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MONTGOMERY PARK *to* HOLLYWOOD

TRANSIT & LAND USE DEVELOPMENT STUDY

EXISTING CONDITIONS
JANUARY 2020



PBOT
PORTLAND BUREAU OF TRANSPORTATION



Bureau of Planning and Sustainability

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MONTGOMERY PARK *to* HOLLYWOOD

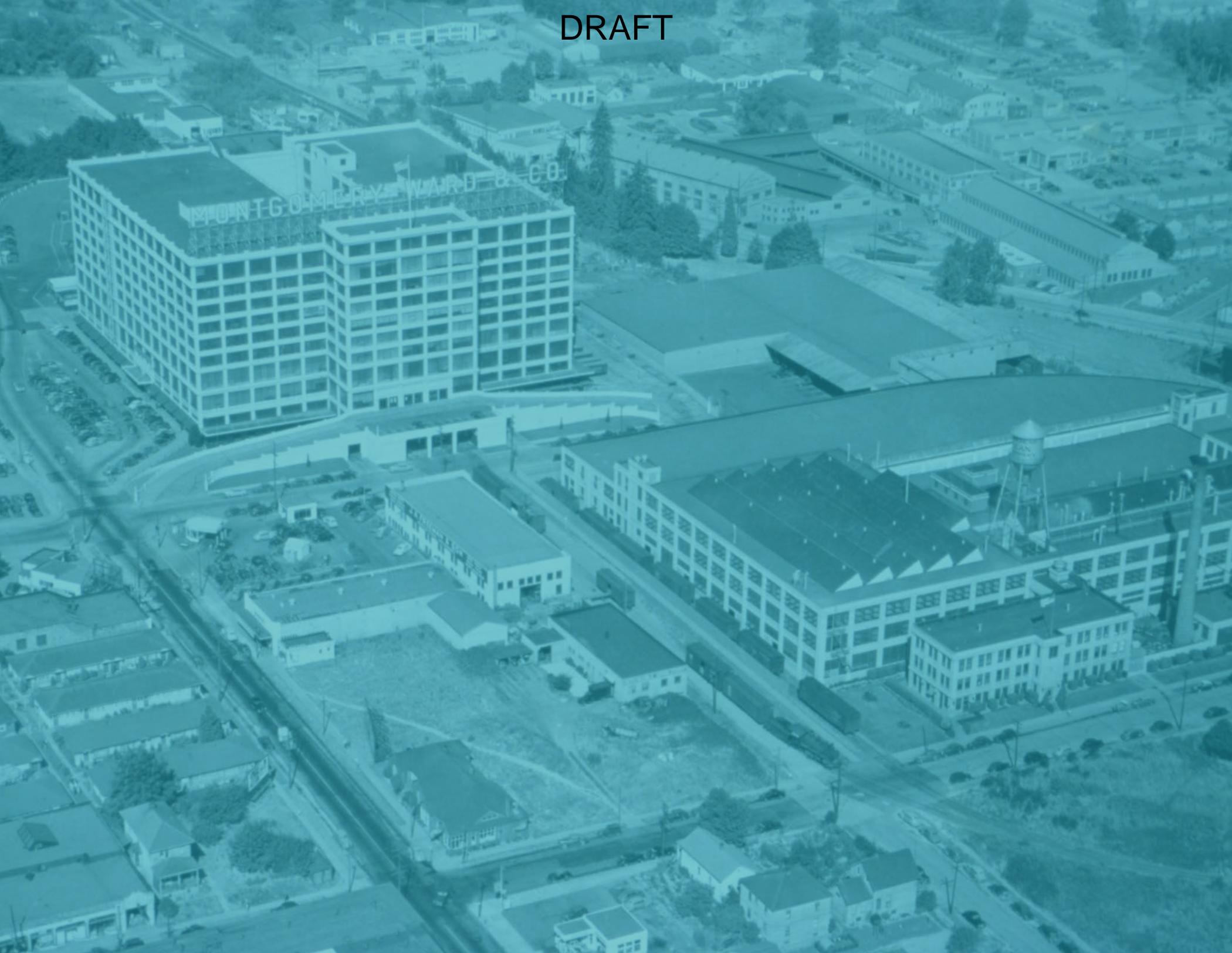
TRANSIT & LAND USE DEVELOPMENT STUDY

EXISTING CONDITIONS

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Introduction & Plan Context

ABOUT THIS STUDY

The Montgomery Park to Hollywood Transit and Land Use Development Strategy (MP2H) will create an equitable development plan for potential transit-oriented districts in Northwest Portland and Inner East Portland.

The MP2H study will identify potential community benefits from land use, urban design, and economic development opportunities under a transit-oriented development scenario. Major transit investments are land use and transportation tools that can be used to shape the future growth of the Central City and surrounding areas. The MP2H project will consider how land use changes and transportation investments could support the City's racial equity, climate justice, employment and housing goals.

ABOUT THIS REPORT

The Land Use and Transportation Existing Conditions document represents the first phase of the MP2H study. The report provides a baseline overview of the land use and transportation conditions in each district. While the project seeks to eventually create a streamlined transit ride between the destinations of Montgomery Park and the Hollywood Transit Center, near-term work will consider each alignment and district separately. The westside study area looks at extending transit from the Central City to Montgomery Park, the second-largest office building in the City of Portland. On the eastside, the study area includes three potential alignments that could connect the Central City to the Hollywood District.

The Existing Conditions report provides information on who lives and works in these study areas, the mix of uses, zoning, and land use characteristics. The document also provides information on transportation volumes, classifications, street cross sections, travel networks and more. This document is intended to serve as an informative atlas of today's conditions upon which the project can analyze opportunities to shape vibrant, equitable, green and thriving neighborhoods. Future study phases will provide analysis of different opportunities and constraints related to land use scenarios and transportation investments.

WESTSIDE STUDY AREA | MONTGOMERY PARK CONNECTION

The westside study area, also referred to as Northwest study area and alignment, consists of a quarter-mile buffer around a potential streetcar alternative route that connects the second-largest office building in Portland, Montgomery Park, to the existing Portland Streetcar network. The alignment diverges from the existing couplet on NW Lovejoy and NW Northrup, heading north via NW 18th and NW 19th beneath the HWY 30 ramps, before heading west via a couplet on NW Wilson and NW York.

The study area is primarily within the Northwest District and adjacent industrial areas to the north within the NW Industrial Business Association boundary. The neighborhoods surrounding the 18th/ 19th alignment are a mix of single and multifamily homes and buildings. Commercial buildings mix with restaurants and other destinations. Recent development at the former Conway site included large apartment buildings with a new grocer.

North of Vaughn the eastern portion of the study area is largely zoned industrial, while the western half includes large parcels of mixed use, and general employment. Businesses range from manufacturing, light industrial, office, storage, and more. Many parcels are currently transitioning

EASTSIDE ALIGNMENTS STUDY AREA

The eastside study area includes a quarter-mile buffer around three potential streetcar alignment alternatives. These alignments are spaced closely enough that the buffers around each alignment overlap. The northernmost alignment operates on the NE Broadway/Weidler couplet, tying into the existing streetcar system at NE Grand and Martin Luther King Jr. Boulevard. At 24th Ave, the alignment runs both east and west on Broadway to NE Sandy Boulevard where it terminates at the Hollywood Transit Center. The NE Irving alignment ties into the existing streetcar system at NE Oregon Street, runs east on Lloyd Boulevard across the 12th street bridge and east-west along Irving street until it joins Sandy, east of NE 24th Street. The NE Sandy alignment primarily operates between the Hollywood Transit Center and the Burnside Bridge via Sandy Boulevard, then connecting to E Burnside St. and NE Couch at NE 13th Ave.

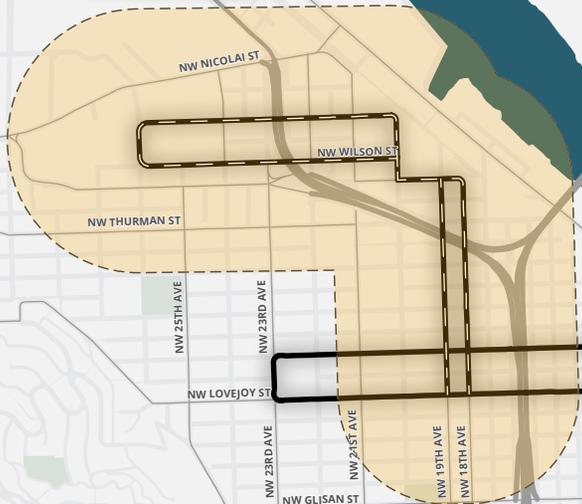
ONE STUDY, TWO ALIGNMENTS

This planning effort is focused on examining the transportation and land use implications of providing a new high-capacity transportation link between Montgomery Park and the Hollywood Town Center. However, due to varying levels of background planning for the western and eastern extents, this study can also be framed as investigating two separate planning questions.

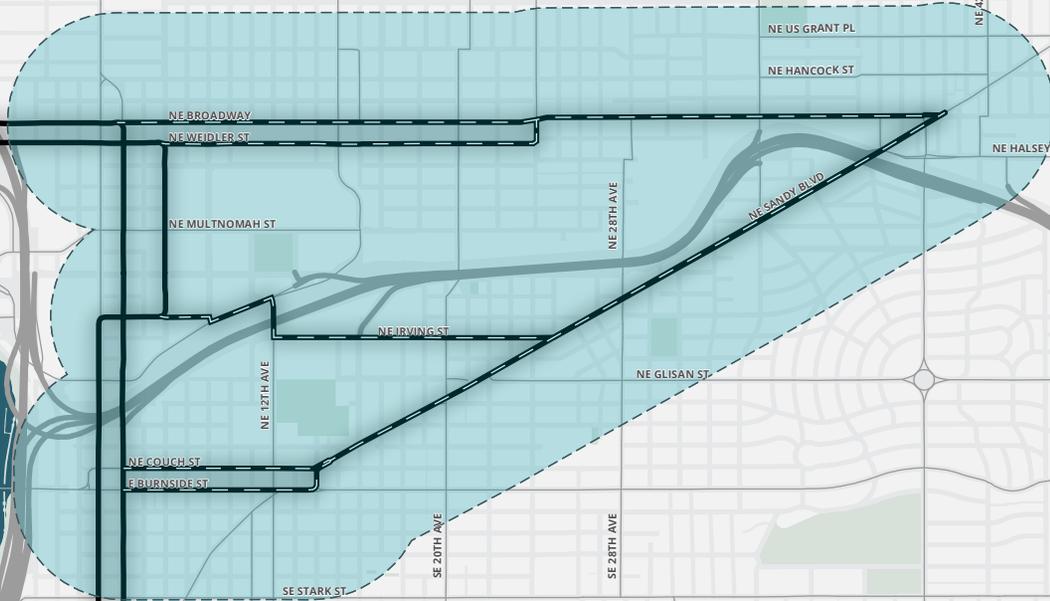
For the western extent, the pertinent questions focus on what land use changes (if any) would be supportive of a major transit investment connecting to Montgomery Park.

To the east, the focus of the study is at a higher level and seeks to understand the benefits and trade-offs between three alignment options, with the purpose of identifying the most promising alignment for future study and project development.

**WESTSIDE/ NORTHWEST
STUDY AREA**



COMBINED EASTSIDE STUDY AREA

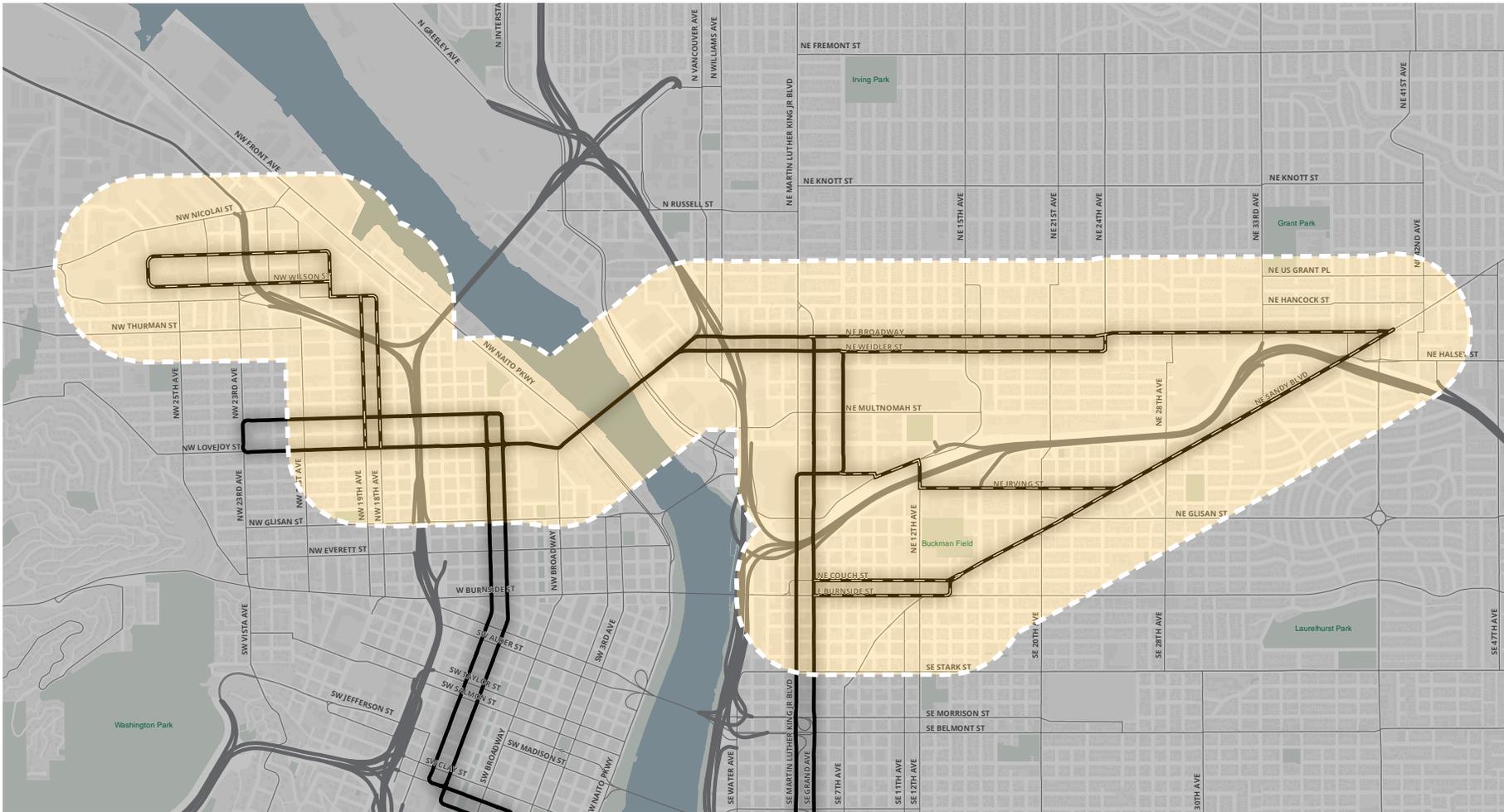


ADDITIONAL STUDY AREAS

Looking outside the study areas under consideration helps to bring additional context to the existing conditions report. In addition to the Westside study area and the combined eastside study area, this document also reports numbers and figures when appropriate for a combined east-west extent, a Pearl District alignment, and a Central Eastside alignment.

COMBINED EAST-WEST EXTENT

The Combined East-West study area is a quarter-mile buffer around the proposed alignments (eastside and westside) as well as a buffer around the existing route along the NW Lovejoy/Northrup couplet over the Broadway Bridge.



POLICY BACKGROUND

The 2035 Comprehensive Plan includes policies that address expanding transit and increasing density in centers and corridors identified for growth and investment, as well as the preservation of prime industrial and employment lands. Policies specific to urban planning, development, transportation, public infrastructure, and equity are included in Comprehensive Plan chapters related to Urban Form (3), Housing (5), Economic Development (6), Public Facilities (8), Transportation (9), and Land Use Designations and Zoning (10). The 2035 Comprehensive Plan policies related to Community Involvement (Chapter 2) are found in the MP2H Community Engagement Plan.

Policy 1.19 Area-specific plans. Use area-specific plans to provide additional detail or refinements applicable at a smaller geographic scale, such as for centers and corridors, within the policy framework provided by the overall Comprehensive Plan.

Policy 3.2 Growth and stability. Direct the majority of growth and change to centers, corridors, and transit station areas, allowing the continuation of the scale and characteristics of Portland's residential neighborhoods.

Policy 3.3 Equitable development. Guide development, growth, and public facility investment to reduce disparities; encourage equitable access to opportunities, mitigate the impacts of development on income disparity, displacement and housing affordability; and produce positive outcomes for all Portlanders.

Policy 3.6 Land efficiency. Provide strategic investments and incentives to leverage infill, redevelopment, and promote intensification of scarce urban land while protecting environmental quality.

Policy 3.9 Growth and development. Evaluate the potential impacts of planning and investment decisions, significant new infrastructure, and significant new development on the physical characteristics of neighborhoods and their residents, particularly under-served and under-represented communities, with particular attention to displacement and affordability impacts. Identify and implement strategies to mitigate the anticipated impacts.

Policy 3.15 Investments in centers. Encourage public and private investment in infrastructure, economic development, and community services in centers to ensure that all centers will support the populations they serve.

Policy 3.19 Center connections. Connect centers to each other and to other key local and regional destinations, such as schools, parks, and employment areas, by pedestrian trails and sidewalks, bicycle sharing, bicycle routes, frequent and convenient transit, and electric vehicle charging stations. Prepare and adopt future street plans for centers that currently have poor street connectivity, especially where large commercial parcels are planned to receive significant additional housing density.

Policy 3.33 Transportation. Improve Town Centers as multimodal transportation hubs that optimize access from the broad area of the city they serve and are linked to the region's high-capacity transit system.

Policy 3.39 Growth. Expand the range of housing and employment opportunities in the Inner Ring Districts. Emphasize growth that replaces gaps in the historic urban fabric, such as redevelopment of surface parking lots and 20th century auto-oriented development.

Policy 3.43 Active transportation. Enhance the role of the Inner Ring Districts' extensive transit, bicycle, and pedestrian networks in conjunction with land uses that optimize the ability for more people to utilize this network. Improve the safety of pedestrian and bike connections to the Central City. Strengthen transit connections between the Inner Ring Districts and to the Central City.

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Policy 3.67 Employment area geographies.

Consider the land development and transportation needs of Portland’s employment geographies when creating and amending land use plans and making infrastructure investments.

Policy 5.3 Housing potential. Evaluate plans and investments for their impact on housing capacity, particularly the impact on the supply of housing units that can serve low- and moderate-income households, and identify opportunities to meet future demand.

Policy 5.12 Impact analysis. Evaluate plans and investments, significant new infrastructure, and significant new development to identify potential disparate impacts on housing choice, access, and affordability for protected classes and low-income households. Identify and implement strategies to mitigate the anticipated impacts.

Policy 5.15 Gentrification/displacement risk. Evaluate plans and investments, significant new infrastructure, and significant new development for the potential to increase housing costs for, or cause displacement of communities of color, low- and moderate-income households, and renters. Identify and implement strategies to mitigate the anticipated impacts.

Policy 5.16 Involuntary displacement. When plans and investments are expected to create neighborhood change, limit the involuntary displacement of those who are under-served and under-represented. Use public investments and programs, and coordinate with nonprofit housing organizations (such as land trusts and housing providers) to create permanently-affordable housing and to mitigate the impacts of market pressures that cause involuntary displacement.

Policy 6.8 Business environment. Use plans and investments to help create a positive business environment in the city and provide strategic assistance to retain, expand, and attract businesses.

Policy 6.13 Land supply. Provide supplies of employment land that are sufficient to meet the long-term and short-term employment growth forecasts, adequate in terms of amounts and types of sites, available and practical for development and intended uses. Types of sites are distinguished primarily by employment geographies identified in the Economic Opportunities Analysis, although capacity needs for building types with similar site characteristics can be met in other employment geographies.

Policy 6.14 Brownfield redevelopment.

Overcome financial-feasibility gaps to cleanup and redevelop 60 percent of brownfield acreage by 2035.

Policy 6.27 Income self-sufficiency. Expand access to self-sufficient wage levels and career ladders for low-income people by maintaining an adequate and viable supply of employment land and public facilities to support and expand opportunities in Portland for middle- and high-wage jobs that do not require a 4-year college degree.

Policy 6.30 Disparity reduction. Encourage investment in, and alignment of, public efforts to reduce racial, ethnic, and disability-related disparities in income and employment opportunity.

Policy 6.36 Industrial land. Provide industrial land that encourages industrial business retention, growth, and traded sector competitiveness as a West Coast trade and freight hub, a regional center of diverse manufacturing, and a widely-accessible base of family-wage jobs, particularly for under-served and under-represented people.

Policy 6.37 Industrial sanctuaries. Protect industrial land as industrial sanctuaries identified on the Comprehensive Plan Map primarily for manufacturing and distribution uses and to encourage the growth of industrial activities in the city.

Policy 6.38 Prime industrial land retention.

Protect the multimodal freight-hub industrial districts at the Portland Harbor, Columbia Corridor, and Brooklyn Yard as prime industrial land that is prioritized for long-term retention.

Policy 6.46 Impact analysis. Evaluate and monitor the impacts on industrial land capacity that may result from land use plans, regulations, public land acquisition, public facility development, and other public actions to protect and preserve existing industrial lands.

Policy 6.54 Neighborhood buffers. Maintain and enhance major natural areas, open spaces, and constructed features as boundaries and buffers for the Portland Harbor and Columbia Corridor industrial areas.

Policy 8.21 System capacity. Establish, improve, and maintain public facilities and services at levels appropriate to support land use patterns, densities, and anticipated residential and employment growth, as physically feasible and as sufficient funds are available.

Policy 8.22 Equitable service. Provide public facilities and services to alleviate service deficiencies and meet level-of-service standards for all Portlanders, including individuals, businesses, and property owners.

Policy 8.29 System development. Require private or public entities whose prospective development or redevelopment actions contribute to the need for public facility improvements, extensions, or construction to bear a proportional share of the costs.

Policy 8.113 School district capacity. Consider the overall enrollment capacity of a school district – as defined in an adopted school facility plan that meets the requirements of Oregon Revised Statute 195 – as a factor in land use decisions that increase capacity for residential development.

Policy 9.11 Land use and transportation coordination. Implement the Comprehensive Plan Map and the Urban Design Framework through coordinated long-range transportation and land use planning. Ensure that street policy and design classifications and land uses complement one another.

Policy 9.25 Transit equity. In partnership with TriMet, maintain and expand high-quality frequent transit service to all Town Centers, Civic Corridors, Neighborhood Centers, Neighborhood Corridors, and other major concentrations of employment, and improve service to areas with high concentrations of poverty and historically under-served and under-represented communities.

Policy 9.27 Transit service to centers and corridors. Use transit investments as a means to shape the city's growth and increase transit use. In partnership with TriMet and Metro, maintain, expand, and enhance Portland Streetcar, frequent service bus, and high-capacity transit, to better serve centers and corridors with the highest intensity of potential employment and household growth.

