live. This land has the potential for better high density use.
- NW Industrial streetcar service would encourage vibrancy to the NW but still would be contained within Nicolai to the North and Montgomery Park to the West - leaving the vast majority of the NW Industrial area unaffected..
- I'm a property owner and employ 500 people that make their living calling on industrial customers. With Esco's closure, there is not that much true heavy industrial in this study area, and the area is too difficult to commute to for those income brackets without college education, so I personally think we need industrial space closer to lower cost housing, not in the heart of the city, even though logistically preferable for a business like ours.

Out of Project Area Comment:

- The streetcar development puts industrial lands and middle-wage jobs at risk and threatens to drive them away from the central city area.

Q7: From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?

Employee Comment:

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- I live at a NW Portland address in WA county. Driving to work (in NW Industrial area) takes me 20 min or less. The trimet trip planner shows it would take me 75 min to get there by public transport-that's if I am willing and able to walk a total of 2.8 miles, half of that along a road with no sidewalk. Bus routes that allow residents to use public transportation from where they currently live are a much more urgent need than connecting the Pearl to the NW Industrial area.

Business Owner Comment:

- All prospective transit projects should be weighed on their intrinsic merits - NW area should not receive additional weight. All economic, environmental, social, etc. impacts should be considered in prioritizing projects.
- It's not about equity; this is a leading and poorly written question.
- Our employees live in Southeast Portland (NE 92nd Ave), Vancouver, WA, and SE Portland (Mt. Scott. The Mt. Scott employee is a salesman and needs his car to be at his work site.
- There are many other areas of the city that need public transit or better public transit. Especially in light of the city's decision to allow large apartment complexes with little or no parking.

Property Owner Comment:

- I believe that the rezoning of this area will add substantially to the City of Portland both in terms of development but also taxable income. This area would become a major area of employment with much more density than its present use. Economically, rezoning this area is absolutely in the community and city's best interests.
- Of all 4 quadrants of the city - NW Industrial is the one area that has been completely left behind regarding development support from the city of Portland. There is no streetcar, very limited bus service and many acres of vacant or undeveloped land .
- Busses!
- Getting in and out of the NW Industrial area is already a bottleneck. This project will make that worse. The businesses in that area need to move their products and supplies in and out of that area. The traffic jams this will create will significantly, and negatively effect local businesses. The project will have the opposite effect that the city claims. Jobs will be lost.
- Other areas just aren't as central or desirable, and many of them have had investment as well, this is a natural extension of NW and the Pearl and probably higher density uses make sense.

Out of Project Area Comment:

- Outer southeast Portland is hurting and the City Council doesn't care.

Q8: For Property Owner/Operators in the NW Industrial area: you will likely see your land values increase with rezoning. How might this effect your ability to stay and work in the NW Industrial Area?

Employee Comment:

- No responses

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Business Owner Comment:

- Unless Oregon changes the statute/law (not sure what it is) where there is a maximum increase of 3% of assessed value... an increase in land value is good long term.
- Land values will likely increase BUT these additional costs will cut out many industrial users

Property Owner Comment:

- The increase in land cost will be offset by the increased value to tenants and their employees. So, tenants will either be willing to pay more or other tenants will want to be in this area of the city if it is developed correctly.
- Our leases are locked in for at least the next 10 years ensuring that our light industrial workers will have jobs in this area for years to come.
- We already moved our business out, so I now rent to a movie studio user that might be happy with the developments this spurs in the neighborhood, even though loss of parking could be a problem.

Out of Project Area Comment:

- Increasing land values does not promote industrial development.

Q9: It will be reasonable to expect lease rates to increase with rezoning. How might this effect your operation?

Employee Comment:

- It will force us to move locations.
- Of course an increase in lease rates will affect my employer. Is there a way to control lease rates?
- We could all lose our jobs if the rent was too high, we are a small business. it could greatly impact us in a negative way.
- The business owner owns the building, and we typically lease out half of it. That will positively affect his business.
- I'm assuming property taxes will increase. Not sure, employer owns the building and rents out part of it.

Business Owner Comment:

- This will be good for those who own property and want to get out of the area, but not good for industrial/manufacturing businesses who want to stay. To pick up and move is a huge cost.
- Cuts into my budget and the bottom line of my company! At some point it will become too costly to stay here thanks to rezoning that has happened and will most likely happen on the Esco site.
- Our business does not depend on foot traffic, so increased residential density will have no positive impact to revenue, just an increase to expenses.
- many biz have fled Pdx due to increase tax and regulations, add more lose more biz....

Property Owner Comment:

- No responses

Out of Project Area Comment:

- No responses

Q10: Why is your current location in NW Portland the most effective location for your firm?

Employee Comment:

- No responses

Business Owner Comment:

- Near arterials to access clients all over the area, but do a lot of business in the downtown core area.
- A large portion of our product comes to us via flatbed trucks from outlying areas. Transportation access is a huge factor. We have been here for over 80 years and have done very well due to being in an Industrial Sanctuary that allowed for operations such as ours!
- and long-term location.
- we have many customers coming into NW Portland for supplies. They at the same time pickup steel parts from us. As the suppliers move out, our transportation costs will go up and we will probably move out of the city. Most likely to Vancouver.
- it was affordable

Property Owner Comment:

- No responses

Out of Project Area Comment:

- No responses

Q11: Do you see the area between Vaughn and Nicolai in NW Portland as a viable location for your employer in the next 10+ years?

Employee Comment:

- Since they have been here since 1982 i would hope so. but if they make big changes they would probably have to move.
- Assuming that the proposal goes through, our facility would have to relocate, possibly such that the current employees would have to find work elsewhere. The street car tracks would prevent loading/unloading at our facility.

Business Owner Comment:

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- Depends on City and state taxes. the Large increases in taxes in the last few years along with some of the taxes being proposed make it tough for an industrial company to compete with other companies in Vancouver and in other Oregon counties.
- Hopefully the city won't figure out how to move fast.

Property Owner Comment:

- but only if it stays with current allowed industrial zoning
- Again, the present zoning makes no sense for the public or the City of Portland. If we want more jobs and more money in the area we need to develop this area of Portland.
- Light Industrial - absolutely! Heavy Industrial - I don't think is viable near dense populations like close in NW residential, The Pearl District, Chapman school.
- Not if you're pushing for more commercial business rather than industrial.
- If we go through zone changes that promote redevelopment for other uses, it will be increasingly difficult for industrial firms to choose the GLIS.
- No, Esco's exit and subsequent rezoning of that area started this landslide and the city that works won't stop until they have everyone living on top of each other with the highest wage earners being the baristas that they all require 24/7.
- The City has allowed buildings like the New York to be built with very little parking. there is virtually no place for employees to park close to these types of buildings.

Out of Project Area Comment:

- Assuming there is adequate buffer zones between residential and industrial firms.

Q12: Where might your business move?

Employee Comment:

- No responses

Business Owner Comment:

- Anywhere but Portland.
- I am very disenchanted with the City's lack of concern over the well-being of industrial residents. I am planning to exit Portland and the Metro areas in 2021 due to high taxes and the destruction of a once viable city through mis-management.
- Canby, Ridgefield, Woodburn
- Boise, Idaho
- Washington State
- vancouver

Property Owner Comment:

- It makes no sense to have industrial land in what is otherwise already a developed part of Portland. The extension of NW 23rd to Nicolai makes sense and would help Portland develop a vibrant economy in that area of town, generating jobs and taxes. If the city allowed high density

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in this area, it could attract one or more major employers to the area. As noted above, moving industrial areas to near the airport or outside the primary metropolitan area of Portland makes a lot more sense.

- The rising taxes and the traffic congestion that this will create will drive businesses OUT of the area and possibly out of Multnomah Co. People are fed up with City of Portland's constant meddling with a system that works and turning into something that doesn't.
- We are not industrial.

Out of Project Area Comment:

- If the industrial space in NW Portland is lost, I don't see where they would go. Likely out of the area.
- Portland seems not to care about industrial jobs.
- not if the 'industrial sanctuary' turns into Yuppyville.

Q13: What, if any, concerns do you have about economic and/or other pressures that might force industrial firms and tenants out of the NW Industrial area?

Employee Comment:

- No responses

Business Owner Comment:

- No responses

Property Owner Comment:

- Rezoning should increase property prices to the point that it allows Industrial businesses to sell their property and relocate to a less expensive area. This may include areas where they don't have to pay the City of Portland property taxes or Multnomah County Taxes on business income. These businesses could be provided property tax offsets for the move. Rezoning for high density will increase Portland's tax base by providing substantially more taxes from businesses, and property tax.
- Industrial businesses will feel they're getting push out
- For the last 20 years or so the City has obviously viewed Industry as a second class citizen. The city has no concern for this step child and has been doing everything it can to strangle it. In the future the city will wake up realize what it has caused to cease to exist and wonder how that happened...

Out of Project Area Comment:

- The homelessness problem needs to be dealt with before we further gentrify the downtown. There is too much of a class difference there already. We need good paying jobs, not more expensive housing and shopping.
- Gentrification

Q14: In the long term, what do you think is the best use of land in the study area between NW Vaughn and NW Nicolai?

Employee Comment:

- No responses

Business Owner Comment:

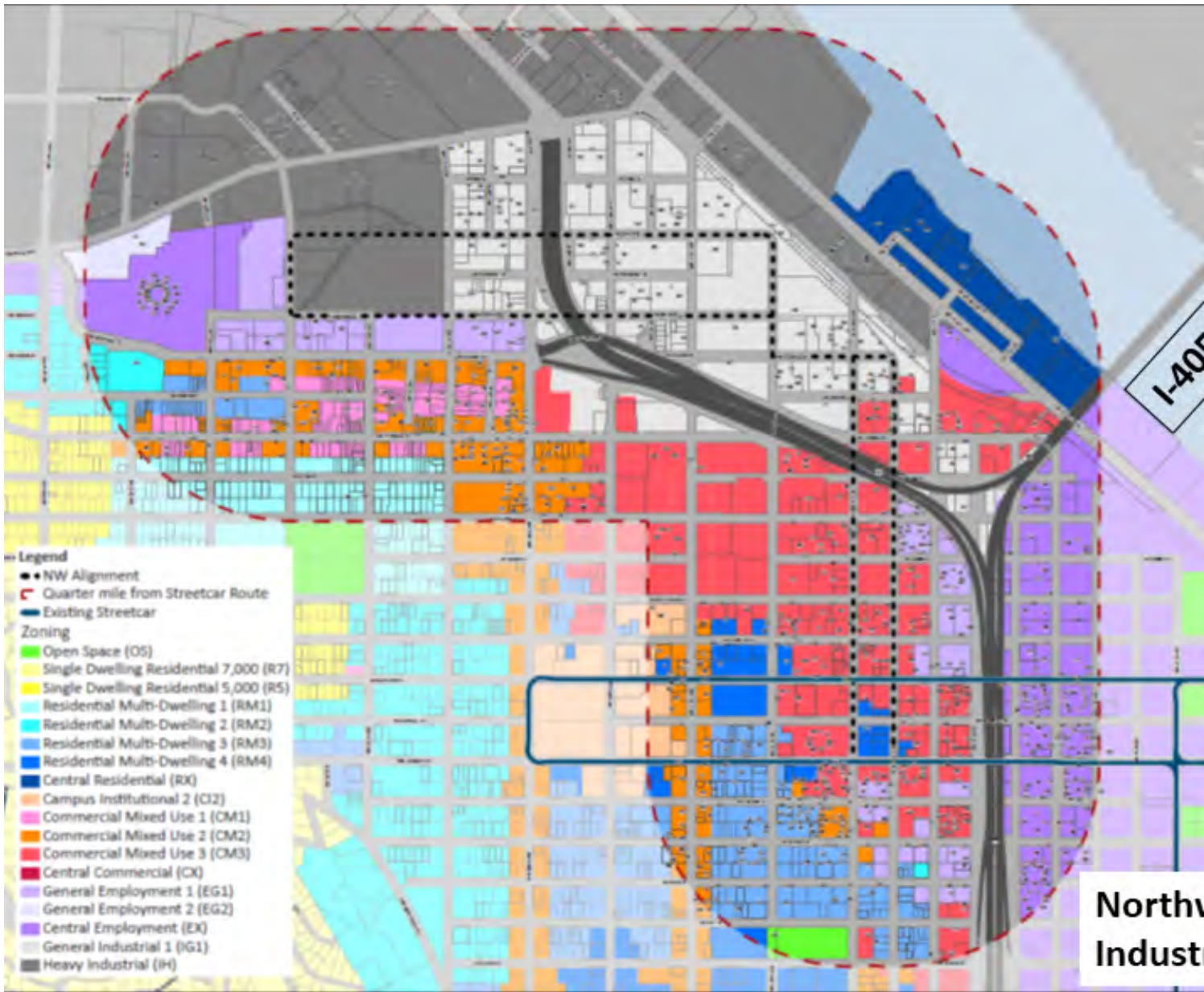
- No responses

Property Owner Comment:

- Both the Pearl District and NW Portland demonstrate how areas of the city can be transformed from bad or undeveloped areas to vibrant areas filled with high quality housing, dining and jobs. The amount of land presently available for redevelopment between the Montgomery Park area, Esco and the surrounding areas provides a massive opportunity for Portland and its residents.
- Turned Esco's land into enhanced industrial and leave everything else alone.
- Probably above my pay grade, but I do know as a relatively large industrial distribution distributor in the area, these current buildings are already limited functionality and not class A or even Class B space, so lots of tradeoffs being made. The surrounding residential neighborhood is not blue collar at all, so long commutes in for most industrial employees, should likely located industrial space closer to where industrial workers are likely to live.

Out of Project Area Comment:

- No responses



Constant Contact Survey Results

Survey Name: Portalnd Streetcar NW Industrial Impact Survey for Employees

Response Status: Partial & Completed

Filter: None

10/14/2020 11:05 AM PDT

Thank you for participating in the
Portland Streetcar Impact Survey!

*Please note that survey responses, including demographic information, will be reported as an anonymous aggregate to the City of Portland and the public. We respect your right to confidentiality. Unless you specifically request that your name be attached to the project, all responses will be anonymous. State and federal law prohibit use of this information to discriminate against you.

Introduction The City of Portland is studying whether to bring the streetcar to the NW industrial area. If this happens, industrial land will likely be rezoned for other uses. While industrial use would be grandfathered in, economic pressures would make it more difficult for industrial businesses to continue in this area. It would likely be similar to the changes we've seen in Central Eastside, The Pearl and at the Conway site near NW 22nd.











In addition to rezoning, there would be a loss of on-street parking along the route and an increase in residential housing.

There are three alternative land use scenarios available to view on the city website. To enter our raffle for \$150 gift card, please enter the following (Optional. Answers to the survey will remain anonymous.)






Answers	Number of Response(s)
First Name	36
Last Name	36
Work Phone	37
Email Address	16

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Where do you live or commute from?

Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			9	20.4 %
NW Portland			1	2.2 %
SW Portland			6	13.6 %
SE Portland			8	18.1 %
NE Portland			4	9.0 %
Portland/places East of I-205			2	4.5 %
Columbia County			0	0.0 %
Washington County			6	13.6 %
Clark County			4	9.0 %
Clackamas County			1	2.2 %
Other			3	6.8 %
No Response(s)			0	0.0 %
Totals			44	100%





How do you typically get to work or the NW Portland Industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Auto			37	84.0 %
Transit: Bus, Streetcar, MAX, etc			2	4.5 %
Bicycle			1	2.2 %
Walk			0	0.0 %
Other			3	6.8 %
No Response(s)			1	2.2 %
Totals			44	100%




Would you use the Northwest extension of the Portland Streetcar to commute to work?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly likely			2	4.5 %
Somewhat Likely			9	20.4 %
Highly Unlikely			33	75.0 %
No Response(s)			0	0.0 %
Totals			44	100%





Would you use the streetcar to go to lunch, get to meetings, etc.?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly Likely			2	4.5 %
Somewhat Likely			7	15.9 %
Highly Unlikely			34	77.2 %
No Response(s)			1	2.2 %
Totals			44	100%




If zoning in the area were changed to support streetcar, industrial uses would be allowed to continue operations, however increases in land values would likely result in redevelopment of industrial facilities to commercial and/or residential uses over time and compatibility conflicts may arise. Do you think your firm or others in the study area would continue operations in this type of environment?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly Likely			7	15.9 %
Somewhat Likely			9	20.4 %
Highly Unlikely			28	63.6 %
No Response(s)			0	0.0 %
Totals			44	100%

Making room for the streetcar would require removal of some on-street parking. How might loss of on-street parking and freight loading affect your operations?




Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			31	70.4 %
Neutral/No Impact			10	22.7 %
Positive Impact			2	4.5 %
No Response(s)			1	2.2 %
Totals			44	100%

Part of the goal of streetcar expansion is to connect housing and jobs with transit services to help workers live near where they work and/or provide a viable commute option. Do you think adding streetcar access and rezoning land for residential use in the NW Industrial district study area helps accomplish this goal for you or for other current NW Industrial tenants and employees?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			5	11.3 %
No			38	86.3 %
No Response(s)			1	2.2 %
Totals			44	100%

Industrial

lands serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an adequate supply of industrial lands and expand access for minority and marginalized community members to those jobs?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			4	9.0 %
No			39	88.6 %
No Response(s)			1	2.2 %
Totals			44	100%

From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			12	27.2 %
No			32	72.7 %
No Response(s)			0	0.0 %
Totals			44	100%

It will be reasonable for your employer to expect lease rates to increase with rezoning. How might this effect your operation?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			37	84.0 %
Neutral/No Impact			5	11.3 %
Positive Impact			1	2.2 %
No Response(s)			1	2.2 %
Totals			44	100%

Do you see the area between Vaughn and Nicolai in NW Portland as a viable location for your employer in the next 10+ years?





Answer	0%	100%	Number of Response(s)	Response Ratio
Highly Likely			10	22.7 %
Somewhat Likely			11	25.0 %
Highly Unlikely			22	50.0 %
No Response(s)			1	2.2 %
Totals			44	100%

Why is your location in NW Portland the most effective location for your firm?






Answer	0%	100%	Number of Response(s)	Response Ratio
Close to customers or suppliers			13	33.3 %
Transportation connections and freight access			20	51.2 %
Long-term location or sunk costs			19	48.7 %
Other			1	2.5 %
Totals			39	100%

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Records show that on average manufacturing wages in Portland are about \$26.50/hr. What range does your salary fall within?

Answer	0%	100%	Number of Response(s)	Response Ratio
\$0-\$15/hr			0	0.0 %
\$15-\$20/hr			2	4.5 %
\$20-\$27/hr			13	29.5 %
Over \$27/hr			19	43.1 %
No Response(s)			10	22.7 %
Totals			44	100%

What is your education level?

Answer	0%	100%	Number of Response(s)	Response Ratio
HS Diploma or Less			10	22.7 %
Some College			11	25.0 %
4-year College Degree			8	18.1 %
Advanced College Degree			5	11.3 %
No Response(s)			10	22.7 %
Totals			44	100%

*What is your race/ethnicity? Please select all that apply.

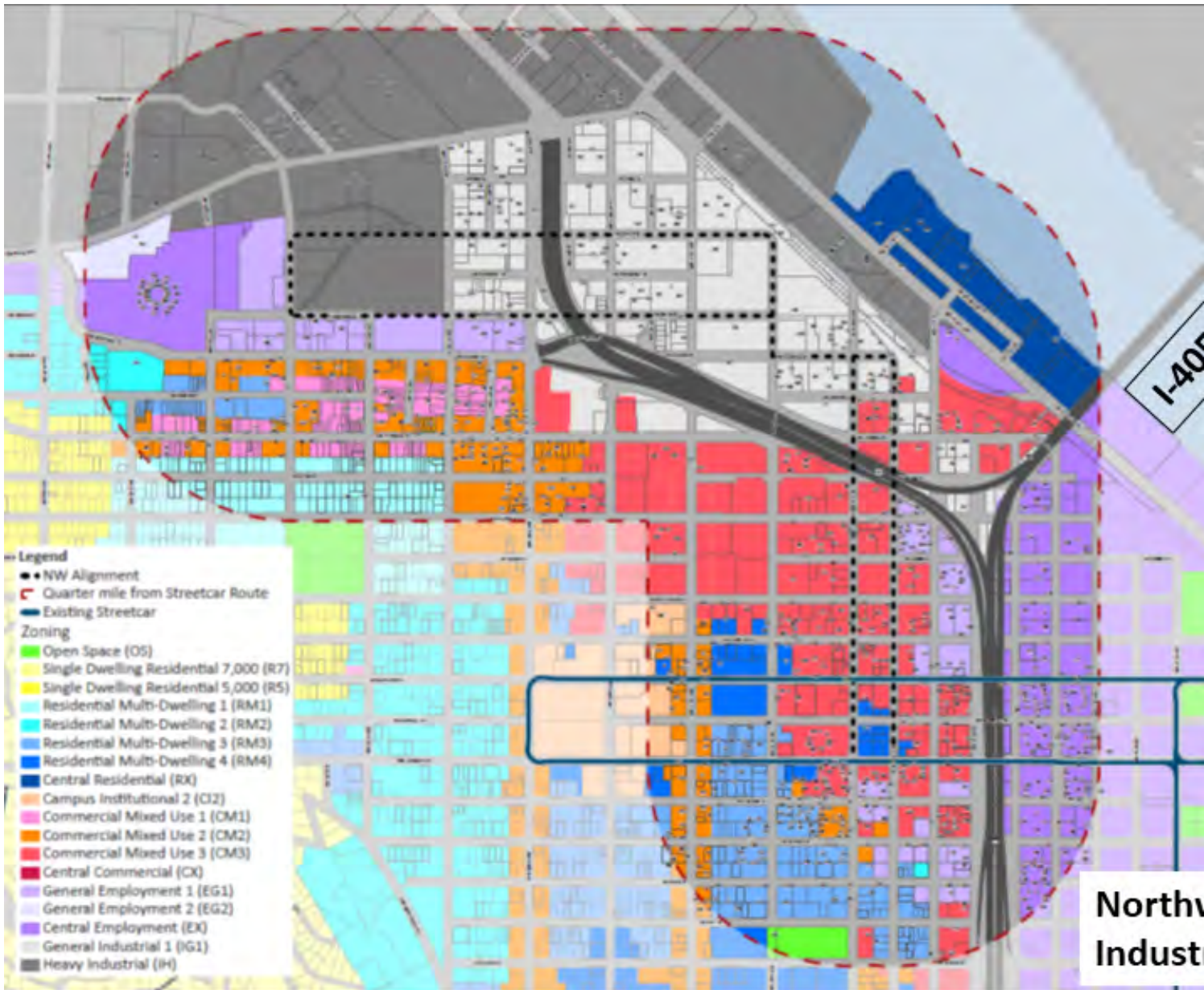
Answer	0%	100%	Number of Response(s)	Response Ratio
African-American / Black			4	9.0 %
American Indian / Alaskan Native			0	0.0 %
Asian			4	9.0 %
Hispanic / Latinx			11	25.0 %
Middle Eastern / North African			0	0.0 %
Native Hawaiian or Pacific Islander			0	0.0 %
White			22	50.0 %
My race is unknown to me			1	2.2 %
I prefer not to disclose			4	9.0 %
Other			0	0.0 %
Totals			44	100%

*Are you a person living with a disability?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			2	4.5 %
No			41	93.1 %
I prefer not to disclose			1	2.2 %
No Response(s)			0	0.0 %
Totals			44	100%

*Do you identify as LGBTQ+?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			4	9.0 %
No			34	77.2 %
I am undecided and/or questioning.			3	6.8 %
I prefer not to disclose			2	4.5 %
Other			1	2.2 %
No Response(s)			0	0.0 %
Totals			44	100%



Constant Contact Survey Results

Survey Name: Corrected Portalnd Streetcar NW Industrial Impact Survey for Business Owners

Response Status: Partial & Completed

Filter: None

10/14/2020 11:07 AM PDT

Thank you for participating in the
Portland Streetcar Impact Survey!

*Please note that survey responses, including demographic information, will be reported as an anonymous aggregate to the City of Portland and the public. We respect your right to confidentiality. Unless you specifically request that your name be attached to the project, all responses will be anonymous. State and federal law prohibit use of this information to discriminate against you.

Introduction

The City of Portland is studying whether to bring the streetcar to the NW industrial area. If this happens, industrial land will likely be rezoned for other uses. While industrial use would be grandfathered in, economic pressures would make it more difficult for industrial businesses to continue in this area. It would likely be similar to the changes we've seen in Central Eastside, The Pearl and at the Conway site near NW 22nd.

In addition to rezoning, there would be a loss of on-street parking along the route and an increase in residential housing.

There are three alternative land use scenarios available to view on the city website. To enter our raffle for \$150 gift card please enter the following (Optional. Answers to survey questions will remain anonymous.)

Answers	Number of Response(s)
First Name	16
Last Name	16
Work Phone	14
Email Address	16

DRAFT

Where do you live or commute from?

Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			3	11.1 %
SW Portland			1	3.7 %
NE Portland			4	14.8 %
SE Portland			2	7.4 %
Portland/places East of I-205			1	3.7 %
Columbia County			3	11.1 %
Washington County			3	11.1 %
Clark County			2	7.4 %
Clackamas County			3	11.1 %
Other			5	18.5 %
No Response(s)			0	0.0 %
Totals			27	100%

How do you typically get to work or the NW Portland industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Auto			27	100.0 %
Transit: Bus, Streetcar, MAX, etc			0	0.0 %
Bicycle			0	0.0 %
Walk			0	0.0 %
Other			0	0.0 %
No Response(s)			0	0.0 %
Totals			27	100%

Would you use the Northwest extension of the Portland Streetcar to commute to work?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly likely			0	0.0 %
Somewhat Likely			3	11.1 %
Highly Unlikely			24	88.8 %
No Response(s)			0	0.0 %
Totals			27	100%

Would you use the Northwest extension of the Portland streetcar to go to lunch, get to meetings, etc.?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly Likely			2	7.4 %
Somewhat Likely			0	0.0 %
Highly Unlikely			24	88.8 %
No Response(s)			1	3.7 %
Totals			27	100%



If zoning in the area were changed to support streetcar, industrial uses would be allowed to continue operations, however increases in land values would likely result in redevelopment of industrial facilities to commercial and/or residential uses over time and compatibility conflicts may arise. Do you think your firm or others in the study area would continue operations in this type of environment?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			11	40.7 %
No			15	55.5 %
No Response(s)			1	3.7 %
Totals			27	100%

Making room for the streetcar would require removal of some on-street parking. How might loss of on-street parking and freight loading affect your operations?



Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			17	62.9 %
Neutral/No Impact			10	37.0 %
Positive Impact			0	0.0 %
No Response(s)			0	0.0 %
Totals			27	100%

Part of the goal of streetcar expansion is to connect housing and jobs with transit services to help workers live near where they work and/or provide a viable commute option. Do you think adding streetcar access and rezoning land for residential use in the NW Industrial district study area helps accomplish this goal for you or for other current NW Industrial tenants and employees?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			7	25.9 %
No			20	74.0 %
No Response(s)			0	0.0 %
Totals			27	100%

Industrial lands

serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an adequate supply of industrial lands and expand access for minority and marginalized community members to those jobs?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			4	14.8 %
No			23	85.1 %
No Response(s)			0	0.0 %
Totals			27	100%

From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			5	18.5 %
No			22	81.4 %
No Response(s)			0	0.0 %
Totals			27	100%

DRAFT

For Property Owner/Operators in the NW Industrial area: you will likely see your land values increase with rezoning. How might this effect your ability to stay and work in the NW Industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			11	40.7 %
Neutral/No Impact			6	22.2 %
Positive Impact			1	3.7 %
N/A - I am not a property owner/operator in the NW Industrial area			9	33.3 %
No Response(s)			0	0.0 %
Totals			27	100%

For Business Owners who do not also own the land: it will be reasonable for you to expect lease rates to increase with rezoning. How might this effect your operation?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			20	74.0 %
Neutral/No Impact			3	11.1 %
Positive Impact			0	0.0 %
N/A - I am a property owner/operator			4	14.8 %
No Response(s)			0	0.0 %
Totals			27	100%

Why is your current location in NW Portland the most effective location for your firm?

Answer	0%	100%	Number of Response(s)	Response Ratio
Close to customers or suppliers			9	33.3 %
Transportation connections and freight access			10	37.0 %
Long-term location or sunk costs			4	14.8 %
Other			4	14.8 %
No Response(s)			0	0.0 %
Totals			27	100%

Do you see the area between Vaughn and Nicolai in NW Portland as a viable location for your firm in the next 10+ years?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			14	51.8 %
No			12	44.4 %
No Response(s)			1	3.7 %
Totals			27	100%

Outside of NW Portland, what locations would you see as viable for industrial firms like yours??

Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			5	19.2 %
SW Portland			3	11.5 %
NE Portland			3	11.5 %
SE Portland			2	7.6 %
Portland/places East of I-205			2	7.6 %
Columbia County			6	23.0 %
Washington County			8	30.7 %
Clark County			10	38.4 %
Clackamas County			7	26.9 %
Other			7	26.9 %
Totals			26	100%

*About how many people are employed at your facility?

26 Response(s)

DRAFT

* Please estimate the percentage of your employees currently commuting to work using public transportation.

Answer	0%	100%	Number of Response(s)	Response Ratio
0-10%			22	81.4 %
10-20%			4	14.8 %
20-30%			1	3.7 %
30-40%			0	0.0 %
40-50%			0	0.0 %
More than 50%			0	0.0 %
No Response(s)			0	0.0 %
Totals			27	100%

* Records show that on average manufacturing wages in Portland are about \$26.50/hr. What is the average wage of employees at this site?

Answer	0%	100%	Number of Response(s)	Response Ratio
\$0-\$15/hr			1	3.7 %
\$15-\$20/hr			1	3.7 %
\$20-\$27/hr			13	48.1 %
Over \$27/hr			12	44.4 %
No Response(s)			0	0.0 %
Totals			27	100%

* About what percentage of your employees are minority or disadvantaged?

Answer	0%	100%	Number of Response(s)	Response Ratio
0-10%			9	33.3 %
10-20%			13	48.1 %
20-30%			0	0.0 %
30-40%			1	3.7 %
40-50%			3	11.1 %
More than 50%			1	3.7 %
No Response(s)			0	0.0 %
Totals			27	100%

*About what percentage of your employees have a 4-year college degree?

Answer	0%	100%	Number of Response(s)	Response Ratio
0-10%			9	33.3 %
10-20%			6	22.2 %
20-30%			2	7.4 %
30-40%			3	11.1 %
40-50%			1	3.7 %
More than 50%			6	22.2 %
No Response(s)			0	0.0 %
Totals			27	100%

*What is your race/ethnicity? Please select all that apply.

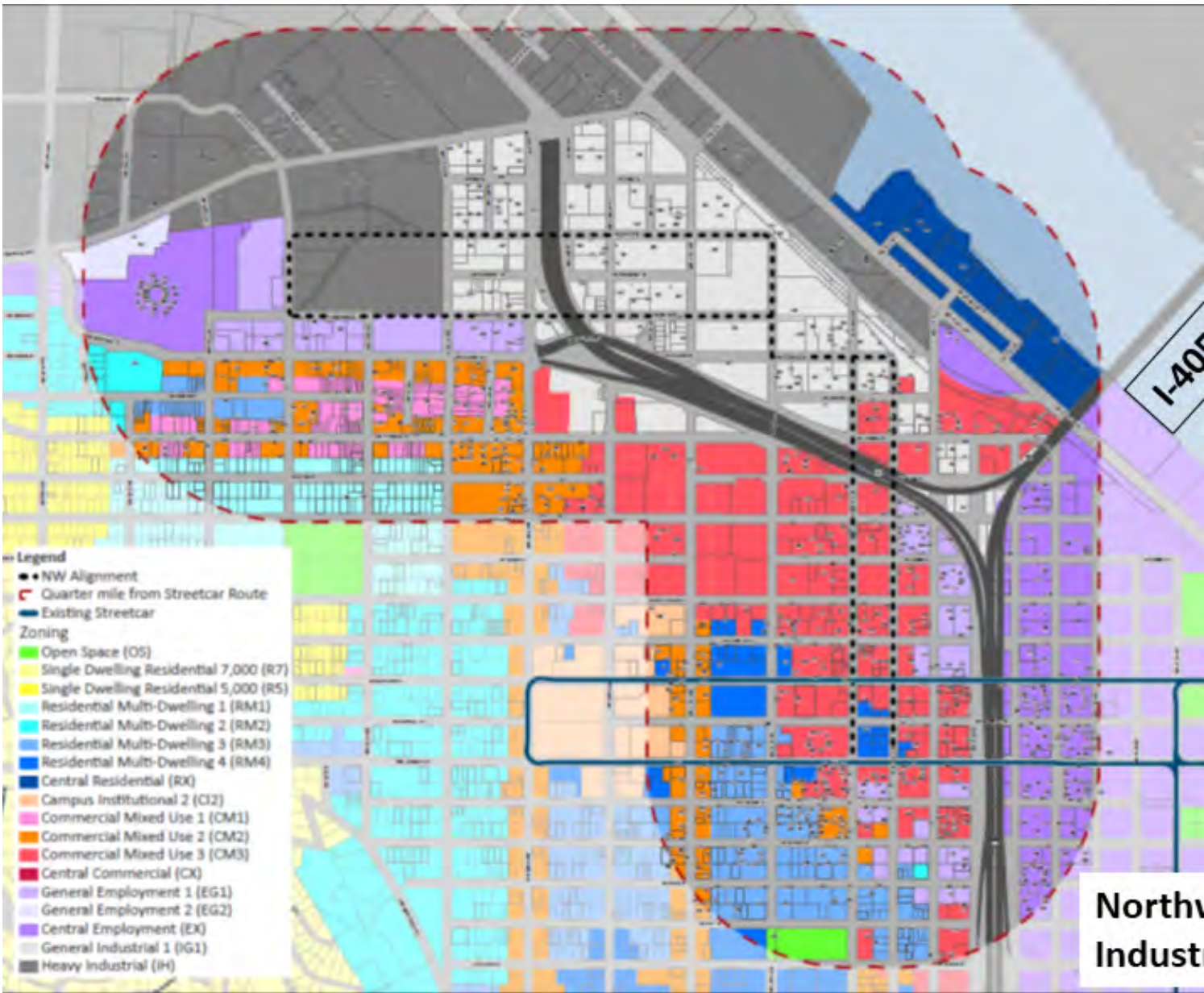
Answer	0%	100%	Number of Response(s)	Response Ratio
African-American / Black			0	0.0 %
American Indian / Alaskan Native			0	0.0 %
Asian			0	0.0 %
Hispanic / Latinx			1	3.8 %
Middle Eastern / North African			0	0.0 %
Native Hawaiian or Pacific Islander			0	0.0 %
White			18	69.2 %
My race is unknown to me			1	3.8 %
I prefer not to disclose			3	11.5 %
Other			3	11.5 %
Totals			26	100%

*Are you a person living with a disability?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	3.7 %
No			21	77.7 %
I prefer not to disclose			5	18.5 %
No Response(s)			0	0.0 %
Totals			27	100%

*Do you identify as LGBTQ+?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	3.7 %
No			19	70.3 %
I am undecided and/or questioning.			0	0.0 %
I prefer not to disclose			5	18.5 %
Other			2	7.4 %
No Response(s)			0	0.0 %
Totals			27	100%



Constant Contact Survey Results

Survey Name: Corrected Portland Streetcar NW Industrial Impact Survey for Property Owners

Response Status: Partial & Completed

Filter: None

10/14/2020 11:10 AM PDT

Thank you for participating in the
Portland Streetcar Impact Survey!

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IntroductionThe City of Portland is studying whether to bring the streetcar to the NW industrial area. If this happens, industrial land will likely be rezoned for other uses. While industrial use would be grandfathered in, economic pressures would make it more difficult for industrial businesses to continue in this area. It would likely be similar to the changes we've seen in Central Eastside, The Pearl and at the Conway site near NW 22nd.







In addition to rezoning, there would be a loss of on-street parking along the route and an increase in residential housing.

There are three alternative land use scenarios available to view on the city website. To enter our raffle for \$150 gift card please enter the following (Optional. Answers to the survey will remain anonymous.)



Answers	Number of Response(s)
First Name	10
Last Name	10
Work Phone	8
Email Address	10

DRAFT



Where do you live or commute from?

Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			0	0.0 %
SW Portland			1	9.0 %
NE Portland			0	0.0 %
SE Portland			0	0.0 %
Portland/places East of I-205			0	0.0 %
Columbia County			1	9.0 %
Washington County			2	18.1 %
Clark County			0	0.0 %
Clackamas County			1	9.0 %
Other			5	45.4 %
No Response(s)			1	9.0 %
Totals			11	100%

How do you typically get to the NW Portland industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Auto			10	90.9 %
Transit: Bus, streetcar, MAX, etc			0	0.0 %
Bike			0	0.0 %
Walk			1	9.0 %
Other			0	0.0 %
No Response(s)			0	0.0 %
Totals			11	100%

Would you use the Northwest extension of the Portland Streetcar to commute to your property?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly likely			0	0.0 %
Somewhat Likely			2	18.1 %
Highly Unlikely			9	81.8 %
No Response(s)			0	0.0 %
Totals			11	100%

Would you use the Northwest extension of the Portland streetcar to go to lunch, get to meetings, etc.?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly Likely			2	18.1 %
Somewhat Likely			1	9.0 %
Highly Unlikely			8	72.7 %
No Response(s)			0	0.0 %
Totals			11	100%



If zoning in the area were changed to support streetcar, industrial uses would be allowed to continue operations, however increases in land values would likely result in redevelopment of industrial facilities to commercial and/or residential uses over time and compatibility conflicts may arise. Do you think your tenants or others in the study area would continue operations in this type of environment?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			7	63.6 %
No			4	36.3 %
No Response(s)			0	0.0 %
Totals			11	100%



Making room for the streetcar would require removal of some on-street parking. How might loss of on-street parking and freight loading affect your tenant's operations?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			7	63.6 %
Neutral/No Impact			2	18.1 %
Positive Impact			2	18.1 %
No Response(s)			0	0.0 %
Totals			11	100%

Part of the goal of streetcar expansion is to connect housing and jobs with transit services to help workers live near where they work and/or provide a viable commute option. Do you think adding streetcar access and rezoning land for residential use in the NW Industrial district study area helps accomplish this goal for current NW Industrial tenants and employees?



Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			4	36.3 %
No			7	63.6 %
No Response(s)			0	0.0 %
Totals			11	100%

From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			5	45.4 %
No			6	54.5 %
No Response(s)			0	0.0 %
Totals			11	100%




Industrial lands

serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an adequate supply of industrial lands and expand access for minority and marginalized community members to those jobs?









Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			4	36.3 %
No			7	63.6 %
No Response(s)			0	0.0 %
Totals			11	100%

DRAFT



As a property owner in the NW Industrial area you will likely see your land values increase with rezoning. How might this effect your current tenant's ability to stay and work in the NW Industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			4	36.3 %
Neutral/No Impact			4	36.3 %
Positive Impact			3	27.2 %
No Response(s)			0	0.0 %
Totals			11	100%

Outside of NW Portland, what locations do you see as viable for industrial firms like your tenants and other firms currently in the NW Industrial District? ?






Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			4	36.3 %
SW Portland			0	0.0 %
NE Portland			0	0.0 %
SE Portland			1	9.0 %
Portland/places East of I-205			3	27.2 %
Columbia County			2	18.1 %
Washington County			7	63.6 %
Clark County			2	18.1 %
Clackamas County			6	54.5 %
Other			2	18.1 %
Totals			11	100%

Do you see the area between Vaughn and Nicolai in NW Portland as a viable location for industrial firms in the next 10+ years?





Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			4	36.3 %
No			7	63.6 %
No Response(s)			0	0.0 %
Totals			11	100%

DRAFT




What, if any, concerns do you have about economic and/or other pressures that might force industrial firms and tenants out of the NW Industrial area? Select any/all that apply.

Answer	0%	100%	Number of Response(s)	Response Ratio
Scarcity of industrial land within the City of Portland			8	72.7 %
Loss of middle wage jobs			6	54.5 %
Economic Impacts of losing industrial businesses in the urban core			7	63.6 %
No concerns			2	18.1 %
Other			2	18.1 %
Totals			11	100%



In the long term, what do you think is the best use of land in the study area between NW Vaughn and NW Nicolai?

Answer	0%	100%	Number of Response(s)	Response Ratio
Industrial - maintain the existing industrial character			4	36.3 %
Enhanced Industrial - industrial with creative/industrial office like Central Eastside			4	36.3 %
Employment - high density office/employment center, similar to Lloyd District or Downtown			1	9.0 %
Mixed Use - Residential and Commercial, similar to the Pearl District or NW Portland			2	18.1 %
Other			0	0.0 %
No Response(s)			0	0.0 %
Totals			11	100%




*What is your race/ethnicity? Please select all that apply.

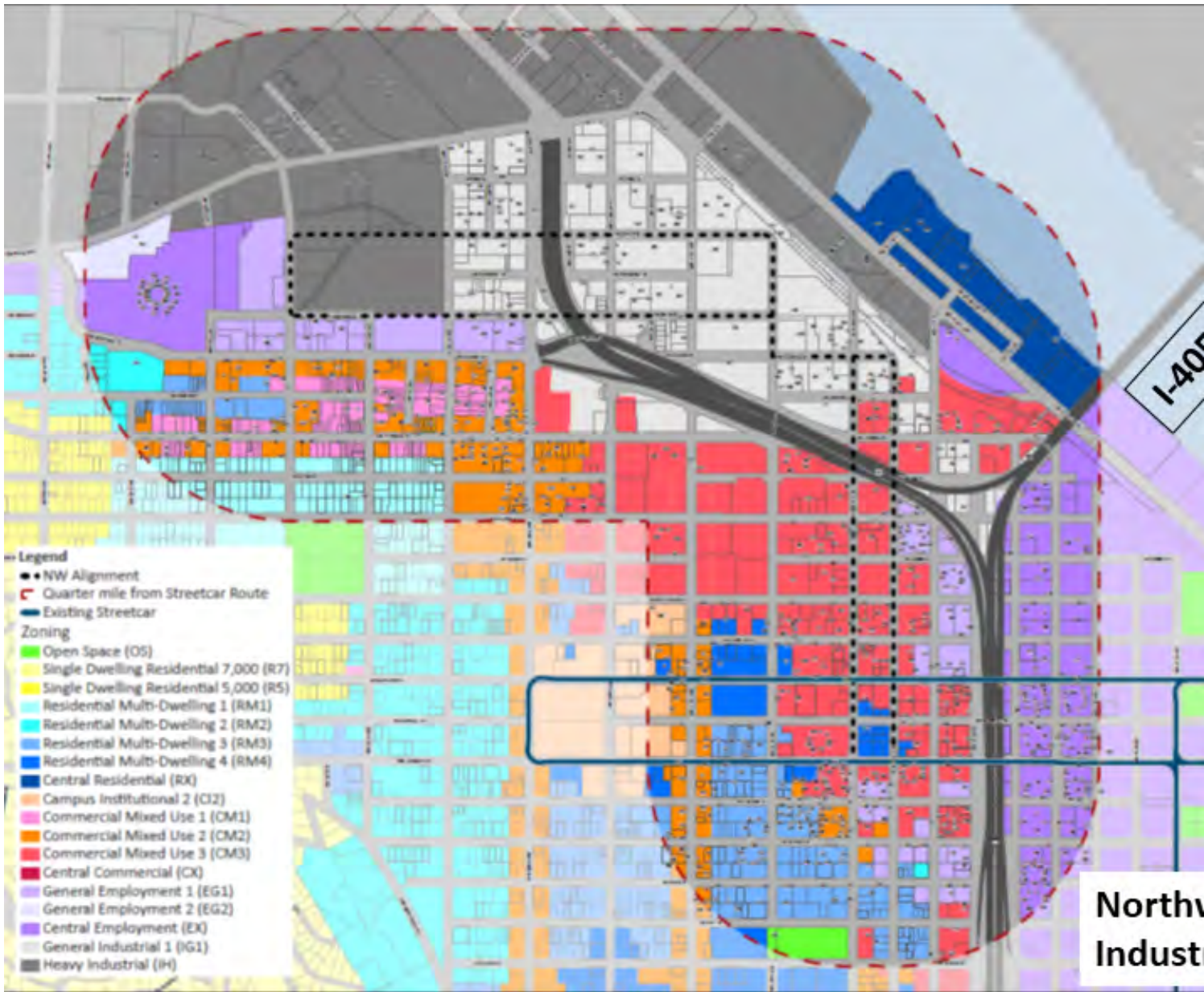
Answer	0%	100%	Number of Response(s)	Response Ratio
African-American / Black			0	0.0 %
American Indian / Alaskan Native			0	0.0 %
Asian			0	0.0 %
Hispanic / Latinx			0	0.0 %
Middle Eastern / North African			0	0.0 %
Native Hawaiian or Pacific Islander			0	0.0 %
White			9	81.8 %
My race is unknown to me			0	0.0 %
I prefer not to disclose			1	9.0 %
Other			1	9.0 %
Totals			11	100%

*Are you a person living with a disability?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			0	0.0 %
No			10	90.9 %
I prefer not to disclose			1	9.0 %
No Response(s)			0	0.0 %
Totals			11	100%

*Do you identify as LGBTQ+?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			0	0.0 %
No			9	81.8 %
I am undecided and/or questioning.			0	0.0 %
I prefer not to disclose			1	9.0 %
Other			1	9.0 %
No Response(s)			0	0.0 %
Totals			11	100%



Constant Contact Survey Results

Survey Name: Corrected Portland Streetcar NW Industrial Impact Survey Outside Project Area

Response Status: Partial & Completed

Filter: None

10/14/2020 11:11 AM PDT

Thank you for participating in the
Portland Streetcar Impact Survey!

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In addition to rezoning, there would be a loss of on-street parking along the route and an increase in residential housing.

There are three alternative land use scenarios available to view on the city website . To enter our raffle for \$150 gift card please enter the following (Optional. Answers to the survey will remain anonymous.)

Answers	Number of Response(s)
First Name	7
Last Name	7
Work Phone	6
Email Address	7

Where do you live or commute from?

Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			1	10.0 %
SW Portland			3	30.0 %
NE Portland			0	0.0 %
SE Portland			3	30.0 %
Portland/places East of I-205			0	0.0 %
Columbia County			0	0.0 %
Washington County			1	10.0 %
Clark County			1	10.0 %
Clackamas County			0	0.0 %
Other			1	10.0 %
No Response(s)			0	0.0 %
Totals			10	100%



Would you use the Northwest extension of the Portland Streetcar when commuting to the NW Industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Highly likely			0	0.0 %
Somewhat Likely			1	10.0 %
Highly Unlikely			9	90.0 %
No Response(s)			0	0.0 %
Totals			10	100%



If zoning in the area were changed to support streetcar, industrial uses would be allowed to continue operations, however increases in land values would likely result in redevelopment of industrial facilities to commercial and/or residential uses over time and compatibility conflicts may arise. Do you think industrial firms in the study area would continue operations in this type of environment?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	10.0 %
No			9	90.0 %
No Response(s)			0	0.0 %
Totals			10	100%

Making room for the streetcar would require removal of some on-street parking. How might loss of on-street parking and freight loading affect operations for industrial firms?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			9	90.0 %
Neutral/No Impact			1	10.0 %
Positive Impact			0	0.0 %
No Response(s)			0	0.0 %
Totals			10	100%

Part of the goal of streetcar expansion is to connect housing and jobs with transit services to help workers live near where they work and/or provide a viable commute option. Do you think adding streetcar access and rezoning land for residential use in the NW Industrial district study area helps accomplish this goal for current NW Industrial tenants and employees?


Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	10.0 %
No			9	90.0 %
No Response(s)			0	0.0 %
Totals			10	100%

From an equity perspective, should the City invest in expanding the streetcar into Northwest given the transit and economic development needs in other parts of the city?



Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			0	0.0 %
No			9	90.0 %
No Response(s)			1	10.0 %
Totals			10	100%

Industrial lands










serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an adequate supply of industrial lands and expand access for minority and marginalized community members to those jobs?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			0	0.0 %
No			9	90.0 %
No Response(s)			1	10.0 %
Totals			10	100%

Land values for property owners in the NW Industrial District would increase with rezoning. How might this effect their current tenants' ability to stay and work in the NW Industrial area?

Answer	0%	100%	Number of Response(s)	Response Ratio
Negative Impact			8	80.0 %
Neutral/No Impact			2	20.0 %
Positive Impact			0	0.0 %
No Response(s)			0	0.0 %
Totals			10	100%

Outside of NW Portland, what locations do you see as viable for industrial firms like those currently in the NW Industrial District? ?

Answer	0%	100%	Number of Response(s)	Response Ratio
North Portland			4	44.4 %
SW Portland			1	11.1 %
NE Portland			3	33.3 %
SE Portland			2	22.2 %
Portland/places East of I-205			3	33.3 %
Columbia County			1	11.1 %
Washington County			2	22.2 %
Clark County			3	33.3 %
Clackamas County			6	66.6 %
Other			0	0.0 %
Totals			9	100%

Do you see the area between Vaughn and Nicolai in NW Portland as a viable location for industrial firms in the next 10+ years?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			5	50.0 %
No			4	40.0 %
No Response(s)			1	10.0 %
Totals			10	100%

What, if any, concerns do you have about economic and/or other pressures that might force industrial firms and tenants out of the NW Industrial area? Select any/all that apply.



Answer	0%	100%	Number of Response(s)	Response Ratio
Scarcity of industrial land within the City of Portland			9	90.0 %
Loss of Middle Wage Jobs			8	80.0 %
Economic impacts of losing industrial businesses within the urban core			9	90.0 %
No Concerns			1	10.0 %
Other			1	10.0 %
Totals			10	100%

In the long term, what do you think is the best use of land in the study area between NW Vaughn and NW Nicolai?



Answer	0%	100%	Number of Response(s)	Response Ratio
Industrial - maintain the existing industrial character			6	60.0 %
Enhanced Industrial - industrial with creative/industrial office like Central Eastside			3	30.0 %
Employment - high density office/employment center, similar to Lloyd District or Downtown			0	0.0 %
Mixed Use - Residential and Commercial, similar to the Pearl District or NW Portland			0	0.0 %
Other			0	0.0 %
No Response(s)			1	10.0 %
Totals			10	100%

DRAFT



*What is your race/ethnicity? Please select all that apply.

Answer	0%	100%	Number of Response(s)	Response Ratio
African-American / Black			0	0.0 %
American Indian / Alaskan Native			0	0.0 %
Asian			0	0.0 %
Hispanic / Latinx			0	0.0 %
Middle Eastern / North African			0	0.0 %
Native Hawaiian or Pacific Islander			0	0.0 %
White			6	60.0 %
My race is unknown to me			0	0.0 %
I prefer not to disclose			4	40.0 %
Other			0	0.0 %
Totals			10	100%

*Are you a person living with a disability?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	10.0 %
No			9	90.0 %
I prefer not to disclose			0	0.0 %
No Response(s)			0	0.0 %
Totals			10	100%

*Do you identify as LGBTQ+?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			0	0.0 %
No			9	90.0 %
I am undecided and/or questioning.			0	0.0 %
I prefer not to disclose			1	10.0 %
Other			0	0.0 %
No Response(s)			0	0.0 %
Totals			10	100%

**A.3: Community Based Organization (CBO) Report:
Hollywood Senior Center/Urban League of Portland**

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Hollywood Senior Center & Urban League of Portland MP2H Transportation Survey Findings
September 2020

Background:

The Urban League of Portland is one of the region's oldest Black civil rights and service organizations with a mission is to empower African Americans and others to achieve equality in education, employment, health, economic security and quality of life. Urban League of Portland programs include a distinctive blend of direct services, organizing, outreach, and advocacy, with a strong emphasis around organizing our community to eliminate systemic barriers and address personal barriers in an environment free from judgement and stigma. Programs include housing, workforce, senior and health services, and community and civic engagement.

Founded in 1973, the Hollywood Senior Center is a not for profit committed to enriching the lives of adults 50 and older by creating opportunities for social connection, health and wellness, independence and life-long learning. Hollywood Senior Center offers a diverse range of services focused on empowering older adults to live their lives with independence, and a sense of fulfillment. Hollywood Senior Center is committed to addressing the social, cultural, environmental and economic needs that create barriers that impact the wellness of older adults. To meet the diverse and changing needs of older persons whose ages span many decades of life, whose physical health status ranges from robust to frail, whose mental health status ranges from alert to cognitively impaired, whose socioeconomic status ranges from middle class to homeless, and whose ethnic and language backgrounds range across dozens of countries and cultures, Hollywood Senior Center offers a full selection of programs ranging from preventive activities and supportive services for the broad senior population to long-term care service planning for those of more advanced age and needs.

Hollywood Senior Center serves as the lead agency in the N/NE Consortium, a partnership of the HSC and Urban League of Portland (ULP) established in 2011. The N/NE Consortium works effectively with older adults given that our organization are deeply embedded in the N/NE community and have welcomed and served diverse elder populations, including those from communities of color for many decades.

Both organizations have extensive experience working with all levels of government and successfully partner with more than 50 community based organization. The N/NE Consortium has a longstanding commitment to and experience in adapting our programs and policies to best meet the diverse culturally specific needs of individuals in our community. Throughout the greater community, our strategy is to reach out to, and coordinate closely with, a variety of culturally responsive and specific organizations to work with the senior populations.



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Purpose

The City of Portland released a request for grant-funded outreach proposals to help inform the Montgomery Park to Hollywood Transit and Land Use Development Strategy (MP2H). The MP2H is a city effort to create an equitable development plan for transit-oriented districts in NW Portland and NE Portland. The MP2H study will consider land use and urban design, economic development, and opportunities for community benefits possible with a transit-oriented development scenario, including a potential streetcar extension. The project will also consider how such opportunities could support the City's racial equity, climate justice, employment and housing goals. The work is funded in part by a Federal Transit Administration (FTA) grant. In NE Portland, the study will explore the feasibility of different alignments to extend streetcar or a transit line to the Hollywood District, and select a preferred alignment for future study and more detailed planning.

The main purpose of the grant-funded outreach was to broaden outreach to underrepresented communities (BIPOC, low-income, seniors, immigrant and refugee communities) through community-based organizations. The Hollywood Senior Center and Urban League of Portland partnered on a grant proposal to provide outreach to the communities we support. As trusted resources and focal points for older adults in NE Portland, our organizations felt that it was important that this project identify under-represented communities that may feel the impact of this project the most. The target communities included renters, business owners, people with limited income/resources and communities of color and people with disabilities. The Hollywood Senior Center and Urban League grant proposal was selected by the City in Spring 2020 and work began on finalizing a grant agreement.

Lead Project Staff:

Amber Kern Johnson- Hollywood Senior Center Executive Director
Arleta Christain, Urban League of Portland Senior Director of Health & Older Adult Services
Kashea Kilson-Anderson, Urban League of Portland Senior Center Manager

Approach

Hollywood Senior Center and Urban League of Portland welcomed the opportunity to provide information on the MP2H Transportation Study. We sought to 1) gather information that informs the MP2H Transportation Study; 2) gain greater insight about how the public perceives this study; 3) gain an improved understanding of community values, needs and aspirations; and 4) support the City of Portland Bureau of Planning and Sustainability work to become better connected to and more rooted in communities.



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Urban League of Portland and the Hollywood Senior Center focused outreach on seniors, low-income residents, immigrant/refugee populations and communities of color, renters, and small business owners with a goal to reach a minimum of 100 individuals. Planned outreach to apartment buildings, walk-in hours, community events, local black church announcements, and senior center engagement had to be revised due to COVID-19. Instead, Urban League of Portland and Hollywood Senior Center shifted to creating outreach materials that were sent (mailed and emailed) to more than 4,500 households through monthly printed newsletters. The written transportation survey was created based on information from staff attending several meetings and informational sessions with the City of Portland Bureau of Planning and Sustainability and the <https://www.portland.gov/bps/mp2h/mp2h-northeast-portland-urban-design-concept-virtual-open-house>.

The MP2H Transportation Survey created provided a brief background on the project and a link to the virtual house for those seeking more information. Additionally the survey was included in weekly e-blasts during August allowing for participants to respond directly to an online survey. Surveys were also delivered to Silvercrest Apartments, a low-income senior apartment building in NE Portland, off of NE Sandy.

Surveys answered on paper were entered into the google doc survey for a comprehensive report. Translation and interpretation support was made available although no requests were made to access these services. Staff at both organizations were available by phone to help individuals complete the survey. In those instances, staff entered information on behalf of the individual into the google doc survey. Additionally, case managers contacted homebound clients and some participants directly by phone to gather input for the survey.

Survey Responses


102 individuals completed the survey. A \$5 gift card was provided as an incentive for participation. A list of those who received a gift card has been shared with the City of Portland. Below are findings from the survey. Some written comments have been summarized to highlight specific themes in the survey findings. A complete list of all participant comments/feedback is included in this report along with the original survey for reference.



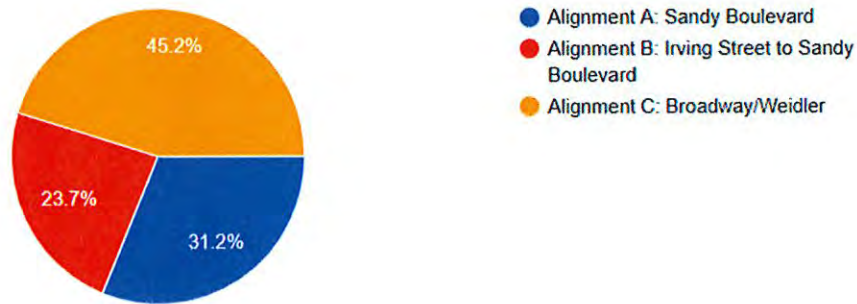
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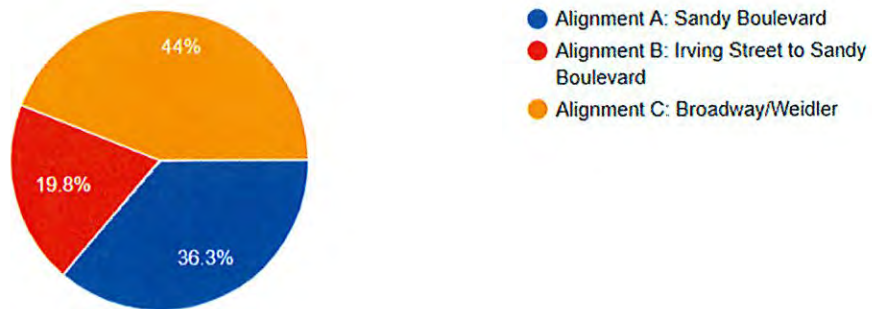
On which alignment do you think a streetcar line can best support economic prosperity through job creation, small business or micro enterprise opportunity, or serve existing jobs? 

93 responses



Which alignment do you think has the most opportunity to advance equitable outcomes through different development types/land uses, or a potential community benefits agreement?

91 responses





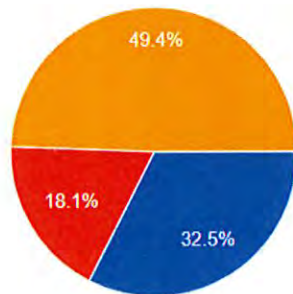
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Which alignment best matches your preferred vision for future development of this area?

83 responses



- Alignment A: Sandy Boulevard
- Alignment B: Irving Street to Sandy Boulevard
- Alignment C: Broadway/Weidler



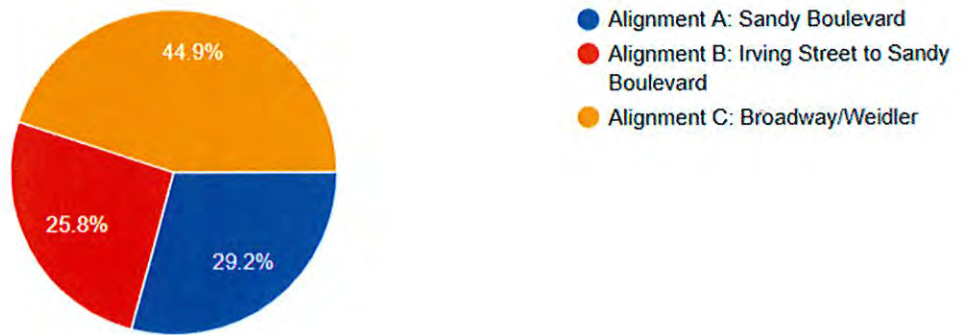
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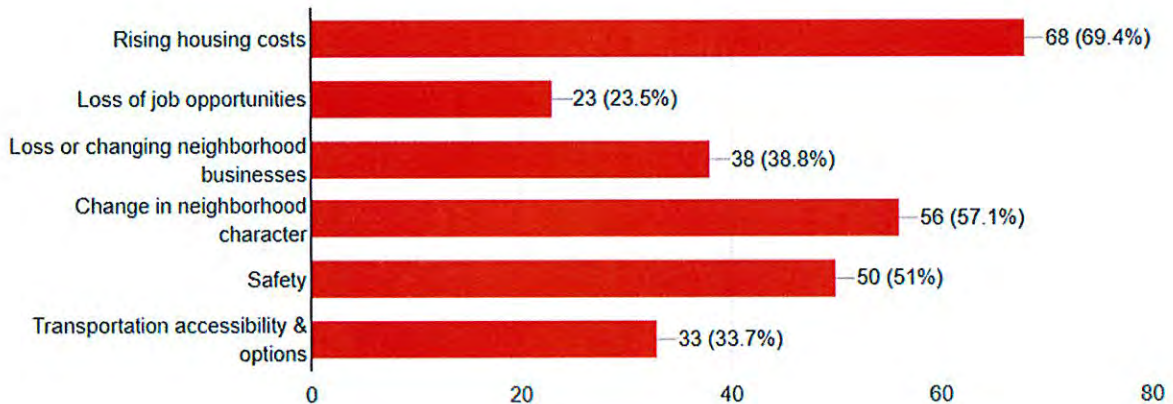
On which alignment would a streetcar investment most improve access to affordable housing, middle- wage jobs, nature and recreation?

89 responses



What are your greatest concerns for NEPortland/ Hollywood?

98 responses

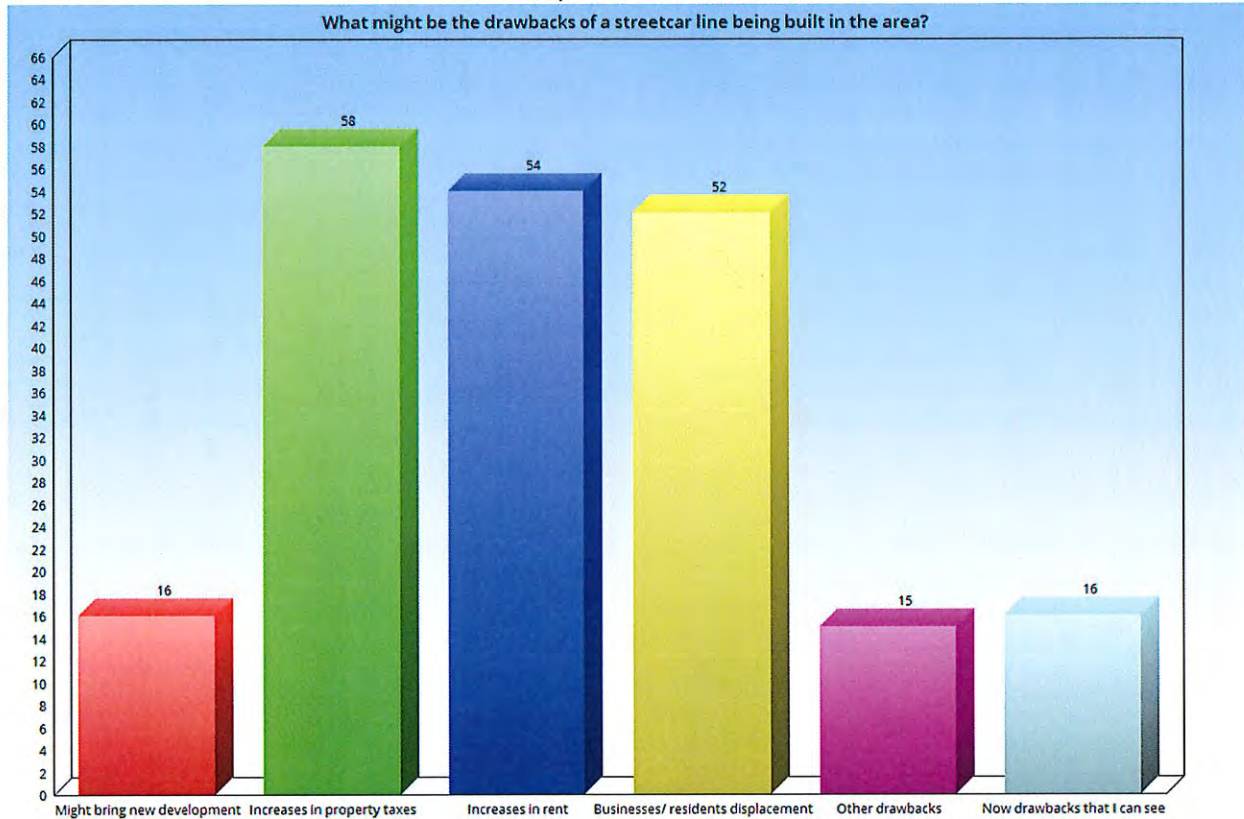




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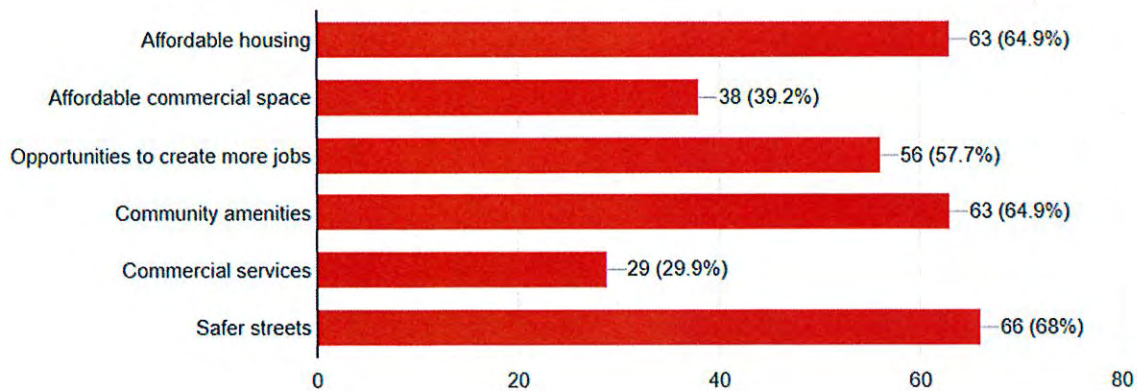
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What types of investment or development would most benefit your neighborhood?(Select all that apply.)

97 responses

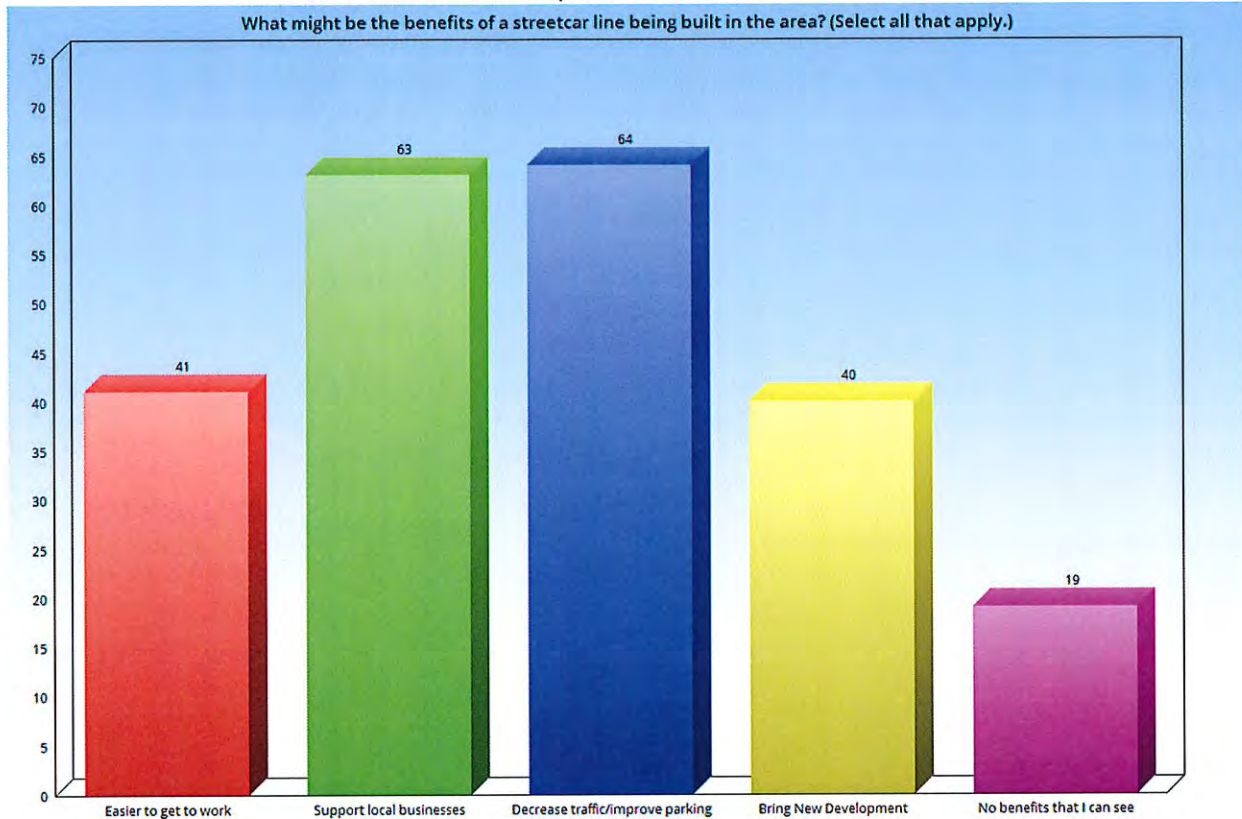




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Please express any additional ideas you have for the NE Portland and Hollywood area? What would you like to see? What are you concerned about?

Some written comments have been summarized to highlight specific themes in the survey findings. Comments in quotations are direct quotes from participants. A complete list of all participant comments/feedback is included in this report along with the original survey for reference.

Community Space & Public Benefit

There were a number of survey responses that referenced the need for more benches/seating in NE for seniors along with fully covered bus stops and improved community green spaces. Additionally there was support to retain current businesses in NE and an interest in bringing new business development along Sandy and Broadway. Below are some participant comments including more comments referring to cost and public benefit of bringing a streetcar to NE.



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"Broadway to Hollywood is dead and dangerous! It needs the streetcar to come alive and contribute safety. It is great connectivity to city center. What a great name for the streetcar - Broadway to Hollywood."

"I don't see a need for a trolley. It is not the best use of transit funds and will increase traffic problems."

"I'm hopeful that the process of adding a street car line would not be too disruptive to the existing districts and it would indeed yield the positive things we hope for."

"I feel that it would allow more people to come the Hollywood District. Visually I think it would be awesome. I really hope this comes to fruition."

"The only concern would be funding and I don't have enough information now."

Housing

Many survey participants commented on housing including the need for more affordable housing in the area and concern around new development. Some surveyed questioned why we should invest in a street car when affordable housing should be the priority.

"Development destroys the character of the area, including buildings which are too modern and plain. I'm especially concerned about demolition of old and historic homes and neighborhoods."

"I don't care to see another explosion of upwardly mobile young people from California Wisconsin, Idaho, or New York, buying little honey comb like condo's that get built so high they block out the Sun."

"I would like to see less demolitions of houses and fewer apartments and more trees and greenspaces. More restaurants and local shops would also enhance the area. Currently cute small bungalows that could become housing for many are being replaced by boring, ugly apartments with little or no parking, few trees, very little green spaces and not commensurate with surrounding neighborhoods. The east side is losing its' character and becoming just a sea of apartment buildings."

"Put money into homeless shelters and affordable housing. Address needs (jobs, better schools) or the poor."



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"I am interested in seeing low income development housing."

"Rather than spend money on a streetcar line which doesn't add to neighbor needs, spend it on affordable housing which is scarce in Portland."

"Please, we need more, many more affordable housing. The minimum wage does not allow a person or a family to find a home at today's rent."

"We need to clean up the homeless problem. More modes of transportation are not needed. Please put our taxes where the most good will be done."

"The addition of another streetcar is unnecessary and the cost is exorbitant. The city needs to invest in social services and provide more affordable housing."

Safety

A few survey participants expressed safety concerns.

"I'd like to see a clean and safer Hollywood District. I grew up and still live in Beaumont Wilshire neighborhood in my family home. I am concerned by the graffiti and lack of caring for our area. Graffiti and trash are not welcoming. They are the opposite; a neighborhood where its citizens don't care. This is a wider Portland Problem but I'd like to see NE Portland be a trailblazer for a safer and healthier urban life"

"I have heard that easily accessible transportation sometime brings crime to the neighborhoods."

"I am also worried about the safety the safety of pedestrians. The streetcar could also affect access to local businesses by blocking entrance to stores and decreasing parking spaces."

Racial Justice& Displacement



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A number of survey participants expressed a historically founded concern that a streetcar would negatively impact the diversity of residents and businesses in NE. Some shared that they don't view streetcars as an inclusive mode of transportation.

"I am concerned about the diversity of residents and businesses-who will be able to live and work in the same area? Portland is now a gated community where only the upper class can live - the rest have to drive in to work."

"I am concerned about the street car causing displacement of people like what happened in the Albina district with uprooting of African American names."

"People who need public transportation won't be able to afford it. People I see on the street car are white - Street car is not racial friendly."

"The way you are moving all the blacks out of the area. You want to run a street car through here?"

Transportation

Survey participants commented on current traffic patterns, parking, walkability and concerns with proposed routes for a streetcar to Hollywood.

"Traffic patterns on Sandy need to be improved (eg, no left turns w/o dedicated left turn lane, traffic circle (roundabout) at major intersections like 72nd)."

"My biggest concern is in regard to the disruption construction will cause to access on and off I-84. I also have major issues with the proposed streetcar "turnaround" that would go around the Trader Joe's property, cross Halsey and do a u-turn in the area of the current transit center, then head north to Broadway, west back to meet Sandy Blvd. Also the timeline for the streetcar is to complete in 2035, but the MP2H team didn't seem to be aware of TriMet's Hollywood Hub project that would add 2 large buildings on the property, which would eliminate the ability to utilize the area for a turnaround. On the surface it doesn't seem that all of the agencies within the city are talking to each other."

"This is a walking neighborhood and traffic is already an issue."



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“Will cars be funneled onto side streets? Will parking become an issue?”

“Turn around on all alignments will be problematic.”

“A big concern is dedicated red bus lane to be included on Sandy as planned by the mayor. If this bus lane will be required on Sandy, there just isn't enough room on Sandy for a streetcar. Why wasn't information about this bus lane included with the information of the street car before making decisions? Unfortunately, plans to cut car lanes increase traffic congestion. For example on Glisan, the elimination of car lanes often causes cars to be backed up for 10 blocks. Ten blocks of cars idling does not do much for the environment and increases stress and hinders safety.”

“Please don't put more traffic on Sandy Blvd. and make one-way traffic on crowded side streets. Especially 74th going down to the school and 73rd and 72nd also. I like street cars. Street car lines frequently take away many on street parking to the detriment of local businesses. Many disabled people have to drive and keep easily accessible parking spots.”

The entire Broadway quarter and north east is under developed as a two commercial District or Main Street. Businesses cannot survive with high runs and lack of ability to attract pedestrian traffic, due to the high speed commuter orientation of the street. Broadway would be too perfect opportunity for mixed use development with taller buildings but it now has mostly one and two level buildings including drive-through food chains that waste valuable space and force density into adjacent neighborhoods. Getting to Hollywood now for us is by street car would be an effective and pleasurable way to stop driving. Broadway to Hollywood as a way to energize- a vital corridor that is long neglected by the city.”

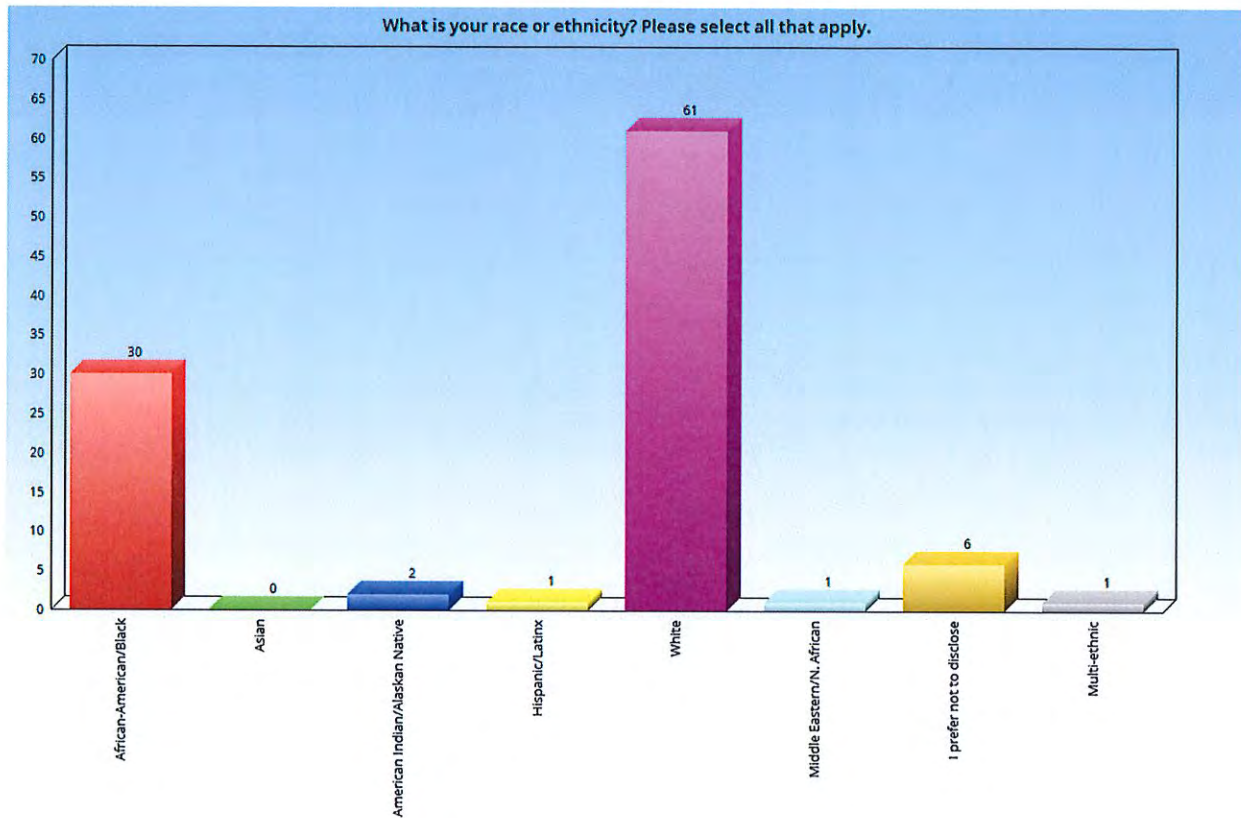


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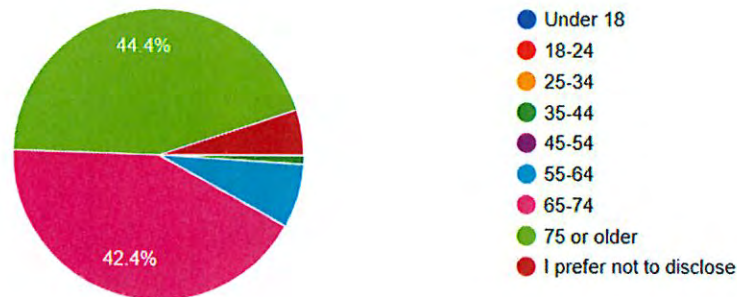
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Survey Response Demographics (102 surveys completed)



What is your age?