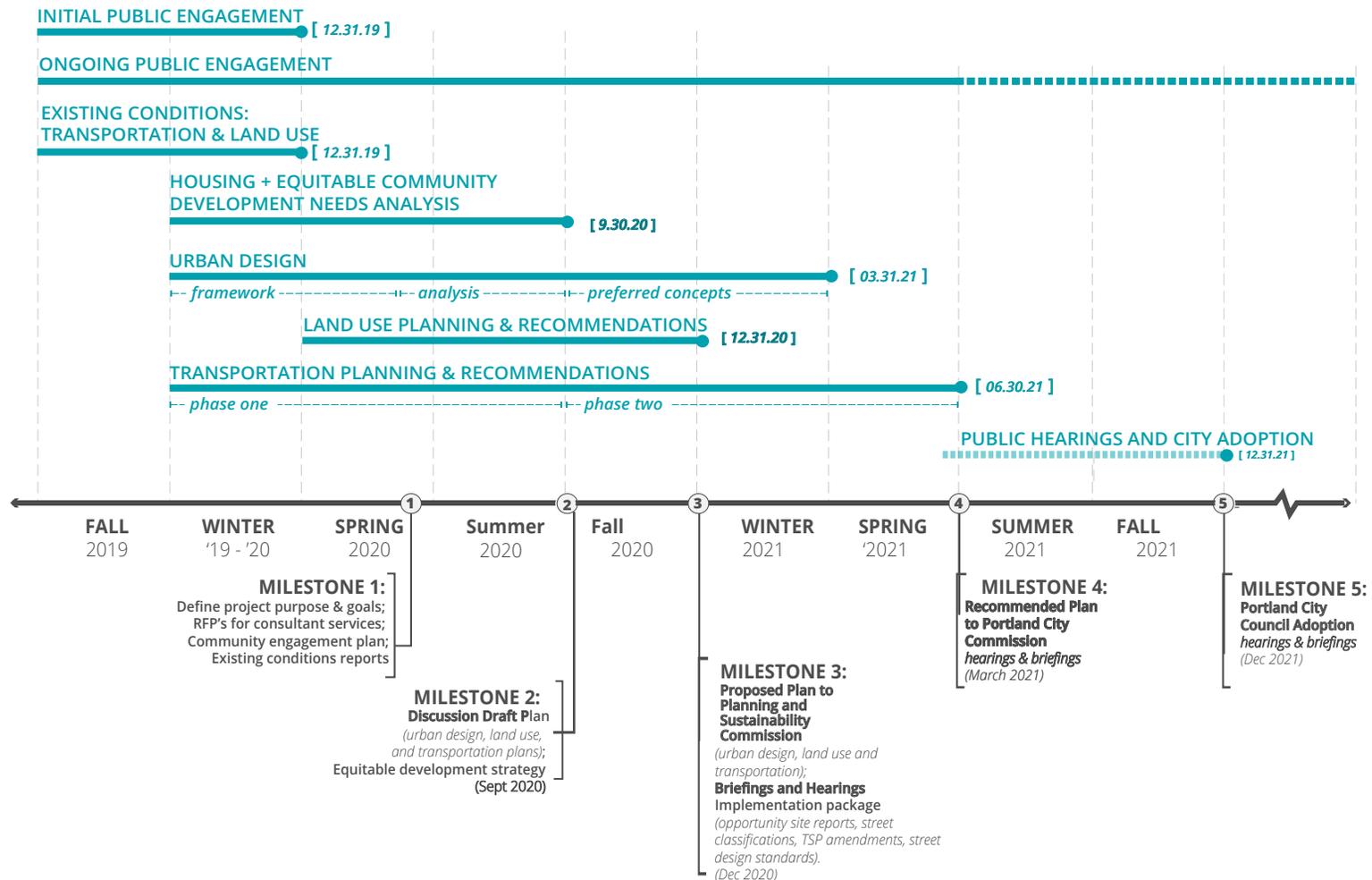
Policy 9.31 Economic development and industrial lands. Ensure that the transportation system supports traded sector economic development plans and full utilization of prime industrial land, including brownfield redevelopment.

Policy 10.1 Land use designations. Apply a land use designation to all land and water within the City's Urban Services Boundary. Apply the designation that best advances the Comprehensive Plan goals and policies. The land use designations are shown on the adopted Land Use Map and on official Zoning Maps.

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PROJECT TIMELINE

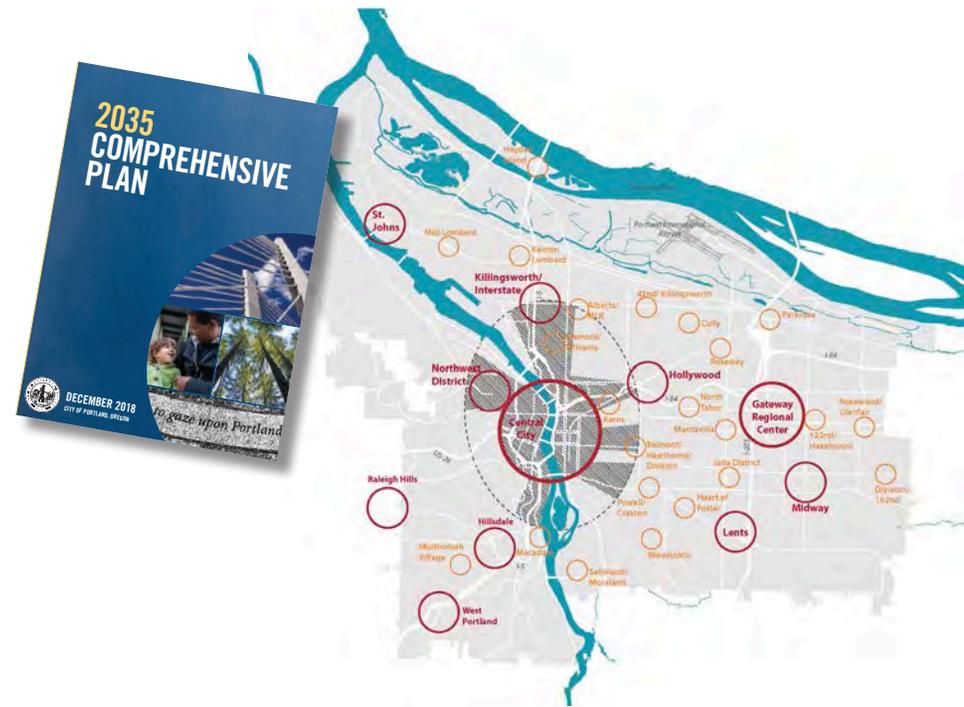
Over the period of 16 months, the MP2H project team will develop and analyze a range of options and alternatives to better understand the opportunities and challenges of land use changes and transportation investments in Northwest and inner East Portland. MP2H will organize the work around project milestones that define project purpose and goals, create urban design frameworks, identify needed community benefits, evaluate land use and transportation alternatives, and develop recommendations. Project milestones and decision-making will be informed by ongoing, purposeful engagement with area stakeholders and impacted community members. The diagram below outlines key planning efforts and project milestones.



Planning Context

2035 COMPREHENSIVE PLAN

The 2035 Comprehensive Plan, adopted in 2016, sets the framework for growth and development in the City of Portland for the next 20 years. The 2035 Comprehensive Plan sets direction for land use, as implemented through the Portland Zoning Map and Zoning Code. It also sets the direction for transportation investments and improvements as shown in the Transportation System Plan. Finally, the 2035 Comprehensive Plan links to the city's infrastructure needs via the related Citywide Systems Plan.



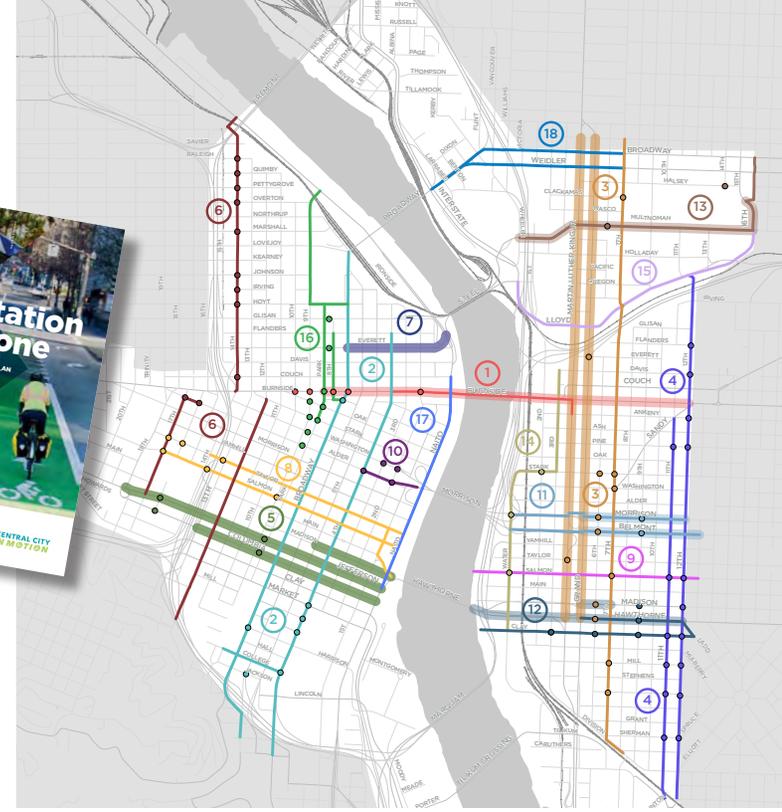
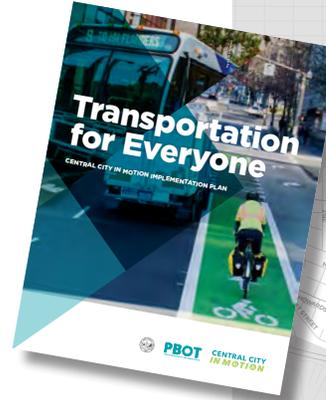
CENTRAL CITY 2035

City Council adopted the Central City 2035 (CC2035) Plan in 2018, updating the plans and policies for downtown and central areas of Portland. The CC2035 is part of the Comprehensive Plan, which guides the physical development of the City over a 20-year span. CC2035 envisions a "prosperous, healthy, equitable and resilient Central City, where people collaborate, innovate and create a more vibrant future together." Much of the MP2H study area is adjacent, but outside the Central City, however portions of potential east side and west side alignments will travel through the Central City within the Pearl District and potentially in the Lloyd or Central Eastside.



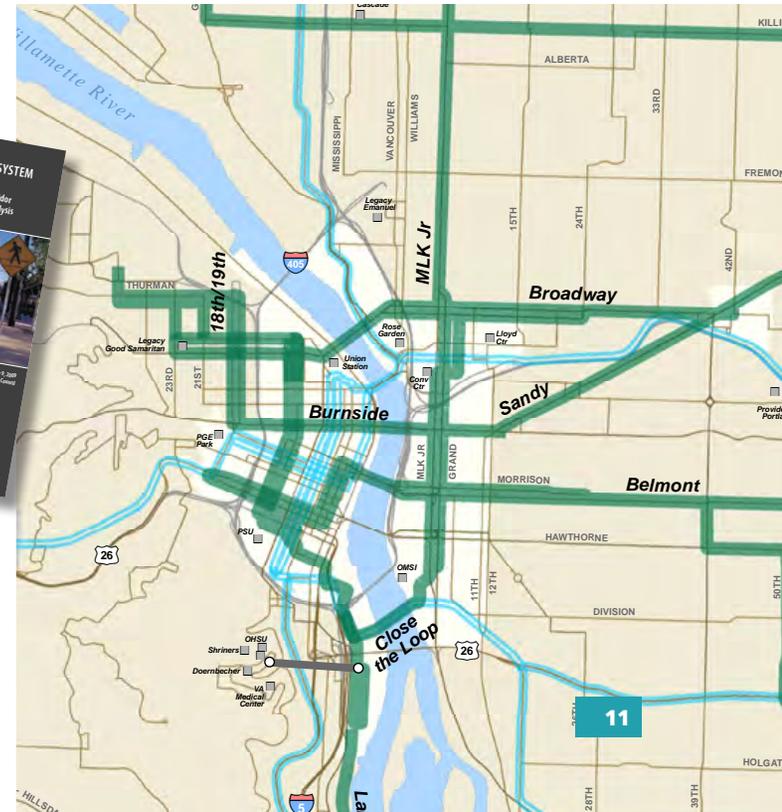
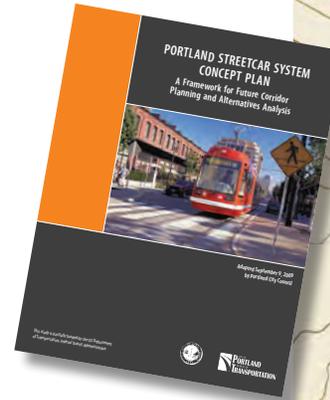
CENTRAL CITY IN MOTION

The Central City in Motion (CCIM) Plan identifies, prioritizes, and implements transportation improvements across the City's core. Eighteen projects have been developed to reshape Portland's streets into more safe, efficient, and flexible corridors. CCIM projects within the MP2H study area include a roadway reconfiguration on NE Broadway/ Weidler, improving a parking protected bike on NE Multnomah Street, coordinated multimodal improvements on Burnside and MLK/Grand/6th/7th. The MP2H plan should consider these planned projects when considering streetscapes and right-of-way configuration on these corridors.

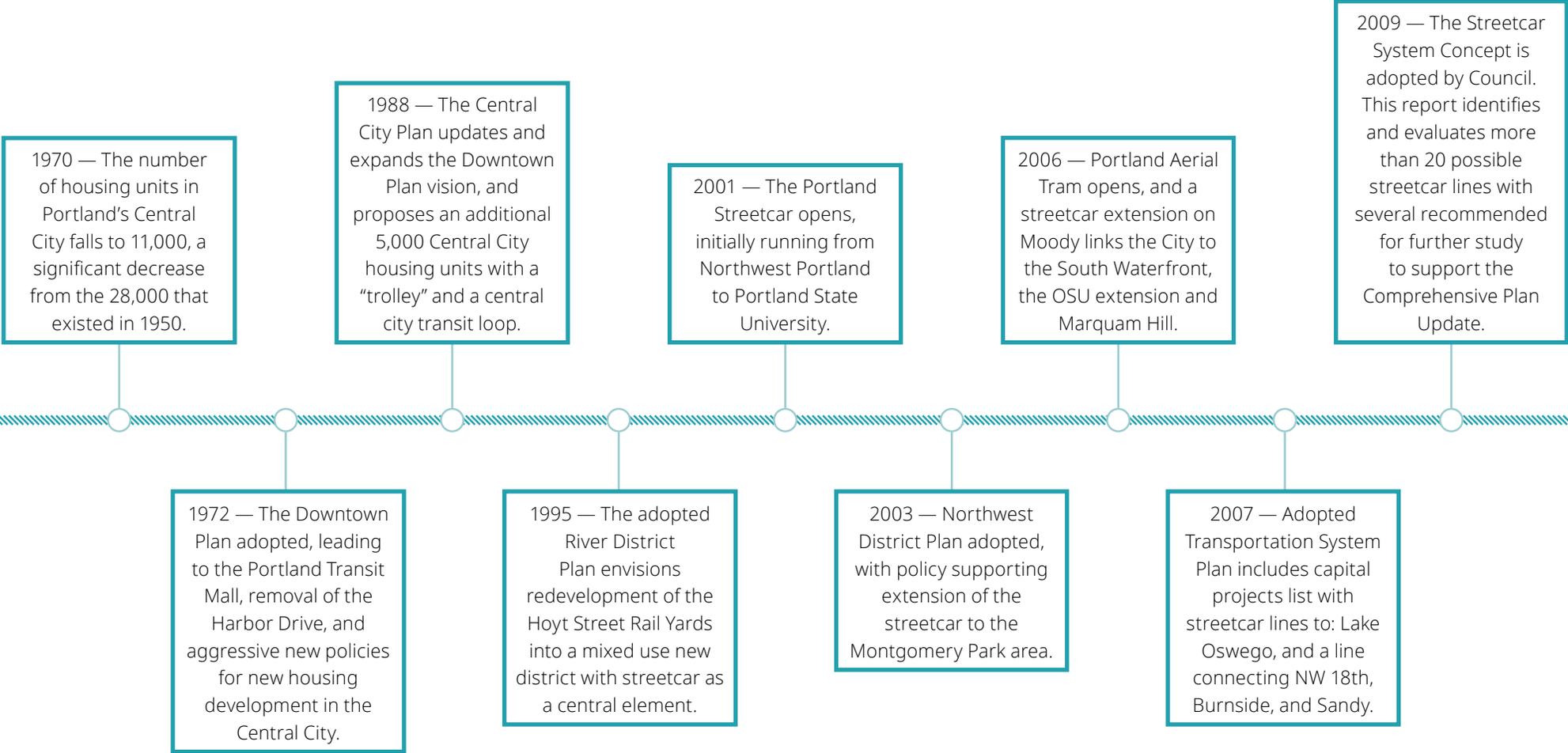


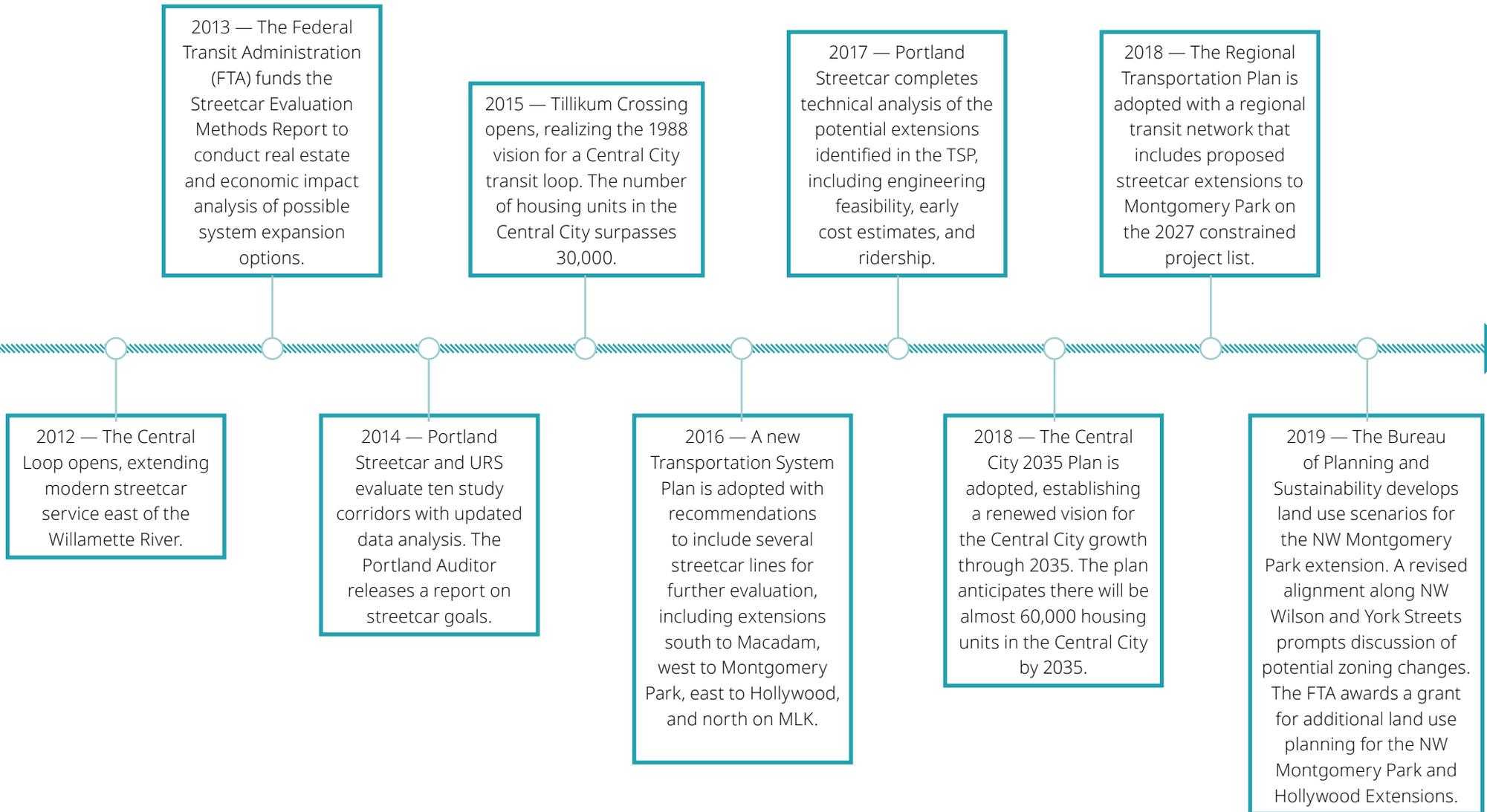
STREETCAR CONCEPT PLAN

The 2009 Streetcar Concept Plan identifies potential corridors that will build upon the successful existing streetcar system and expand service to best serve Portland's neighborhood and business districts. The Plan evaluated and compared corridors to determine what is most promising for streetcar expansion based upon development potential, operational feasibility, transit connectivity, and public involvement. The 2009 Plan included concept corridors to Montgomery Park on NW 18th/19th and NW/Thurman/Vaughn, and to Hollywood on NE Broadway/Weidler and NE Sandy Boulevard.



HOW WE GOT HERE—HOUSING AND STREETCAR PLANNING TIMELINE





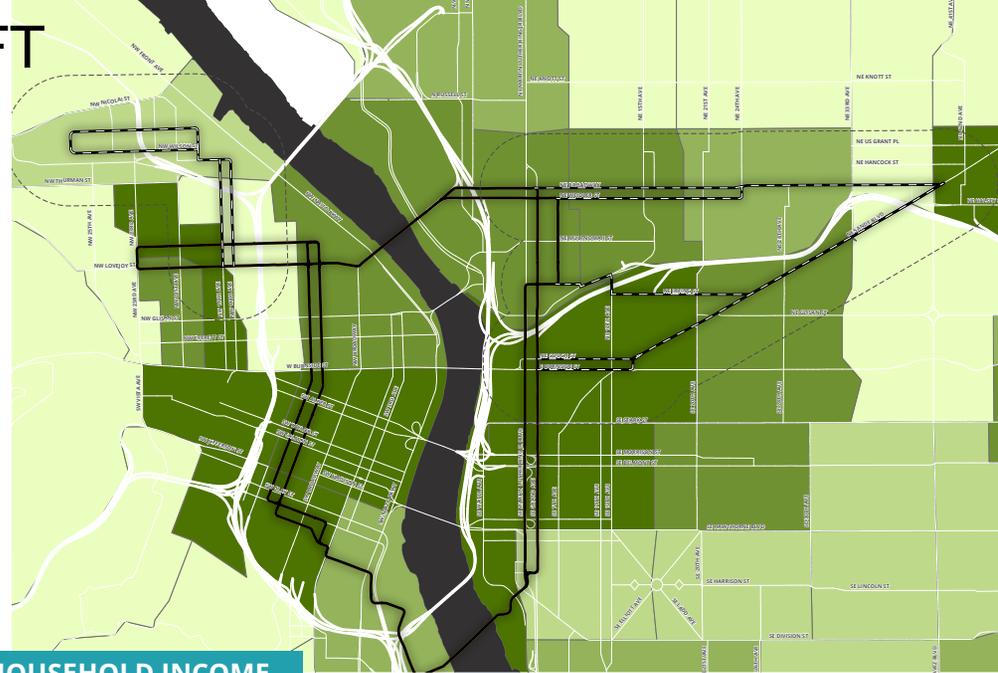
AREA EQUITY INDICATORS

The Portland Bureau of Transportation (PBOT) created an Equity Matrix to better refine our approaches and understand the impact of our work on marginalized groups. The tool is a simplified version of more complex, multi-factored matrices used in the past to identify marginalized and economically vulnerable populations. National best practice and the City's Office of Equity and Human Rights recommends using three demographic variables in equity matrices: race, income, and limited English proficiency.

Using these three demographic variables, PBOT designed a simplified Equity Matrix that identifies areas with higher than the citywide average concentration of people of color and people below the median household income. This strategy centers race and has intersectionality with people with disabilities. Limited English Proficiency (LEP) is not included in the calculation of the matrix due to a relatively high level of uncertainty and error in the underlying data. Instead, census tracts with higher than citywide averages of LEP households are identified.

The MP2H study area touches areas with higher concentrations of marginalized groups. On the west side of the river, a streetcar extension alternative (dashed alignment) could run adjacent to a higher-scoring census tract in the Slabtown area. On the east side, a potential streetcar alignment could tie into the existing system on NE Broadway/Weidler in an area with greater concentrations of marginalized populations. All three potential streetcar alignments serving the Hollywood District would terminate in an area that ranks higher in the equity matrix. Two of the variables, people of color and household income, largely overlap within the study area. One notable exception is south of I-84, where the equity matrix indicates higher levels of lower income people, with only moderately more concentrations of people of color. Only one study area census tract has more LEP households than the Citywide average.