99 responses

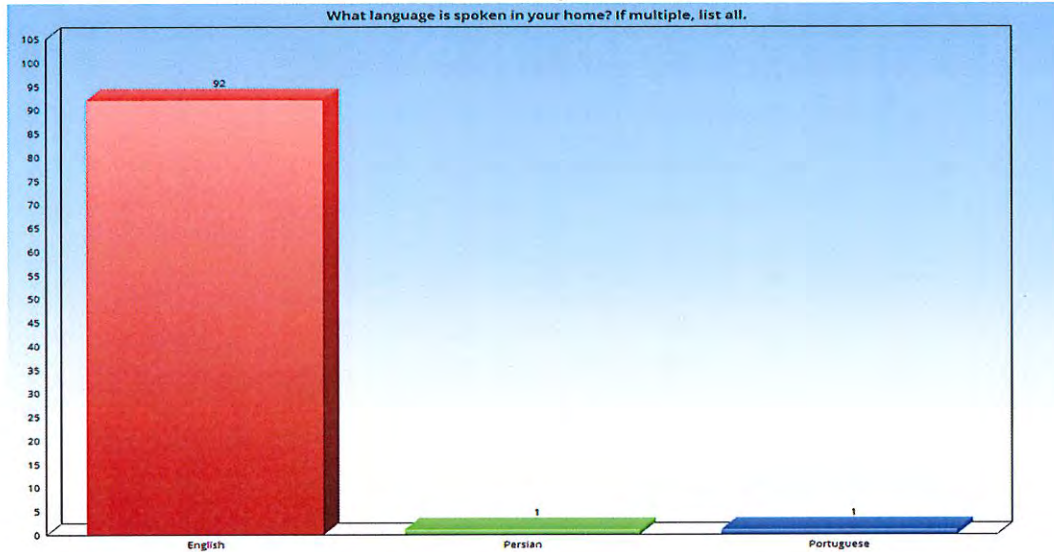




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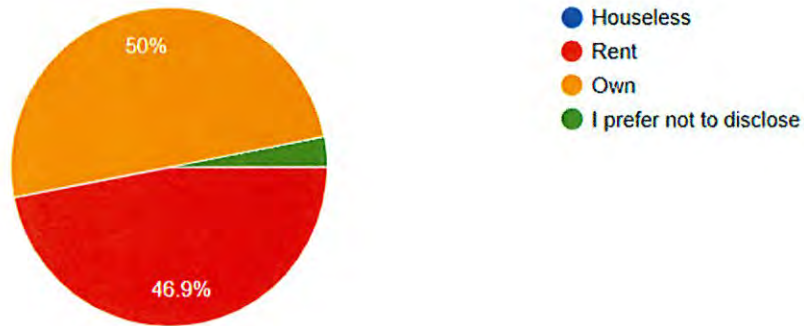
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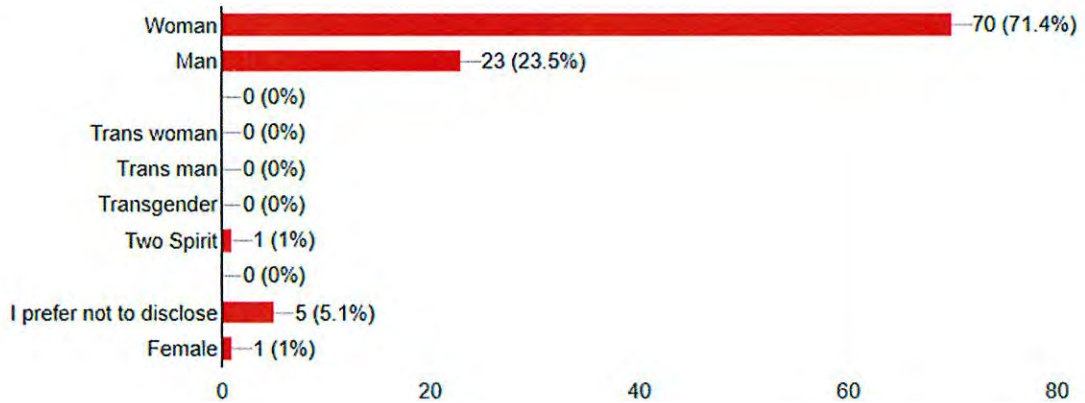
Which best describes your current housing?

98 responses



How do you identify your gender? Select all that apply.

98 responses





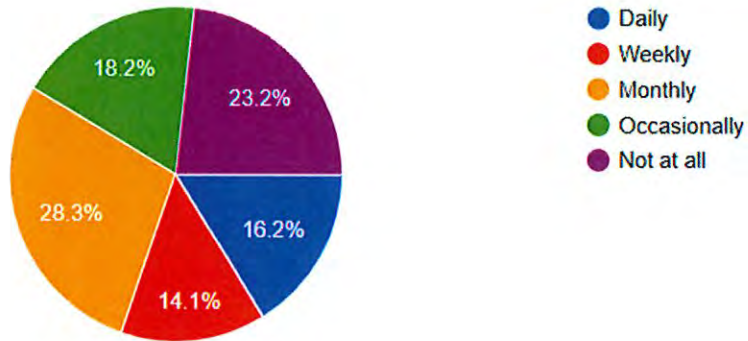
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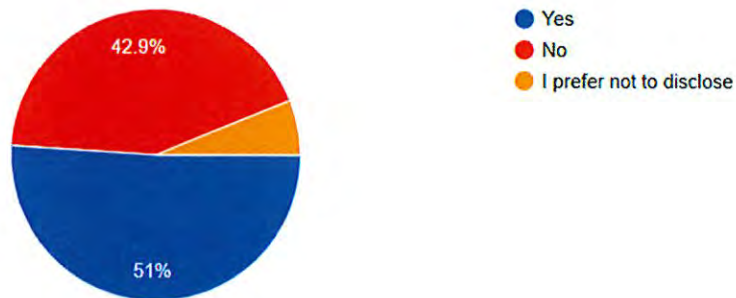
How frequently do you use public transportation?

99 responses



Are you a person living with a disability?

98 responses

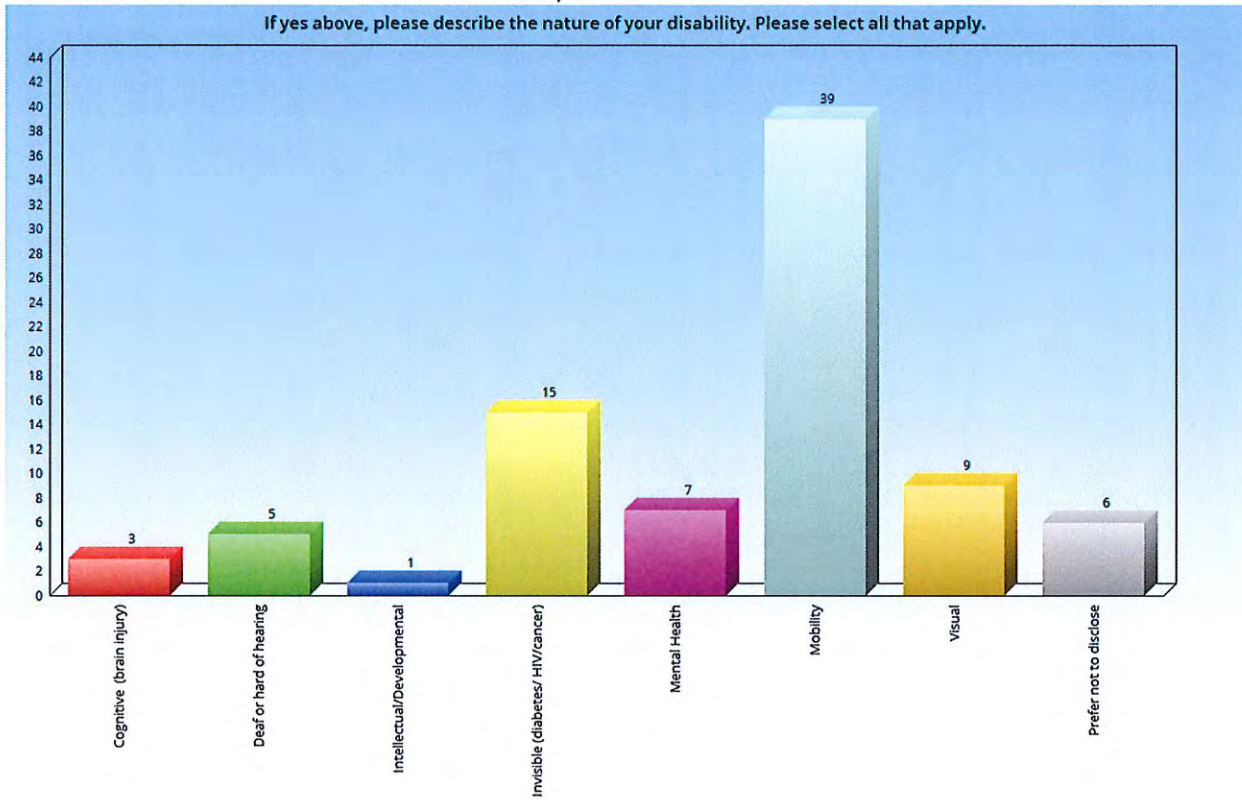




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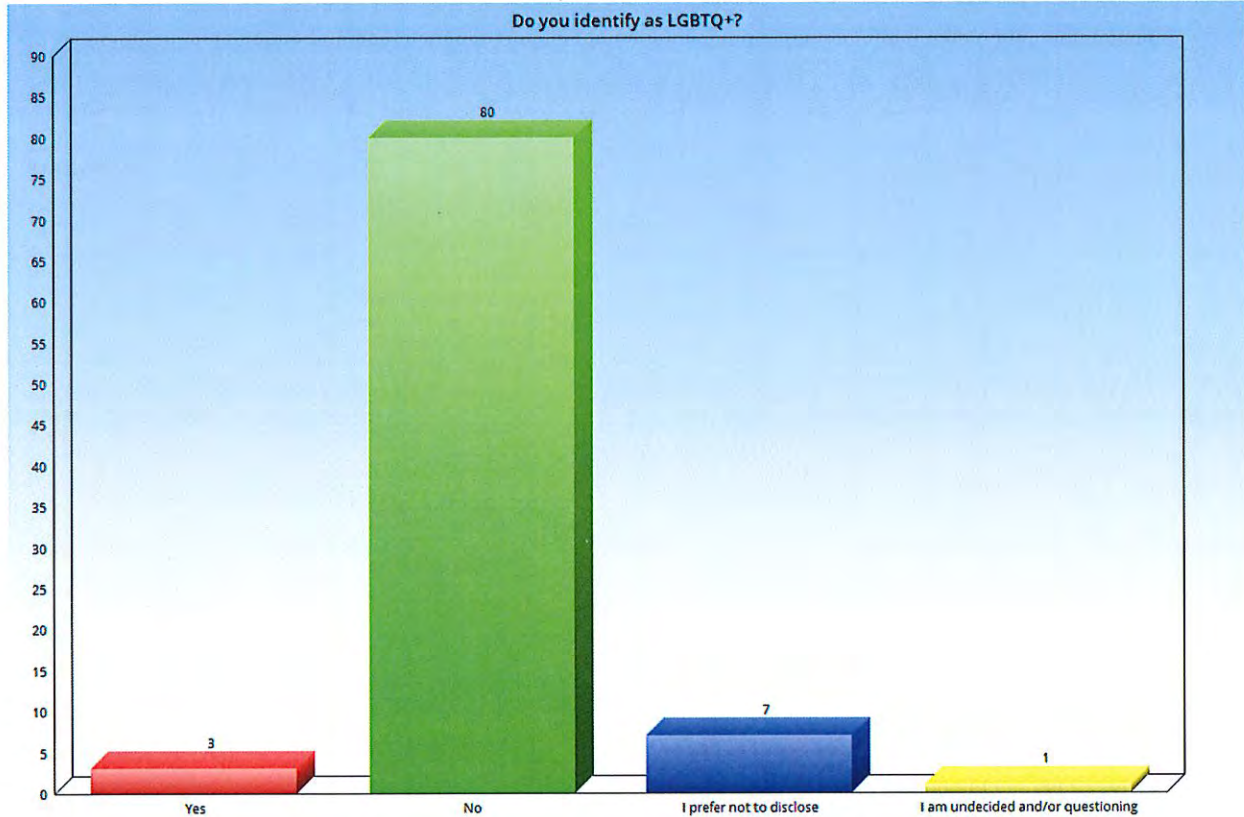




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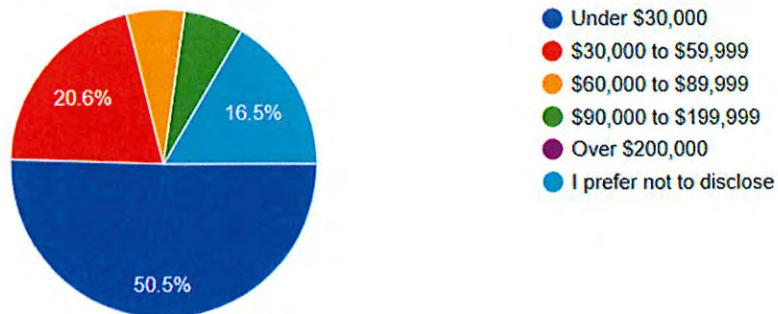
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What is your total household income?

97 responses

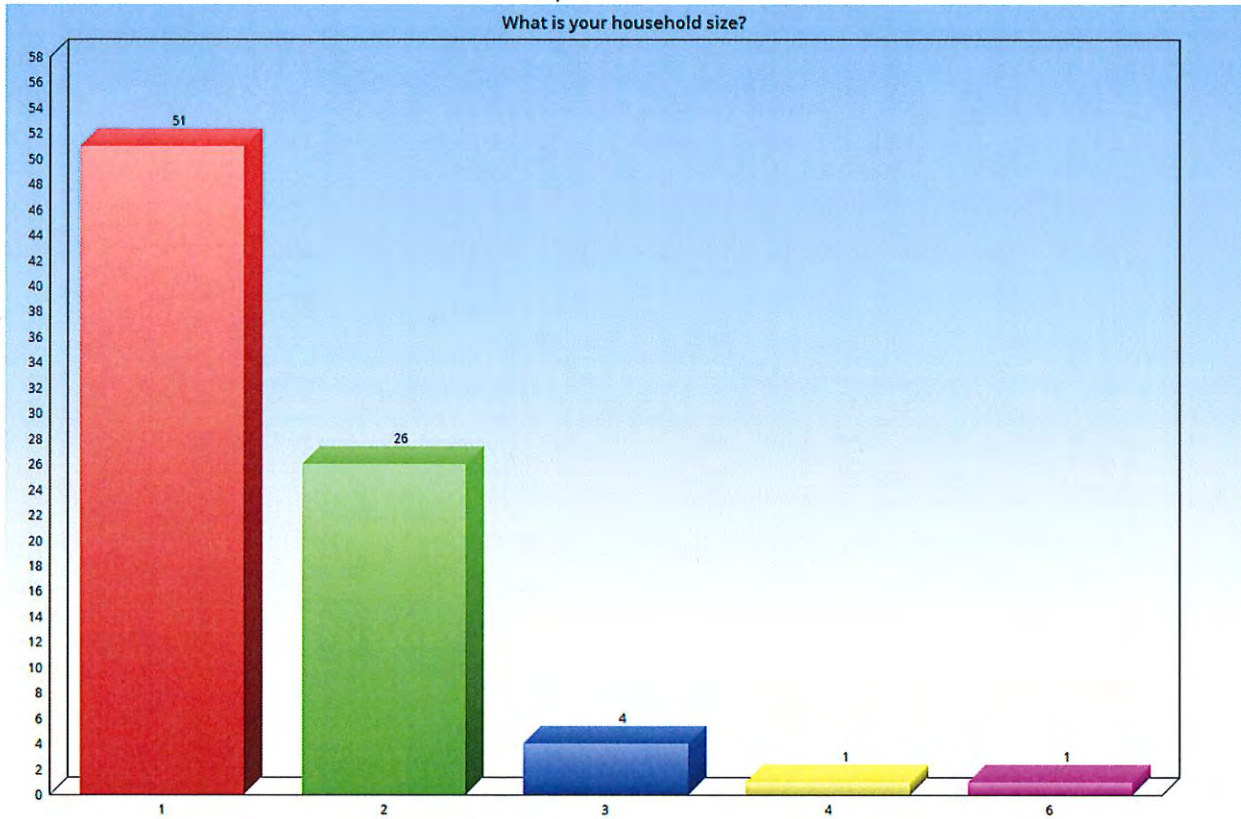




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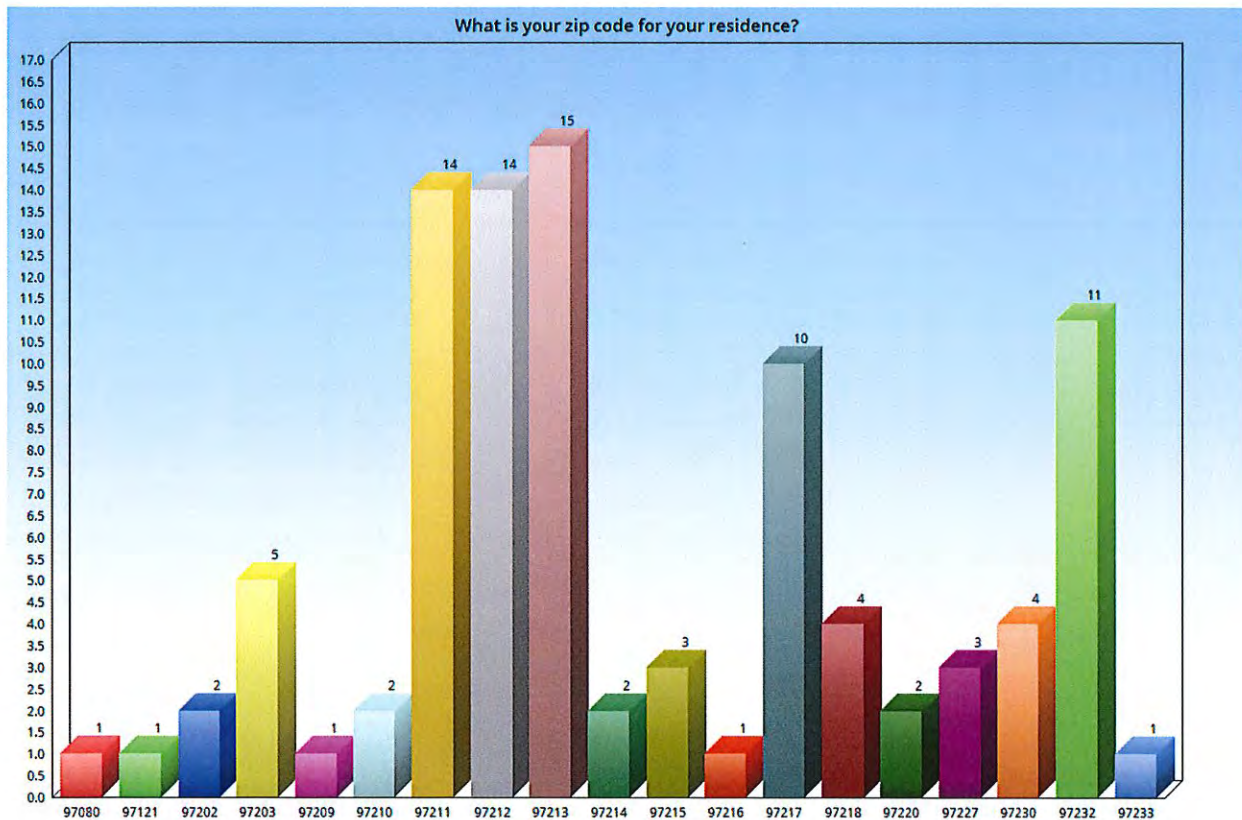
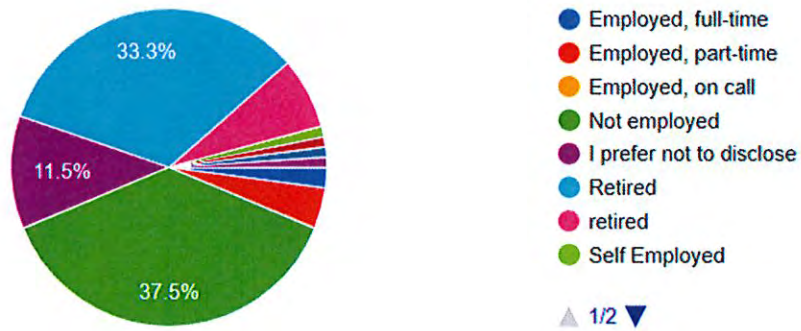
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What is your employment status?

96 responses





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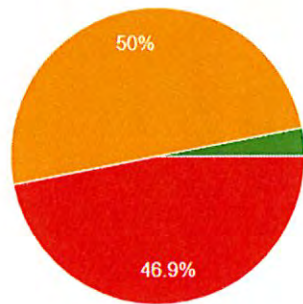
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Which best describes your current housing?

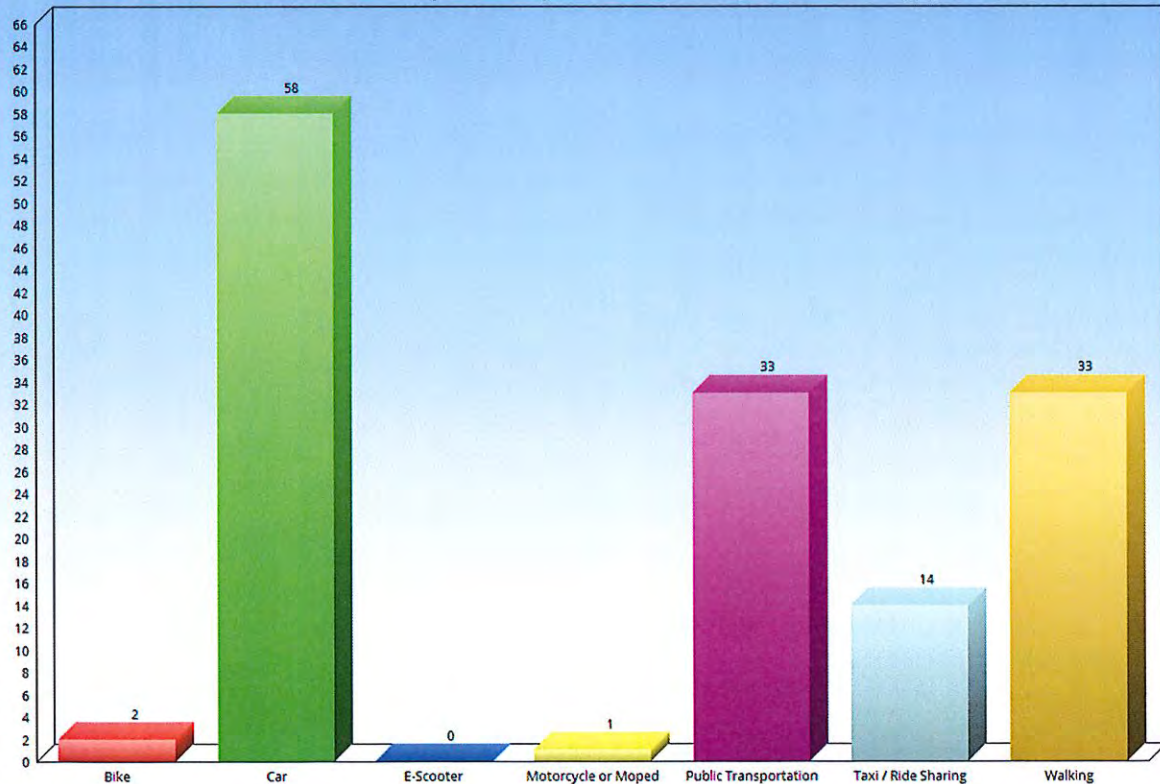


98 responses



- Houseless
- Rent
- Own
- I prefer not to disclose

What form of transportation do you use most often? Please check all that apply.





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Final Thoughts

We believe that the timing of this project had a significant impact on the survey results and findings. Conducting this transportation study survey during a global pandemic, racial reckoning and political polarization made it especially challenging for individuals to think beyond current events and visualize a streetcar ten years out. Many of the seniors who would be using public transportation are no longer using it because of COVID-19. Many are now homebound and concerned for their health and safety and the future of the City of Portland.

These concerns impacted the enthusiasm for this project as it was difficult for many to imagine how an investment in a streetcar would be a priority now when so many businesses are closed, unemployment is high and affordable housing scarce and racial justice needs to be addressed. Both seniors of color and white seniors commented that a streetcar could create more displacement for people of color. Some questioned why there would be an investment in a traditionally more white community than in other N/NE neighborhoods. Many commented that money could be better spent investing in affordable housing and creating more green spaces and community gathering spots. We recommend that future communication around the project clarify funding sources for a streetcar as funding for the project may not be funding that could be redirected to other community needs like housing.

We believe that some survey responses would have been different had this work been done a year ago. At the same time, some responders were excited about the investment of a streetcar in NE to Hollywood. They felt a streetcar would improve traffic congestion, street safety and bring more businesses and growth to the area. A streetcar on Broadway/Weidler received the most interest and enthusiasm from seniors surveyed. We hope that there will be many more opportunities for exploration and discussion, hopefully at a more stable time.



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Complete Comments from Hollywood Senior Center MP2H Transportation Survey

Question: Which alignment best matches your preferred vision for future development of this area?

If it would take us to Freddy's at 3030 Weidler, that would be wonderful.
We don't need more transportation. Do not need to car streets torn up instead repair these and repair sidewalks. We need to lower rents. More common areas like parks for families and children.
Not necessary. Bus is doing the job.
We need a direct way to get to North Portland.
You're already over developed this area. And I don't see you going to the suburbs and running street cars through their neighborhoods and disrupting their lives. This is not San Francisco. It only benefits whites. It's not to help the few black residents that live in the area. Everything that you're doing with our street car is not in our best interest.
These one through four questions are very hard to evaluate due to the poorly designed maps on the slideshow by the city.
Previous improvements to Sandy Boulevard have left me frustrated and diminished access and pedestrian traffic. Can we improve and repair these?
Use of money to speed Max downtown by putting it under ground. Cut back on time going through downtown. We need public transportation that is most efficient. Expansion of light rail with Outer loop. Development of light rail.



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Irving Street passes elderly, non-driving and continues downtown to the streetcar line. This is my favorite option

There are plenty of us lines on Sandy. Irving Street is too narrow. Broadway with her – no. It will change the character in the neighborhood and take away much needed parking.

I pick Sandy Boulevard if we have to pick one. Don't like higher taxes or more traffic on Sandy. I am low income

Spend transportation money on driverless ride share system of the future. All three options are over developed and then would over stimulate businesses. Encourage a bike tricycle use. And ridesharing.

There are too much traffic on both SANDY and Broadway. Many people driving cars are going to give them up or they are driving further out. Before my injury I seldom rode buses. Now with stabbings and Trimet not enforcing social distancing and wearing masks, it is not safe. I suppose a streetcar or a bus line has been considered because the city has built so many rentals with no parking that doesn't make it right especially when it impedes traffic and hinders safety.

I see no advantage for Hollywood of a streetcar over current available transport like the max and bus 12 which runs down Sandy. I do see traffic disruption and traffic jams at Broadway is narrow.

Question: Please express any additional ideas you have for the NE Portland and Hollywood area? What would you like to see? What are you concerned with?

more benches/seating in community for seniors. fully covered bus stops. keep local small businesses. better connections between all modes of public transportation.