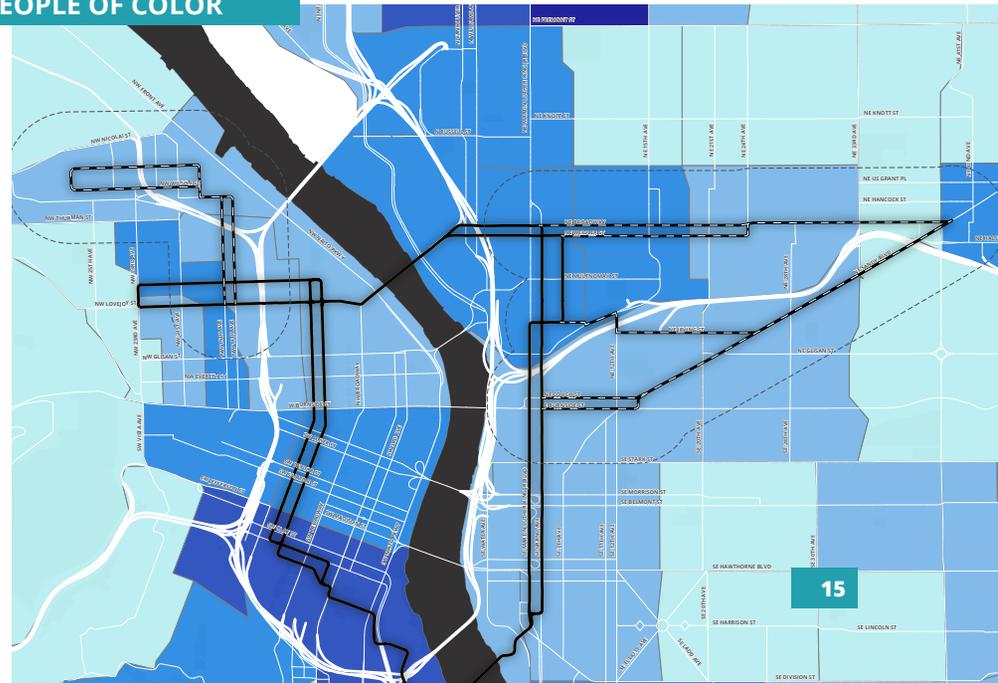
More information on PBOT's Equity Matrix can be found here: <https://www.portlandoregon.gov/transportation/74236>

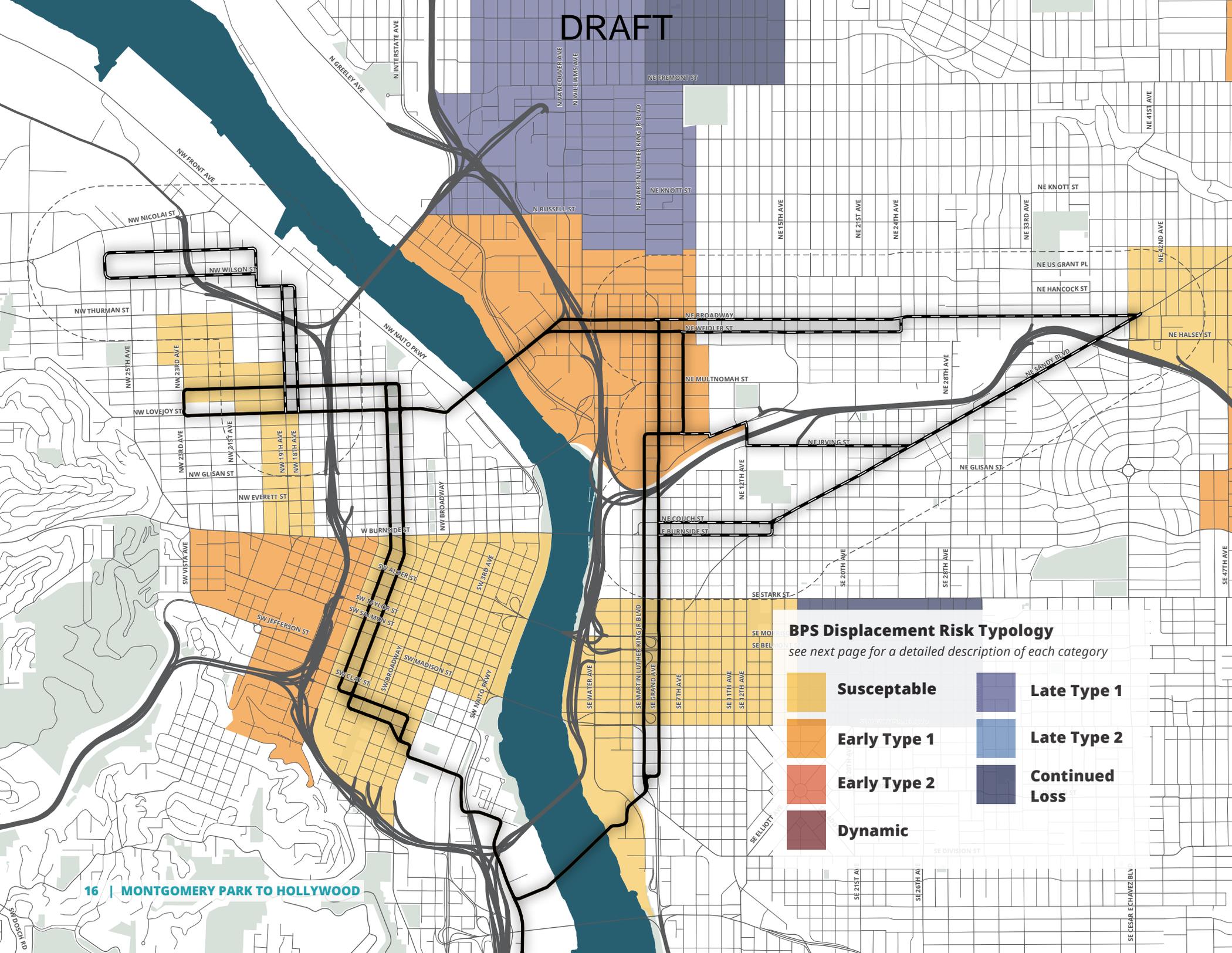


HOUSEHOLD INCOME

| | | | |
|----------------|---|------------|---|
| < \$47K | 5 | > 40% | 5 |
| \$47K to \$60K | 4 | 31% to 40% | 4 |
| \$61K to \$67K | 3 | 22% to 30% | 3 |
| \$68K to \$92K | 2 | 15% to 21% | 2 |
| > \$92K | 1 | < 15% | 1 |

PEOPLE OF COLOR





BPS Displacement Risk Typology

see next page for a detailed description of each category

- Susceptible**
- Early Type 1**
- Early Type 2**
- Dynamic**
- Late Type 1**
- Late Type 2**
- Continued Loss**

RESIDENTIAL DISPLACEMENT RISK

EARLY-STAGE GENTRIFICATION: These neighborhoods are not yet gentrifying or are showing early signs that they could be gentrifying.

Susceptible: These neighborhoods have higher shares of vulnerable populations but have not yet experienced demographic changes. Their housing market is low or moderate, but they are adjacent to tracts whose values are already high or are increasing rapidly.

Early: Type 1: These neighborhoods have higher shares of vulnerable populations but have not yet experienced demographic changes. Their housing market is still low or moderate but has experienced high appreciation since 2008 (or 2012 for rents).

Early: Type 2: These neighborhoods have higher shares of vulnerable populations but have experienced demographic changes whereby they are losing vulnerable populations proportionally. Their housing market is low or moderate, but they are adjacent to tracts whose values are already high or are increasing rapidly.

MID-STAGE GENTRIFICATION

Dynamic: These neighborhoods are currently undergoing gentrification. They have higher shares of vulnerable populations but have experienced demographic changes by losing vulnerable populations proportionally. Their housing market is still low or moderate but has experienced high appreciation since 2008 (or 2012 for rents)

LATE-STAGE GENTRIFICATION: These neighborhoods have mostly gentrified but vulnerable populations may still reside in there. The housing market has completely shifted from low or moderate to high value.

Late: Type 1: These neighborhoods have higher shares of vulnerable populations but have experienced demographic changes by losing vulnerable populations proportionally. Their housing market used to be low or moderate in 2000 but has appreciated rapidly since, and now values are high.

Late: Type 2: A new typology in 2018, these neighborhoods no longer have high shares of vulnerable populations like they used to in 2000 or in 2006-10. They have experienced demographic changes by losing their once-high share of vulnerable populations. Their housing market is still low or moderate but has experienced high appreciation since 2008 (or 2012 for rents).

Continued loss: These neighborhoods no longer have high shares of vulnerable populations like they used to in 2000 or in 2006-10. The share of white people is growing and/or the share of people with a four-year degree is growing. Their housing market used to be low or moderate in 2000 but has appreciated rapidly since, and now values are high

ABOUT THIS DATA SOURCE

Policy makers must consider the impact that plans and investments may have on vulnerable communities and the potential to cause displacement. A first step is to examine where the communities most vulnerable to displacement live. Montgomery Park to Hollywood alignments largely avoid areas with elevated displacement risk, but additional study and mitigating measures should be considered.

On the west side, 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.

On the east side, Census Tract 23.03 (Broadway bridgehead and lower Albina) is considered to be Early Type 1 typology, meaning that there is a high share of vulnerable communities here and housing costs have increased, but the area has not seen a significant change in demographics.

More information on gentrification typologies can be found in the 2018 Gentrification and Displacement Methodology and Key Findings report: <https://www.portlandoregon.gov/bps/article/700970>.

Land Use & Development

COMPREHENSIVE PLAN DESIGNATIONS

Portland's 2035 Comprehensive Plan, adopted by Portland City Council in December 2016, establishes the framework for the growth and development of the city through 2035. The Comprehensive Plan includes goals that set forth the city's aspirations for change and policies that further articulate the approach to accomplishing those goals. Future desired land uses are identified in the Portland Comprehensive Plan Map. This map, shown for the study area on the adjoining page, generally describes the type and character of land uses that are allowed or expected to be developed on privately and publicly owned land within the city. The Montgomery Park to Hollywood study area encompasses a broad array of Comprehensive Plan designations including industrial sanctuary areas in the west, as well as mixed use, Central City, and residential designations along the length of the study area alignments. A more detailed description can be found in the Westside and Eastside chapters.

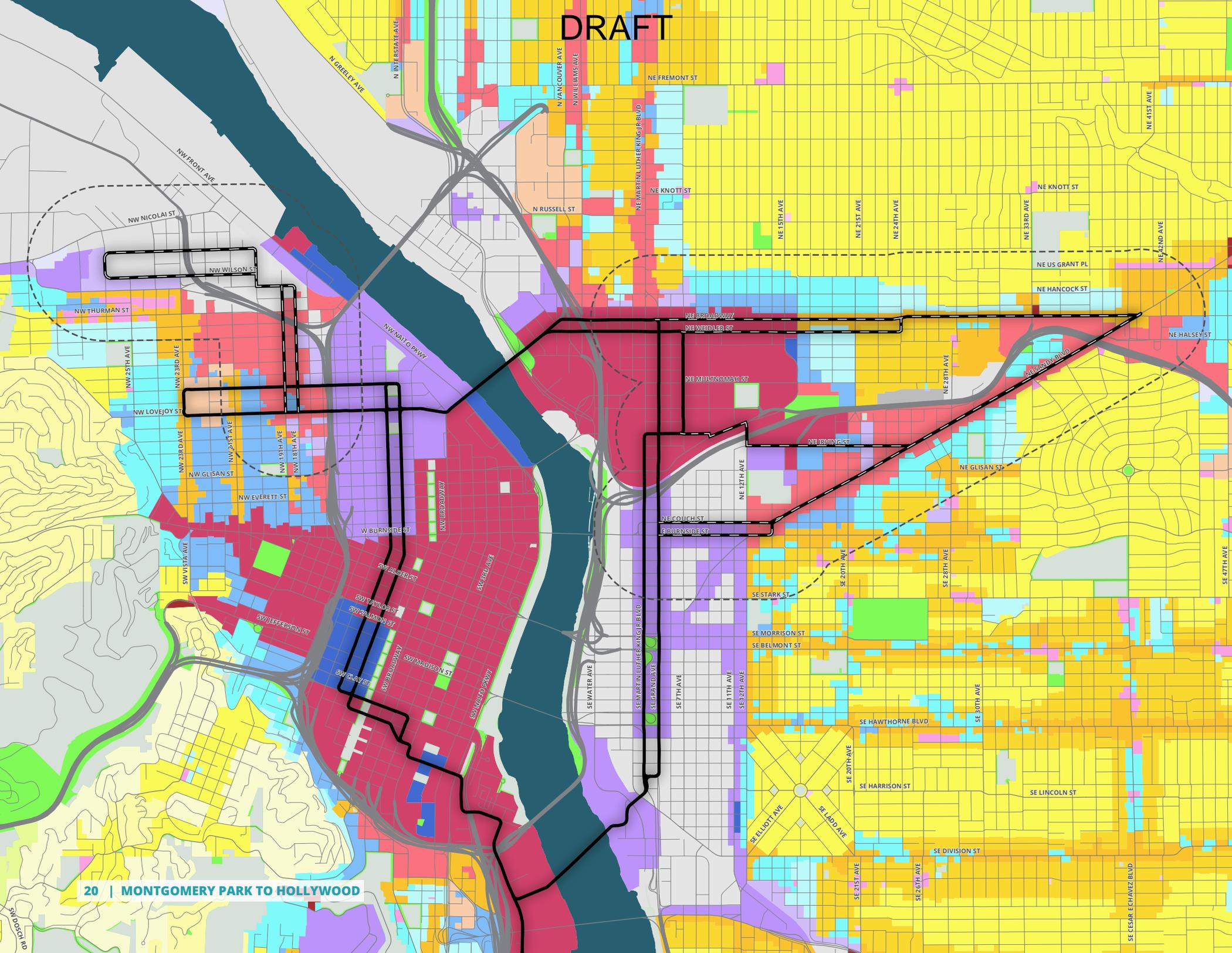
The Comprehensive Plan map and associated map designations are typically broad in terms of their land use direction, and are implemented through associated zoning designations, the zoning map (see next section), and zoning code. Comprehensive Plan designations may be implemented through one or more zoning map designations. Each zoning designation is associated with specific use allowances and development and design standards that are specified in the Portland Zoning Code (Title 33).

COMPREHENSIVE PLAN DESIGNATIONS

- Single-Dwelling 10,000
- Single-Dwelling 7,000
- Single-Dwelling 5,000
- Single-Dwelling 2,500
- Multi-Dwelling 2,000
- Multi-Dwelling 1,000
- High Density Multi-Dwelling
- Central Residential
- Institutional Campus
- Mixed Use – Dispersed
- Mixed Use – Neighborhood
- Mixed Use – Civic Corridor
- Mixed Use – Urban Center
- Central Commercial
- Central Employment
- Mixed Employment
- Industrial Sanctuary
- Open Space

| GEOGRAPHY | SINGLE-DWELLING | MULTI-DWELLING | MIXED USE/COMMERCIAL | INSTITUTIONAL | EMPLOYMENT | INDUSTRIAL | OPEN SPACE | STREETS |
|--------------------------------------|-----------------|----------------|----------------------|---------------|------------|------------|------------|---------|
| COMBINED EAST-WEST STUDY AREA | 9% | 10% | 32% | 1% | 11% | 10% | 2% | 25% |
| NORTHWEST STUDY AREA | 0% | 10% | 32% | 1% | 19% | 25% | 1% | 12% |
| COMBINED EASTSIDE STUDY AREAS | 15% | 12% | 34% | 1% | 3% | 5% | 2% | 29% |

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CURRENT ZONING

Zoning dictates the type of allowable land uses and development standards for a given parcel. A land use is how a property is used (e.g., commercial, residential, mixed-use, industrial, open space, community service, etc.) either by right, or with certain limitations. Development standards regulate the size, bulk, location, and features of the development on a site. Together, zoning shapes the activity and character of a neighborhood and specifies the types of development that can be built on both privately-owned and publicly-owned land.

In Portland, zoning allowances are typically determined by “base zones” that apply to

different types of allowed uses (residential, commercial, industrial, etc.). These are augmented by “overlay zones” and “plan districts” which supplement base zones. See westside and eastside descriptions for details.

The Westside study area is a mix of zoning types within the NW District, including Commercial/Mixed Use, Residential, and Employment. The northern part of the study area is largely zoned Industrial, with Montgomery Park zoned Central Employment, which allows a mix of uses, and the former ESCO site is zoned as industrial, but is designated on the Comprehensive Plan map for

more flexible employment uses in the future.

In the table below, the Northwest alignment refers to the potential streetcar alignment extension.

The Eastside study area is also mix of zoning. The Broadway alignment is zoned a mix of Central Commercial and Commercial/Mixed Use. The Sandy alignment is bordered by Commercial/Mixed Use, and the Irving alignment varies from Central Commercial to Commercial/Mixed Use and multidwelling residential zoning.

CITY OF PORTLAND | ZONING

| | |
|---|--|
|  Residential 10,000 (R10) |  Commercial Residential (CR) |
|  Residential 7,000 (R7) |  Commercial Mixed Use 1 (CM1) |
|  Residential 5,000 (R5) |  Commercial Mixed Use 2 (CM2) |
|  Residential 2,500 (R2.5) |  Commercial Mixed Use 3 (CM3) |
|  Residential 2,000 (R2) |  Commercial Employment (CE) |
|  Residential 1,000 (R1) |  Central Commercial (CX) |
|  High Density Residential (RH) |  General Employment 1 (EG1) |
|  Central Residential (RX) |  General Employment 2 (EG2) |
|  General Industrial 1 (IG1) |  Central Employment (EX) |
|  General Industrial 2 (IG2) |  Campus Institutional 1 (CI1) |
|  Heavy Industrial (IH) |  Campus Institutional 2 (CI2) |
| |  Open Space (OS) |

| GEOGRAPHY | SINGLE-DWELLING | MULTI-DWELLING | MIXED USE/COMMERCIAL | INSTITUTIONAL | EMPLOYMENT | INDUSTRIAL | OPEN SPACE | STREETS |
|--------------------------------------|-----------------|----------------|----------------------|---------------|------------|------------|------------|---------|
| COMBINED EAST-WEST STUDY AREA | 10% | 10% | 30% | 0% | 11% | 13% | 2% | 25% |
| NORTHWEST STUDY AREA | 0% | 10% | 25% | 1% | 15% | 36% | 1% | 12% |
| COMBINED EASTSIDE STUDY AREAS | 15% | 12% | 32% | 0% | 5% | 5% | 2% | 29% |

**ABOUT THIS DATA SOURCE:
BUILDABLE LANDS INVENTORY**

The following sequence of maps show the outputs of two models used to forecast where future growth in jobs and housing may occur. These are the Buildable Lands Inventory (BLI) capacity model and the allocation model. Visit the BLI homepage for more information, including a methodology of the models: <https://www.portlandoregon.gov/bps/59296>.

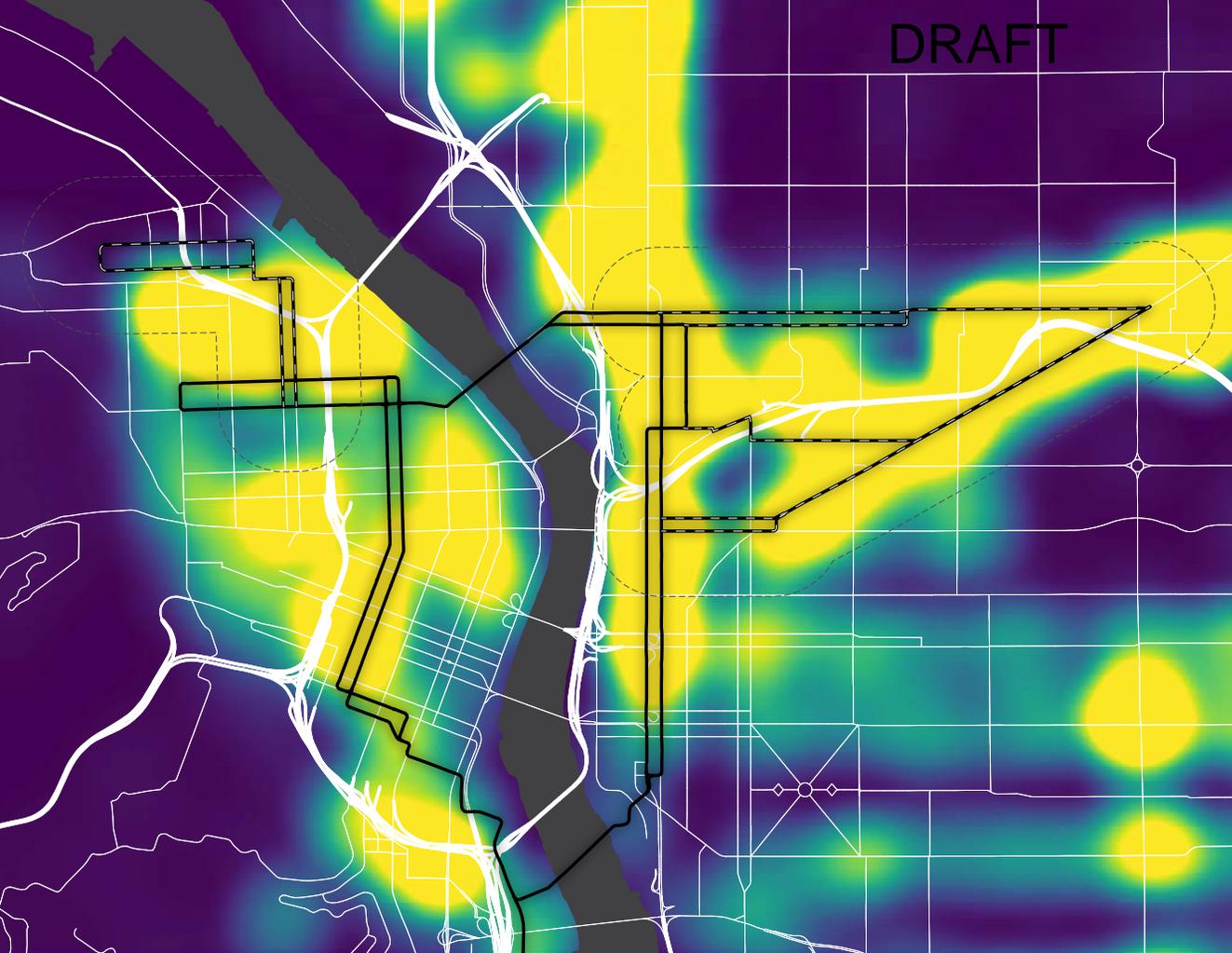
Buildable Lands Inventory

VACANT & UNDERUTILIZED PARCELS

The parcels on this map have been identified as vacant or re-developable based on the BLI capacity model from 2015. When a parcel’s existing development is significantly less than what is allowed to be built by current zoning, the parcel is identified as re-developable (called “under-utilized” in the model). Together with vacant sites, under-utilized sites inform where the city could accommodate future growth in terms of housing and jobs.

Re-zoning areas of land as part of the Montgomery Park to Hollywood Streetcar Project will likely flag additional parcels as re-developable—this is particularly true for low-rise industrial warehouses that might convert to mixed-use, for example. In total, the combined East-West study areas, including the Northwest and Eastside alignments contain over 1,300 vacant or underutilized parcels and could accommodate up to 34,300 new housing units and 53,900 jobs under current zoning.

| GEOGRAPHY | UNIT CAPACITY | JOB CAPACITY | ACRES | PARCEL COUNT |
|----------------------|---------------|--------------|-------|--------------|
| NORTHWEST STUDY AREA | 6,249 | 4,157 | 99 | 219 |
| EASTSIDE STUDY AREA | 25,205 | 39,977 | 276 | 946 |



HOUSING CAPACITY

Based on the vacant and under-utilized parcels that were identified in the BLI capacity model, we can estimate the net new number of jobs and housing units that could be accommodated under current zoning. Areas with a high capacity for new housing units include the MLK corridor, Sandy Boulevard, Broadway east of 24th, and the NW 18th/19th couplet in Northwest. However, current zoning does not support additional capacity for housing north of Vaughn, nor along the Broadway corridor between 10th and 24th Ave.