I don't care to see another explosion of upwardly mobile young people from California Wisconsin, Idaho, or New York, buying little honey comb like condo's that get built so high they block out the Sun. I feel we have to tend our own garden here first. Instead, of the over growth model I would like to see more day



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centers indoors, for folks the folks who were born and raised here, places of learning, with some resources, places for them to hang out, and get some hands on experience around successful neighbors. A place for some just to reboot, retool, get indoors, maybe have a sandwich from VOA.. We try to immediately improve everyone mold them, turn them into good little working machines. How has this strategy worked out for our community. Not that well. Indoor public spaces need to be established, at least during the day. A place where those who walk in feel welcome and don't get greeted by a social worker, a head shrinker, or a security guard. Where you can just come as you are. To be accepted right where you are at. Maybe have a shower, a clothes pantry. But that would be the extent of it. We could do this. have temporary locker space for those who carry their world on their backs all day long.. they'd have more hope their sleeping outside situation might improve. There are people who come here with great talents. Latent skills. Hemingways, Keseys, they watch us out of the corner of their eye and assess how we treat them. It wouldn't cost much for travelling folk to get a good taste in their mouth about us, our kindness, patience and generous hospitality. if they'd care to get out of the elements, and I am not just talking about senior centers. I am talking about having tables, chairs, couches, a bathroom, electrical charging stations, for everyday people, including those camping or sleeping outdoors, spaces also for those who want to get actively involved to volunteer their time and share their particular skills. Everyone has something to teach and to learn. We could have inclusive seminars, instructional workshops, ping pong tables, music studios. people stopping in to take a class, or get day labor jobs getting hooked up for who knows how long, from simply running into people at these central meeting spots. Citizens who maybe like the energy of these spaces and need some help to get a job done... We need stationary melting pots besides public transit melting pots. We also desperately need clubhouses for kids where they get sparked by mentors to empower our children to form their own club rules, where they have places they can belong to. These clubhouses would be centrally located and color blind. You would have whatever status you have due not from your pocketbook, but, stemming from the content of your character. These clubhouses could get some great things done, bring city advocate role models their due sense of worth, get them involved and back to work, and for the children, they could decide their own fundraising activities. It's time to end profiling, apartheid and segregation. Caucasian citizens must also take a step forward. I feel we're willing. This survey is proof of that. It may be out of our comfort zones to better mix socially, But, As a growing and diverse city, but for our own social development too, it's critical everyone reach out and come to the table. So, somebody with vision has to set and sit down at the table. only through proximity can we abandon our myths about others who we may not yet understand, those who don't look, speak, or pray as we do. Discovering we aren't so mysteriously different from other religions, cultures, races, but also to acknowledge we are all on Nation, who's stronger because of our differences. Not because we try to erase all the lines between us.

I don't see a need for a trolley. it is not the best use of transit \$ and will increase traffic problems

Grocery store

designated bike trail within green space trails less traffic lanes make happy residents and businesses

have heard that easily accessible transportation sometime brings crime to the neighborhoods.

I'm hopeful that the process of adding a street car line would not be too disruptive to the existing districts and it would indeed yield the positive things we hope for.

Traffic patterns on Sandy need to be improved (eg, no left turns w/o dedicated left turn lane, traffic circle (roundabout) at major intersections like 72nd)



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No parking within 100 ft of stop signs
My biggest concern is in regard to the disruption construction will cause to access on and off I-84. I also have major issues with the proposed streetcar "turnaround" that would go around the Trader Joe's property, cross Halsey and do a u-turn in the area of the current transit center, then head north to Broadway, west back to meet Sandy Blvd. The timeline for the streetcar is to complete in 2035, but the MP2H team didn't seem to be aware of TriMet's Hollywood Hub project that would add 2 large buildings on the property, which would eliminate the ability to utilize the area for a turnaround. On the surface it doesn't seem that all of the agencies within the city are talking to each other.
Safety and homelessness.
Homelessness
The only concern would be funding and I don't have enough information now
Develop which destroys the character of the area, including buildings which are too modern and plain. Especially concerned about demolition of old and historic homes and neighborhoods.
I'd like to see a clean and safer Hollywood District. I grew up and still live in Beaumont Wilshire neighborhood in my family home. I am concerned by the graffiti and lack of caring for our area. Graffiti and trash are not welcoming. They are the opposite; a neighborhood where its citizens don't care. This is a wider Portland Problem but I'd like to see NE Portland be a trailblazer for a safer and healthier urban life. Also our area's small businesses (think global show local) We are a small business that gives back to the area. More education on supporting local business is a critical need now.
Loss of character of this unique community and landmarks
1. Pedestrians - this is a walking neighborhood and traffic is already an issue. 2. Will cars be funneled onto side streets, will parking become an issue? 3. Diversity of residents and businesses: who will be able to live and work in the same area? Portland is now a gated community where only the upper class can live - the rest have to drive in to work.
I would like to see A Paper back book exchange where a person can take their old books and get credit in value. Also, I would like to see a Cold Stone Creamery shop. I would like to see more minority own



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<p>businesses. I would like to see additional variety of retail stores such as Walgreens. How about a KFC or Burger King or Popeyes. I don't not wish for businesses that exist now leave the area. I would like to see more thrift stores in the area.</p>
<p>Turn around on all Alignments will be problematic</p>
<p>I would like to see less demolitions of houses and fewer apartments and more trees and greenspaces. More restaurants and local shops would also enhance the area. Currently cute small bungalows that could become housing for many are being replaced by boring, ugly apartments with little or no parking, few trees, very little green spaces and not commensurate with surrounding neighborhoods. The east side is losing it's character and becoming just a sea of apartment buildings. A big concern is dedicated red bus lane to be included on Sandy as planned by the mayor. If this bus lane will be required on Sandy, there just isn't enough room on Sandy for a streetcar. Why wasn't information about this bus lane included with the information of the street car before making decisions. Unfortunately, plans to cut car lanes increase traffic congestion. For example on Glisan. The elimination of car lanes often causes cars to be backed up for 10 blocks. Ten blocks of cars idling does not do much for the environment and increases stress and hinders safety.</p>
<p>Put money into homeless shelters and affordable housing. Address needs (jobs, better schools) or the poor.</p>
<p>I am interested in seeing low income development housing</p>
<p>Dense housing with little parking</p>
<p>Please don't put more traffic on Sandy Blvd. and make one way traffic on crowded side streets. Especially 74th going down to the school and 73rd and 72nd also . I like street cars, too one out to Oaks Park when I was 26 and I am 97 and still like them.</p>
<p>Street car lines frequently take away many on street parking to the detriment of local businesses. Many disabled people have to drive an keep easily accessible parking spots.</p>
<p>Green spaces - benches at bus stops and parks. Multi generational activities such as Shakespeare in the Park, picnic area, water foundations and clean restrooms, more libraries, community centers, multi-generational housing. Rebuilding centers - Fix it Fairs, outdoor dining and eliminate fast food restaurants help small business and local, ethnic business.</p>
<p>NE Portland swimming pool and rec center with meeting rooms. Need sidewalks along all the streets, school musical groups playing and entertaining in the park. Movies in the park, free popcorn, neighborhood parade bikes.</p>
<p>Rather than spend money on a streetcar line which doesn't add to neighbor needs, spend it on affordable housing which is scarce in Portland.</p>



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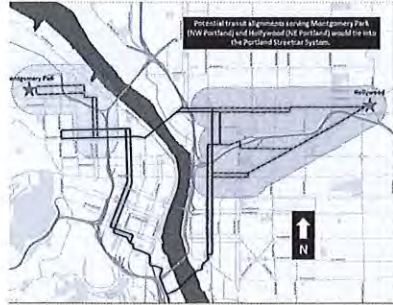
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I feel that it would allow more people to come the Hollywood District. Visually I think it would be awesome. I really hope this comes to fruition.
Would like to see more commercial development such as small shops, restaurants, specialty food stores, etc.
I am concerned about the street car causing displacement of people like what happened in the Albina district with uprooting of African American names. I am also worried about the safety the safety of pedestrians. the streetcar could also affect access to local businesses by blocking entrance to stores and decreasing parking spaces.
Not a good idea
Broadway to Hollywood is dead and dangerous! It needs the streetcar to come alive and contribute safety. It is great connectivity to city center. What a great name for the streetcar "Broadway to Hollywood"
Because of the black lives matter does not seem like a good time right now since our city has been destroyed. Sandy Blvd is a mess anyway.
Drivers would be white and probably not race friendly. In addition to the majority of the passengers being white due to the project.

TRANSPORTATION SURVEY

The City of Portland wants your input on plans for a future streetcar line in NE Portland

Hollywood Senior Center, in partnership with the Urban League of Portland, has received a financial grant from the City of Portland Bureau of Planning and Sustainability to help the City better understand



community issues and priorities regarding transit investments and land-use changes. The City is exploring bringing a streetcar to the Hollywood District, in 10-20 years. There are currently three main potential streetcar alignments being evaluated for this project:

- NE Sandy Boulevard
- NE Irving Street to Sandy Boulevard
- NE Broadway/Weidler

We want to hear from you!

Do you like the idea of bringing a streetcar line into NE Portland? Which of the three streetcar alignments do you favor? What questions and concerns do you have about a streetcar coming to NE?

We don't have space in this newsletter to include all of the great visual references that go along with this survey, but we encourage you to review this **ONLINE**

SLIDESHOW if you can, before completing the survey:

<https://www.portland.gov/bps/mp2h/mp2h-northeast-portland-urban-design-concept-virtual-open-house>

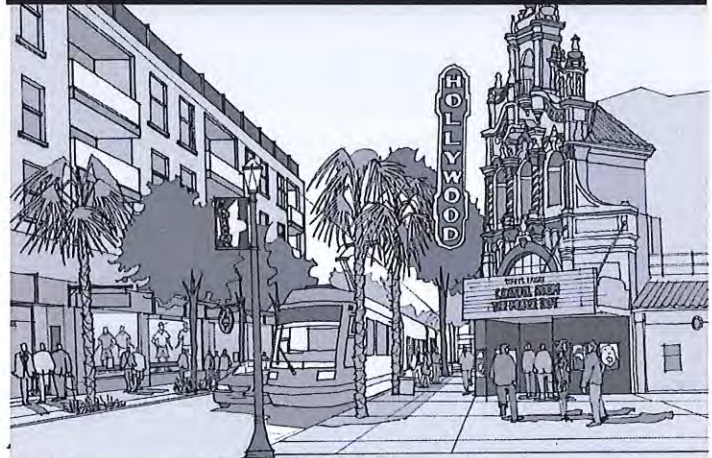
Please fill out this survey, including the demographic information at the end, and return by mail by 8/15 to:

HSC or **ULP, Attn. Arleta**
1820 NE 40th Avenue **10 N. Russell St.**
PPX, OR 97212 **PDX, OR 97227**

Feel free to attach an extra page if your comments don't fit in the allotted space. Everyone who completes the survey will receive a \$5 Fred Meyer gift card as a thank you.

THE CITY WANTS YOUR INPUT!

Hollywood Senior Center and the Urban League of Portland have been given a grant to gather input from older adults on the future expansion of transit in NE Portland. We will be reporting your input to the city. We hope you will complete this Transportation Survey to help the city make informed decisions!



This alignment includes the following attributes:

- ◇ Streetcar would travel along Sandy Boulevard to reach the Hollywood Town Center, and features two potential connection points to the existing streetcar system: at Burnside/Couch Street or at Washington/Stark Street.
- ◇ Connects to existing transportation infrastructure, including MAX at Hollywood, and bus lines at MLK/Grand; 11th/12th; Glisan; and Cesar Chavez/Hollywood.

...Survey continued on page 2

Alignment B: Irving Street to Sandy Boulevard

This alignment includes the following attributes:

- ◇ Ties into the existing streetcar system at Martin Luther King Boulevard and Irving Street. The streetcar would then cross I-84 on the 12th street bridge, operating on Irving Street until it reaches Sandy Boulevard.
- ◇ Connects to existing transportation infrastructure, including MAX at NE 11th and Hollywood, and bus lines at MLK/Grand; 11th/12th; Glisan; and Cesar Chavez/Hollywood.

Alignment C: Broadway/ Weidler

This alignment includes the following attributes:

- ◇ The streetcar would tie into the existing streetcar system at Martin Luther King Jr. Blvd and Grand Avenue, then operate on the Broadway/Weidler couplet until NE 24th where the streetcar would operate two-way on Broadway to reach the Hollywood Town Center.
- ◇ Connects to existing transportation infrastructure, including MAX at MLK/Grand and Hollywood, and bus lines at MLK/Grand; 11th/12th; 33rd, and Cesar Chavez/Hollywood.

SURVEY QUESTIONS:

Which Alignment Do You Think Works Best?

1. **On which alignment do you think a streetcar line can best support economic prosperity through job creation, small business or micro enterprise opportunity, or serve existing jobs?**
 - Alignment A: Sandy Boulevard
 - Alignment B: Irving Street to Sandy Boulevard
 - Alignment C: Broadway/Weidler

2. **On which alignment would a streetcar investment most improve access to affordable housing, middle-wage jobs, nature and recreation?**
 - Alignment A: Sandy Boulevard
 - Alignment B: Irving Street to Sandy Boulevard
 - Alignment C: Broadway/Weidler

3. **Which alignment do you think has the most opportunity to advance equitable outcomes through different development types/land uses, or a potential community benefits agreement?**
 - Alignment A: Sandy Boulevard
 - Alignment B: Irving Street to Sandy Boulevard
 - Alignment C: Broadway/Weidler

4. **Which alignment best matches your preferred vision for future development of this area?**

- Alignment A: Sandy Boulevard
- Alignment B: Irving Street to Sandy Boulevard
- Alignment C: Broadway/Weidler
- None of the Above. Your Idea:

General Questions:

5. **What might be the benefits of a streetcar line being built in the area? (Select all that apply.)**
 - Easier to get to work
 - Bring more customers to local business
 - Decrease area traffic/solve parking problems
 - Might bring new development
 - No benefits that I can see
 - Other:

6. **What types of investment or development would most benefit your neighborhood? (Select all that apply.)**

- Affordable housing
- Affordable commercial space
- Opportunities to create more jobs
- Community amenities
- Commercial services
- Safer streets

7. **What might be the drawbacks of a streetcar line being built in the area?**

- Might bring new development
- Increases in commercial and residential rents
- Increases in property taxes
- Displacement of businesses and residents
- Other drawbacks
- No drawbacks I can see

8. **What are your greatest concerns for NE Portland/ Hollywood?**

- Rising housing costs
- Loss of job opportunities
- Loss or changing neighborhood businesses
- Change in neighborhood character
- Safety
- Transportation accessibility & options

9. **How frequently do you use public transportation?**

- Daily
- Weekly
- Monthly/Occasionally
- Not at all

10. **Please express any additional ideas you have for the NE Portland and Hollywood area? What would you like to see? What are you afraid of seeing or concerned about?**

**A.4: Community Based Organization (CBO) Report:
Micro Enterprise Services of Oregon (MESO)**

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To: Barry Manning, City of Portland Bureau of Planning & Sustainability

From: Micro Enterprise Services of Oregon

Re: MP2H – Northeast/Hollywood Feedback Session Interim Report

Target Group: Minority- and women-owned small business owners

In May and June, as part of a contract with the City of Portland Bureau of Planning and Sustainability (BPS), Micro Enterprise Services of Oregon (MESO) held sessions to obtain feedback from BIPOC and women owners of small businesses about three possible Portland streetcar routes being considered in northeast Portland as part of the City of Portland’s Montgomery Park to Hollywood (MP2H) Transportation Strategy.

The sessions were intended to gather input from small businesses that have traditionally been underserved and underrepresented during planning for City transportation projects. The objectives focused on providing information about the proposed project and the routes being considering, and then providing a chance through discussion and completion of a survey for the business owners to share how each route might benefit or impact them. While those goals were met during the sessions, current events in Portland, including a growing awareness and call for increased social and racial justice, influenced the conversations and discussions.

The discussion and feedback gathered from the sessions provide insight into business owner views and opinions about the proposed streetcar project. The majority of participants, for example, see the proposed route along Sandy as the preferred route. However, the participant feedback and comments also offer a first-hand look issues that small business owners, especially BIPOC entrepreneurs, believe need to be addressed at the City level in order to create a foundation of equity that can then be used to plan, develop and move forward with physical projects such as extending the Portland Streetcar line from the Montgomery Park area to the Hollywood District

SESSION DETAILS

As per MESO’s contract with BPS, we focused outreach for both sessions on minority- and women-owned small business that either were located in the Northeast project area or worked

with clients in that area. Our original proposal, submitted to BPS before Gov. Brown issued a stay-at-home mandate in mid-March, indicated we would conduct outreach to between 60 and 80 small businesses. We planned on holding two two-hour in-person feedback sessions and estimated we would gather feedback from a total of between 30 and 50 small business owners. However, due to COVID-19 precautions, the two-hour in-person format original planned for the session was adjusted to two virtual sessions of one hour each. Prior to the change, approval was obtained from City representatives.

Both sessions featured a similar format. After a welcome from MESO and initial introductions that included identifying staff from MESO, BPS, Portland Bureau of Transportation (PBOT) and Prosper Portland, City staff provided background information about the purpose of the project and presented a video to educate participants about project, including routes being considered. MESO then facilitated a discussion that allowed participants to talk ask questions and share their viewpoints with MESO and City staff. Participants were sent an online survey after each session.

Each participant received a \$50 stipend/compensation for completely filling out and returning an online survey designed to gather feedback about how the proposed routes might impact their businesses and/or business activity. All participants returned completed surveys, with 23 stipends provided

Just under 40% of the session participants/survey respondents were men, slightly more than 56% were women, with a little more than 4% self-describing. Approximately 52% identified as Black/African American; nearly 18% identified as Hispanic or Latinx; slightly more than 4% identified as Asian, nearly 22% identified as White and approximately 4% declined to provide racial/ethnic information. Approximately 65% operate home-based businesses; the remainder lease storefront spaces, with monthly lease rates ranging from \$1,751 to \$4,000. Respondents spent an average of nearly 13 minutes filling out the survey.

MESO participants who attended the sessions included Stephanie Basalyga, Nita Shah, Carmen Madrid and Vianca Moto. Sessions also were attended by Barry Manning of BPS, Kate Drennan of PBOT, and Joana Filgueiras of Prosper Portland.

MESO held the first of the two virtual sessions on May 27. Eighteen minority and women owners of small businesses located in, or associated with, the study area containing the three routes viewed a video about the project and participated in a discussion led by MESO and staff from PBOT, BPS and Prosper Portland. Participants were part of a group of current MESO clients who were invited to participate in the session.

The second feedback session was held on June 18. MESO invited clients that were unable to attend the first session. We also used our in-house MarketLink research service to identify more than 200 small businesses with ownership that met the target audience because they are located in the project area and/or work with clients in the area. The latter group of businesses received direct-mail postcards that invited them to attend the session and provided information about the project (including links to the City's MP2H project website).

The second session drew a smaller number of participants. Although approximately 20 people registered for the event, a total of five people actually attended the session. MESO attributes this lower attendance to conditions related to the pandemic. The first session was held at a time when many small businesses were closed, so owners had time free to attend. By the time the second session was held, however, small businesses had either started to open or had pivoted their goods and services in ways that allowed them to start serving customers once again. Focused on reopening, including rebuilding inventory and preparing physical spaces to meet safety requirements, fewer owners had time available to attend the June session.

The discussions also differed between the two sessions. During the first session, discussion was split between the transportation project and participants' views on steps the City should take to improve equity in both City projects and development of underserved and underrepresented communities.

During the second session participants focused their questions and discussion more on the topics of equity and opportunity, especially in the areas of neighborhood development and fair participation. We attribute that shift in focus to events (such as the Black Lives Matter protests) that took place between the first and second sessions that turned a spotlight on the need for greater social justice and equity. This led to an increased willingness of participants to share their own experiences with inequity as small business and property owners in Portland. The resulting participant comments and discussion during the second virtual session, presented in detail later in this report, provide valuable information that may help the City as it moves forward with building relationships in communities that historically have been underserved and underrepresented.

For both sessions MESO gathered surveys and feedback from a total of 23 individuals. Although the total number of attendees was below the number originally proposed by MESO, survey responses among participants were consistent, leading us to determined additional survey responses would result in similar results.

SURVEY RESULTS SUMMARY

Based on all survey responses, 43% of respondents selected the Sandy option as their favored streetcar route, citing a need for more public transit options along that route and seeing Sandy as a straightforward way to connect the Montgomery Park and Hollywood areas.

“Sandy is a two-way artery. There seems to have more space for street car, vehicles and bikes to share,” one small business owner commented. “Also, some parts of Sandy ... are steep; therefore, pedestrians could benefit by having the option to take the street car uphill.”

A little more than 26% selected the Broadway route as their favorite option. A little less than 9% selected the Irving/Sandy option. Nearly 22% said they didn’t favor any of the routes, with several comments providing an indication those respondents didn’t see streetcar as an addition that would benefit the study area. *(See Appendix A on page 11 for raw data and additional comments related to the most favored route.)*

The least favored route was Broadway, which was selected by a little more than 39% of survey respondents. The 26% who saw Sandy as the least favorable option felt bringing in a streetcar line would worsen gentrification already occurring along that route. Another 26% who felt Irving/Sandy was the least favored route thought placing a streetcar line would make the route too confusing to navigate.

Those who selected Broadway as their least favorite option indicated the area already had enough public transit options. Concerns about placing a streetcar line on Sandy focused on the possibility of the project increasing the inequity through community displacement that has already taken place along that route. *(See Appendix B on page 12 for raw data and additional comments related to the least favored route.)*

Increased commercial and residential rents topped the list of participants’ concerns about negative impacts that might result from bringing a streetcar line into the study area. Following close behind were concerns about possible increases in property taxes and displacement of both residents and businesses. About one-quarter of respondents saw development that might result from a streetcar line as a possible negative impact. *(See Appendix C on page 14 for raw data and comments about possible positive/negative impacts related to streetcar service in neighborhoods.)*

Impacts on traffic were most commonly cited by participants as their number one concern about how construction of a street line would impact their areas and their ability to effectively run their business. Close behind were concerns about a loss of adequate parking and difficulties for customers in accessing businesses in or near areas of construction work.

When it comes to sharing feedback about projects or discussing projects with the City, half of the respondents favored doing so at public meetings. The remaining 50% were evenly split in favoring one-to-one conversations, online video conferences, or email conversations.

In the survey, participants also were provided with an opportunity to write their own responses to a question asking them to identify the most important thing the City should keep in mind with regard to equity as it moves forward on this project.

Responses provided, which were supported by comments made during the discussion periods in both feedback sessions, indicate participants are seeking consistency and follow-through from the City. They also called for the City to continue to seek out voices of those already in the area in order to avoid displacement of residents and businesses similar to what has happened in other parts of the city.

Specific suggestions included:

- “(Make) affordable housing for BIPOC and BIPOC businesses (a priority).”
- “Make sure (the process) is inclusive of residents as well as business owners, and that People of Color know about the planning stages and are given a right to voice their opinions.”
- “Continual dialogue with all stakeholders – especially the disenfranchised.”
- “(The City should consider) how will minorities be impacted and what is defined (as) middle-wage jobs/low income housing. If there is still low-income housing, then that means these people will still feel less than the areas they live in. Maybe home ownership is a better investment.”
- “Equity at its core is a redistribution of wealth. I suggest considering ways to implement progress in a way that abandons the traditional exclusionary practices.”
- “Please listen to the locals before move forward.”

(Refer to Appendix D on page 16 for additional participant responses/suggestions.)

At least one respondent acknowledged the difficulty that comes with trying to address myriad needs and interests of stakeholders in projects such as the one being considered in the MP2H study.

“Hard to say (what the City should keep in mind as it goes forward with this study). Seems like a ‘damned if you do, damned if you don’t situation,’” the respondent wrote. “Increasing the efficiency of traffic flow is going to make the city better, and making the city better is going to lead to gentrification unless middle-class jobs and homeownership are made available to poor people in the areas you’re improving. Can PBOT guarantee these options? Seems like fixing the systemic issues that lead to gentrification is beyond the scope of PBOT. So do you just leave some parts of the city poorly-developed so that they’re cheap enough for poor people to live in? That doesn’t seem like a good solution either.

“I think maybe the best option would be to guarantee low-income housing along any lines that are developed and to create parks and green spaces nearby. From what little I know about urban planning, it seems that creating green spaces is correlated with educational achievement. So if you have guaranteed low-income housing near parks and good transportation, you could potentially, in some small way, help narrow the achievement gap for kids of color, which, over time, should reduce the wage gap between whites and people of color, which should lead to homeownership in communities of color, which should make them more resistant to gentrification because your rent can’t be raised if you’re not a renter.”

INSIGHTS AND OBSERVATIONS

The Positive Potential of Development: On the subject of new development in communities, it’s often assumed underserved and underrepresented residents and small business owners don’t support development in their communities because it usually drives up residential and commercial/office/retail space rents and prices, and forces lower-income residents out of the area. At first glance, our survey results would appear to support that assumption. Examining the responses and comments more carefully, however, leads to an important realization.

Of the respondents, 21.75% said they considered new development as a possible drawback to a streetcar being brought to the Hollywood District. In addition, 79.57% of respondents worried that bringing streetcar access to their neighborhood could lead to increases in commercial/retail/office rents as well as jumps in residential housing prices, and 70% worry

about how new development might impact their ability to stay in their communities and neighborhoods due to gentrification.

However, 35% of small business respondents indicated they see development associated with a streetcar line as having potential benefit to revitalize historically under-served communities that haven't seen investment. Respondents who see development as having potential benefits supported their viewpoint with comments that indicate those benefits can only be realized by not just including residents and small business owners already in the neighborhood in decision making, but also by finding opportunities to allow them to financially benefit from any development that occurs (see Collective Bargaining Agreements section later in this report for further analysis).

Creating Opportunity: One word was brought up by participants of color during both sessions – Opportunity. BIPOC business owners in both sessions said they appreciated the opportunity to weigh in on potential development and transportation plans in the Montgomery Park and Hollywood districts. However, they felt the efforts were mainly “window dressing” and failed to address the real issues that they say have been problems in traditionally minority communities.

Several participants in both sessions stressed that simply giving BIPOC residents and small business owners a say in the types of development and transportation options in underserved areas falls short of what's really needed. Instead, they called for more opportunities for BIPOC small business owners especially to be provided with opportunities to participate in – and benefit from – actual development efforts.

One participant during the second session, for example, expressed frustration that large developers from outside the Portland area seem to have little difficulty obtaining permits and approval to tackle developments in his neighborhood. Meanwhile he owns two pieces of property that he says he has tried to develop, only to run into what he considered roadblocks from the City.

Both this property owner and others involved in the sessions said they found the City's permitting and design review processes and systems confusing and skewed to favor larger, more experienced developers. BIPOC property and small business owners might benefit from a class or program that walks them through how the City approaches development and transportation projects.

A mentorship-type program that connects BIPOC owners of property zoned commercial or retail with experienced developers also might prove beneficial. Such a program also would support and promote genuine equity in the development of underserved communities and

neighborhoods. As feedback session participants stressed, in order to create true equity for BIPOC small business owners and residents, the City needs to examine ways to help them actually invest in their communities, with the goal of keeping those dollars in the specific communities.

Community Benefit Agreement Suggestions: The move from home-based to brick-and-mortar represents a major accomplishment for a small business owner. The transition can often offer the opportunity for the business to grow its customer base, product lines and revenue. Too often, however, moving into storefront space, especially in new developments, can incur expenses higher than most small business can afford. In addition, traditional commercial and retail spaces are often larger than most small or micro businesses need, with rents higher than they can afford.

A true commitment to supporting a diverse, inclusive business community in a neighborhood requires providing opportunities for micro enterprises to gradually grow into larger businesses. That commitment must come from both developers and local government.

Community Benefit Agreements (CBAs) for developers should be shaped in ways that encourage developers to turn first to locally owned businesses to fill commercial and/or retail spaces. Local tenants are more likely to reinvest in the community, spending their dollars to help support other local businesses in the community.

As one small business participant commented: “Larger developers and big conglomerate chains seem to have first dibs or first rights of use to the most coveted commercial spots. They snatch the spaces even before construction starts. It would be ideal to favor small local business and entrepreneurs first.”

In addition, CBAs should encourage developers to consider innovative approaches to commercial, office and retail that create smaller spaces that are more affordable to micro businesses. Small business participants in the feedback sessions also suggested providing incentives to encourage developers to find ways to make it easier – and less expensive – for micro and small businesses to move into spaces. Build outs of hard-shell spaces in typical developments, for example, can end up being more expensive than most micro businesses can afford while move-ins of soft-shell spaces are more affordable.

Home-based businesses: While the tendency may be to focus on small businesses located in storefronts, the Hollywood area is host to many home-based businesses. In fact, more than 63% of the participants in the feedback sessions ran their small businesses out of their homes

While storefront businesses are easiest to connect with for input, effort also should be made to ensure communication and notices about upcoming meetings and projects are reaching home-based businesses. The input of home-based businesses is critical to accurately determining project impacts on the business community of an area or neighborhood. Many home-based businesses provide services that are needed – and used – by local brick-and-mortar-based businesses.

As development occurs in areas, attention should be paid to the types of home-based small businesses in the area. Encouraging developers to fill retail spaces with storefront businesses that will be able to use the goods and services of local home-based businesses – and creating programs and ways to connect those businesses – will help build a healthy, inclusive foundation for a neighborhood business landscape that will benefit all in the area.

As one participant commented in their survey, “The development on nearby Division Street has greatly boosted local businesses, which in turn helps me get more clients.’

Leading versus open-ended questions: At least two respondents in the first session felt at least one question MESO included in the feedback survey was phrased in a way that was “leading” respondents to provide a positive answer. The question, related to participant experiences with development in their neighborhoods, was taken almost verbatim from a survey used by the City during its open house.

After reviewing the question, MESO agreed the question could be perceived as trying to draw a positive response from participants. We removed the question from the survey form that was sent to second-session participants and also removed the question and its results from answers from the participants in the first session. Prior to the second session, we also carefully reviewed the rest of the survey questions to ensure they didn’t appear to be “leading” respondents to certain types of answers.

For both MESO and the City, the experience highlights an important reminder that not everyone approaches situations from the same viewpoint. While bias in how questions are phrased may never be completely eliminated, it is important to consider what filters those creating the questions may be using and to run surveys by outside groups for input prior to releasing them to larger groups.

FUTURE CONVERSATIONS

When asked in the survey to name the most important step for the City to take to support and promote equity during the study and any future projects, one small business owner responded: “Actually create equity instead of just talking about it. Find a way that people of color can benefit from the changes.”

By holding these feedback sessions to connect with minority- and women-owned small businesses, BPS has taken important first steps. The agency has opened up a dialogue that should – and must – continue in order to create true equity and inclusion in underserved, underinvested parts of Portland.

BIPOC- and women-owned small businesses in the Northeast portion of the MP2H project area are interested in both receiving ongoing information about the project and being given a seat at the table – and a voice – to shape how a possible Portland Streetcar expansion can be done in a way that promotes true equity and inclusion. Approximately 69.5% said they would be interested in attending another feedback session when the City narrows the northeast routes down to two options. Meanwhile, a little more than 43% said they would be interested in participating in feedback sessions when environmental review information is available. And at least one survey participant suggested providing a financial report examining how different scenarios would economically impact and/or benefit specific racial and ethnic groups (*see Appendix D on page 16 for specific comment*).

While CBOs like MESO can play an important part in connecting the City with BIPOC- and women-owned businesses, it is critical that the City and its agencies be an active partner in dialogues and discussions. Having representatives from City agencies such as BPS and Prosper Portland participate in both feedback sessions gave participants an opportunity to feel their voices, concerns and viewpoints were being heard. It’s how trust is built. Through consistent and long-term commitment to the scenario of inclusion and equity that is being painted by this project and approaches such as minority/women-specific feedback sessions, Portland has an opportunity to move beyond past trauma and pain toward a brighter and more equitable future.

APPENDIX A

Survey Question: Which of the three possible routes do you see as most favorable? (Select one; open-ended question – 23 responses)

Responses:

Broadway	26.09%
Sandy	43.48%
Irving/Sandy	8.70%
None favorable	21.74%

Comments:

“Sandy is a two-way artery. There seems to have more space for street car, vehicles and bikes to share. Also, some parts of Sandy ... are steep; therefore, pedestrians could benefit by having the option to take the street car uphill.”

“(Sandy is) already congested but having the streetcar might improve the flow of traffic, similar to Burnside.”

“The Broadway route seems as though it would better connect folks who don't already have pretty decent access to bus and Max routes. It would also limit extra impact to Sandy, which is already seeing a lot of new development and will undoubtedly see increases in rent, traffic and all of the other negative effects of forced development.”

“The construction alone (on Broadway) would be disruptive to the thoroughfare, which already is congested. We have existing streetcar lines and buses on this route. Sandy Boulevard connects a number of different areas of the city.”

APPENDIX B

Survey Question: Which of the three possible routes do you see as least favorable? (Select one; open-ended question – 23 respondents)

Responses:

Broadway	39.13%
Sandy	26.09%
Irving/Sandy	26.09%
Undecided	8.70%

Comments:

“Too many people rely on vehicle transportation in (the Irving/Sandy) area.”

“(Broadway) is one of the rear streets that has 2-3 lanes in this area and ... being that the Max is near & the other streetcar goes up to 7th before re-routing.”

“Too much traffic on Sandy right now.”

“Driving on a road with a streetcar in is not a great experience. I know the point is to reduce traffic and encourage the use of public transport, but until that becomes cheap enough to use as a regular alternative, being able to drive comfortably on a road, without slipping into tram tracks (whether it's wet or dry), will be more important to me as a business owner. I drive up and down Sandy regularly and would definitely be negatively impacted by reduced lane usage and having to maneuver around tram tracks. Not to mention waiting for stops, and the inevitable increase of foot traffic in the Hollywood area.”

“Deeper congestion and community displacement. With deepening gentrification of communities across the Portland Metro area, how would these particular routes support the thousands of cars driving into Portland from cities outside of the Portland Metro area?”

“It seems like having a line on Sandy would be less useful to people because Sandy runs diagonally to the grid. It's easier to navigate the public transit system when lines run parallel to each other.”

“I think (Irving/Sandy) would be confusing for people to navigate.”

“There was just a direction project in this area, so why up root all that has been done to add more transportation. Money can be allocated in other areas.”

APPENDIX C

Survey Question: What do you see as possible benefits to having streetcar service in your neighborhood? (Multiple choices allowed – 23 respondents)

Responses:

Decrease traffic/solve parking problems	56.52%
Bring more customers to my business	39.13%
Bring new development to the area	34.78%
Easier for my employees to get to work	21.74%
No benefits that I can see	27.74%

Comments:

“I was located on N Williams Ave 2 blocks north of Broadway for 18 years and just moved to NE 28th 1 year ago. I did not feel the street car had any benefit to my business or my rental located on Williams Ave.”

Survey Question: What do you see as possible drawbacks to having streetcar service in your neighborhood? (Multiple choices allowed – 23 respondents)

Responses:

Bring new development to area:	21.74%
Increase commercial/residential rents	69.57%
Increase property taxes	73.91%
Displace businesses and residents	69.57%
No drawbacks that I can see	8.7%

Comments:

“As development happens the businesses who have been in the area for a long time seem to get pushed out. The development areas lose some of their uniqueness and flavor which is what made them interesting in the 1st place. I have experienced firsthand a huge spike in taxes in the developing area which definitely adversely affects existing residents and businesses. The new construction is either too expensive to afford a lease and/or very generic with no character, no green space, it's very uninviting and doesn't encourage pedestrian traffic.”

APPENDIX D

Survey Question: What is the most important thing for the City to consider with regard to equity as it moves forward with this study? (Open-ended question – 23 respondents)

Responses:

“Gathering comments from community members, record comments and utilize before decision making happens.”

“Stopping the increase in commercial rent to allow businesses with established locations to avoid being forced out of their homes. Similarly, assessing what other negative impacts the development will have on those businesses. As listed above, decrease of available parking, increased traffic, etc.”

“When it comes to affordable housing, there should be rental and business ownership. Not just rental property for the rich. People should be given the opportunity to buy.”

“Consider black people, their opinions, their values, and their businesses.”

“That development projects positively impact the people who already live and work here.”

“Impact on preexisting neighborhoods and businesses.”

“(Think about) who would want to have a business or live in the area and participate in growing the community as well as embracing the existing businesses? Encouraging diversity and celebrating individual culture so the area is not generic. A grant for existing businesses to make upgrades or do maintenance, improve signage, make it easier for a small business or start up to have a retail space as well as helping with education and networking so they can be successful.”

“As I discussed within the meeting, (I would like to see) a detail fiscal impact statement that disaggregates its data by race for the data being used for your projections. I would also suggest exploring additional projects that would center Black, Indigenous, and People of Color investors and business owners.”

B. Prosper Portland Memo/IGA Close-Out

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Montgomery Park to Hollywood Transit and Land Use Development Strategy

Prosper Portland Memo/ IGA Close-out

June 2021

- Community Engagement Plans and Process
- Urban Design Analysis and Concepts
- Community Equitable Development: Needs and Opportunities

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Background

On August 30th, 2019, Prosper Portland and the Bureau of Planning and Sustainability signed an Intergovernmental Agreement that included Prosper Portland involvement or partnership on four (4) key tasks as part of a broader City of Portland work on the Montgomery Park to Hollywood Transit & Land Use Development Strategy: 1) Community Engagement Plans and Process; 2) Urban Design Analysis and Concepts; 3) Community Equitable Needs and Opportunities; 4) City Legislative Process.

It is our observation that much of the tasks 1, 2 and 3 is complete and, based on that work, the City is considering next steps related to the City Legislative Process. Given the Legislative Process step may take longer than originally anticipated and Prosper Portland's need to reprioritize staff to focus on COVID-19 economic relief and response together with longer term economic recovery, Prosper Portland is providing this memo as a summary of our participation and deliverables to date due under the IGA. Prosper Portland stands ready to continue to be a supportive thought partner to the City as needed as the City Legislative process proceeds and proposes to retain only a portion of the IGA funds remaining available to cover our participation through June 2021.

Community Engagement Plans and Process

Per the IGA, the work considered is described as follows: "BPS will lead community engagement efforts, with a focus on the needs of underserved communities and how development along the project corridor can advance outcomes for historically marginalized communities. Prosper staff will participate in the engagement as time and budget allow. There is no Prosper Portland deliverable in this task, other than staff participation."

In furtherance of this process, Prosper Portland participated in several planning and community engagement events led by Portland Streetcar Inc, PBOT and BPS, including the following:

- ✓ Support for a Request For Proposal (RFP) to select community based organizations for engagement, through which Friendly House; Micro Enterprise Services of Oregon (MESO); Northwest Industrial Business Association (NIBA) / Columbia Corridor Association (CCA); and the Hollywood Senior Center/ Urban League were awarded contracts.
- ✓ Attendance at in person and virtual public Open House events.
- ✓ Input on the creation of surveys to be used in the community engagement processes, suggesting questions to be included and, especially with CCA.
- ✓ Assistance with expanding survey distribution through firms and employers active in the industrial area, specifically major construction trades within the subject area.

Prosper Portland also engaged with regular project working group and internal cross-bureau planning meetings in support of preparation and presentation of engagement related materials.

Through the community engagement and outreach done, particularly by the four contracted community based organizations, Prosper Portland's main take aways about the project include: 1) the potential loss of industrial businesses and already short supplied industrial lands in Portland; 2) the potential for new mixed use development that has been historic inequitable, due to lack of accessibility or opportunities for wealth creation amongst disadvantaged and BIPOC communities, including offering only affordable housing and no other supporting tools; and 3) the effects the streetcar could have on traffic and parking in the areas of proposed extension.

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Community engagement and outreach via community-based organizations and with stakeholders should continue to provide updates as plans related to the City Legislative processes or decision making solidify.

Urban Design Analysis and Concepts

Per the IGA, the work considered is described as follows: “BPS and PBOT, with Metro-funded consultant assistance, will lead urban design work with a framework guided by the project purposes and goals. Findings from the housing and equitable community development needs analysis will guide urban design. Prosper staff, working with BPS and PBOT will generate ideas for consultant, provide supporting technical analysis as appropriate, and review drafts. There is no Prosper Portland deliverable in this task, other than staff participation and review of documents.”

Nelson Nygard was awarded a contract via Request for Proposals to lead the urban design analysis work with a portion of their work subcontracted to ECONorthwest. Prosper participated in the consultant’s selection through the review and ranking of RFP responses. Following selection, Prosper attended several meetings with Nelson Nygard and ECONorthwest to review design and concepts for the project; consider development feasibility of different scenarios described below; and analyze economic impacts of scenarios (change in land value due to re-zoning, potential loss/ gain of jobs in the area, and other benefit considerations). Below is a side by side comparison for each scenario based on information from project consultants (EcoNorthwest Opportunities and Challenges Report, March 2021) and city staff transportation impact estimates from late 2020.

	Scenario 1- Enhanced Industrial	Scenario 2 - Employment	Scenario 3 – Mixed Use	Scenario 4 – Hybrid (Mixed Use + Enhanced Industrial
Land Value Change	+ \$22M	+ \$60M	+ \$150M	+ \$103M
Industrial Jobs Change	+ 930	+930	+250	+560
Office Jobs Change	+ 1,390	+ 1,390	+490	+960
Retail/ Restaurant Jobs Change	+10	+50	+ 340	+ 270
Net Jobs Change	+ 2,330	+ 2,370	+1,080	+1,790
Market Rate Units Change	+190	+820	+ 3,110	+ 2,030
Affordable Units Change	+20	+ 50	+ 315	+ 190
Est. Vehicle trips Generated	+ 35%	+ 29%	+ 28%	+ 27%
Est. transportation Infrastructure Costs (Excluding Streetcar)	\$30M	\$50M	\$60M	\$42M

Prosper’s primary lens as the economic development agency has been to review scenarios from an equity perspective and a focus on potential impacts to quality jobs and broader wealth creation and economic growth. Based on the analysis done by Nelson Nygard and EcoNorthwest, all scenarios result in net jobs change however the types of job growth differs across these scenarios.

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In Prosper’s most recent cluster action plan reviews, we referenced a recently developed Brookings analysis framework (Shearer et al., Brookings, 2018) identifying the industries that concentrate good and promising jobs in metropolitan America. The Brookings analysis defines three types of jobs:

- Good jobs provide stable employment, middle-class wages and benefits
- Promising jobs are entry-level positions from which most workers can reach a good job within 10 years
- Other jobs do not provide decent pay, benefits, or pathways to good jobs

Together, Good + Promising Jobs are characterized as “Opportunity Jobs” – the types of jobs that either currently or within a reasonable timeframe make a middle-class living feasible for American workers. Because of Prosper Portland’s focus on the creation and retention of Opportunity Jobs for workers without a Bachelor’s degree, the team further identified the proportion of these jobs within each of the city’s target clusters. The chart below summarizes these findings.

Quality Jobs by Cluster, 2018 (Multnomah County)

Cluster or Industry Group	Total Emp	Total Good Sub-BA Jobs	Share Good Sub-BA Jobs	Total Sub-BA Promising Jobs	Share Promising Sub-PA Jobs	Ranked by: Total Opportunity Jobs	Share Opportunity Jobs
All Traded	158,758	26,309	17%	15,062	9%	41,372	26%
Non-Cluster Traded	119,412	14,658	12%	11,559	10%	28,635	24%
Cluster Combined	54,165	11,915	22%	3,503	6%	15,418	28%
Clean Tech	20,232	4,567	23%	919	5%	5,486	27%
Adv Mfg	13,374	3,947	30%	1,314	10%	5,261	39%
AO	6,719	982	15%	770	11%	1,752	26%
Software	13,839	2,418	17%	602	4%	3,020	22%

Accessible quality jobs are defined as jobs with lower barriers to entry, offering living wage salaries and potential for growth without the requirement for a college degree. As the Adv Mfg category indicates, Industrial jobs are critical and significant contributors to the City’s accessible quality jobs base. Industrially based quality jobs also tend to employ a higher rate of Black, Indigenous and People of Color in the region relative to other traded sector and growth clusters. The Metals & Machinery (Adv Mfg) cluster also represents the largest trove of middle-wage jobs held by people of color. The focus of this cluster is therefore on retaining and growing the firms providing these jobs, irrespective of ownership.

Per the Portland Plan “About three out of four manufacturing and distribution jobs in the city are located in the industrial districts, as well as about half of the construction and industrial service jobs,” signifying the importance of dedicated industrial lands to supporting the city’s quality cluster jobs base. Portland continues to lose legacy industries to the suburbs and other regions of the country due to gentrification and operational difficulties in the city of Portland. Some of the city’s recent losses include ESCO, Portland Bottling, Premier Gear, and PECO Manufacturing. Job losses from these four companies totaled more than 2,000 jobs paying an average of \$60,000.

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In 2015, Prosper partnered with BPS on the SE Quadrant Plan as part of the Central City 2035 plan examining another industrial sanctuary within the Central Eastside. The goal of the plan was to increase the density of employment within the Central Eastside by protecting established industrial sectors; expanding the diversity of industrial uses allowed in the Central Eastside; and maximizing the potential of mixed-use corridors in a manner that manages and monitors potential impacts of increased employment densities on industrial uses.

While important drivers of job and economic growth, office jobs can have more difficult barriers to entry. This is demonstrated by the lower rates of Opportunity Jobs in the other cluster and non-cluster traded sector industries listed above. In general, office job industries are also less inclusive and offer fewer Quality Opportunities for a BIPOC workforce.

Finally, while retail and restaurant jobs offer low barriers to entry and more opportunities for a diverse workforce, those industries do not provide quality wage jobs or paths for economic growth as defined under Opportunity Jobs.

Community Equitable Development: Needs and Opportunities

Per the IGA, the work considered is described as follows: “BPS and Prosper Portland staff will co-lead an analysis to understand the impact of the potential rezoning and transit expansion on low-income and people of color working and living in the area and develop an equitable development strategy. The work will include engagement with communities of color, residents, employees, and businesses at risk of displacement. In addition, the project will engage private developers and property owners to vet land use assumptions and market dynamics on key opportunity sites, focusing on the potential equity benefits.”

This section responds to Prosper’s obligation within the IGA to deliver on an equitable development report related to community development impacts, including housing, community needs, and employment/ economic development implications of the scenarios at a finer grain of detail.

Context. The NW Industrial / Montgomery Park area of town is currently predominantly industrial uses with minimal residential properties, therefore, the project isn’t expected to have any extensive residential displacement impact. Two major parcels within the area (the Montgomery Park and ESCO sites) offer opportunity for significant change. The first site, Montgomery Park, is home to a large office building, and is zoned EX which allows dense mixed-use development. This site is expected to develop more intensely with a mix of uses over time. The second, the former ESCO site, has been substantially cleared of buildings, and has a future plan designation of Mixed Employment but is currently zoned Heavy Industrial (IH). The ESCO site could offer opportunity for more mixed use, dense development and, in turn, greater land value and potential growth if zoned to accommodate this type of development. As previously stated, a portion of the area zoned IG1k and IHk is a designated prime industrial area, and rezoning scenarios that move away from an industrial focus would likely displace, or remove future opportunity for industrial businesses given potential transportation, infrastructure, and land economic impacts. Up zoning in industrial districts can impact adjacent properties that would also like to benefit from up zoning. In 2018 Prosper Portland partnered with the Urban Manufacturing Alliance and Portland State University on developing a report on The State of Urban Manufacturing in Portland in which we received input from businesses and industry organizations that the buffer zone between industrial and housing/commercial is perceived as diminishing, resulting in increased complaints regarding odors, noise, late night lights, and transportation vehicles. Industrial business displacement would in turn affect the types of jobs and employment supported in the area. With a

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constrained amount of industrial areas this could create a hardship to businesses owners when trying to relocate within the City and/or region.

Conversely, the east side of the project (the extension of the streetcar to Hollywood) which was not part of Prosper's primary review would potentially affect a large residential area, as well as commercial. Based on the financial feasibility the City and PSI team has shared, it is Prosper's understanding that the NW Industrial / Montgomery Park portion of the project is the most likely to materialize first.

Community Engagement.

The 2019 *Racial Equity Analysis of NW Streetcar Expansion and Land Use* (attached), stated similar concerns to the ones heard over the past few months through community engagement events and surveys done by the four organizations contracted. The Equity Analysis raised concerns around the loss of industrial jobs in the area, specially the loss of jobs held by BIPOC employees and further augment financial and wealth disparities in Portland. The following summarizes the input received via the community based organization outreach, with certain outreach focused on the East/Hollywood portion of the proposed alignment (MESO, the Urban League of Portland, and The Hollywood Senior Center) and certain outreach focused on the NW Industrial / Montgomery Park portion of the project (Columbia Corridor Association, NIBA and Friendly House).

- **MESO's** outreach focused on BIPOC and small business owners. Participants, in a large majority, pointed to potential property tax increase as a draw back to the project, followed by the displacement of businesses and residents and increases in rent. Many respondents saw the potential development generated by the implementation of a streetcar route as negative. Over 50% of participants see the potential for decreasing traffic and solving parking problems as a potential benefit of this project, followed by the potential to bring customers to the businesses. In terms of preferred route, 43% of respondents chose the Sandy alignment option as their preferred route for the potential extension, and 22% didn't favor any routes, citing that the extension of the streetcar would not be beneficial to the area.

The report shares that BIPOC communities want more than to just give an opinion. Opportunities need to be created, including potential for ownership, access to jobs and wealth creation, mentorship opportunities, and investment opportunities, with the following potential benefits suggested by MESO:

- Affordable commercial spaces based on what BIPOC small businesses can afford
 - Support to small businesses moving into commercial spaces for the first time
 - Community Benefit Agreements with private developers
 - Offer smaller commercial spaces, including office, that support small business needs and are "warm shell"
 - Create opportunities for local home-based businesses to connect with new businesses in the area to help the home-based businesses grow
- **The Urban League of Portland and Hollywood Senior Center's** outreach surveyed seniors, low-income residents, immigrants/ refugee populations and communities of color, renters and small business owners. The survey received 102 responses with half of the respondents identifying as white and 44.4% were 75 or older. The majority of respondents prefer the Broadway/ Weidler alignment, believing it will be the most beneficial to economic prosperity,

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serving existing jobs, advancing equitable outcomes, providing affordable housing and middle-wage jobs, and for future development of the area.

The three biggest concerns raised were the rising housing costs, change in neighborhood character, and safety. Potential benefits of the project included creation of new affordable housing and community amenities (equally), making the neighborhood safer, and opportunities for job creation. They similarly expressed the project could potentially decrease traffic and improve parking in the area as well as support local businesses.

- **Columbia Corridor Association's** outreach focused on property owners, businesses, employees and "outside of the study area" participants in the broader NW industrial area with the lens that employees are potentially the most negatively impacted by the westside project. Their analysis considered split interest amongst property owners as some may be larger beneficiaries of such changes through land value appreciation relative to business impact. The report states the importance of industrial jobs in the region and the large diversity, both racial as well as of gender, within those jobs. It shows that most respondents, whether property owners in the area or employees, prefer to keep the area industrial, enhanced industrial or employment based.

The majority of employees stated that they commute by car, would not use the streetcar, are concerned about potential loss of parking in the area, and do not believe this would be an equitable project. Although property owners in the area could benefit from up zoning, the majority of property owners believe the area should continue to be industrial or enhanced industrial. 55% do not believe the streetcar expansion will be an equitable project for the city. CCA's report strongly opposes the project due to the potential loss of Industrial land and quality jobs in the area.

- **Friendly House's** outreach focused on elderly and or LGBTQ+ engagement participants, with half identifying as BIPOC. The priority identified via this outreach was for affordable housing and addressing concerns around a potential rise of property taxes. The group also raised concerns about the need for parking and potential reduction of existing parking in the area. 61% of respondents believe the streetcar project could potentially decrease traffic and solve parking issues in the area. The group also expressed concerns around safety and their desire to have a safer neighborhood.

MESO and the Urban League's reports conflict in terms of the preferred eastside route. Additional engagement may be needed to further understand the concerns of participants and to support the community in assessing pros and cons of each option. Both reports raise concerns to be addressed with any alignment, including impact to affordability (for residents and businesses) and potential displacement resulting from those market changes. They both agreed that the project could potentially reduce traffic and help solve parking issues.

CCA and Friendly House's reports resulted in very different input acknowledging a tradeoff between the potential loss of industrial lands, businesses with the potential increase in affordable housing and safety with new land use and infrastructure. This tension helps to inform the timing and sequencing of potential equity benefits and structuring of those benefits discussed below.

Potential Equity Benefits and Structuring Community Benefits.

Similar to the 2019 Equity Analysis, this report on potential equity benefits and structures to leveraging benefits at various phases of City action does not assess whether the project should or should not occur. This analysis looks to provide

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Prosper’s perspective on phased ways to 1) minimize or mitigate any harm to historically marginalized communities and 2) optimize creating opportunities for disadvantaged communities to realize the benefits of new development and economic growth. As the project moves forward, it will also continue to be extremely important to engage the community-based organizations and represented interests who participated in the initial outreach. Funding to community-based organization to continue to engage in the process, build capacity, and be party to project information and decision making will be an ongoing need with any project funding approach.

Based on our conversations with BPS, PBOT, PSI and input from community, Prosper observes three key phases of City regulatory or financial policy decision making that could involve parallel benefit requirements.

1. Land Use / Zoning Change
2. Streetcar / Transit Infrastructure Investment
3. Master Development Planning and Implementation

Below is a summary of Prosper’s observations and potential approaches at each phase based on our experience with economic development and equity focused implementation tools.

1) Land Use / Zoning Change

Based on ECONorthwest’s analysis, different rezoning scenarios result in different potential impacts and opportunities for benefits. Whereas industrial and employment-based scenarios have lesser displacement impact on industrial businesses and job growth, those scenarios also offer fewer opportunities for new commercial supporting retail businesses and/or market delivered affordable housing through Inclusionary Housing. Conversely, the mixed use and hybrid scenarios have greater displacement impact on industrial businesses and job growth, while delivering increased opportunities for additional retail/restaurant businesses and market delivered affordable housing.

Speculation based on potential zoning changes may occur but redevelopment under any new zoning would take time with residential and office uses most likely to first occur and at the project area’s south side (closer to NW 23rd and the Pearl District) given Portland’s market conditions. While rezoned land is not sold or developed, the value created is only an expectation and becomes difficult to recapture.