LOW UNIT
CAPACITY



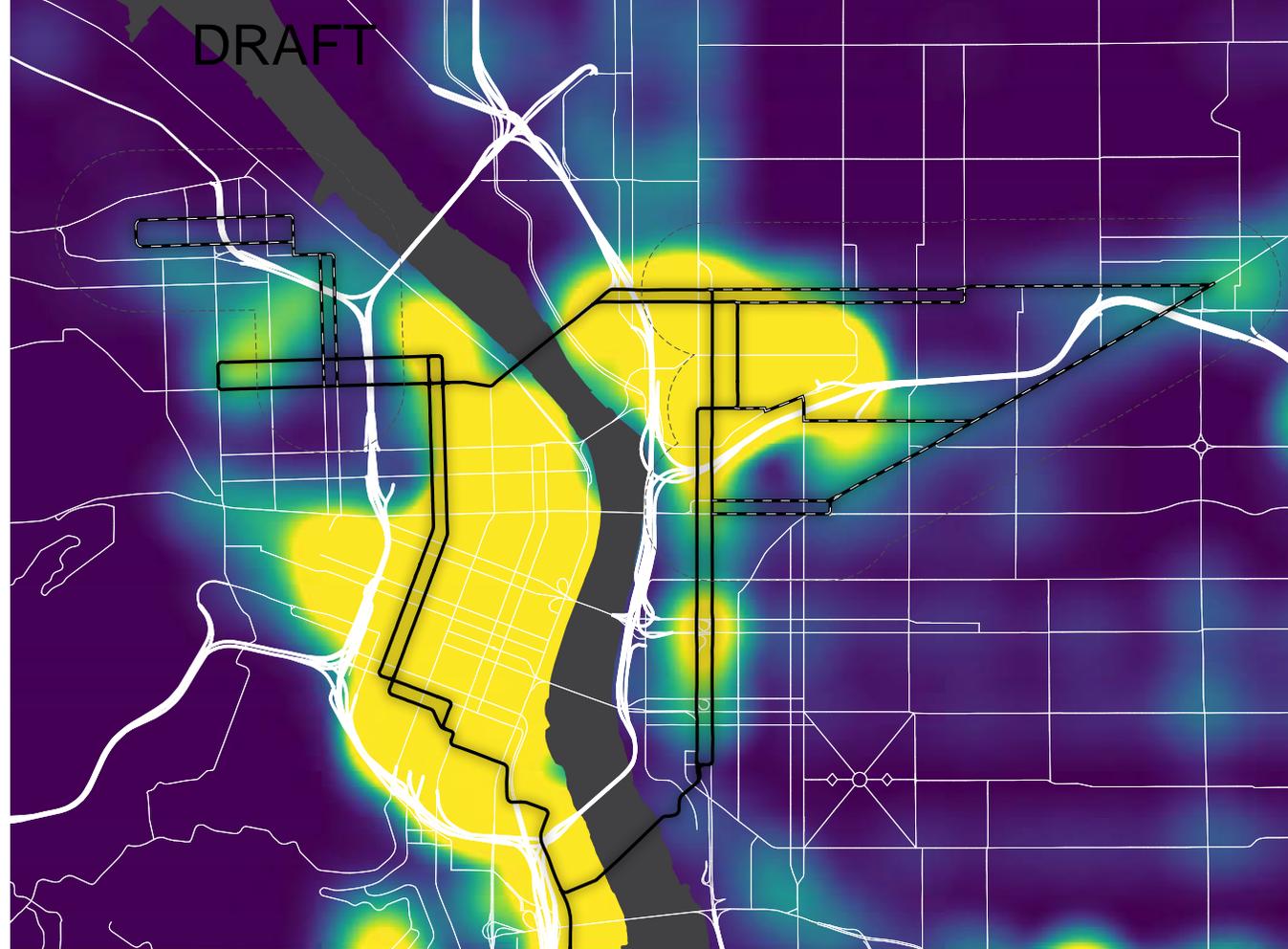
HIGH UNIT
CAPACITY

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JOBS CAPACITY

It's also possible to estimate the number of jobs that could be accommodated under current zoning. The Comprehensive Plan's Urban Design Framework aims to locate employment and multi-family housing in Centers, Corridors and the Central City. As such, the Central City plays a prominent role in absorbing jobs capacity. Other locations with significant employment in the study areas include Hollywood and the area near NE Irving St.

Read more on the Urban Design Framework here: <https://www.portlandoregon.gov/bps/65430>



LOW UNIT
CAPACITY



HIGH UNIT
CAPACITY

BUILDABLE LANDS INVENTORY: 2035 HOUSING AND JOBS ALLOCATION

The second component of the Buildable Lands Inventory is the allocation model. The City of Portland coordinates with Metro and the State Department of Land Conservation and Development (DLCD) to forecast the number of jobs and housing units the region will likely see. Metro then assigns jurisdictions in our region a growth forecast that they must plan for. Between 2015 and 2035, Portland was allocated 105,800 housing units to plan for.

The BLI allocation model apportions this growth throughout the city based on many factors, including recent development trends and where the city has capacity. Through this process, we are able to predict the number of jobs and housing units throughout the city in 2035.

The combined Northwest and Eastside alignment study areas will grow by about 16,900 new housing units between 2015 and 2035 for a total of approximately 33,100 housing units in 2035 (see table below). The largest growth will be in the NE Irving alignment, more than doubling its housing. NE Broadway will contain the highest number of housing units within the study area.

A healthy public transit system requires adequate supportive densities of jobs and housing to make transit viable. Using the forecast number of units from the BLI allocation model, we anticipate which areas will have the supportive densities in 2035, which starts at around 15 units per acre.

| GEOGRAPHY | EXISTING UNITS (2015) | UNIT ALLOCATION (2015-2035) | FORECAST UNITS (2035) | FORECAST DENSITY (UNITS/AC) |
|-------------------------------|--------------------------|--------------------------------|--------------------------|--------------------------------|
| COMBINED EAST-WEST STUDY AREA | 22,414 | 19,871 | 42,285 | 17.0 |
| NORTHWEST STUDY AREA | 5,179 | 3,417 | 8,596 | 13.8 |
| COMBINED EASTSIDE STUDY AREAS | 11,038 | 13,440 | 24,478 | 16.7 |

| GEOGRAPHY | EXISTING JOBS (2015) | JOBS ALLOCATION (2015-2035) | FORECAST JOBS (2035) | FORECAST DENSITY (JOBS/AC) |
|-------------------------------|-------------------------|--------------------------------|-------------------------|-------------------------------|
| COMBINED EAST-WEST STUDY AREA | 59,119 | 14,191 | 73,310 | 29.5 |
| NORTHWEST STUDY AREA | 15,518 | 1,539 | 17,057 | 27.4 |
| COMBINED EASTSIDE STUDY AREAS | 34,827 | 9,723 | 4,550 | 30.3 |

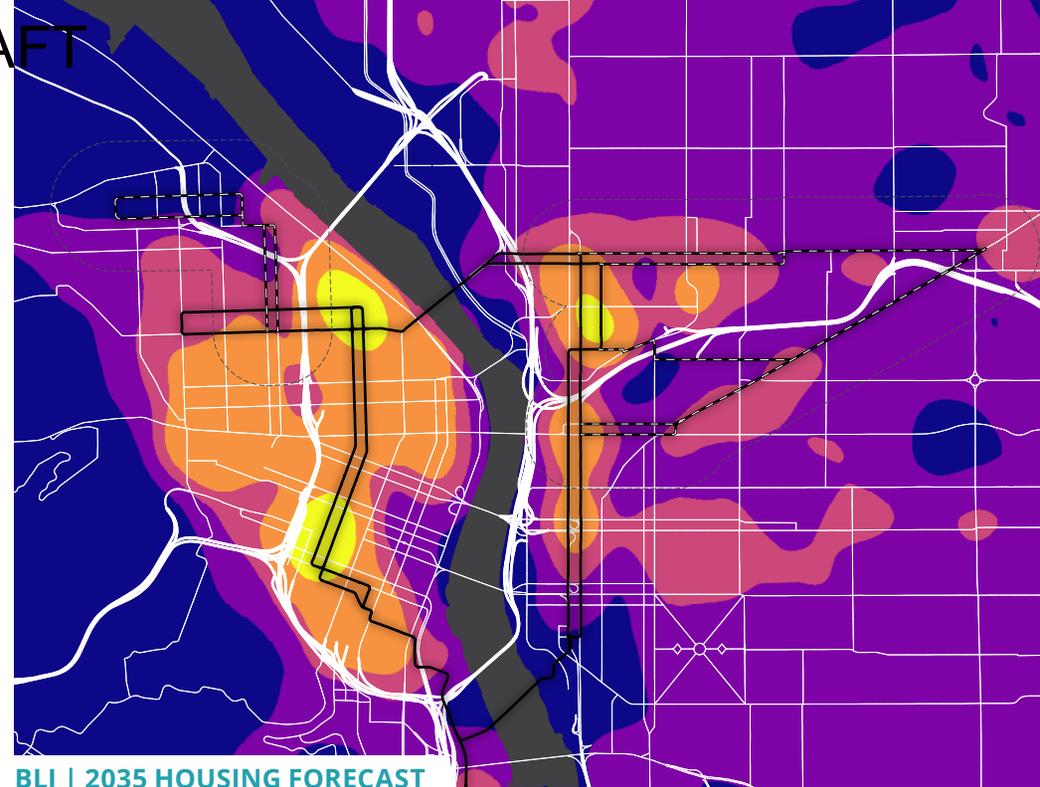
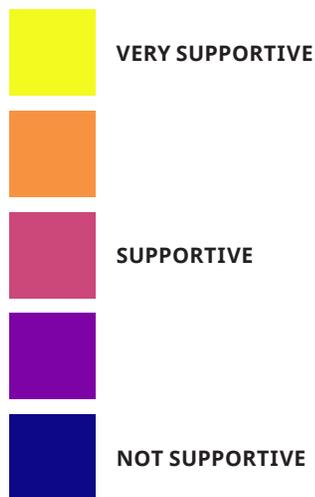
The Eastside alignments all contain generally transit supportive future densities, particularly on Broadway close to the Lloyd Center, along the MLK corridor, and along Sandy. The NE Broadway alignment contains the highest supportive densities at almost 18 units per acre in aggregate.

In addition to adequate housing density that supports good public transit, we also consider the density of jobs, which starts at around 40 jobs per acre. The BLI allocation models helps us predict where these densities may occur in 2035.

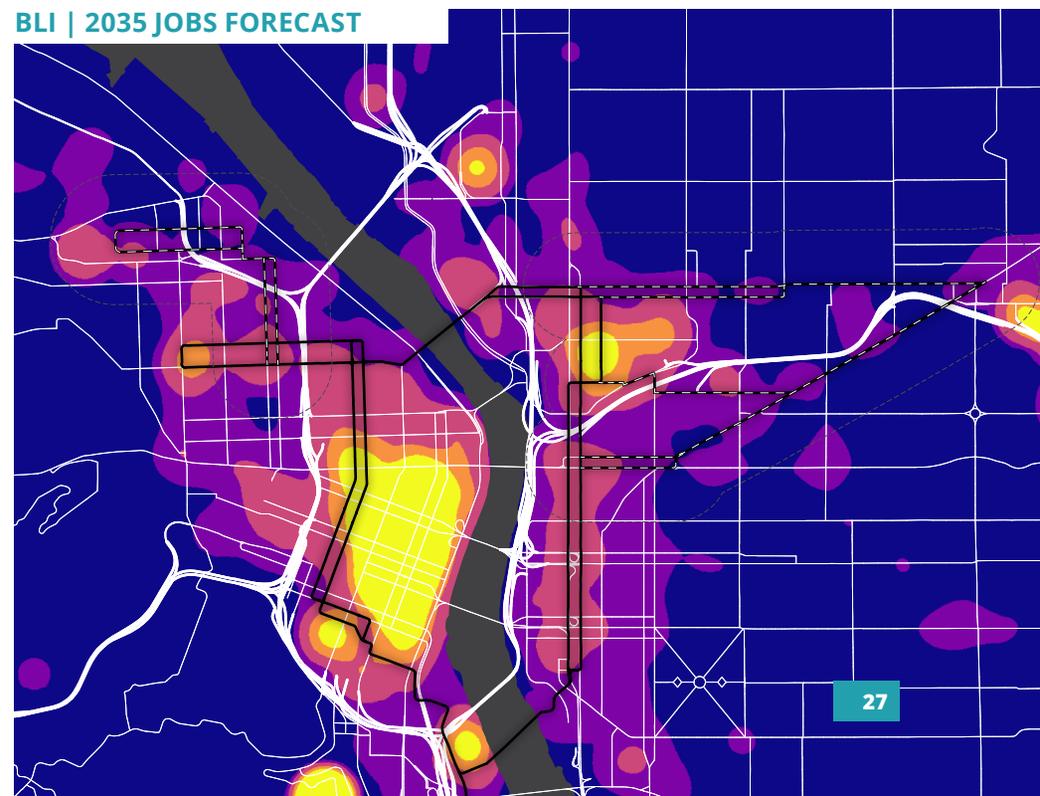
With the exception of the NE Irving Alignment, the study areas do not contain generally supportive future densities of employment. However, the alignments all link specific areas with very supportive concentrations of employment, including Montgomery Park, the Lloyd, Hollywood and parts of Providence Hospital's campus.

Any re-zoning processes associated with the Montgomery Park to Hollywood streetcar expansion will require re-running the BLI capacity and allocation models to anticipate the effects.

TRANSIT-SUPPORTIVE DENSITY



BLI | 2035 HOUSING FORECAST



BLI | 2035 JOBS FORECAST

Transportation: Guiding Policy & Existing Investments

The Transportation System Plan (TSP), a component of the City's Comprehensive Plan, guides the City's transportation policy and investment strategy for the next 20 years. The TSP guides policy and investment through street classifications, area plans, master street plans, and modal plans.

As Portland and the region grow, however, there is a continuing challenge to maintain the natural environment, economic prosperity, and overall quality of life. If in 2035, the percentage of people who drive alone to work remains the same as it is now (nearly 60 percent), traffic, carbon emissions, and household spending on vehicles and fuel will all worsen significantly.

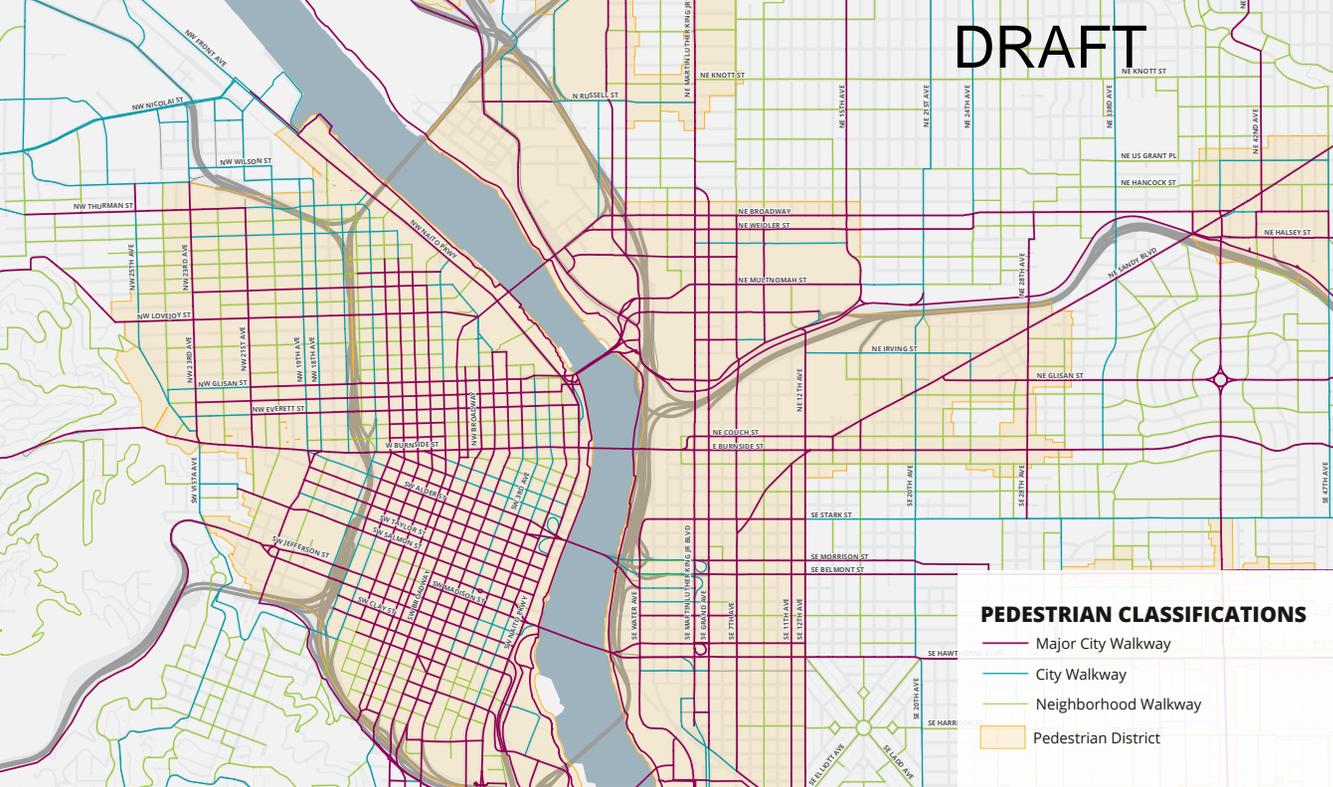
To accommodate this growth, our transportation system must provide Portlanders safer and more convenient ways to walk, bike, and take transit for more trips. The 2035 Transportation System Plan guides investments to maintain and improve the livability of Portland by:

- Supporting the City's commitment to Vision Zero by saving lives and reducing injuries to all people using our transportation system
- Helping transit and freight vehicles to move more reliably
- Reducing carbon emissions and promoting healthy lifestyles
- Keep more money in the local economy by enabling people to spend less on vehicles and fuel; and
- Creating great places.

The following classification maps define how the streets should operate for each travel mode, not necessarily how they operate today. The classifications guide investment to achieve these goals.



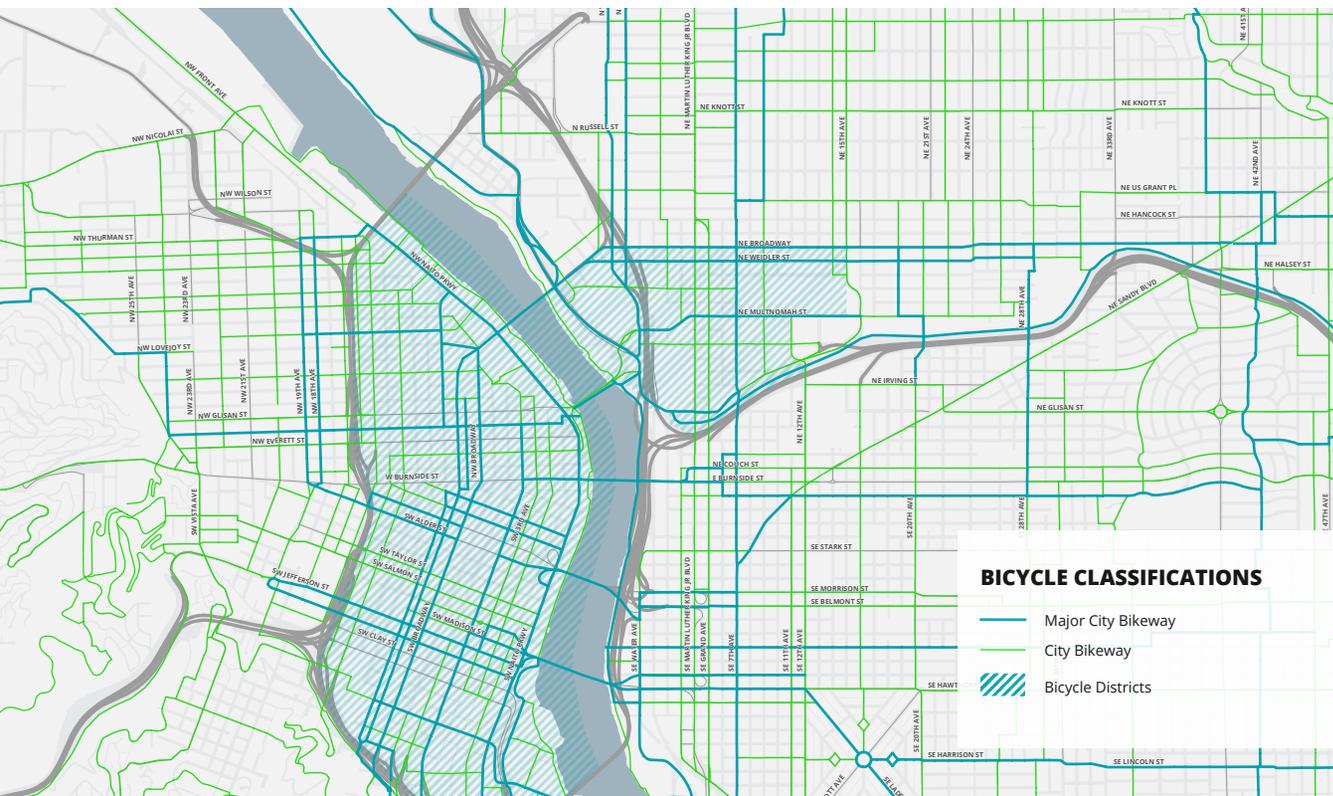
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WALKING CLASSIFICATIONS

Pedestrian classification reflects the level of demand for pedestrian movement on that street. Higher classifications reflect a prioritization of pedestrian connections to key transit and land use destinations. The density of elevated walking classifications reflect places with high levels of pedestrian activity such as the Central City, and busy commercial districts in the Pearl District, the Central Eastside Industrial District and the Broadway/Weidler corridor.

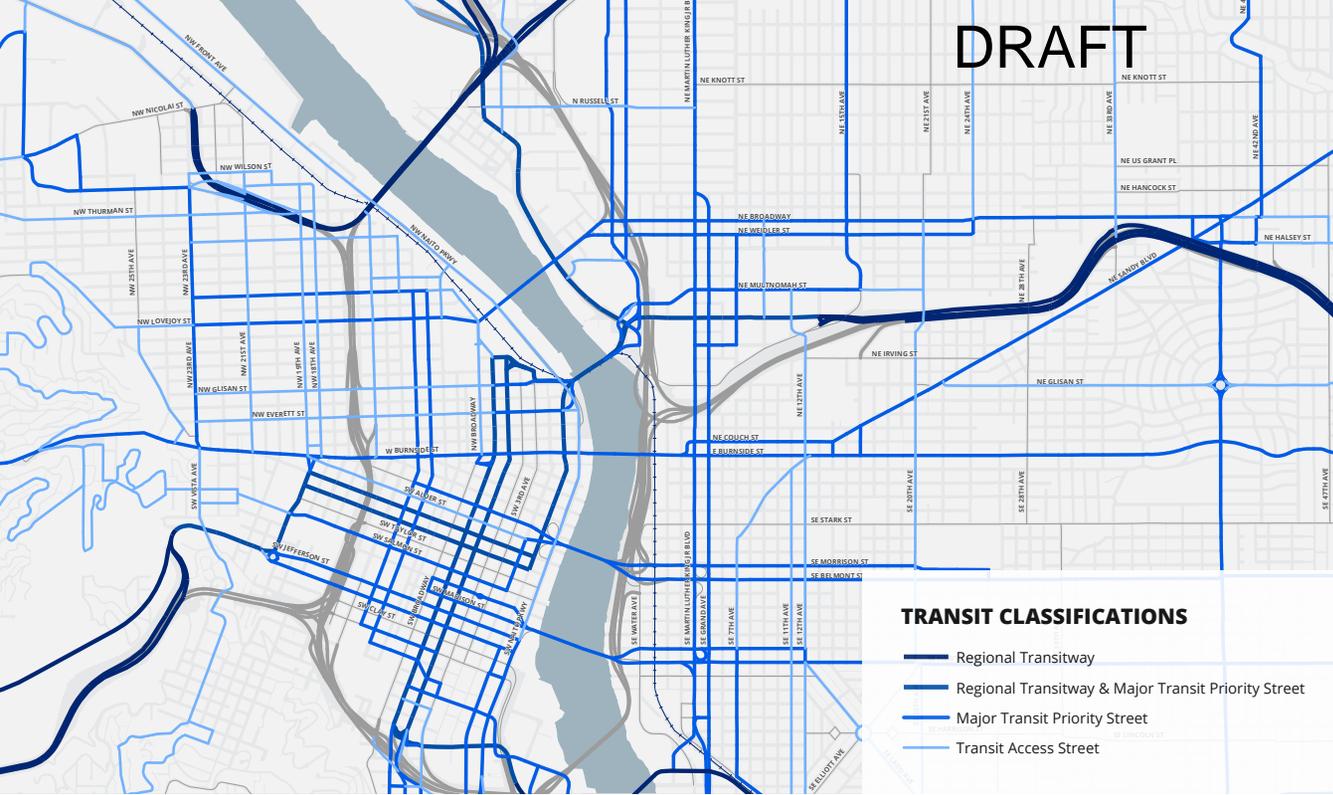
Pedestrian Districts are intended to give priority to pedestrian access in areas where there is high levels of pedestrian activity, such as the Central City, transit hubs, and hubs of commercial activity.



BIKING CLASSIFICATIONS

Bicycle Classifications designate streets that are intended to support direct, convenient access to 2040 land use types, and both significant and neighborhood destinations. Major City bikeways form the backbone of the city's bicycle network, while City and local service bikeways provide coverage to connect from high volume thoroughfares to local destinations.