	Scenario 1- Enhanced Industrial	Scenario 2 - Employment	Scenario 3 – Mixed Use	Scenario 4 – Hybrid (Mixed Use + Enhanced Industrial)
Land Value Change due to Zoning Change	+ \$22M	+ \$60M	+ \$150M	+ \$103M
Industrial Jobs Change	+ 930	+930	+250	+560
Office Jobs Change	+ 1,390	+ 1,390	+490	+960
Retail/ Restaurant Jobs Change	+10	+50	+ 340	+ 270
Net Jobs Change	+ 2,330	+ 2,370	+1,080	+1,790
Market Rate Units Change	+190	+820	+ 3,110	+ 2,030
Affordable Units Change	+20	+ 50	+ 315	+ 190

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<p>Minimize/Mitigate Harmful Displacement Impacts to Marginalized Communities</p>	<p>Augment funding for programs and tools that address disparities and optimize opportunities within industrial and other traded sectors. From Prosper’s perspective, a good template is the public benefits spoken to in Prosper’s E-Zone Program related to program administration. See these benefits further described below.</p>	<p>Address impacts to marginalized communities due to impacts to industrial lands/businesses/jobs, through contribution to:</p> <ul style="list-style-type: none"> - Brownfield cleanup/redevelopment fund to address Portland’s industrial land supply needs. - Workforce training fund in partnership with Prosper Portland and WSI.
<p>Optimize Benefits to Marginalized Communities</p>		<p>Focus benefits to marginalized communities through equitable access to 1) new retail/restaurant space; 2) market delivered affordable housing. Alternatively, BPS in partnership with PHB could consider additional Inclusionary Housing or affordable commercial zoning mechanisms as further described below.</p>

Economic Development. Prosper Portland develops and administers Economic Development programming to support historically underserved workers, entrepreneurs, and established businesses. Pending the availability of resources, potential support activities could include:

- Industry specific workforce support. Connect dislocated workers to jobs in manufacturing through investment in job training, career coaching and workforce navigation.
- Business Support. Invest in ongoing business technical assistance and support for manufacturing firms. Increase access to incubator or training space for entrepreneurs and workers, respectively.

Portland Enterprise Zone (E-Zone) Policy. Prosper Portland administers the Portland E-Zone Policy on behalf of the City to maximize important local community benefits, particularly to companies and residents in and near the E-Zone. Each Written Agreement with participating companies contains the following requirements that could provide a template for BPS and City consideration with any land use zoning change:

- Quality Job Commitments. All full-time jobs at the company’s project site must meet minimum quality levels wage and compensation levels.
Procurement Plans. Good faith efforts to increase the amount of goods and services purchased from businesses located within Portland and specifically from businesses owned by people of color and businesses in priority neighborhoods designated by Prosper Portland.
- Workforce Training and Business Development Fund. The fund is established and managed by Prosper Portland to increase economic opportunity and income for Portland residents particularly historically disadvantaged Portlanders (e.g., communities of color, residents in priority neighborhoods, etc.) and to assist businesses within the City of Portland, particularly those within or near the Portland E-Zones.
- Employee Support Fund. The fund is established and managed by Prosper Portland to support employees at E-Zone companies and to increase economic opportunity and income for other Portland residents. Before designating how contributions made shall be used, Prosper Portland first discusses employee with a focus principally on transit and child support opportunities.

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Inclusionary Housing Considerations. Land value created through zone changes is latent value that remains with the property until such time as the land is put for sale and/or new zoning-based development is pursued. Current Inclusionary Housing requirements offer multiple regulatory options, including a required 10% of units at 60% AMI. Based on the analysis done by ECONorthwest, incremental land value generated through rezoning under scenarios 3 and 4 could not support increasing the Inclusionary Housing rate by more than 2% above the current regulatory requirements (or 12% of units at 60% AMI). With this modelling, ECONorthwest modelling also assumed no other public benefit requirements were (e.g. brownfield fund or other fund contribution) considered. Prosper defers to PHB and BPS on operational and legal considerations tied to potential area specific Inclusionary Housing mechanisms.

2) Streetcar / Transportation Improvements

Over the past 5 years, Prosper has partnered with City Bureaus on a number of community development initiatives developed around major transit investments anticipated by the region and the City – from Division Bus Rapid Transit to SW Corridor. An early priority for any of these investments is to ensure community capacity building centering BIPOC and disadvantaged community voices and, over the longer run, providing ongoing processes or structures of accountability as project decisions are made.

It is our understanding the streetcar expansion cost is estimated at ~\$50 million (not including the rebuild of NW 23rd Avenue) funded 50/50 through a Federal Transit Authority (FTA) grant and local share (LID, Transportation SDCS and parking revenues over 20 years). The project team has also shared there’s sizable related transportation infrastructure investments anticipated with the project and the various land scenarios as follows.

	Scenario 1- Enhanced Industrial	Scenario 2 - Employment	Scenario 3 – Mixed Use	Scenario 4 – Hybrid (Mixed Use + Enhanced Industrial)
Est. Vehicle trips Generated	+ 35%	+ 29%	+ 28%	+ 27%
Est. transportation Infrastructure Costs (Excluding Streetcar)	\$30M	\$50M	\$60M	\$42M

Prosper encourages BPS, PBOT and other City partners to consider a community development funding package as an integrated component to the transportation funding package. For example, while Metro’s recent Get Moving 2020 Corridor Investment Package was not passed by voters, it had significant community support based on support tied in part to complementary community development based investments contemplated in parallel to transportation investments for things like revitalizing main streets (sidewalks, crosswalks, seating, lighting, street trees and other main street improvements); anti-displacement strategies (community-led strategies to prevent displacement with a focus on housing accessibility and small business retention); and maintaining affordable housing options near transportation investments. In addition to intentional equity contracting (for design through construction contracts), Prosper would encourage PBOT and PSI to continue to consider how streetcar serves BIPOC communities (residents, visitors, and workforce) and opportunities to improve those services with any streetcar system expansion.

In the past, Portland’s streetcar extensions have exclusively focused on transportation investments and have been funded through a mix of public (Transportation System Development Charges, TIF, and State funds) and private resources (Local

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Improvement Districts). Given regional discussions about tax increment financing and the need for TIF to be an ever more directed and focused tool, Prosper is prioritizing any new TIF district discussions via community led processes and with a primary focus in East Portland.

One of the financial tools being considered for the implementation of the streetcar infrastructure in the Northwest Industrial / Montgomery Park area is the creation of a Local Improvement District (LID). The LID would leverage private investment to finance infrastructure improvements that benefit both adjacent property owners within the improvement area as well as the region. An LID draws against potential and projected future private property value increases and leverages a private contribution to development related infrastructure costs. It is our understanding the PSI is currently contemplating a LID contribution of ~\$10 million in support of the streetcar implementation. After consulting City Council, it has been clear that LID funding uses is strictly restricted and cannot be used for public benefits, as per Oregon statute.

Other public / private funding mechanisms like Enhanced Services Districts or Business Improvement Districts could similarly be considered for the area to fund economic development-based programming including small businesses technical or grant assistance to address lease or rent barriers for small businesses. ESDs and BIDs rely on business and property owners' ability to absorb and pay additional fees either directly and/or through parking revenues in partnership with the City. Fee based revenues can be challenging and/or take a while to generate adequate resources to support significant programming investments. Fee based programs can further impact smaller and disadvantaged businesses already impacted by business operating costs together with lesser access to capital in the market.

3) Equitable Development

Based on our understanding, there are currently two sizable properties – Montgomery Park which is already zoned for mixed use development, and ESCO which potentially could be rezoned for mixed use development - that could be nearer-term beneficiaries of any streetcar extension supporting redevelopment and build outs. Based on past experience and market trends in Portland, it can be expected that expanding the streetcar network to serve these sites will increase development density and further grow the value of development of those properties.

Over the past 25 years, Prosper has led Development Agreements negotiations on behalf of the City at a number of major redevelopment sites citywide (Pearl District, South Waterfront, Lents Town Center, and Broadway Corridor). Development Agreements are a mechanism the City has used to obtain public and community benefits by leveraging private investment through disposition of publicly owned land and/or a commensurate financial investment of public funds into the build out of the area.

Prosper's most recent Development Agreement and Community Benefit Agreement negotiations on Broadway Corridor provide an example of the type of public / private funding and performance obligations that are realized through these mechanisms. It is also important to note that a significant component of the CBA was to ensure a governance structure and funding to support ongoing oversight and accountability as the Broadway Corridor develops over the coming 20 years.

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Component	Public funding Sources					Private Funding Sources	
	Prosper	PBOT	Parks	BES	Water	Developers (commercial + affordable housing)	LID
Site preparation	✓						
Streets & Utilities Infrastructure		✓		✓	✓		✓
Open Space and Green loop	✓	✓	✓			✓	
Private Streets/Accessways						✓	
Construction technical Assistance	✓					✓	
Prevailing wage	✓					✓	
Operating Fund						✓	
Small Business Affordable. Commercial Fund	✓						
Oversight Committee	✓						

Based on our experience, Development Agreements are negotiated at the time of development (versus at land use changes or infrastructure implementation) and are an implementation tool for shared public / private development funding and finance commitments together with performance obligations. Due to the lack of any publicly owned properties in the project area as well as limited public financing mechanisms, Prosper does not recommend pursuing any Development Agreement for particular sites within the project area at this time. Prosper Portland stands prepared to join BPS and PBOT in briefings to the community and City Council regarding our recommendation at this time.

**C: Northwest Portland Opportunities and Challenges Report,
EcoNorthwest**

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Montgomery Park to Hollywood Transit and Land Use Development Strategy Northwest Portland Opportunities and Challenges Report

April 26, 2021

Prepared for: City of Portland Bureau of Planning and Sustainability
City of Portland Bureau of Transportation

Final Report

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ECONOMICS • FINANCE • PLANNING

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1. Executive Summary

This report analyzes the potential development outcomes of four different land use and urban design scenarios for the Northwest Portland portion of the Montgomery Park to Hollywood Transit and Land Use Development Strategy. The purpose of this analysis is to understand how the impacts and implications of different land use scenarios and development outcomes could respond to expanded transit service through an extension of the existing Northwest Streetcar alignment. While development would occur under all of the four land use scenarios evaluated, the outcomes for commercial development, residential development, and value created to fund public benefits varies between the scenarios.

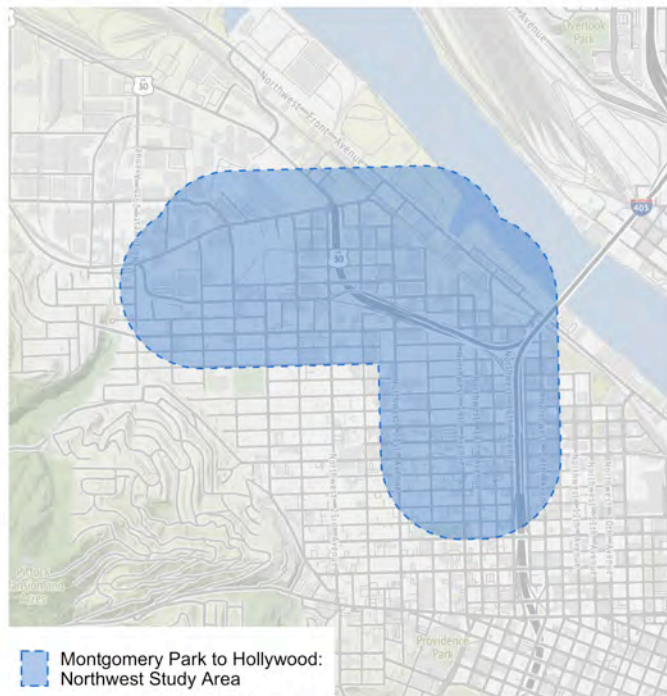
- Development of industrial, employment, mixed-use, and residential prototypes are all feasible at varying levels in the study area
- Low density traditional industrial development types have limited feasibility in the study area due to a combination of relatively low rents and high existing land values
- All urban design and land use scenarios generated residual land value that could be captured to support public benefits
- The mixed-use land use scenario resulted in the least amount of industrial job growth and created the most amount of residual land value through land use changes
- The enhanced industrial results indicate industrial job growth similar to that of the employment scenario but results in the lowest residual land value created of the scenarios that could be available to capture for public benefits.
- The Mixed-Use Scenario creates the most amount of residual land value from land use changes that could be captured to fund public benefits and also results in the least number of jobs created in the district due to the introduction of residential allowances, which compete for land and limit the growth of industrial and office jobs.
- The hybrid enhanced industrial and mixed-use scenario best balances goals for limiting impacts to industrial employment in the district, allowing transit-supportive development to serve future streetcar service, and increasing the supply of affordable housing through the Inclusionary Housing Program.
- Increasing the height maximum to 75 feet to allow for seven-story development in the mixed-use zoned portions of the study area increases development feasibility, affordable and market rate housing production, and the potential for community benefits.
- Deeper affordable housing set-aside targets above 12% of units at 60% AMI create development financing challenges where project revenues cannot support debt service requirements. Deeper affordable housing requirements would cause feasibility challenges without incentives to support increase in net operating income.

2. Project purpose

The purpose of this analysis is to understand how land use policy alternatives play out in different market conditions and zoning designations in response to the introduction of streetcar in Northwest Portland. This analysis was structured to highlight the outcomes of land use scenarios and provide information to help the City of Portland answer the following questions:

- How much development of different types is feasible for the alternative land use scenarios?
- What are the tradeoffs associated with changing land use allowances in the Northwest District?
- What level of change for employment and housing could be possible in the district if zoning permitted higher density employment and residential uses and development?
- What are the impacts of development under the different land use scenarios to existing industrial employment in the district?
- How much value (defined as residual land value) is created from zoning changes in the land use scenarios?
- How much value (defined as residual land value) could be captured in the district from land use changes that could help support public benefits?

Figure 1. Montgomery Park to Hollywood – Northwest Study Area Boundaries



Source: ECONorthwest

3. Overview of Process

The development feasibility and land use outcomes analysis was structured to evaluate various land use and urban design scenarios in collaboration with the consultant team urban design lead Perkins+Will, city staff from the Bureau of Planning and Sustainability and the Bureau of Transportation, and the Montgomery Park to Hollywood Project Working Group. In September 2019 the City of Portland published the Northwest Portland Streetcar Extension and Land Use Alternatives Analysis that summarized preliminary findings about how land use changes and streetcar investment might support economic development, equity, and climate change goals, including the potential creation of affordable housing and job sites. This city-led analysis identified preliminary questions and trade-offs around streetcar investment and land use changes in Northwest Portland that became the basis for further evaluation of streetcar alignment and land use decisions.

Figure 2. Spectrum of Potential Land Use Changes



Source: City of Portland Bureau of Planning and Sustainability

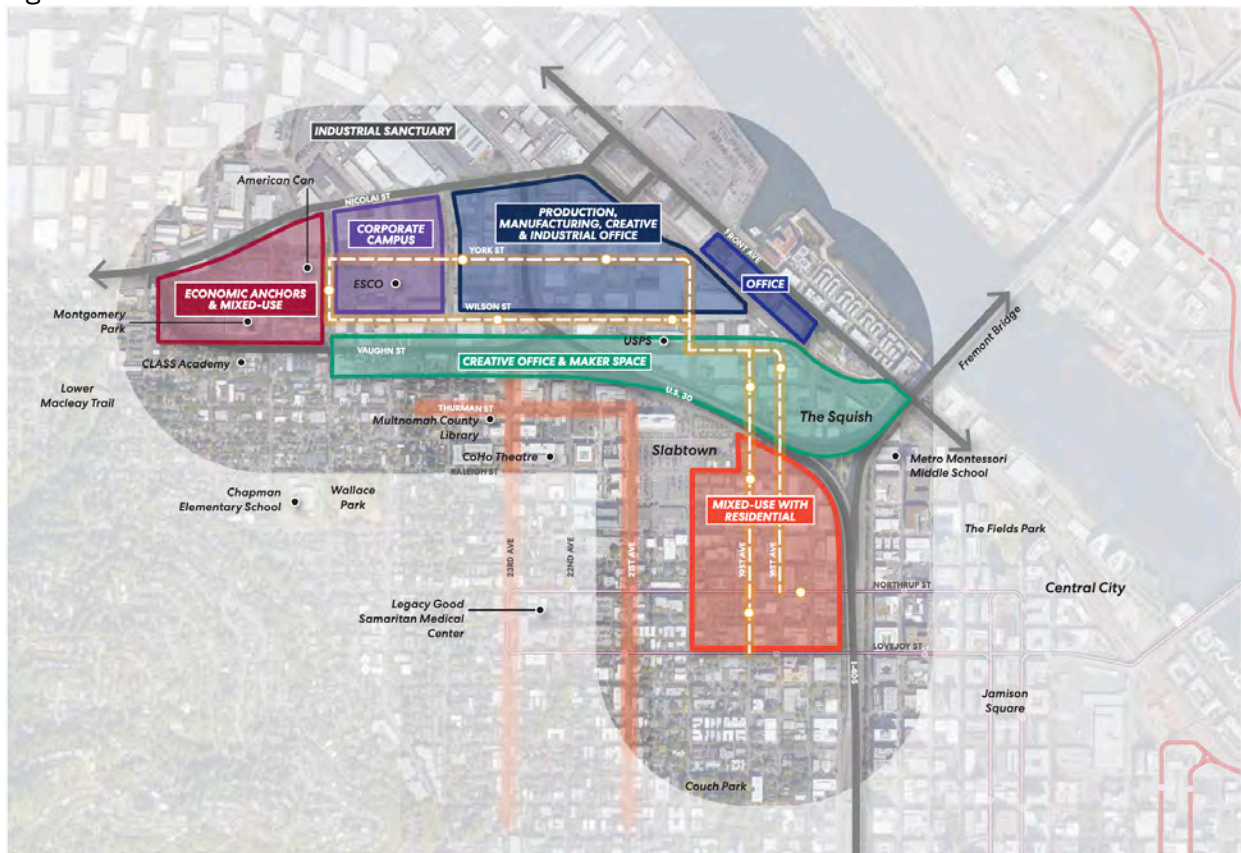
Relationship to the Urban Design Process

Perkins+Will developed three initial urban design concepts to further explore urban form, transportation, and public realm outcomes for each of the land use scenarios in Northwest Portland. Perkins+Will built on the land use scenarios previously analyzed by City of Portland staff with a deeper dive into block and site level impacts of transportation investments and land use changes to identify opportunities to integrate different land use scenarios from various streetcar alignment options.

Urban Design Scenario 1: Enhanced Industrial

The intent of the enhanced industrial scenario was to evaluate an industrially focused land use pattern that allows for more flexibility for industrial uses, introduces the concept of transit streets to the district, and allows for more intense employment uses than currently allowed in around the ESCO site.

Figure 3. Enhanced Industrial Scenario

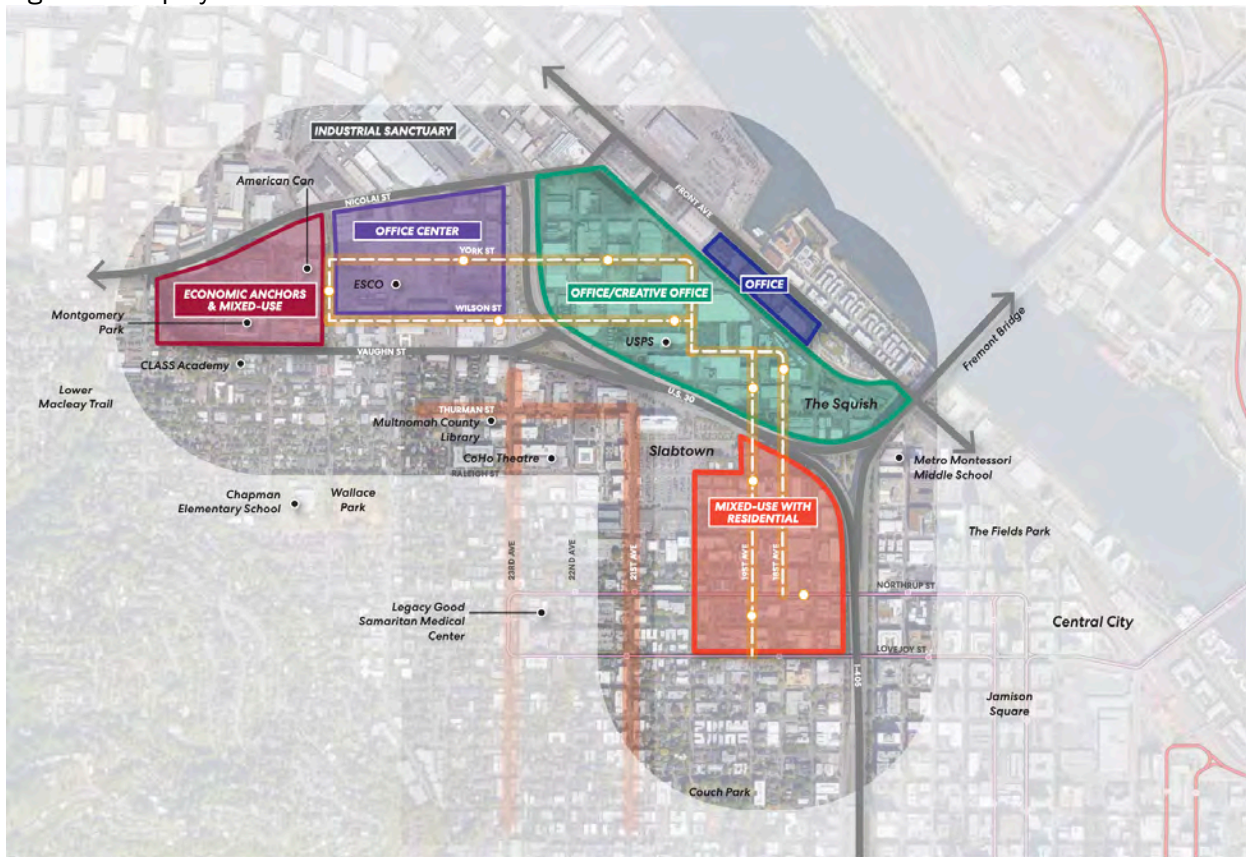


Source: Perkins+Will

Urban Design Scenario 2: Employment

The intent of the employment scenario was to evaluate a denser employment-focused land use pattern that allows for higher density employment uses, broader office allowances across the district. This scenario also introduces a more focused pedestrian environment with public spaces connecting the district.

Figure 4. Employment Scenario

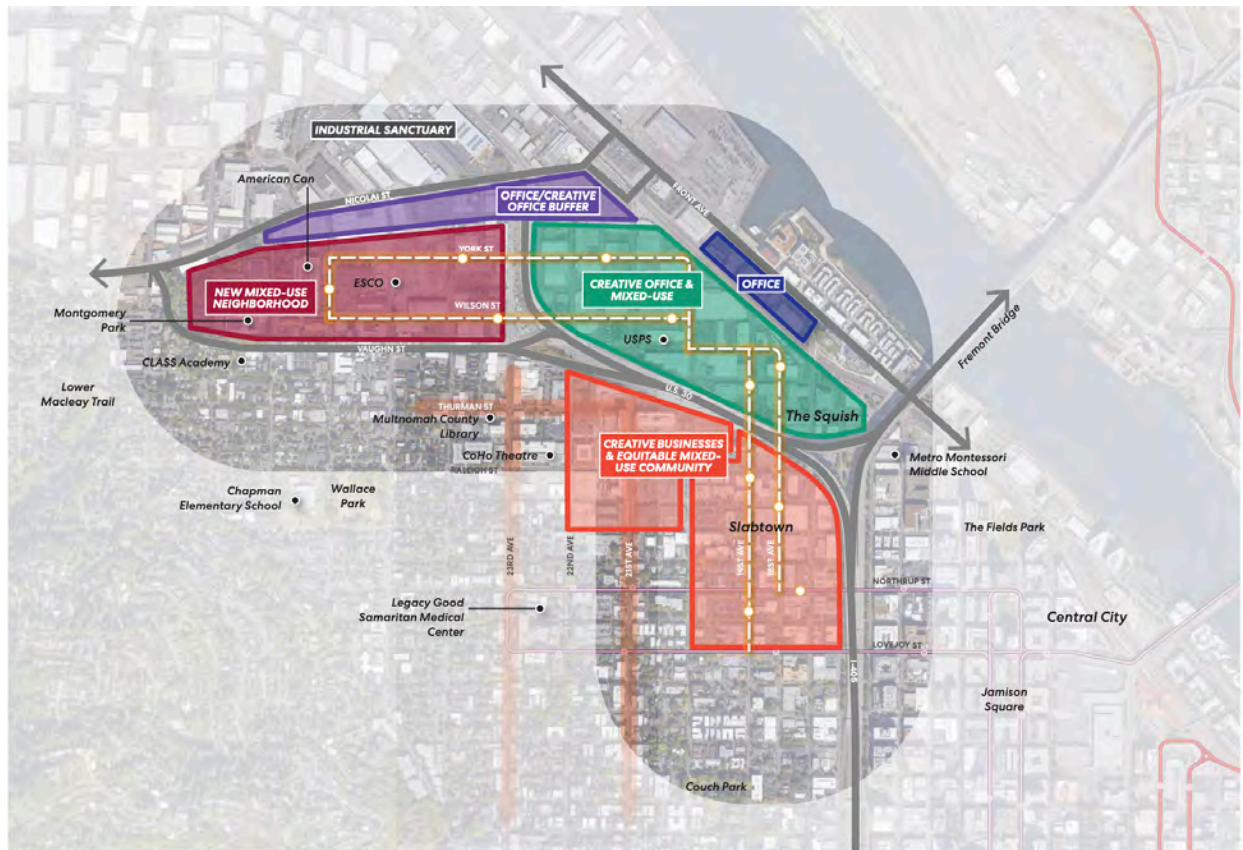


Source: Perkins+Will

Urban Design Scenario 3: Mixed-Use Scenario

The intent of the mixed-use scenario was to evaluate a land use pattern that allows for residential and mixed-use development more broadly throughout the district, a focus on optimizing residential allowances to leverage more affordable housing, and adds a broader variety of public spaces and community facilities.

Figure 5. Mixed-Use Scenario



Source: Perkins+Will

Urban Design Scenario 4: Hybrid Industrial and Mixed-Use Scenario

A fourth “hybrid” scenario was also developed as an outcome of initial evaluation of the previous three scenarios. The intent of the hybrid industrial mixed-use scenario was to evaluate a land use pattern that allows for residential and mixed-use development west of NW 23rd Avenue while maintaining a primary industrial land use function in the portion of the study area east of Highway 30. This scenario focuses the areas of change around Montgomery Park and the ESCO site.

Figure 6. Hybrid Industrial and Mixed-Use Scenario



Source: Perkins+Will

Summary of Land Use Scenarios Evaluated

This land use and development analysis evaluated, within the study area, the cumulative impacts of land use changes between the four urban design scenarios in addition to a baseline scenario that reflects current Comprehensive Plan and zoning designations. Detailed information about the zoning designations used to evaluate the land use scenarios and development prototypes evaluated within zoning designations is available in Table 3 and the Analysis Approach and Methodology section of this report.

Baseline Scenario – This scenario evaluated the development outcomes of existing zoning throughout the study area. The baseline scenario was the comparison by which all other land use scenarios were evaluated. This scenario represents a predominantly industrial zoning pattern in the area north of NW Vaughn Street and includes IH, IG, EG, and EX zones. The baseline scenario represents development outcomes that are market feasible under existing zoning, not current employment or housing units on the ground in the study area today.