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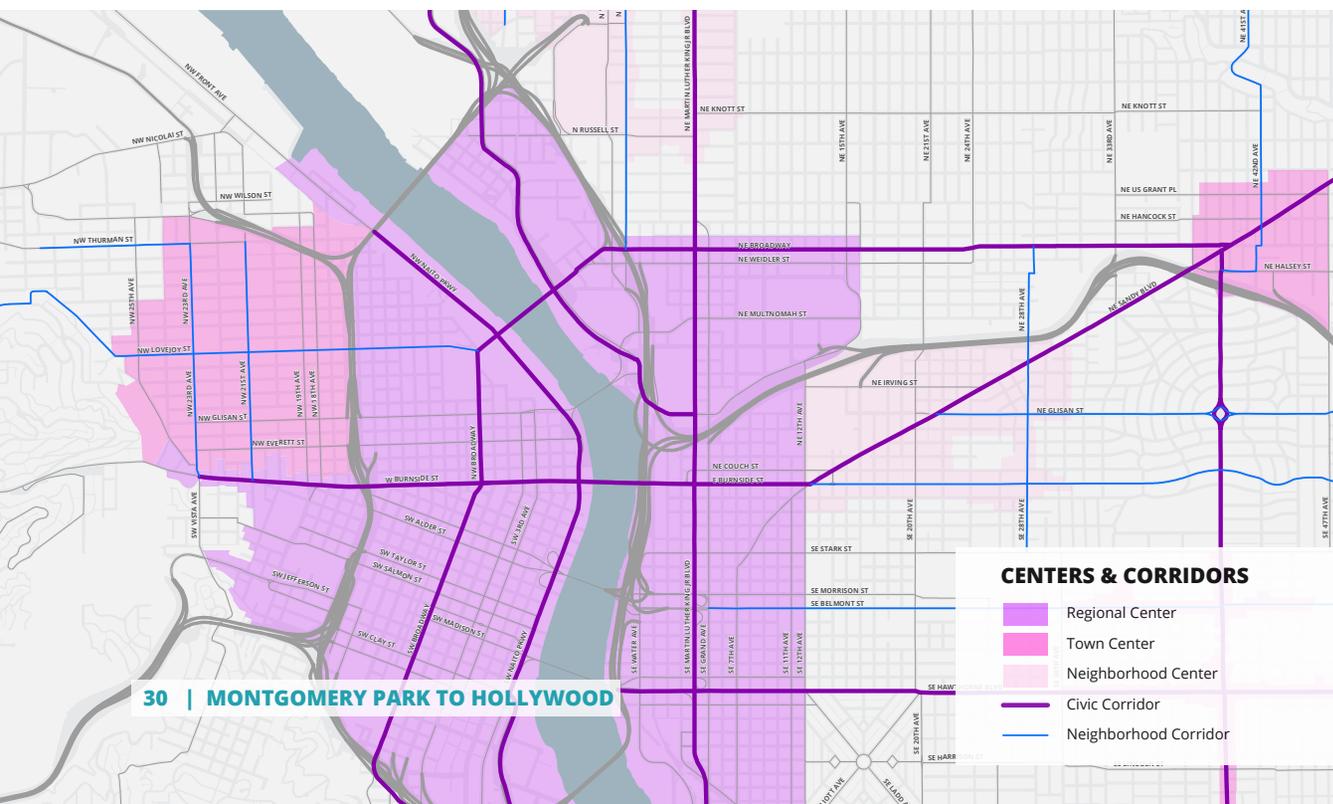
TRANSIT CLASSIFICATIONS

Transit classifications describe streets that support the movement of transit vehicles for regional, interdistrict and local trips. Regional transitways facilitate fast and reliable service over long distances, operating in right-of-way exclusively reserved for transit use where feasible. Major transit priority streets serve higher frequency transit vehicles that connect Central City, Regional and Town Centers, and other major designations. Local service transit streets are focused on serving smaller transit vehicles, including paratransit, and community or connect shuttles.

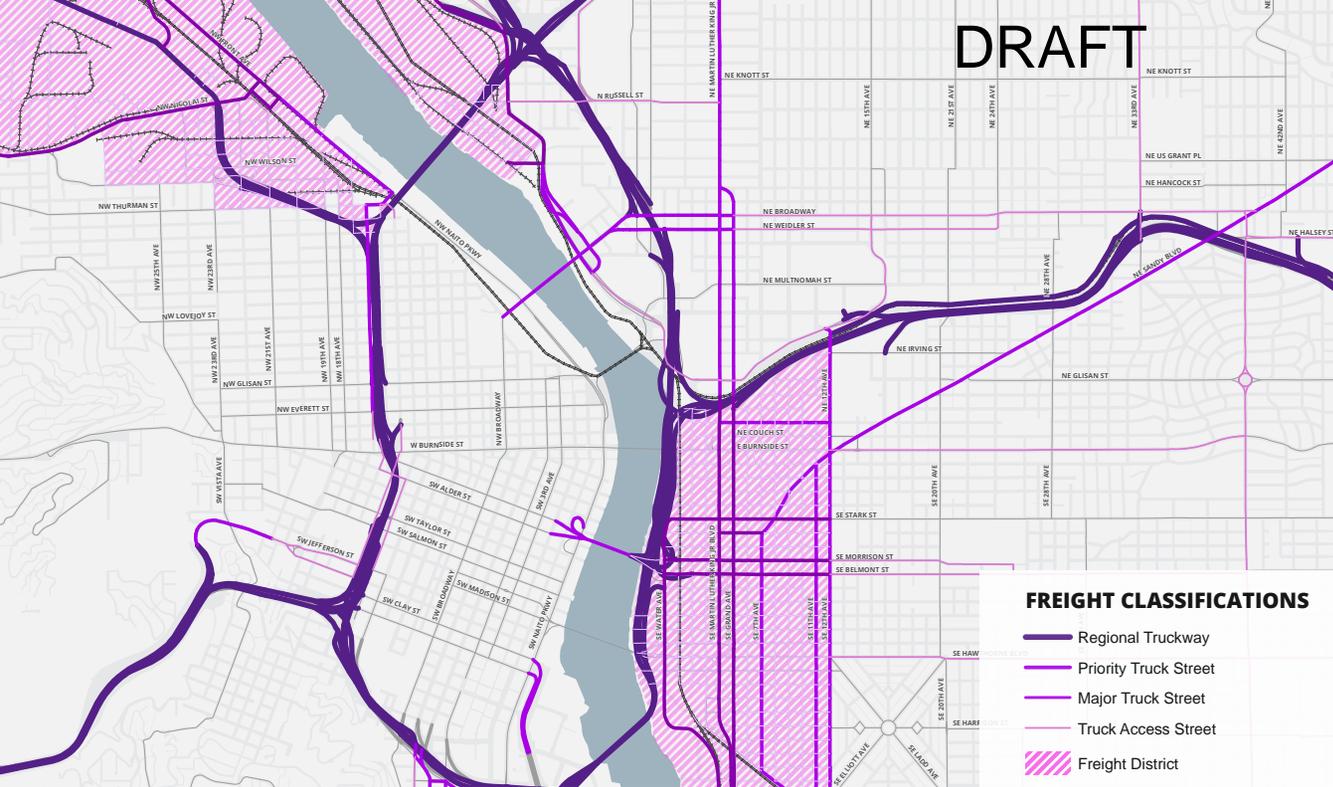
COMPREHENSIVE PLAN CENTERS & CORRIDORS

The study areas include the Central City and Town Centers in Northwest and in the Hollywood District. There are also several Civic and Neighborhood Corridors in the study area, notably Sandy Boulevard, Broadway, Burnside Street, Lovejoy Street, Thurman Street, and others.

The Comprehensive Plan guides new growth toward centers and corridors to help expand access to employment and great neighborhoods. Centers are compact places that serve as anchors to complete neighborhoods. Civic corridors are some of Portland's most important and busiest transportation corridors. Neighborhood corridors are main streets that connect neighborhoods across the city. Density centers and corridors make good use of existing infrastructure and encourages efficiency in new investments.

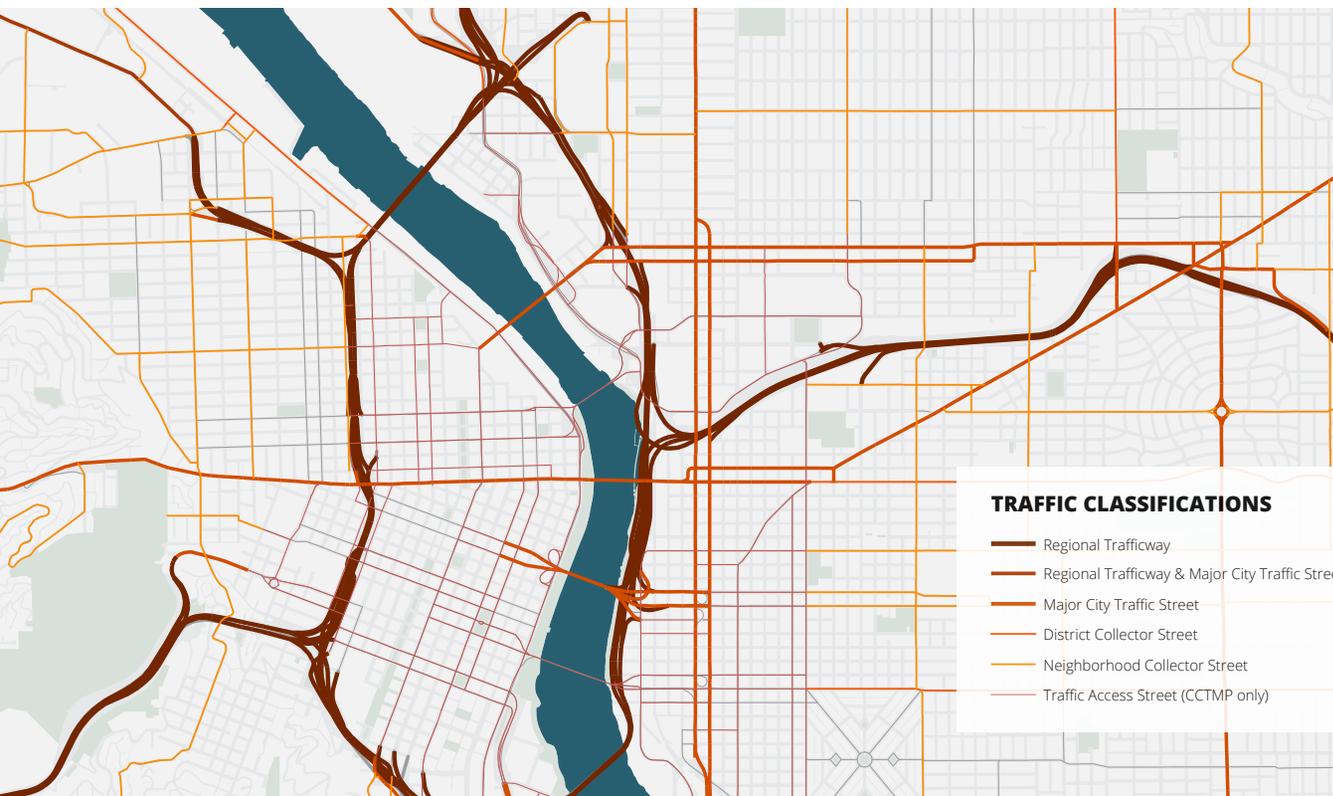


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FREIGHT CLASSIFICATIONS

Streets with freight classifications designate a system of truck streets, railroad lines, and intermodal freight facilities that support local, national, and international distribution of goods. Freight districts are intended to provide safe and convenient truck mobility and access in industrial and employment areas serving high levels of truck traffic, and to accommodate intermodal goods movement.



TRAFFIC CLASSIFICATIONS

Traffic classification streets create a hierarchy of automobile activity on a roadway, reflecting volumes, speeds, and the type of anticipated trips. Within the City of Portland, classifications range from regional trafficway to serve longer distance, regional trips that either start, end or bypass the City of Portland, and local service streets to provide access to neighborhoods. In between are collector and traffic access streets that serve elevated numbers of vehicles to connect major destinations.



WESTSIDE | ALIGNMENT DETAIL

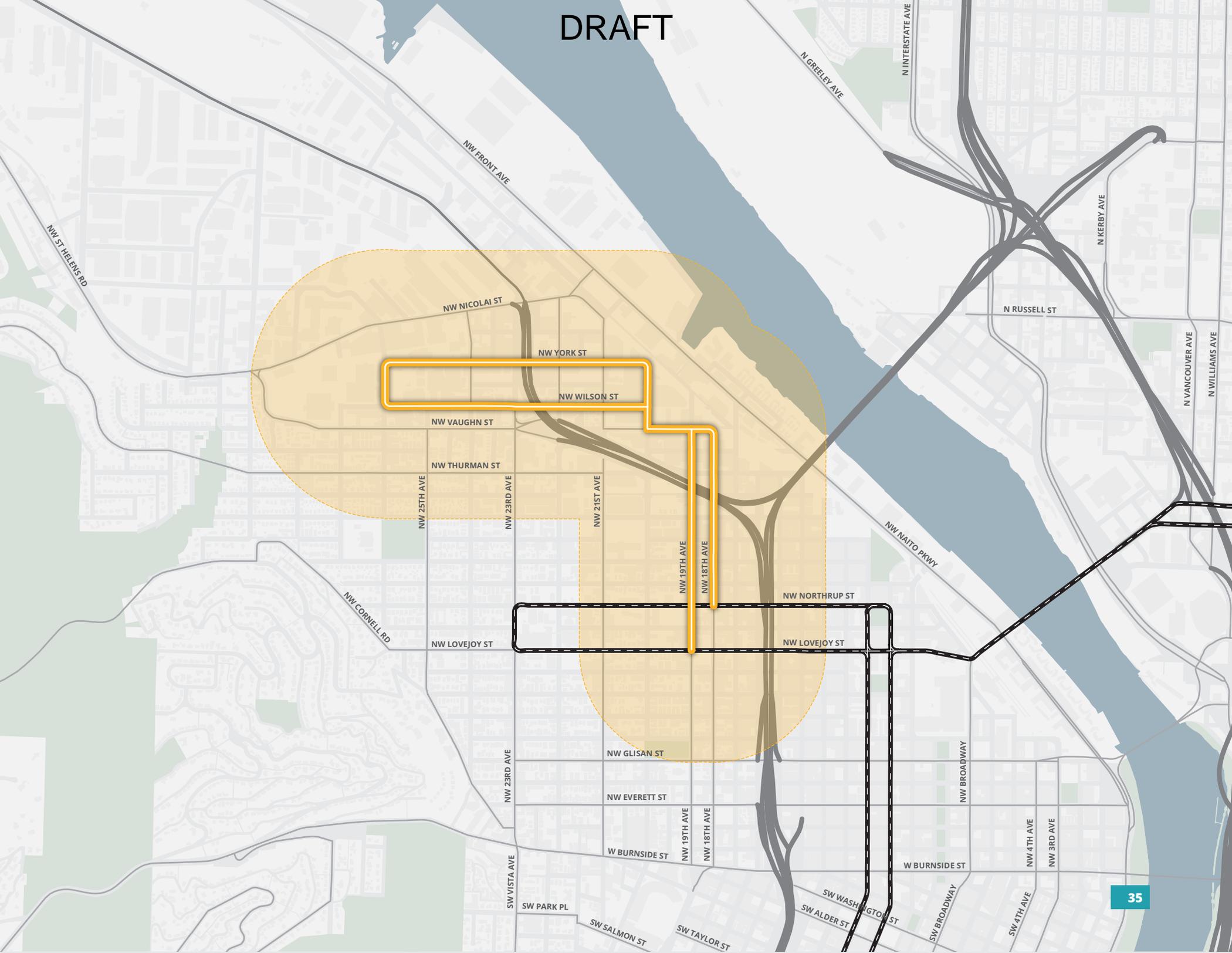
The Westside study area, also referred to as Northwest, consists of a quarter-mile buffer around a potential streetcar alternative route that connects the second-largest office building in Portland, Montgomery Park, to the existing Portland Streetcar network. The alignment diverges from the existing couplet on NW Lovejoy and NW Northrup via NW 18th and NW 19th to connect to NW Wilson and NW York.

The study area is primarily within the Northwest District and adjacent industrial areas to the north are within the NW Industrial Business Association boundary.

The neighborhoods surrounding the 18th/19th alignment are a mix

of single-family homes, multi-dwelling buildings, and commercial buildings with retail and services and other land uses and destinations. Recent development at the former Conway site included large apartment buildings with a new grocer.

North of Vaughn the eastern portion of the study area is largely zoned industrial, while the western half includes large parcels of mixed use, and general employment. Businesses range from manufacturing, light industrial, office, storage, and more. Many parcels are currently transitioning in use following changes in ownership.





Montgomery Park is the second-largest office building in Portland, hosting a variety of businesses and services.



Old railroad tracks that used to serve Montgomery Park are still visible on NW Wilson Street.



A newer building in the district housing storage units.



Large parking lots have long supplied Montgomery Park employees with free parking, but redevelopment may introduce other uses.



The corner of NW 18th and Vaughn serves an event space, garden nursery, and other uses that create placemaking opportunities.



Small creative workspaces fill the building at the corner of 18th and Upshur Street.

WESTSIDE URBAN CHARACTER

The urban character of the Northwest study area is eclectic and varied, with a diversity of building types and land uses. The southern portion of the study area along and near NW 18th and 19th includes a mix of older 2-3 story, multi-family residential structures, more recent 4-to-6-story mixed-use developments, a scattering of low- to medium-scale commercial developments and aging, one- to six-story warehouse and industrial buildings.

Over the previous two decades, this “Slabtown” area has been transitioning from industrial uses to a broader mixed-use character. While there are pockets of smaller-lot developments typical of Northwest Portland further to the south and west, the development pattern here includes generally larger lot sizes and building floorplates. Block sizes east of NW 19th are generally the typical Portland 200 feet by 200 feet, while those to the west are larger at 200 feet by 460 feet, with some as large as 460 feet by 460 feet. Rights-of-way are typically 60 feet wide.

The northern area along NW Wilson and York is industrial in character, with NW Vaughn being the historical boundary between the Guild’s Lake Industrial District and the mixed-use portion of Northwest Portland to the South. The development pattern is dominated by very large lots, including the former ESCO industrial site. There, several large industrial structures were recently demolished and the site sits mostly vacant. One of Portland’s largest commercial structures, Montgomery Park, lies at the west end of the alignment, with large amounts of surface and structured parking. The Historic Landmark American Can Company complex is adjacent to the east.

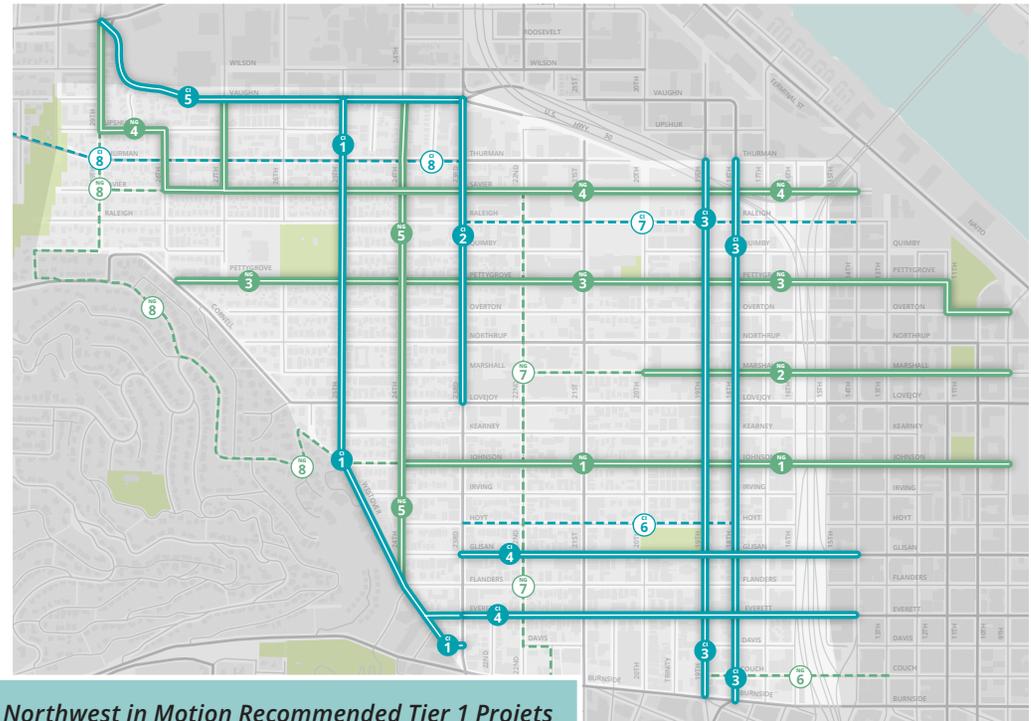
A major character-defining feature of the Northwest study area is the Highway 30/I-405 alignment and the approaches to the Fremont Bridge—major pieces of infrastructure that pose a connectivity barrier in some areas, while towering over others. The area lacks significant public open space, although Forest Park lies about a half-mile to the west.

Westside Planning Context

NORTHWEST IN MOTION

Northwest in Motion (NWIM) is a plan to make Portland's Northwest District safer and more convenient for walking, biking, and riding public transit. People living in the NWIM project area travel by walking, biking, and transit at far higher shares on average than other Portlanders. The five-year implementation plan identifies and prioritizes projects that can be built in the next five to ten years.

The MP2H study area in northwest Portland overlaps with the northern and eastern extents of the NWIM project area. Projects in overlap areas should be coordinated with MP2H to ensure that the goals for both Plans are met through multimodal design. In particular, both plans are proposing corridor improvements on NW 18th and 19th avenues.



GUILD'S LAKE INDUSTRIAL SANCTUARY PLAN

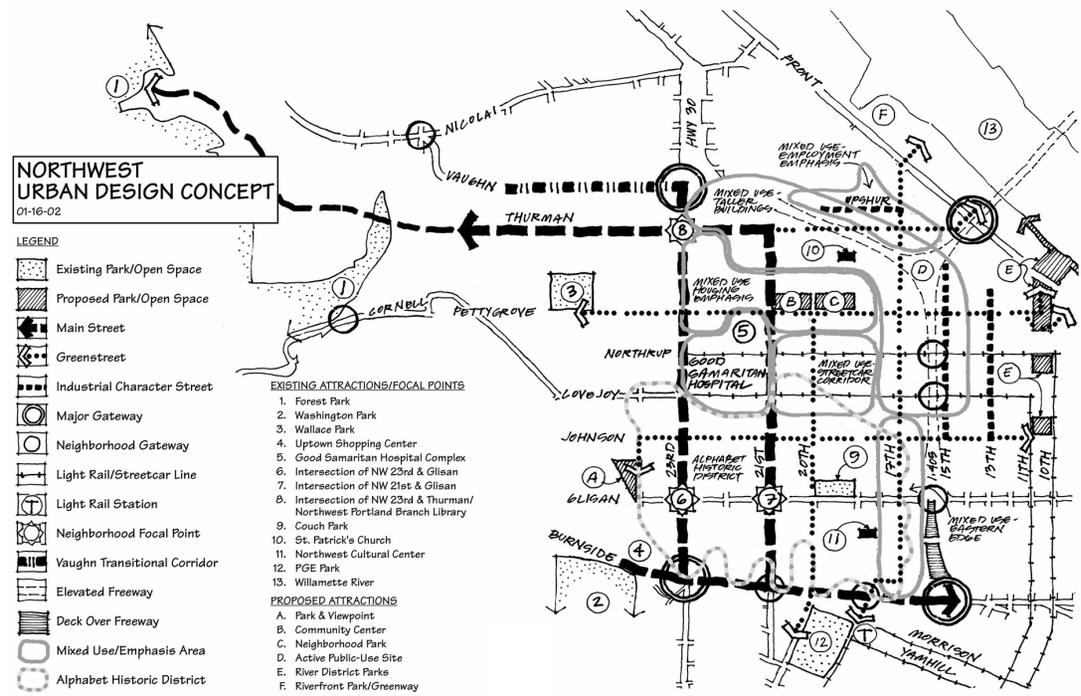
The Guild's Lake Industrial Sanctuary (GLIS) Plan was adopted by City Council in 2001. Guild's Lake plan district covers portions of NW Portland from NW Wilson Street north to the banks of the Willamette River and west to Forest Park. This plan district overlaps with portions of the northwest study area. The plan provides a policy framework to preserve industrial land in NW Portland, in an area that has historically operated as an industrial and manufacturing hub. The plan recommends projects, programs and regulations to implement the plan's visions, policies and objectives. The land use changes and transportation investments the MP2H study will explore could change the neighborhood character and primary land use in the southernmost portion of the Guild's Lake Industrial Sanctuary.