Enhanced Industrial Scenario – This scenario evaluated an industrial-focused zoning pattern but allowed more flexibility for creative office in the industrial zones. The enhanced industrial allowances evaluated are based of the current IG zone allowances in the Central Eastside developed for the Southeast Quadrant Plan and the Central City 2035 Plan.

Employment Scenario – This scenario evaluated more intense employment uses including modified office allowances in existing IG zones and increased density to support traditional and campus office type uses on larger sites throughout the study area. This scenario evaluated a mix of EG-type zoning mapped throughout the study area. A more intense EX-type zone with no housing allowed was evaluated for the ESCO site and surrounding area.

Mixed-Use Scenario – This scenario evaluated a broader mix of uses including residential, office, retail, and industrial. This scenario allowed residential uses broadly throughout the district with limitations on residential development for areas adjacent to NW Nicolai Street and between the rail line and NW Front Avenue. This scenario evaluated a broader mix of CM2, CM3, and EX-type zones that were mapped more broadly across the study area.

Hybrid Mixed-Use and Industrial Scenario – This scenario tested a hybrid of the Enhanced Industrial Scenario and the Mixed-use Scenario. In this scenario, the area North of I-405 and East of Highway 30 was limited to enhanced industrial allowances, including industrial office allowances, while the remainder of the study area bounded by NW Vaughn Street, NW Nicolai Street, and Highway 30 was evaluated using mixed-use and residential prototypes. This scenario evaluated a mix of industrial and mixed-use zones including IG, EG, CM2, CM3, and EX. This scenario also evaluated higher height allowances for the EX zone in the core areas of the ESCO and Montgomery Park parcels that would allow up to seven story developments within a maximum height of 75 feet.

4. Key Findings

For each of the scenarios evaluated, we summarized the total development outcomes including residual land value created, impact to jobs by type, change in housing production, and affordable units produced under an inclusionary housing program. These numbers represent what we call market supportive capacity. In other words, if unlimited market demand under each of these scenarios existed today, this is a realistic range of development outcomes that could be supported under current market conditions. Summarizing development impacts in this way allows staff, community stakeholders, and decisions makers to weigh the relative trade-offs of each land use scenario by comparing outcomes. For example, the residual land value created totals represent the increment of land value that is created from land use changes that can potentially be captured to fund public benefits. The results of this analysis are summarized in Tables 1 and 2 below.

Summary of Scenario Results

Enhanced Industrial Scenario –The Enhanced Industrial Scenario creates the least amount of residual land value, \$22 million, of all the scenarios evaluated. The Enhanced Industrial Scenario creates the second highest number of new jobs split mostly between office and industrial sectors. This scenario creates 930 additional industrial jobs through intensification of existing zones that are still broadly limited to industrial uses. Additionally, there are over 1,390 office jobs forecast in this scenario that are the result of the zoning allowances for office and industrial office uses.

Employment Scenario– The Employment Scenario creates the second least amount of land residual value, \$60 million, of all the scenarios evaluated. The Employment Scenario creates the most jobs of all the scenarios evaluated with nearly 2,370 new jobs, 58 percent of which are in office sectors. This scenario also sees an increase in industrial jobs, 930 new jobs, due to the increased allowances in the enhanced industrial type zoning east of Highway 30. This scenario also adds 820 new residential units from the introduction of allowances for mixed-use and residential development on the north side of Vaughn between 23rd and 27th.

Mixed-Use Scenario – The Mixed-Use Scenario creates the most amount of residual land value, \$150 million, from land use changes that could be captured to fund public benefits. The Mixed-Use Scenario also creates the most amount of new market rate and affordable units under the inclusionary housing program.

However, this scenario sees the least amount of total job creation in the district. The small increase in jobs and employment development are the result of current industrial uses being redeveloped for residential and mixed-uses. Additionally, when redevelopment does occur, new jobs are more likely to be limited to ground floor commercial uses that are likely to be home to service sector jobs such as retail, personal services, or restaurants but could accommodate office and institutional jobs.

Hybrid Mixed-Use and Industrial Scenario – The Hybrid Mixed-Use and Industrial Scenario creates the second highest amount of residual land value, \$103 million, that could be captured for community benefits. This scenario generates 2,030 new market rate residential units in addition to 190 affordable units through the inclusionary housing program.

While this scenario creates 1,790 new jobs, a lot of which are in retail, personal services, and restaurants, it also sees a moderate increase to the total number of industrial jobs in the district. Notably, by excluding residential allowances in the area east of Highway 30 and allowing for intensification of industrial uses in current IG1 zones in combination with applying mixed-use allowances to larger sites on the west side of the study area, this scenario has a moderate net impact to the industrial jobs in the district.

Table 1: Land Use Scenario Results (Net Changes from Baseline Zoning)

	Enhanced Industrial Scenario	Employment Scenario	Mixed Use Scenario (10% set-aside)	Hybrid Industrial and Mixed Use (10% set-aside)
Residual Land Value	\$22 M	\$60 M	\$150 M	\$103 M
Industrial Jobs	930	930	250	560
Office Jobs	1,390	1,390	490	960
Retail / Restaurant Jobs	10	50	340	270
Net Job Changes	2,330	2,370	1,080	1,790
Market Rate Housing Unit Changes	190	820	3,110	2,030
Net Affordable Unit Changes	20	50	315	190

Table 2. Land Use Scenario Results (Total Values for Each Scenario Evaluated)

	Baseline	Enhanced Industrial Scenario	Employment Scenario	Mixed Use Scenario (10% set-aside)	Hybrid Industrial and Mixed Use (10% set-aside)
Residual Land Value	\$607 M	\$629 M	\$667 M	\$757 M	\$710 M
Industrial Jobs	370	1,300	1,300	630	930
Office Jobs	550	1,940	1,940	1,040	1,510
Retail / Restaurant Jobs	400	410	450	730	660
Market Rate Housing Units	10,810	10,990	11,630	13,920	12,840
Affordable Housing Units	940	960	990	1,250	1,130

This analysis also evaluated the impact of increasing the height maximum allowed in the EX zone in the study area in both the Mixed Use and Hybrid Industrial and Mixed Use Scenarios to be aligned with the height bonus option in the CM3 zone. This additional height analysis evaluated allowing development prototypes to access heights up to 75 feet compared to 65 feet in the EX base zone allowances. Increasing the height maximum results in an increase in the residual land value as well as an increase in housing units that are feasible to produce under current market conditions. Allowing buildings up to 75 feet in all scenarios allows a more feasible development type, five-over-two podium development, than what is allowed in 65-foot height maximum. While six-story buildings are permitted and physically possible within a 65-foot height maximum, in most cases a five-story development is identified as the most feasible development type. Allowing additional height up to 75 feet to get to seven-story development improves feasibility and development outcomes across the study area.

Table 3: Scenario Results Comparing a Height Increase to 75 Feet (Net Changes from Baseline Zoning)

	Mixed Use Scenario (10% set-aside)	Mixed Use Scenario (10% set-aside) – more height	Hybrid Industrial and Mixed Use (10% set-aside)	Hybrid Industrial and Mixed Use (10% set-aside) – more height
Residual Land Value	\$150 M	\$186 M	\$103 M	\$140 M
Industrial Jobs	250	250	560	560
Office Jobs	490	490	960	960
Retail / Restaurant Jobs	340	560	270	480
Net Job Changes	1,080	1,300	1,790	2,000
Market Rate Housing Unit Changes	3,110	6,130	2,030	5,060
Net Affordable Unit Changes	315	670	190	550

5. Analysis Approach and Methodology

ECONorthwest utilized MapCraft labs to run financial pro formas to test the impact of changes to zoning and land use allowances within the study area defined as ¼ mile from the proposed Northwest Industrial streetcar alignment. To do this, we modeled development prototypes which conform to various land uses and entitlements currently present in the study areas. We will also model prototypes that conform to potential future entitlements in the study areas for the sensitivity testing of alternative scenarios. The analysis area for Scenario 4 is based on the original study area used for the initial three scenarios and is valid as a point of comparison because only the changes in land use were evaluated between scenarios. Additional analysis would need to be conducted to analyze full development outcomes with a revised study area based on a new transit alignment.

To understand the impact to development, given the factors of the alternative scenarios, our pro forma models evaluated changes to the *residual land value* (RLV) of the prototypes under both the existing zoning allowances (base scenario) and potential future zoning scenarios defined by the Perkins+Will urban design concepts and in discussion with City of Portland staff. RLV is an estimate of what a developer would be able to pay for land given the property’s income from

leases or sales, the cost to build as well as operate the building, and the investment returns needed to attract capital for the project. In other words, it is the budget that developers have remaining for land after all the other development constraints have been analyzed. While there are other quantitative methods for calculating value created from land use changes and calibrating public benefit requirements, such as an internal rate of return (IRR) threshold approach, all of the potential methods share drawbacks regarding the quality of inputs and sensitivity to those inputs. An advantage of the RLV approach is that it does not rely on land prices as an input. Rather, observed land prices can be compared with the model outputs to help calibrate the model and ensure it reflects reality. The residual land value results presented in this memo are the true residuals after subtracting the Multnomah County Assessor's estimates of real market value on each parcel.

We used RLV to identify the prototypical development with the highest value for each site in the study area. This reflects the likely market conditions where land will sell to whichever developer is able to pay the highest price. As a second filter for site level development feasibility, we applied debt service coverage thresholds to identify if projects could overcome financing requirements, even with positive RLVs. The RLV analysis is an estimate of the feasibility for the market to produce housing and commercial space – it is used to compare policy choices but does not produce a precise answer for every site due to variations in property conditions and property owner decisions. It is best to use these results to understand the direction and scale of policy choices relative to desired outcomes (e.g. more affordable housing or less impact on industrial jobs). The outputs of this analysis are not intended to be the final recommendation, but to help ground future recommendations and policy decisions in the context of market realities and how private investment decisions are made.

Additionally, this analysis relies heavily on recent trends and observed development within and around the study area. The near and mid-term impacts of COVID-19 on investment in residential and commercial development are unclear but will affect how and when the scenarios evaluated in this analysis might be realized. It is important to understand that there is still long-term demand for residential and commercial development in the City of Portland and that the location of the study area along with investment in infrastructure and public-realm improvements make the area well positioned for longer term investment.

Zoning Designations and Development Prototypes

ECONorthwest worked with city staff to identify the zoning designations that could implement the urban design scenarios. City of Portland Bureau of Planning and Sustainability provided information to translate the urban design concepts to zoning designations, floor area ratio (FAR) allowances, and heights that were used to develop the development prototypes that were evaluated. These development prototypes represent a typical development that could occur in zones throughout the district and under all land use scenarios. This analysis also evaluated both base and bonus FAR, density, and height bonuses by zone as applicable. Development prototypes that reflect bonus allowances account for current inclusionary housing obligations.

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Table 4: Zones from all scenarios plus respective prototypes evaluated

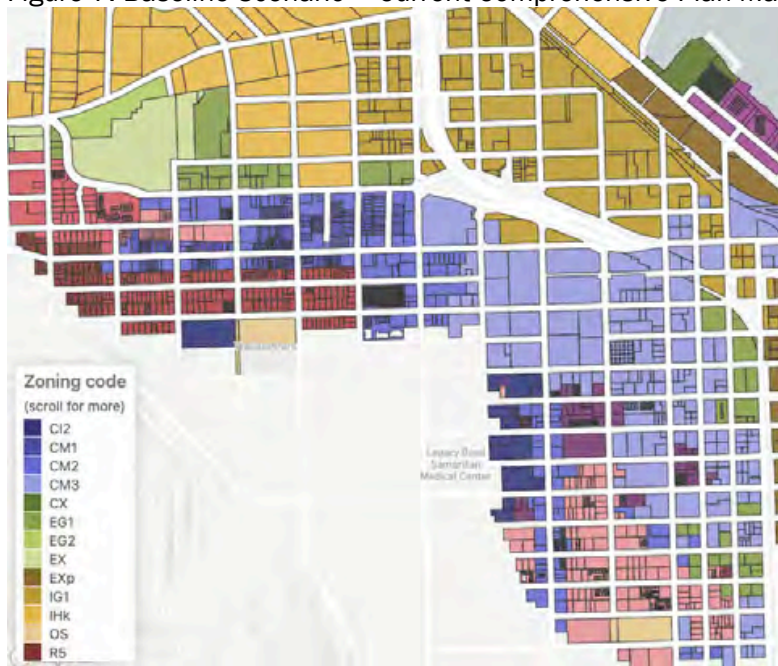
Zone	Prototypes allowed by base entitlements	Prototypes allowed by bonus entitlements
IH	Traditional low-rise industrial: warehouse and manufacturing 1 story, 0.6 FAR	N/A
IG1	Traditional low-rise industrial: warehouse, manufacturing, and flex 1 story, 0.6 FAR	N/A
IG1 Central City – IG1 zone with industrial office allowance	Traditional low-rise industrial: warehouse, manufacturing, and flex; Central City office; urban flex 4 stories, 3.4 FAR	N/A
EG1	Traditional low-rise industrial: warehouse, manufacturing, and flex; urban flex; low-rise office 6 stories, 2.1 FAR	N/A
EG2	Traditional low-rise industrial: warehouse, manufacturing, and flex; urban flex; low-rise office 6 stories, 2.1 FAR	N/A
EX	Traditional low-rise industrial: warehouse, manufacturing, and flex; urban flex; low-rise office; low to mid-rise residential 6 stories, 2.1 FAR – Flex 4 stories, 3.4 FAR – CC Indus.	Traditional low-rise industrial: warehouse, manufacturing, and flex; urban flex; low-rise office; low to mid-rise residential 5 stories, 4.6 FAR
EX - Pearl district height/FAR	Traditional low-rise industrial: warehouse, manufacturing, and flex; urban flex; low-rise office; low to mid-rise residential 6 stories, 2.1 FAR – Flex 4 stories, 3.4 FAR – CC Indus.	Traditional low-rise industrial: warehouse, manufacturing, and flex; urban flex; low to high-rise office; low to high-rise residential 10 stories, 9.3 FAR
EX – no housing	Traditional low-rise industrial: warehouse, manufacturing, and flex; Central City office; urban flex; low-rise office 6 stories, 2.1 FAR – Flex 4 stories, 3.4 FAR – CC Indus.	Traditional low-rise industrial: warehouse, manufacturing, and flex; Central City office; urban flex; low-rise office 6 stories, 3.4 FAR - Flex 5 stories, 4.4 FAR – CC Indus
EX – 7 stories (testing height bonus allowed in EX zone)	Traditional low-rise industrial: warehouse, manufacturing, and flex; Central City office; urban flex; low-rise office 6 stories, 2.1 FAR – Flex 4 stories, 3.4 FAR – CC Indus.	Traditional low-rise industrial: warehouse, manufacturing, and flex; Central City office; urban flex; low-rise office 7 stories, 6.5 FAR – MU Res
CM1	Low-rise residential; low-rise office 3 stories, 1.3 FAR	Low-rise residential; low-rise office 3 stories, 2.0 FAR
CM2	Low to mid-rise residential; low-rise office 4 stories, 2.1 FAR	Low to mid-rise residential; low-rise office 5 stories, 4.0 FAR
CM3	Low to mid-rise residential; low-rise office 4 stories, 2.1 FAR	Low to mid-rise residential; low-rise office 5 stories, 4.6 FAR

CX	Low to mid-rise residential; low-rise office 4 stories, 1.6 FAR	Low to mid-rise residential; low to mid-rise office 8 stories, 7.6 FAR
RM1	Low-rise residential 2 stories, 1 FAR	Low-rise residential 3 stories, 1.3 FAR
RM2	Low-rise residential 3 stories, 1.3 FAR	Low to mid-rise residential 4 stories, 2.1 FAR
RM3	Low-rise residential 4 stories, 1.6 FAR	Low to mid-rise residential 4 stories, 2.1 FAR
RM4	Low to mid-rise residential 5 stories, 4.0 FAR	Low to mid-rise residential 5 stories, 4.6 FAR
RX	Low to mid-rise residential 4 stories, 1.6 FAR	Low to mid-rise residential 7 stories, 6.5 FAR

Zoning Designations Analyzed by Land Use Scenario

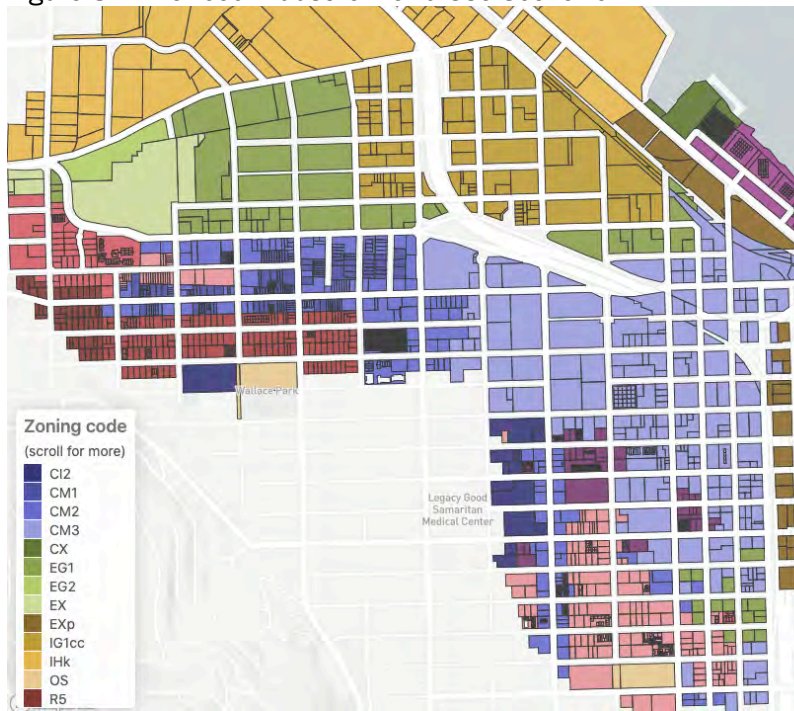
For all of the land use scenarios, we tested numerous development prototypes within each of the zoning allowances for each scenario. For example, in the mixed-use scenario we evaluated multiple development prototypes (e.g.-three story wood frame construction, podium, and steel/concrete towers) and multiple land uses (e.g.- mixed-use, residential, and office uses all within a single type of development) across a range of mixed-use zones including CM2, CM3, and EX zones. Similarly, we tested prototypes for industrial and employment focused development in the IH, IG, and EG zones across all land use scenarios. The following maps in this section identify the zoning designations that were analyzed for each land use scenarios.

Figure 7. Baseline Scenario – Current Comprehensive Plan Map and Zoning



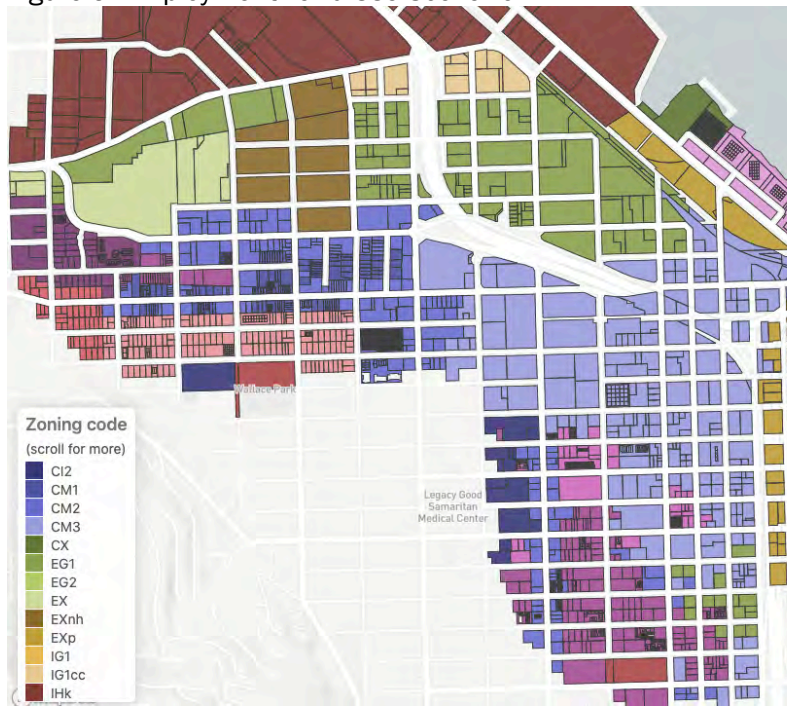
Source: ECONorthwest

Figure 8. Enhanced Industrial Land Use Scenario



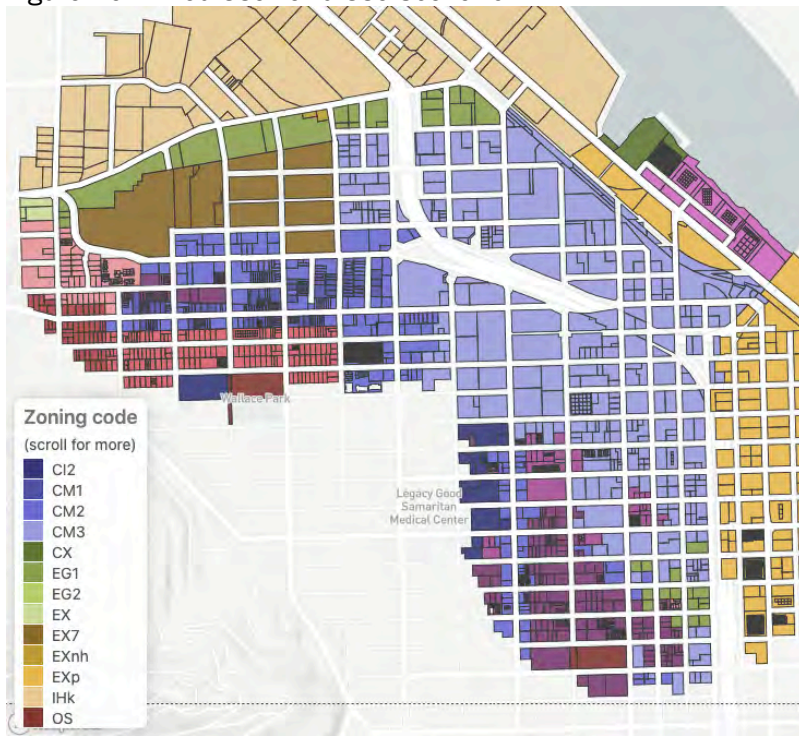
Source: ECONorthwest

Figure 9. Employment Land Use Scenario



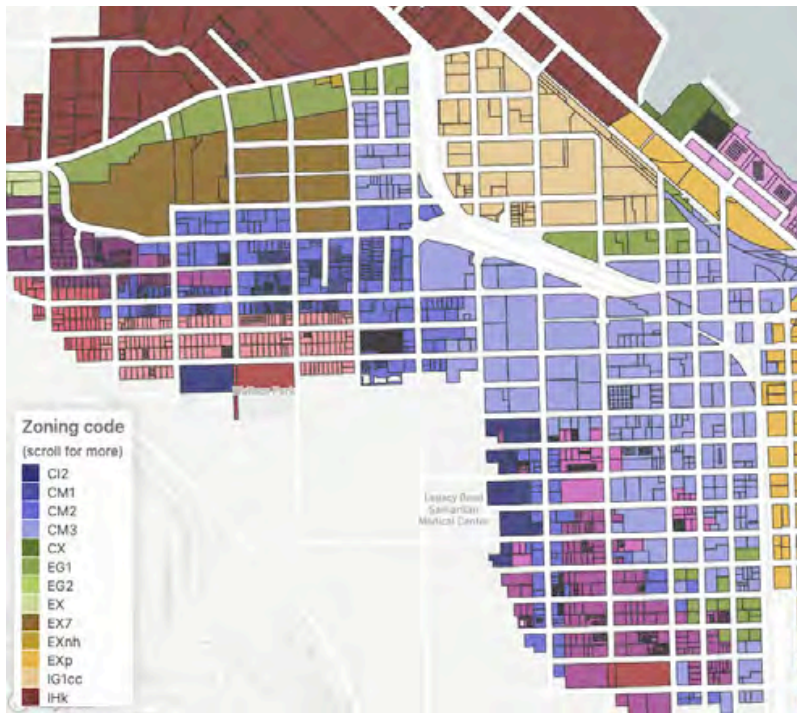
Source: ECONorthwest

Figure 10. Mixed-Use Land Use Scenario



Source: ECONorthwest

Figure 11. Hybrid Industrial and Mixed-Use Land Use Scenario



Source: ECONorthwest

Evaluating Deeper Affordable Housing Targets

We also evaluated multiple affordable housing targets under modifications to the existing inclusionary housing program. Increases in affordable housing set-aside requirements results in less development occurring overall and the scale at which development occurs that impacts both the amount of total housing units expected to be built as well as the number of jobs that are created in each scenario. We found that a 12% set-aside at 60% MFI was the highest outcome scenario for a district specific proposal that maximizes affordable housing through an existing program (Portland Inclusionary Housing Program) while still generating financial returns for site-specific development.

We found that, based on the debt financing assumptions (70% LTC, 6% interest rate), a 15% set-aside reduces the revenue, and subsequent net operating income, to a point that some projects cannot cover the debt service on the loan. At a 12% set-aside, the revenue from the mixes of income levels can still support the annual debt service payment, assuming the same debt financing parameters.

This analysis also evaluated the impact of increasing the height limit allowed in the EX zone in the study area in both the Mixed Use and Hybrid Industrial and Mixed Use Scenarios to be aligned with the height bonus option in the CM3 zone. Increasing the height maximum results in an increase in the residual land value as well as an increase in housing units that are feasible to produce under current market conditions.

Table 5: Affordable Housing Results (Net Changes from Baseline Zoning for Affordable Housing Targets)

	Mixed Use Scenario (10% set-aside)	Mixed Use Scenario (12% set-aside)	Mixed Use Scenario (15% set-aside)	Hybrid Industrial and Mixed Use (10% set-aside)	Hybrid Industrial and Mixed Use (12% set-aside)
Residual Land Value	\$150 M	\$99 M	\$14 M	\$103 M	\$58 M
Industrial Jobs	250	250	250	560	560
Office Jobs	490	490	490	960	960
Retail / Restaurant Jobs	340	270	180	270	490
Net Job Changes	1,080	1,010	930	1,790	1,740
Market Rate Housing Unit Changes	3,110	2,100	930	2,030	1,170
Net Affordable Unit Changes	315	410	590	190	280

Source: ECONorthwest

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Table 6: Affordable Housing Results from a Height Increase to 75 Feet (Net Changes from Baseline Zoning for Affordable Housing Targets)

	Mixed Use Scenario (10% set-aside) – more height	Mixed Use Scenario (12% set-aside) – more height	Hybrid Industrial and Mixed Use (10% set-aside) – more height	Hybrid Industrial and Mixed Use (12% set-aside) – more height
Residual Land Value	\$186 M	\$125 M	\$140 M	\$84 M
Industrial Jobs	250	250	560	560
Office Jobs	490	490	960	960
Retail / Restaurant Jobs	560	490	480	440
Net Job Changes	1,300	1,230	2,000	1,960
Market Rate Housing Unit Changes	6,130	5,080	5,060	4,150
Net Affordable Unit Changes	670	810	550	670

Source: ECONorthwest