Guild's Lake Industrial Sanctuary Plan



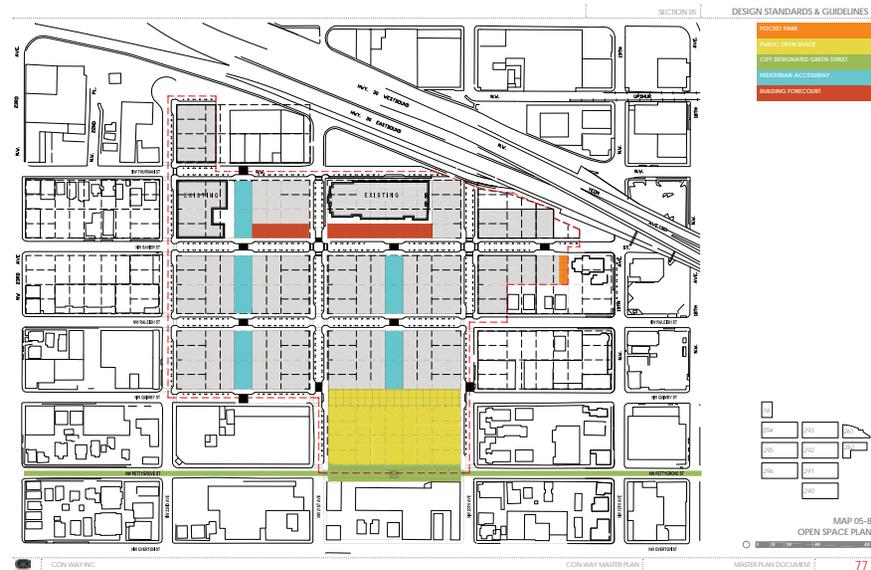
NORTHWEST DISTRICT PLAN

The Northwest District Plan was adopted in 2001 and sets a more specific framework of desired land uses and development for this densely developed neighborhood. The plan is implemented by the Northwest Plan District (33.562) which specifies additional land use allowances and development standards for parcels within the district.



CONWAY MASTER PLAN

The Conway Master Plan (Northwest Master Plan at ConWay Site, LU 12-135162 MS) is a site plan dictating detailed land use, development parameters, design guidelines and open areas for a 15 acre sub area located generally in the vicinity of NW 22nd Avenue, NW Pettygrove Street, NW 20th Avenue and NW Upshur Street within the Northwest Plan District area. The master plan guides the development of the area in a more specific and detailed way than the Northwest Plan District.



People & Place:

STUDY AREA DEMOGRAPHICS AND EQUITY INDICATORS

The Portland Bureau of Transportation (PBOT) created an Equity Matrix to better refine our approaches and understand the impact of our work on marginalized groups. See page 15 for full explanation.

In Northwest Portland, the highest concentrations of equity index populations live along much of the existing streetcar line that operates on NW 18th and 19th, NW Lovejoy and NW Northrup Streets. There are also higher concentrations in Slabtown, reflecting areas of significant recent residential development. This area ranks has a racial equity score of 3, which reflects citywide averages. However, the income equity score of 5 means it has high concentrations of the lowest-income Portlanders compared to the city as a whole. The median income in this tract is about \$37,000 and the most commonly spoken non-English language is Chinese. Approximately 4% of households have limited English proficiency.

In the tract north of NW Thurman, the income and racial equity scores are each a 2, which indicates that the area has lower concentrations of low-income and people of color than the citywide average. About 1% of the households have limited English proficiency, but no common non-English language has been identified for these households.

The tables in this section show characteristics of the population in the Northwest alignment study area compared to the city overall.

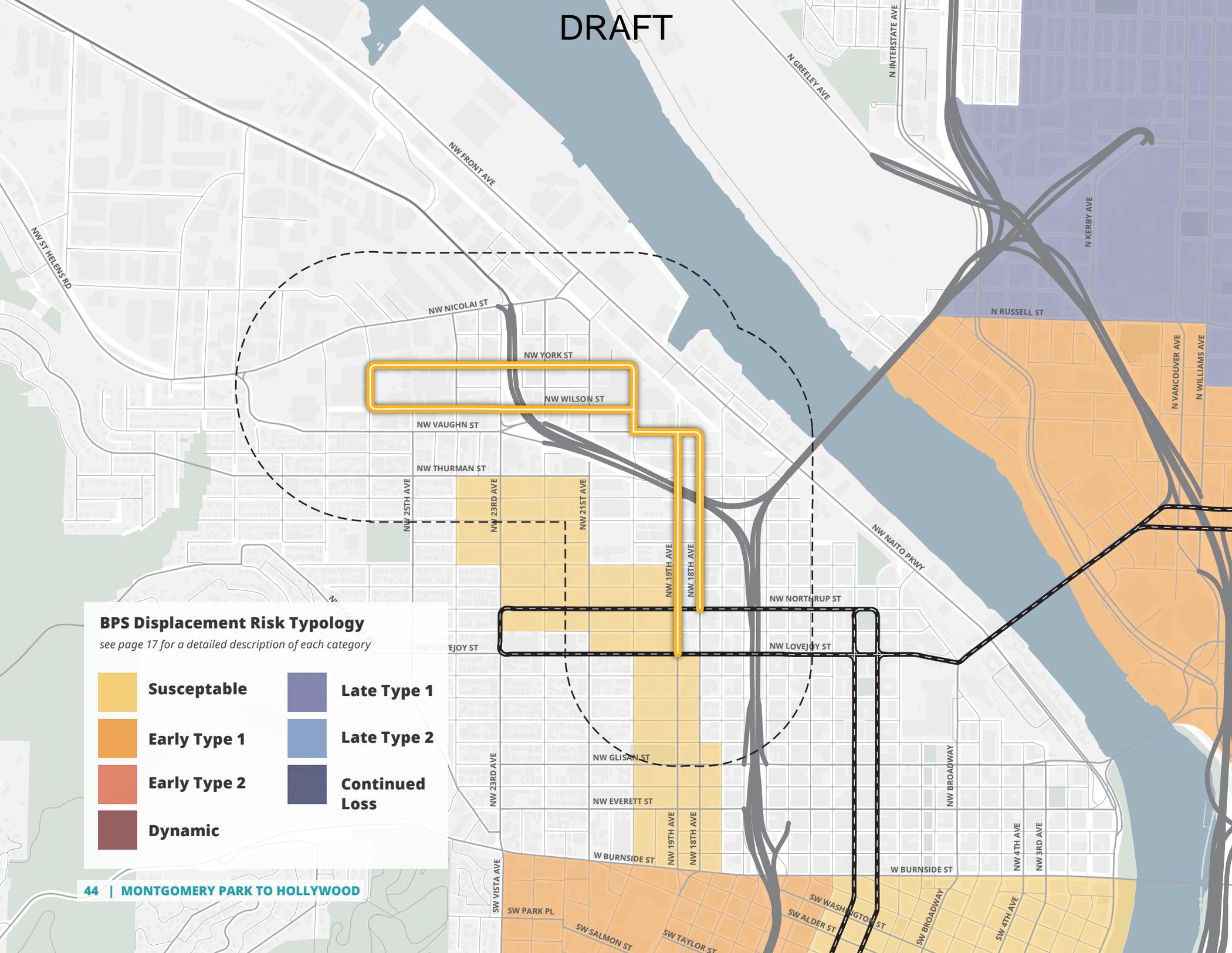
In general, the population in the Northwest study area includes fewer families in poverty, and a much higher per-capita income than Portland. Overall there is a lower percentage of people of color than citywide, as well as significantly fewer children than the city as a whole.

More information on PBOT's Equity Matrix can be found here: <https://www.portlandoregon.gov/transportation/74236>

| Population Characteristics | Northwest Study Area | City of Portland |
|------------------------------|----------------------|------------------|
| Total Population | 6,735 | 630,331 |
| Per Capita Income | \$64,295 | \$37,382 |
| Total Families | 1,108 | 135,543 |
| Share of Families in Poverty | 4% | 10% |
| People of Color | 20% | 29% |

| Race/Ethnicity | Northwest Study Area | City of Portland |
|--------------------|----------------------|------------------|
| Black | 2% | 7% |
| Native American | 2% | 2% |
| Asian | 10% | 10% |
| Pacific Islander | 0% | 1% |
| Another Race | 1% | 3% |
| Hispanic | 8% | 10% |
| Non-Hispanic White | 80% | 71% |

| Age Characteristics | Northwest Study Area | City of Portland |
|---------------------|----------------------|------------------|
| Median Age | 35.2 | 36.8 |
| Share under 18 | 8% | 18% |
| Share 18 to 64 | 80% | 70% |
| Share over 64 | 11% | 12% |



BPS Displacement Risk Typology

see page 17 for a detailed description of each category

- Susceptible**
- Early Type 1**
- Early Type 2**
- Late Type 1**
- Late Type 2**
- Continued Loss**
- Dynamic**

People & Place

RESIDENTIAL GENTRIFICATION & DISPLACEMENT RISK

The tables on this page show characteristics of the households, the educational attainment of the population, and the types of dwelling units in the Northwest alignment study area compared to the City of Portland overall.

In general, households in the Northwest study area are much smaller than the citywide average, and are composed of a greater percentage of renter households. Median household income is above the citywide average. The educational attainment of the population is significantly higher than the city overall, with over 75% of the population over 18 holding a 4-year degree or more. The population in the Northwest study area has a much greater percentage of people that live in multi-dwelling units than citywide, and less than 10% of residents live in detached units.

The map on the adjacent page shows displacement risk for the Northwest study area. See page 17 for more information on displacement typologies.

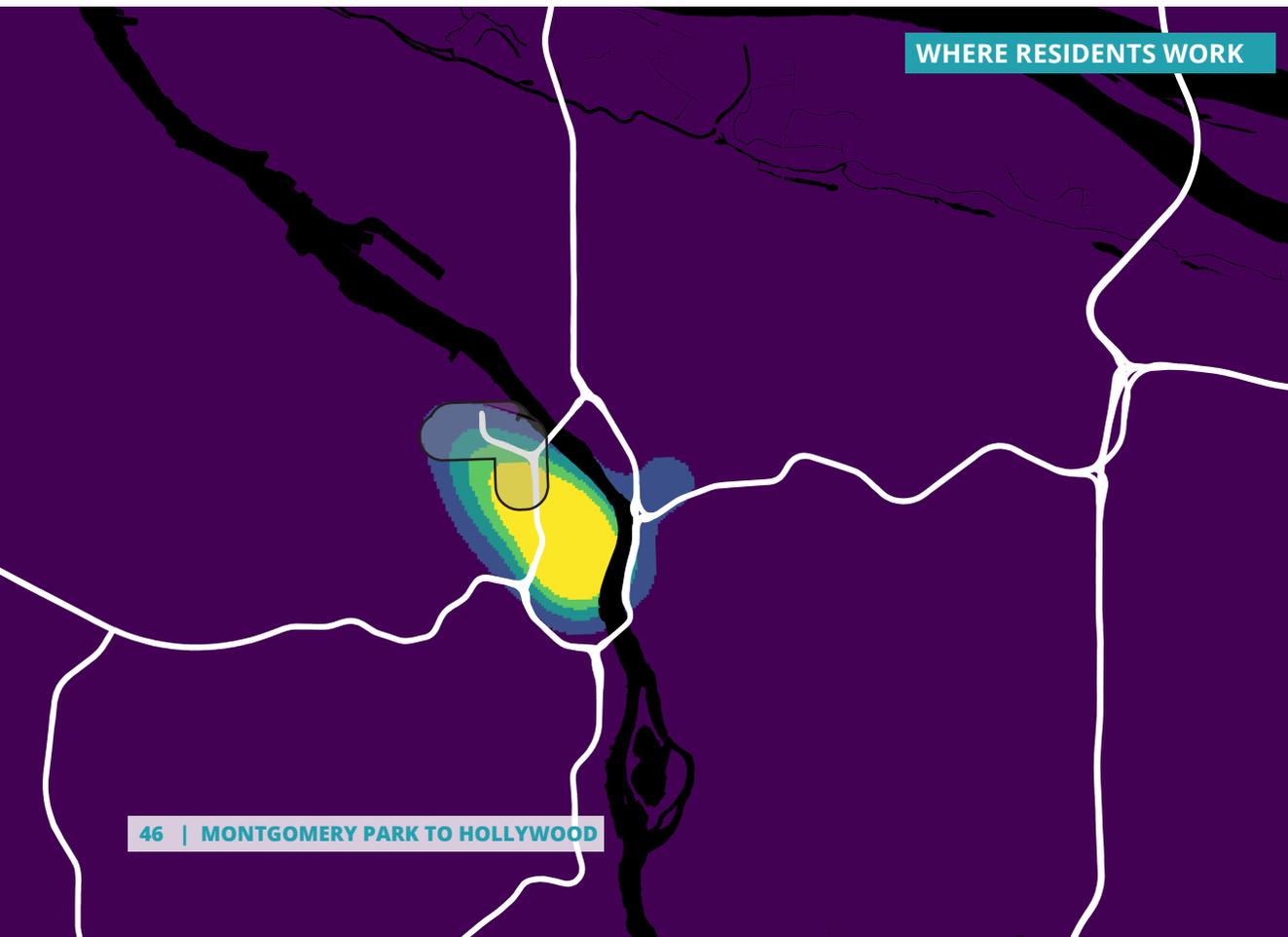
| Household Characteristics | Northwest Study Area | City of Portland |
|----------------------------|----------------------|------------------|
| Total Households | 4,215 | 260,949 |
| Owner-Occupied Households | 29% | 53% |
| Renter-Occupied Households | 71% | 47% |
| Average Household Size | 1.56 | 2.35 |
| Median Household Income | \$68,834 | \$63,032 |

| Highest Educational Attainment | Northwest Study Area | City of Portland |
|--------------------------------|----------------------|------------------|
| Total Adults 25 or Older | 5,818 | 462,362 |
| Less than HS Diploma | 2% | 8% |
| High School Diploma | 6% | 16% |
| Some College | 18% | 28% |
| Four-Year Degree | 43% | 29% |
| Advanced Degree | 32% | 19% |

| Housing Unit Characteristics | Northwest Study Area | City of Portland |
|------------------------------|----------------------|------------------|
| Total Housing Units | 4,806 | 277,499 |
| Detached | 8% | 56% |
| Small Multi-dwelling | 11% | 14% |
| Medium Multi-dwelling | 20% | 11% |
| Large Multi-dwelling | 60% | 18% |
| Other Type | 0% | 2% |

People & Place: Employment Patterns & Travel Behavior

WORKERS PER MI²



JOBS LOCATION

This map shows the density of workplace locations of people that live in the Northwest study area. The highest concentration of workplaces for Northwest residents is in Downtown Portland, on both the east and west sides of I-405. Smaller concentrations work in the inner eastside in the Central Eastside and in the Rose Quarter and Lloyd Center neighborhoods. There is also a cluster of workplaces in Washington County, potentially attributed to the Nike campus and other tech jobs.

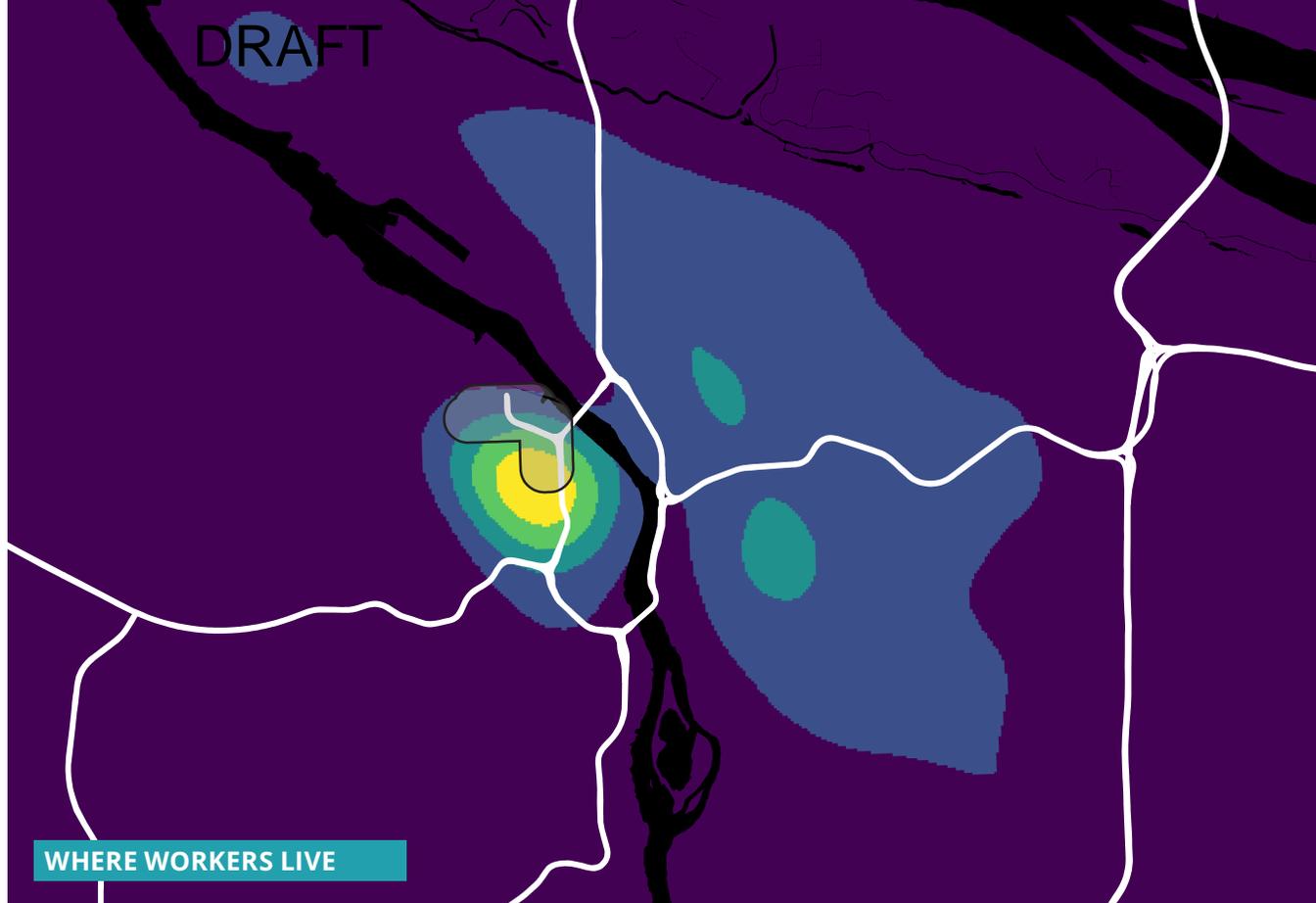
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ABOUT THIS DATA SOURCE: LODES

The **Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES)** is a program run by the U.S. Census Bureau. The Census Bureau coordinates with state employment agencies to gather administrative data from state Unemployment Insurance and Quarterly Census of Employment and Wages (QCEW). This administrative data is then linked to Census surveys using encoded social security numbers (PIKs). From this dataset, the Census Bureau statisticians use a method called “fuzzing” to inject noise into the dataset to make it hard to identify individual employers, resulting in a **partially synthetic dataset** that policy makers can use to understand the dynamics between people and their workplace.

The LODES data contains a matrix showing showing the number of workers that commute between Census blocks. Users can input a study area to retrieve the characteristics about the people who work there as well as those who live in the study area. Users can track where residents go to work and where workers in the area commute from.

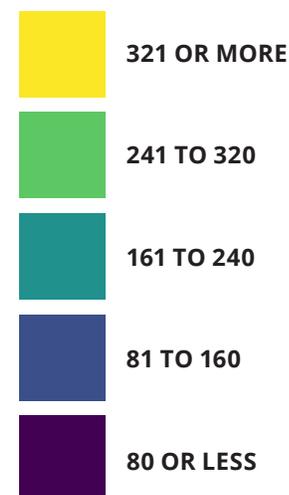
Knowing this information is useful for considering the demand to get from one point to another. The dataset also reveals the dynamics relating to wage, race, sex, age, industry and educational attainment. More information here: <https://lehd.ces.census.gov/data/lodes/LODES7/LODESTechDoc7.4.pdf>



HOUSING LOCATION

This map shows the concentration of households for people who work in the Northwest study area. Workers live across a more dispersed area than where Northwest residents work. The worker’s households are most highly concentrated in the Central City, but also includes areas of SE and NE Portland. The highest eastside concentrations are in inner SE and NE neighborhoods. A cluster of workers also live in St. Johns.

RESIDENTS PER MI²

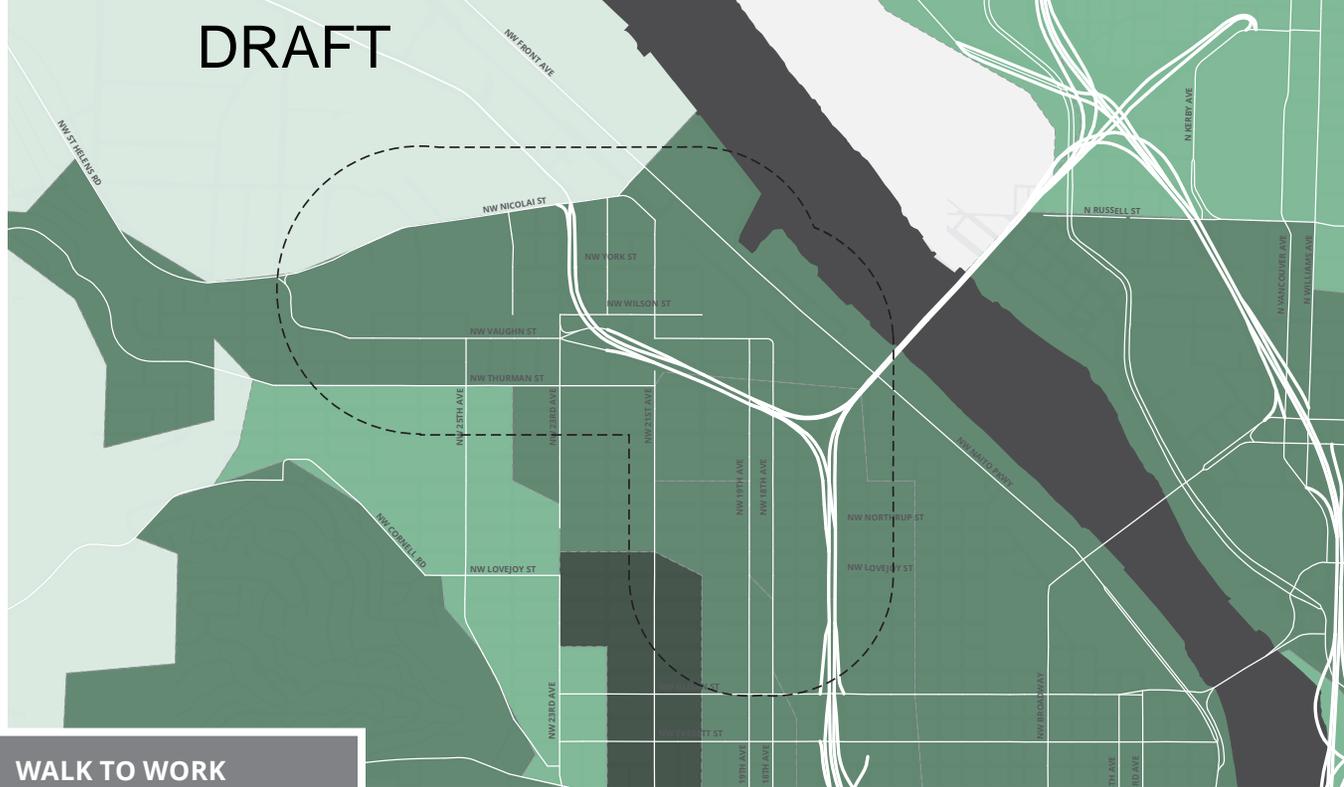


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PEOPLE WALKING

NW Portland has the highest rate of people walking to work in the city. Average citywide walking modal share is 5.6%. In NW Portland, the area between NW 20th and 23rd, from Davis to Lovejoy has a rate of 25% or greater. Elsewhere in the study area, the rate is significantly above average, with rates from 10-25%. This typically indicates that a high concentration of people in the area live near their workplaces.

WALK TO WORK - MODE SHARE



WALK TO WORK

PEOPLE BIKING

Similar to walking, NW Portland has significantly higher rates of biking to work than the citywide average. The citywide average is 5.3%, while the Northwest study area has one tract above 20%, and much of the study area has ranges between 10 and 15%. This echos earlier maps that indicate that many of those who live in NW Portland work in the Central City. Similarly, many of those who work in the area live in either the Central City or inner NE and SE Portland.

BIKE TO WORK - MODE SHARE



BIKE TO WORK

DRAFT

PEOPLE TAKING TRANSIT

Populations south of NW Thurman have transit mode shares above the Citywide average of about 12%. On either side of I-405, transit shares are more in line with City averages, while east and west of that tract boast ridership above 15%. North of Thurman, transit ridership is less than 5%, significantly lower than City averages. This could reflect less transit service availability for workers and residents.

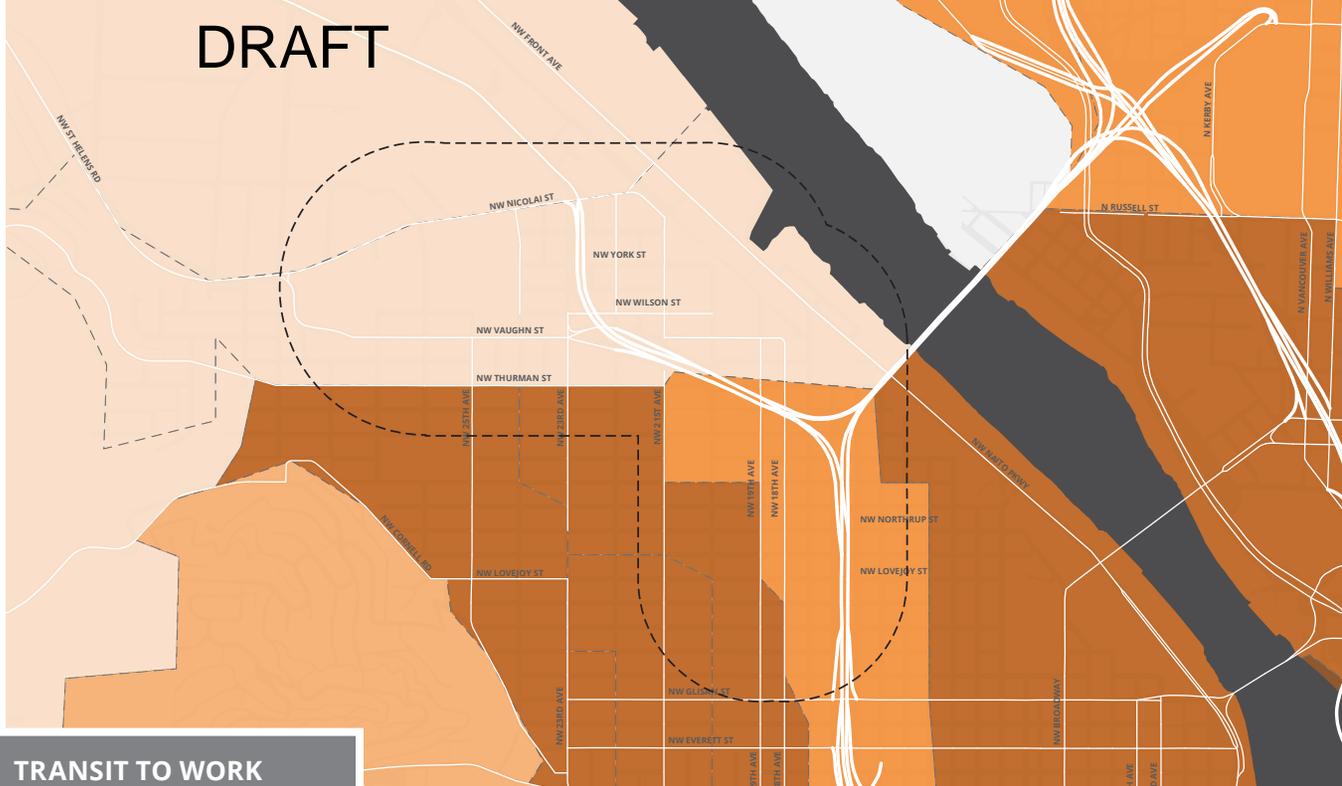
TRANSIT TO WORK - MODE SHARE



PEOPLE DRIVING ALONE

Due to greater numbers of people walking, biking, or taking transit to work, the Northwest study area has a significantly lower percentage of single occupant vehicle commuters and fewer households that own multiple vehicles.

DRIVE ALONE TO WORK - MODE SHARE



Land Use: Comprehensive Plan

COMPEHENSIVE PLAN DESIGNATIONS

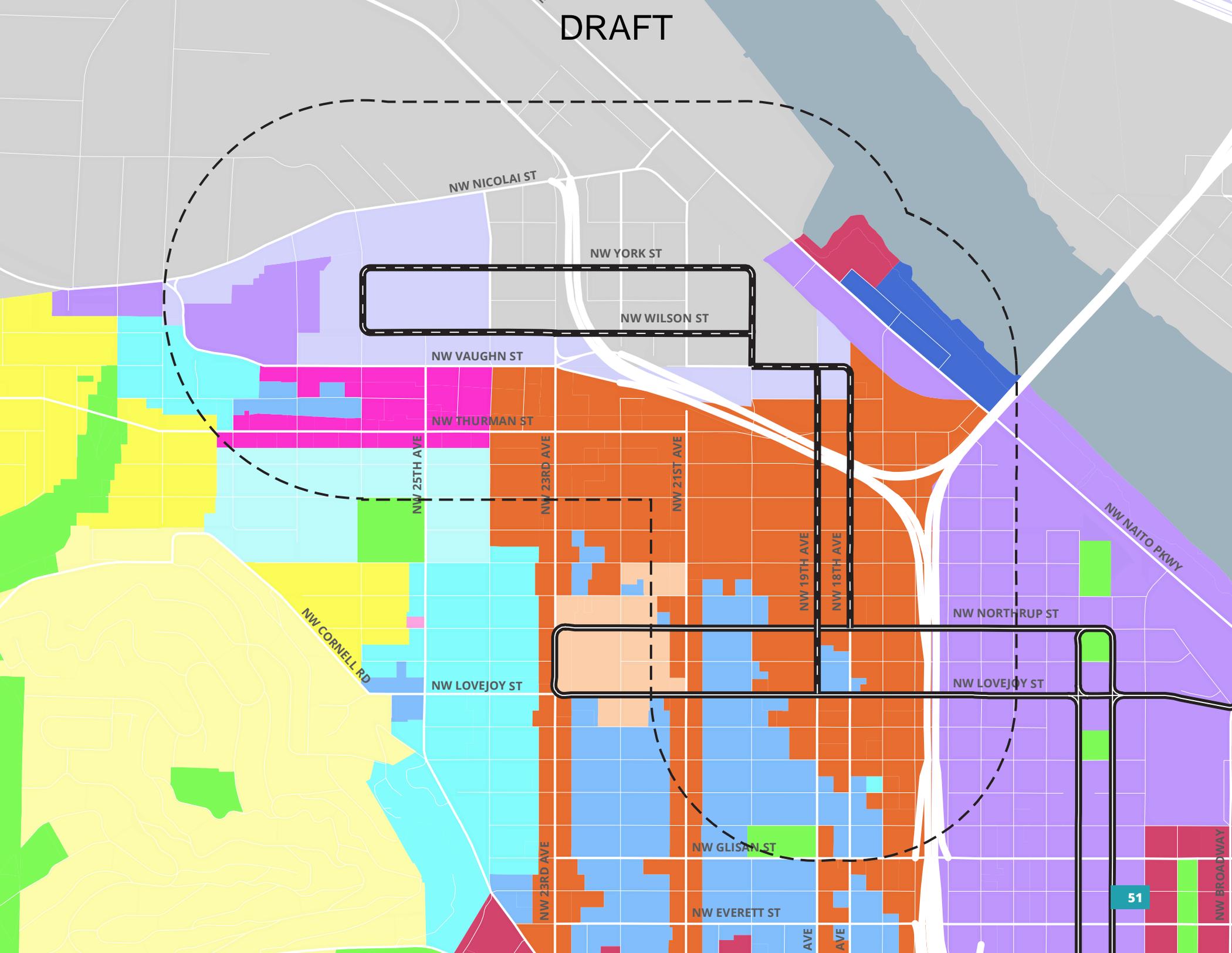
The Northwest study area features an array of different Comprehensive Plan designations along its path. Along NW 18th and NW 19th, the plan is generally Mixed Use Urban Center, which supports a variety of commercial, residential and employment uses at a mid-rise scale. North of NW Upshur and west to NW 24th, the Comprehensive Plan designation is Industrial Sanctuary, which limits non-industrial uses. At NW 24th, the designation becomes Mixed Employment, which allows a greater array of employment type uses, but prohibits housing. At NW 26th, the plan designations transition to Central Employment, which allows a full array of commercial, employment and residential land uses at a mid-rise scale.

COMPREHENSIVE PLAN DESIGNATIONS

- Single-Dwelling 10,000
- Single-Dwelling 7,000
- Single-Dwelling 5,000
- Single-Dwelling 2,500
- Multi-Dwelling 2,000
- Multi-Dwelling 1,000
- High Density Multi-Dwelling
- Central Residential
- Institutional Campus
- Mixed Use – Dispersed
- Mixed Use – Neighborhood
- Mixed Use – Civic Corridor
- Mixed Use – Urban Center
- Central Commercial
- Central Employment
- Mixed Employment
- Industrial Sanctuary
- Open Space

| GENERALIZED COMPREHENSIVE PLAN DESIGNATIONS | NORTHWEST | PORTLAND |
|---|--------------|---------------|
| AREA (ACRES) | 599 | 89,042 |
| SINGLE-DWELLING | 0.4% | 35.2% |
| MULTI-DWELLING | 10.2% | 6.2% |
| MIXED USE/ COMMERCIAL | 32.0% | 6.4% |
| INSTITUTIONAL | 0.6% | 1.5% |
| EMPLOYMENT | 19.2% | 2.4% |
| INDUSTRIAL | 24.9% | 16.3% |
| OPEN SPACE | 0.5% | 16.9% |
| RIGHT-OF-WAY | 12.1% | 15.1% |

DRAFT



Land Use: Zoning

ZONING

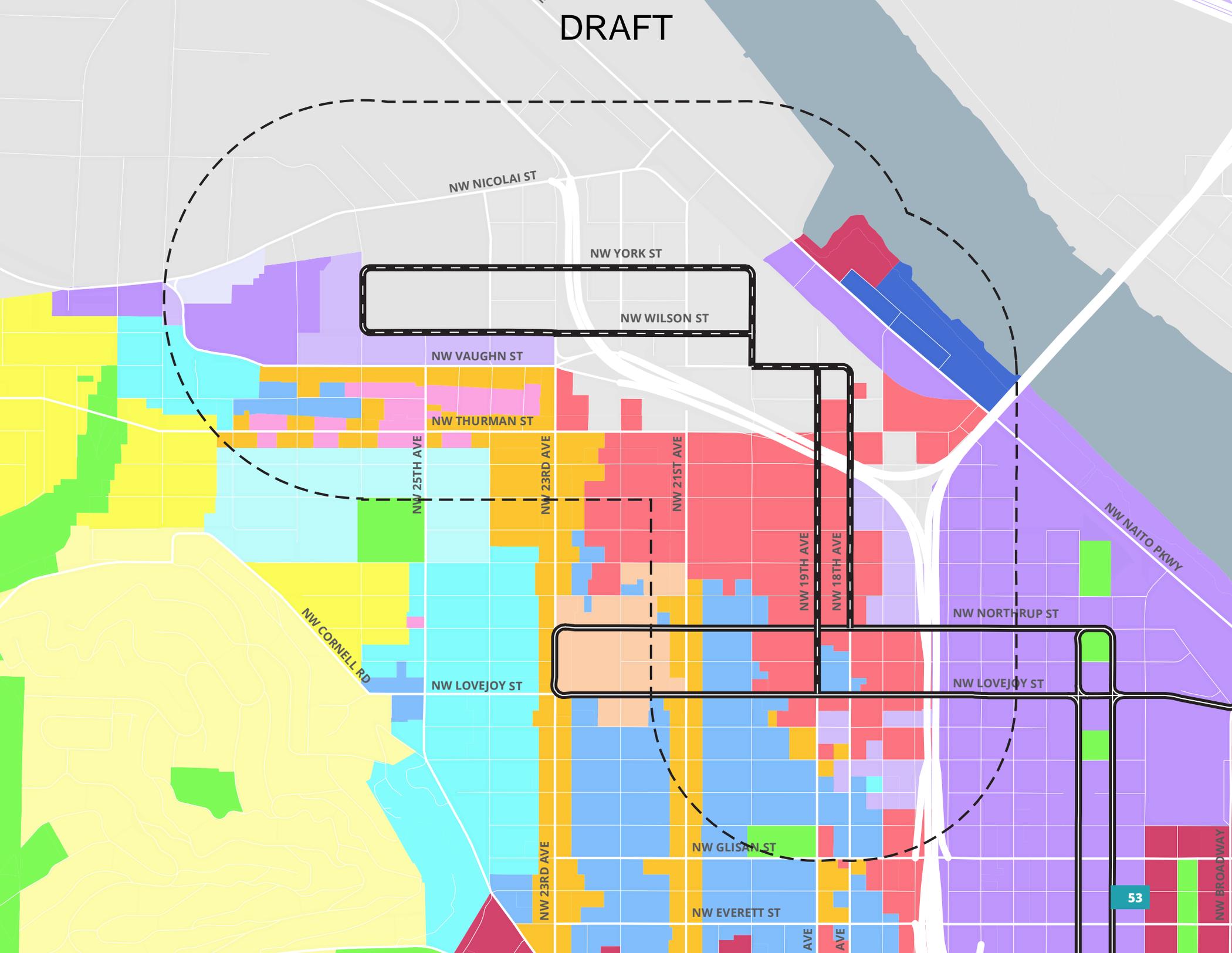
At the southern part of Northwest study area near NW Lovejoy, the zoning is Commercial/Mixed Use 3 (CM3) and High Density Multi-dwelling (RH). Further north to NW Upshur, the zoning is CM3 and EG1 (General Employment) east of NW 18th at Quimby. North of Upshur, the zoning is primarily Industrial (IG1). At NW 24th, the zoning becomes Heavy Industrial (IH) on the former Esco site, transitioning to General Employment (EG1) at NW 26th. The area between Vaughn and Wilson between NW 23rd and NW 27th is also designated EG1. The zoning transitions to Central Employment (EX) at NW 26th and is applied to the Montgomery Park site. The area is also regulated by two plan districts. The Northwest Plan District is applied in the area generally south of NW Vaughn, and the Guilds Lake Plan District is applied in the industrial and general-employment zoned areas north of Vaughn.

CITY OF PORTLAND | ZONING

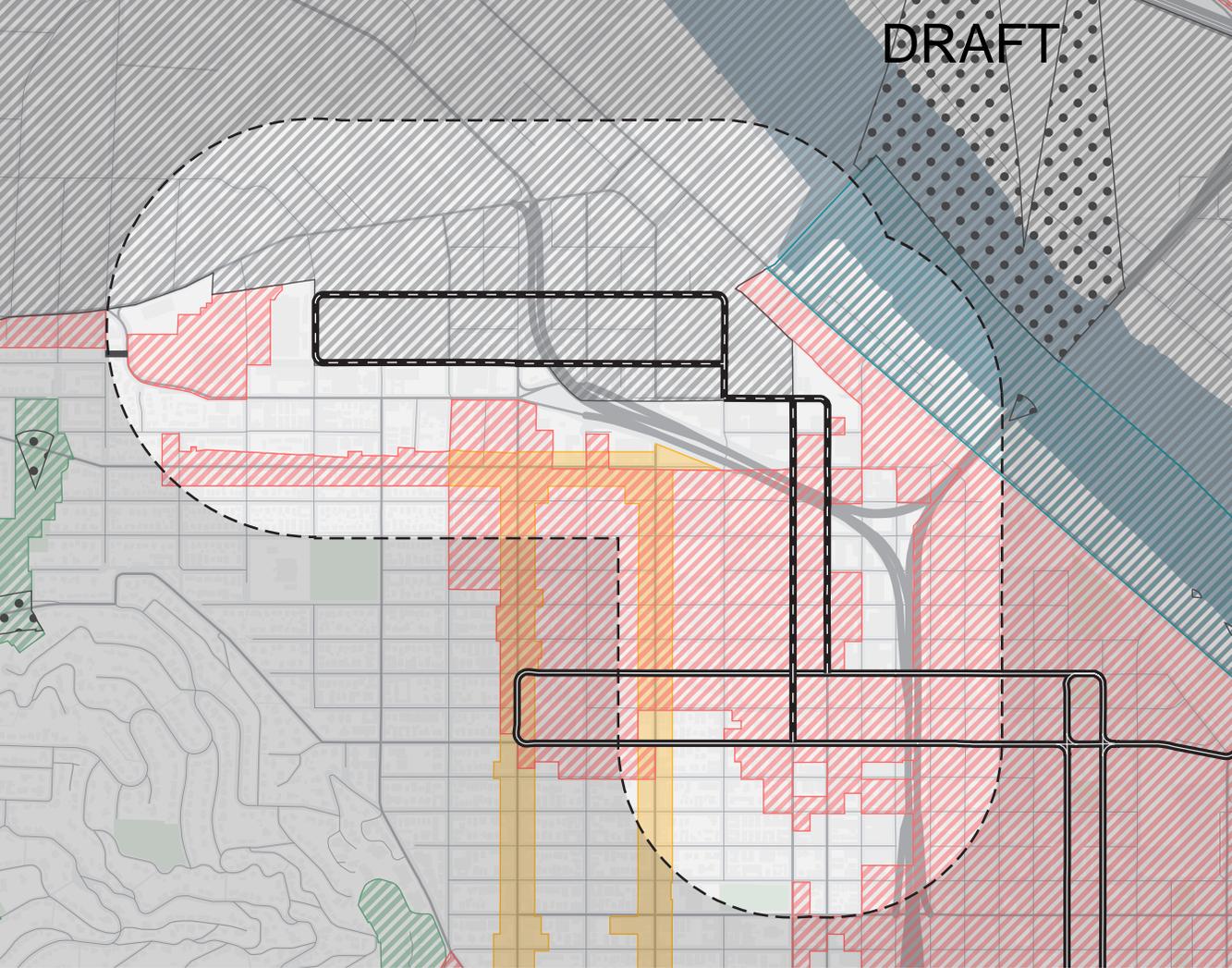
| | |
|---|--|
|  Residential 10,000 (R10) |  Commercial Residential (CR) |
|  Residential 7,000 (R7) |  Commercial Mixed Use 1 (CM1) |
|  Residential 5,000 (R5) |  Commercial Mixed Use 2 (CM2) |
|  Residential 2,500 (R2.5) |  Commercial Mixed Use 3 (CM3) |
|  Residential 2,000 (R2) |  Commercial Employment (CE) |
|  Residential 1,000 (R1) |  Central Commercial (CX) |
|  High Density Residential (RH) |  General Employment 1 (EG1) |
|  Central Residential (RX) |  General Employment 2 (EG2) |
|  General Industrial 1 (IG1) |  Central Employment (EX) |
|  General Industrial 2 (IG2) |  Campus Institutional 1 (CI1) |
|  Heavy Industrial (IH) |  Campus Institutional 2 (CI2) |
|  Open Space (OS) | |

| ZONING CATEGORIES | NORTHWEST | PORTLAND |
|------------------------------|--------------|---------------|
| AREA (ACRES) | 599 | 89,042 |
| SINGLE-DWELLING | 0.4% | 34.5% |
| MULTI-DWELLING | 10.2% | 6.1% |
| MIXED USE/ COMMERCIAL | 25.5% | 6.3% |
| INSTITUTIONAL | 0.6% | 1.2% |
| EMPLOYMENT | 14.8% | 2.5% |
| INDUSTRIAL | 35.9% | 16.3% |
| OPEN SPACE | 0.5% | 16.8% |
| RIGHT-OF-WAY | 12.1% | 15.1% |

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DESIGN



RIVER



PRIME INDUSTRIAL



ENVIRONMENTAL



CENTERS MAIN ST



SCENIC RESOURCES

OVERLAY ZONES

Overlay zones augment the regulations of the “base zones” and are applied to parcels in various parts of the city that have either a similar characteristic or similar desired zoning effect. In the NW Portland area, the following overlay zones are applied.

The **Design overlay zone (“d”)**, implemented by 33.420, is applied in areas where new development is subject to a greater degree of design control due to special character of an area, or the scale of anticipated development.

The **Centers Main Street overlay zone (“m”)**, implemented by 33.415, is applied to areas designated as neighborhood or town centers to evoke active urban development.

The **Prime Industrial overlay zone (“k”)** is applied to protect industrial and employment land that has been identified in the Comprehensive Plan as Prime Industrial and to prioritize these areas for long-term retention.

The **Scenic Resource overlay zone (“s”)**, implemented by 33.480, is applied to protect scenic resources that provide benefits to the public, enhance the appearance of Portland, create attractive entrance ways to Portland and its districts, improve economic vitality, and to implement scenic resource goals of Portland’s Comprehensive Plan.

The **Environmental Conservation overlay zone (“c”)**, implemented by 33.430, is applied to protect natural resources that have been identified in the Comprehensive Plan. This is applied outside the study area.

DRAFT

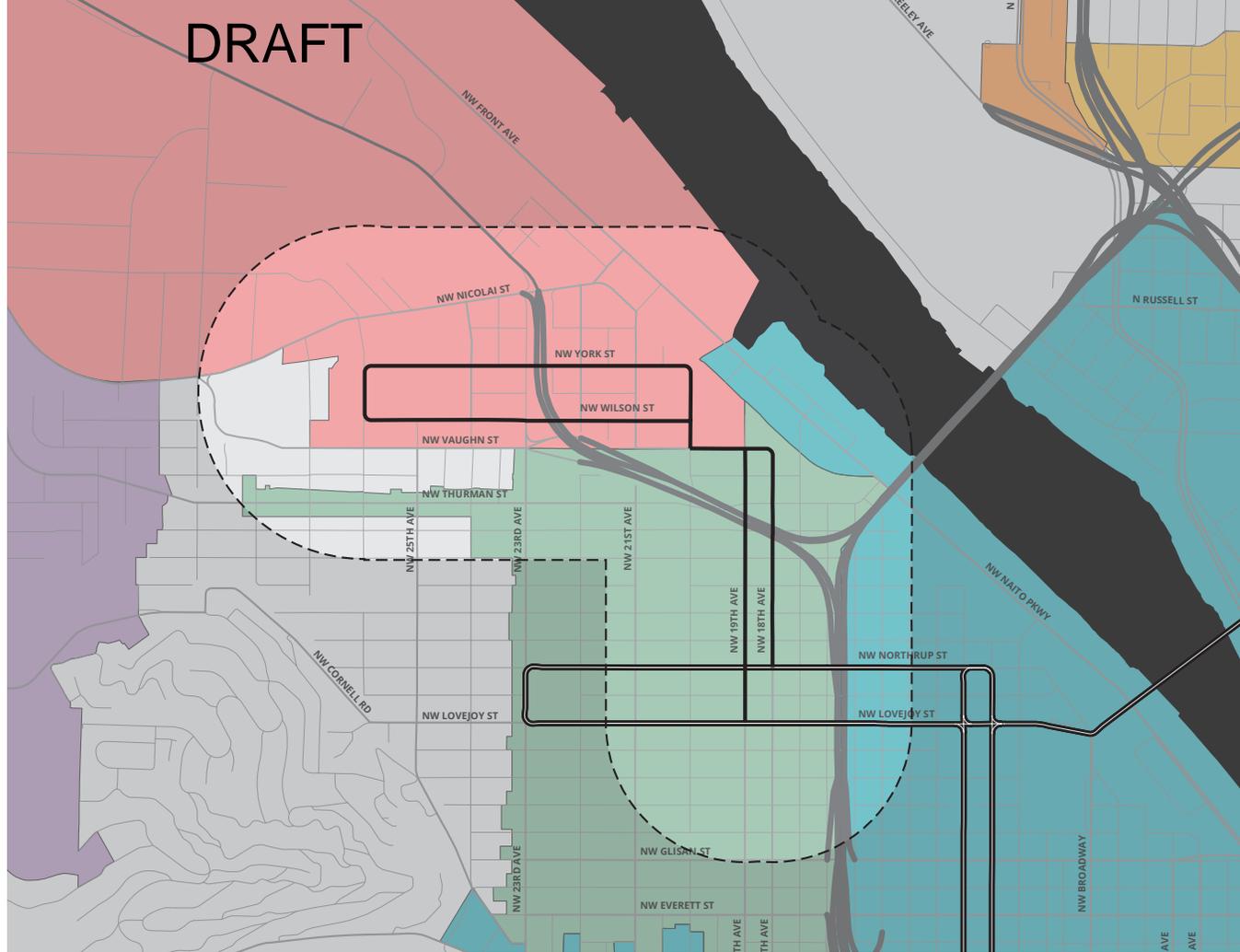
PLAN DISTRICTS

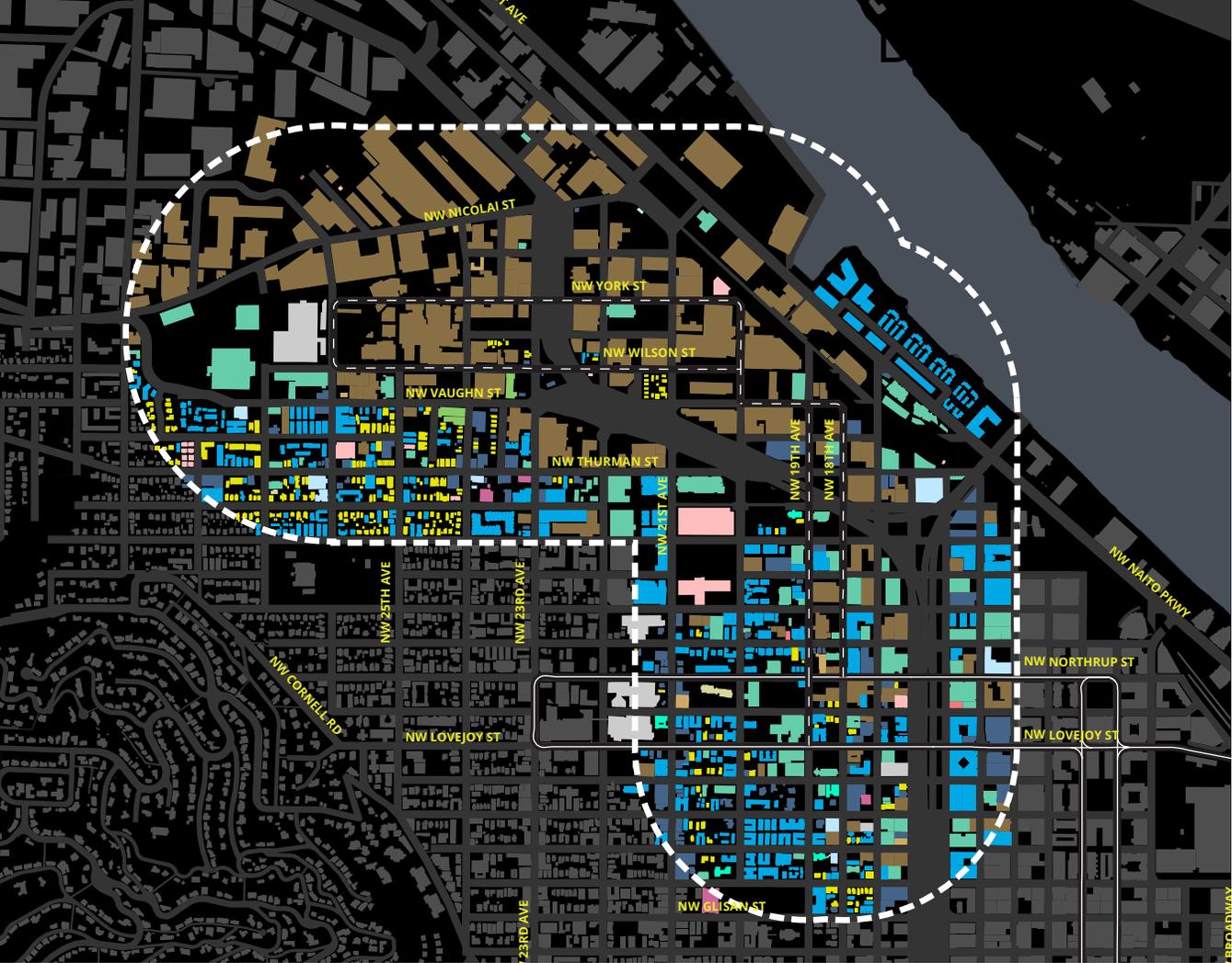
Plan districts are zoning tools that are applied to specific geographic areas within the city that have special or unique characteristics. Plan Districts are most often applied to provide additional regulatory guidance to implement area-specific land use plans. The NW Portland study area intersects three different plan districts.

The **Northwest Plan District** (33.562) is applied south of NW Vaughn Street to implement the Northwest District Plan. It provides for an urban level of mixed-use development including commercial, office, housing, and employment and strengthens the area's role as a commercial and residential center.

The **Guild's Lake Industrial Sanctuary Plan District** (33.531) is applied north of NW Vaughn Street to implement the Guild's Lake Industrial Sanctuary Plan. The plan district fosters the preservation and growth of the industrial district, recognizes that inappropriate nonindustrial uses potentially threaten the integrity of this district, and protects the area from incompatible uses which threaten the district's integrity, stability and vitality and compromise its transportation system.

The **Central City Plan District** (33.510) is applied in the area east of I-405 and along NW Naito Parkway/Front Avenue. The plan district encourages the highest densities in the city with a broad mix of commercial, residential, industrial and institutional uses, and fosters transit-supportive development, pedestrian and bicycle-friendly streets, a vibrant public realm and a healthy urban river.



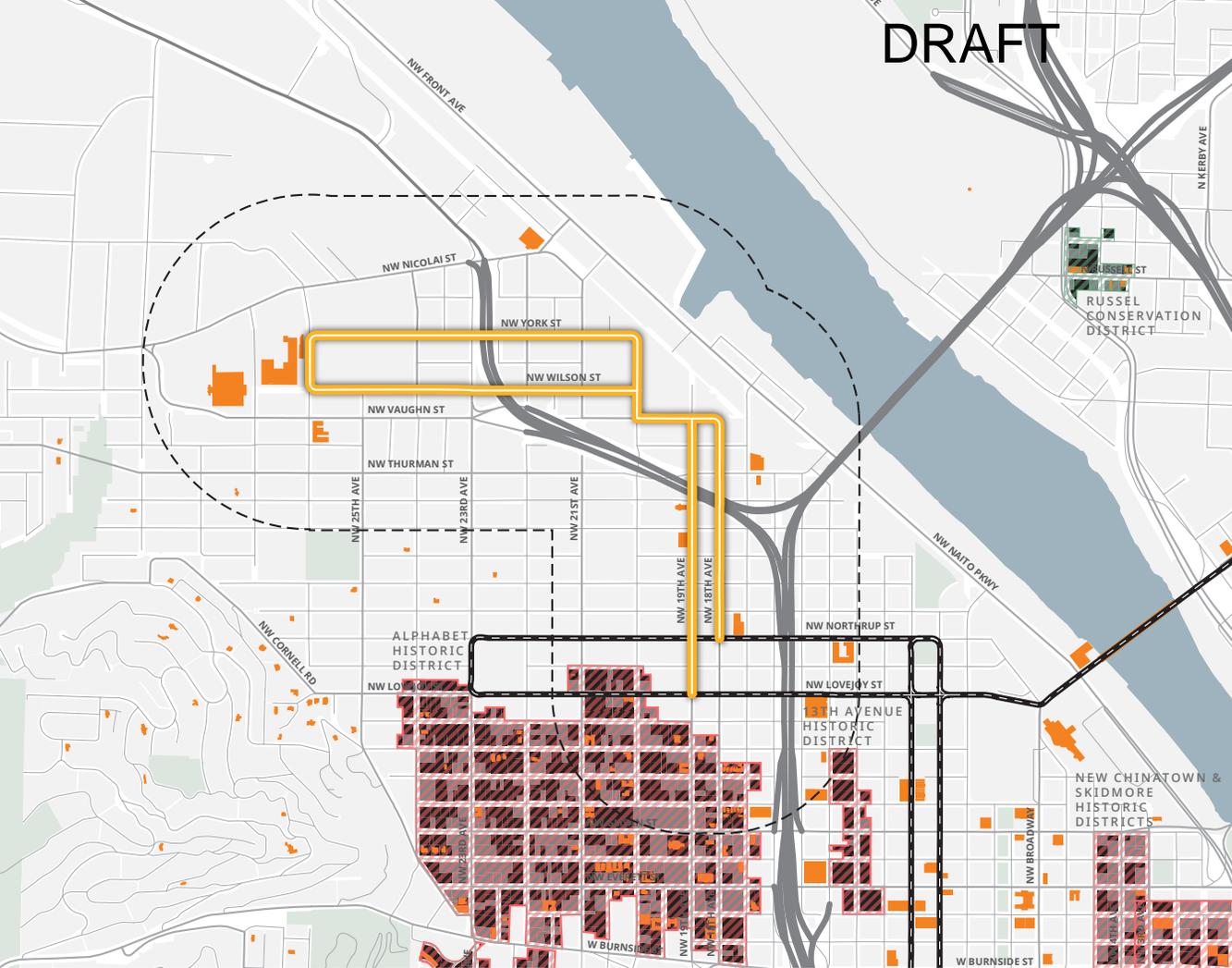


LAND USES

Current land uses in the Northwest study area include a wide array of uses. South of NW Vaughn, there is a concentration of commercial and residential uses, with a few industrial or auto-service uses primarily between NW 16th and NW 19th Avenue.

North of NW Vaughn, land uses are mostly industrial, with a few notable exceptions. The block between Wilson and Vaughn west of NW 21st is primarily residential (a block of older houses), as is an area along the Willamette River at the former Terminal 1 facility. The Montgomery Park site and nearby Red Fox Commons are shown as office space. There is a large parking structure on Wilson between 26th and 27th.

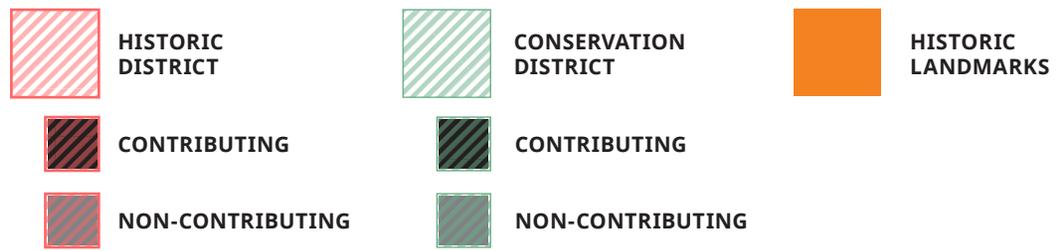




HISTORIC RESOURCES

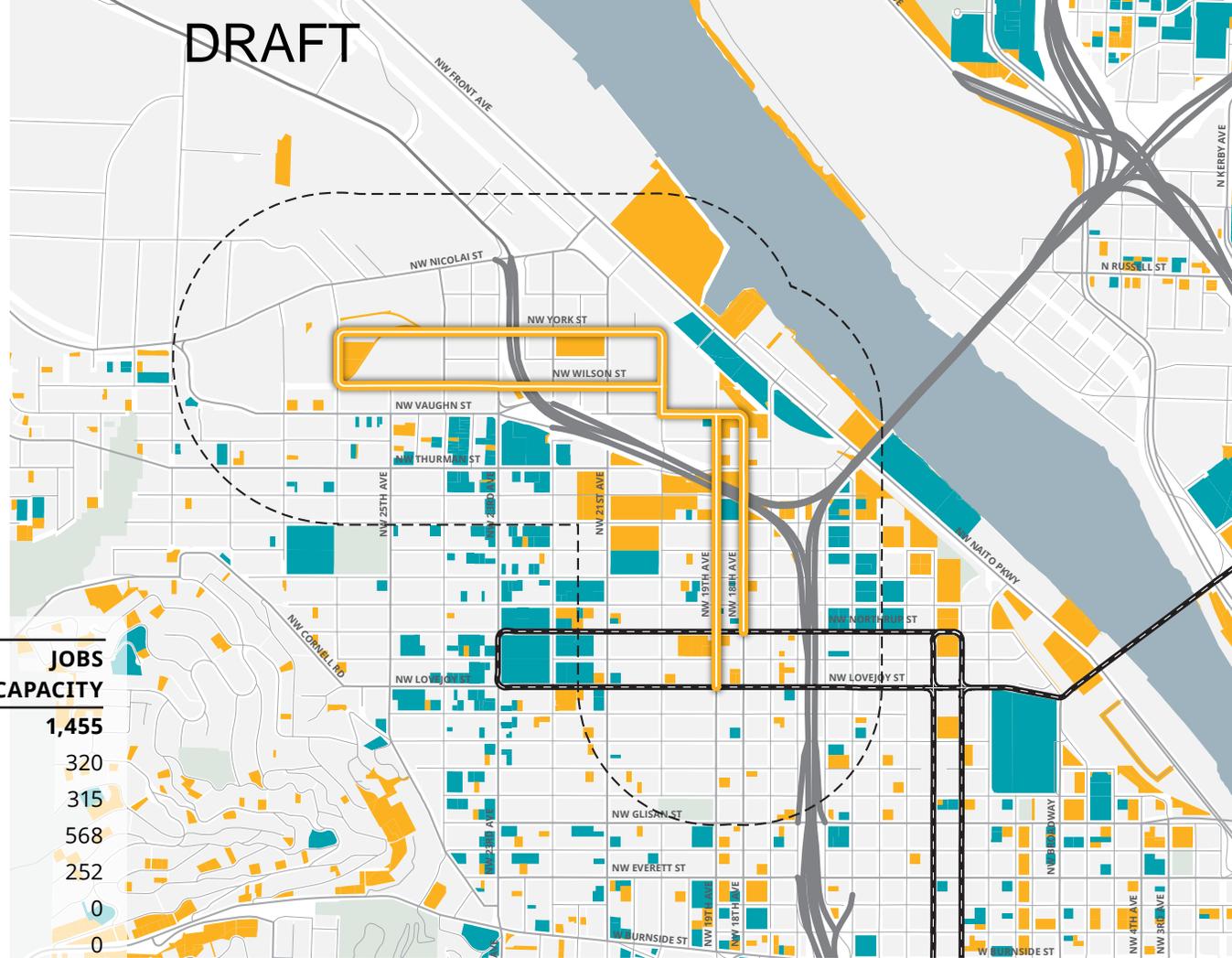
Most of the individual historic resources in the Northwest study area are associated with early twentieth-century industrial uses. Two large Historic Landmarks anchor the west end of the study area, the 1920 Montgomery Ward Co. warehouse, which has been rehabilitated as a large commercial office building, and the American Can Company complex, a former manufacturing plant. Both of these resources are listed in the National Register of Historic Places. Landmarks along the NW 18th and 19th corridor include the Lane-Miles Standish Printing Plant, the Cor-Berry Press building and the 1891 St. Patrick's Church, an excellent example of Beaux Arts religious architecture and a neighborhood icon.

The southern part of the study area includes a portion of the Alphet Historic District. This National Register-listed district is characterized by a concentration of late nineteenth and early twentieth century multi-family structures, many of which were designed and constructed by the city's premier architects and developers, as well as streetcar-era commercial structures along NW 21st and 23rd avenues.



UNDERUTILIZED LOTS

In 2015, there were 219 lots in Northwest study area identified as vacant or underutilized, totaling about 100 acres. Half of the lots were vacant and the other half underutilized. On these parcels approximately 6,200 additional housing units and 4,200 additional jobs could be accommodated under current zoning. The largest opportunities for redevelopment are in smaller sites under 1 acre, which could accommodate up to 1,600 additional housing units. For vacant sites, medium-sized lots 3 to 5 acres in size have the highest capacity for housing (about 1,200 units).



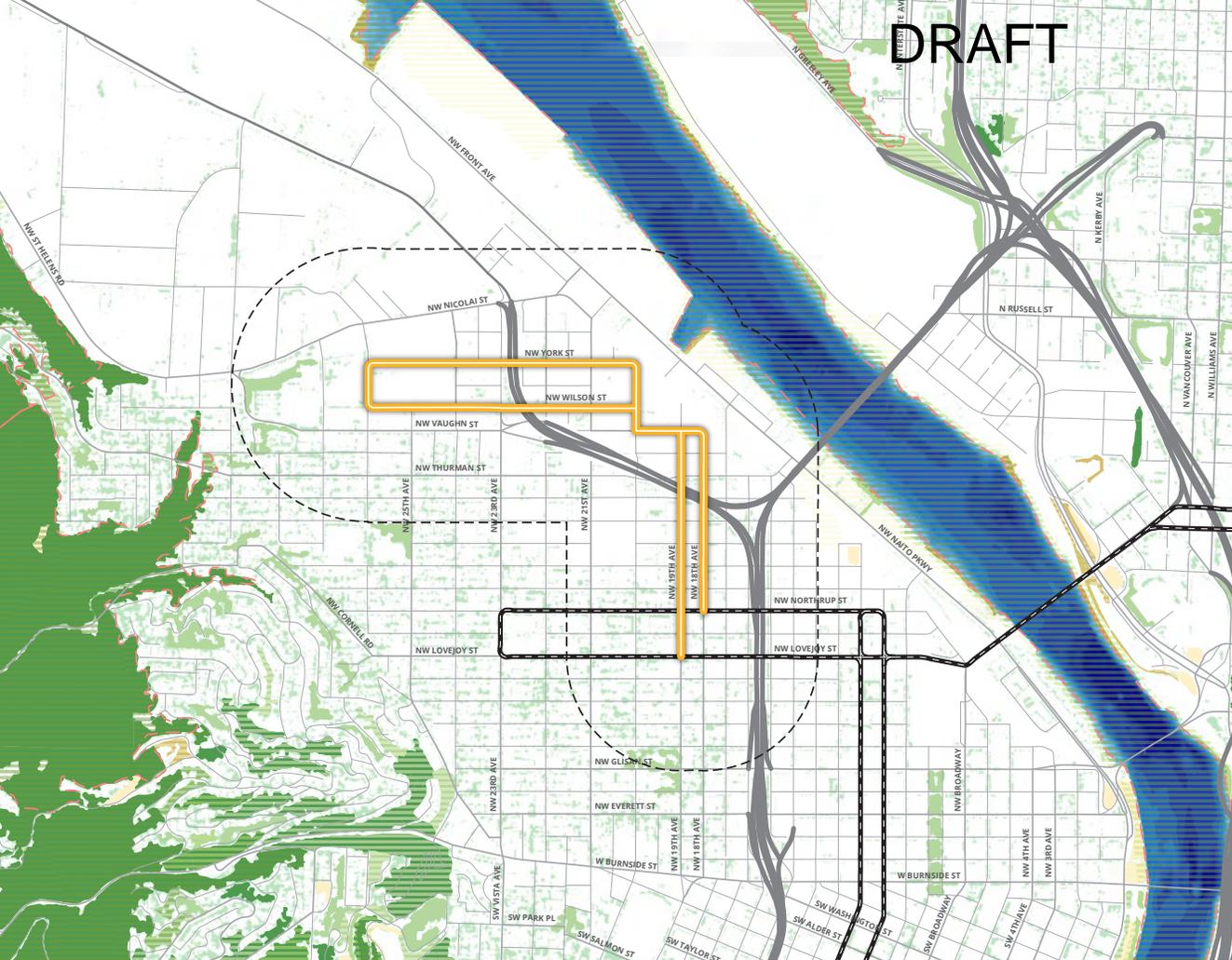
| | PARCEL COUNT | TOTAL ACRES | HOUSING CAPACITY | JOBS CAPACITY |
|----------------------|--------------|-------------|------------------|---------------|
| UNDERUTILIZED | 110 | 43 | 3,280 | 1,455 |
| < 0.5 ACRES | 36 | 6 | 450 | 320 |
| 0.5 TO 1 ACRE | 30 | 10 | 1,125 | 315 |
| 1 TO 3 ACRES | 35 | 12 | 689 | 568 |
| 3 TO 5 ACRES | 8 | 11 | 841 | 252 |
| 6 TO 10 ACRES | 1 | 6 | 175 | 0 |
| 10 TO 20 ACRES | 0 | 0 | 0 | 0 |
| 20 TO 50 ACRES | 0 | 0 | 0 | 0 |
| > 50 ACRES | 0 | 0 | 0 | 0 |
| VACANT | 109 | 56 | 2,968 | 2,702 |
| < 0.5 ACRES | 45 | 7 | 640 | 467 |
| .5 TO 1 ACRE | 14 | 4 | 300 | 407 |
| 1 TO 3 ACRES | 37 | 17 | 864 | 977 |
| 3 TO 5 ACRES | 12 | 12 | 1,163 | 850 |
| 6 TO 10 ACRES | 0 | 0 | 0 | 0 |
| 10 TO 20 ACRES | 1 | 16 | 0 | 0 |
| 20 TO 50 ACRES | 0 | 0 | 0 | 0 |
| > 50 ACRES | 0 | 0 | 0 | 0 |
| TOTAL | 219 | 99 | 6,249 | 4,157 |



UNDERUTILIZED LOT



VACANT LOT



NATURAL RESOURCES

The Northwest study area is highly urbanized, but its natural resources include the Willamette River, shallow water habitat, river banks both vegetated and non-vegetated, flood area and upland vegetation, primarily street trees and trees in parks.

The Willamette River and river banks provide important functions including river flow moderation, water storage, sediment and nutrient control, channel dynamics, food web and nutrient cycling and fish and wildlife habitat. The shallow water areas provide critical habitat for Endangered Act Species-listed fish. The flood area, both developed and not developed, provides water storage during large flood events. Upland vegetation, including street trees and landscape vegetation, captures and stores rainwater, cools the air and provide wildlife habitat.



Special Habitat Areas

Natural Resources Inventory Rank



River Depth from Ordinary Highwater



Vegetation Patches

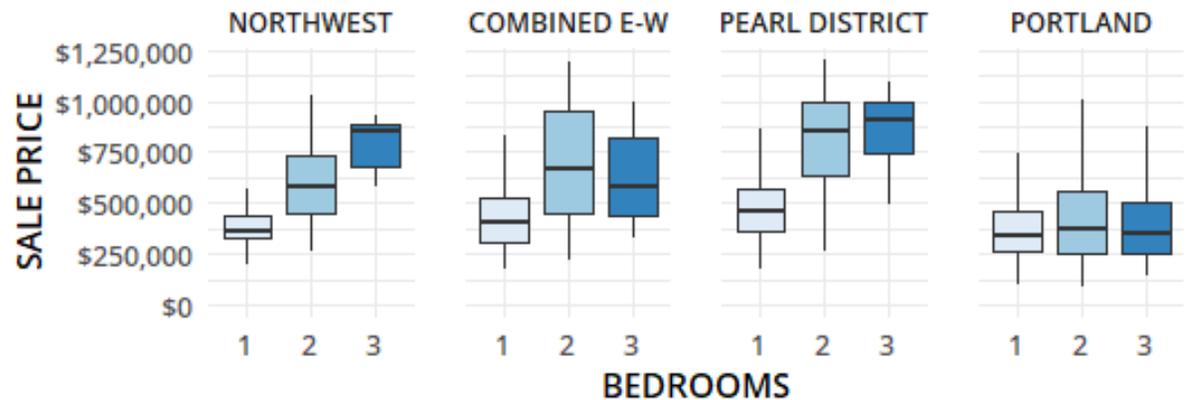


Housing & Development

FOR-SALE MARKET

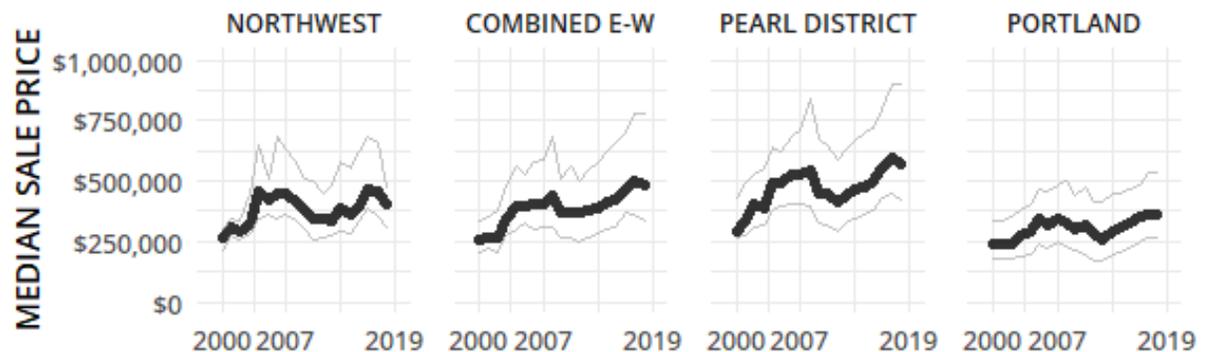
The for-sale housing market in Northwest is slim, with sales of 82 condos and 10 combined single-family and townhomes in 2018. This compares to 336 condo sales in the Pearl in 2018. The current sale price is about \$410,000 at the median but varies significantly by submarket and bedroom count. One-bedroom condos start at about \$190,000 and three-bedroom condos range as high as \$940,000.

DISTRIBUTION OF CONDO SALES BY BEDROOM COUNT, 2017-18



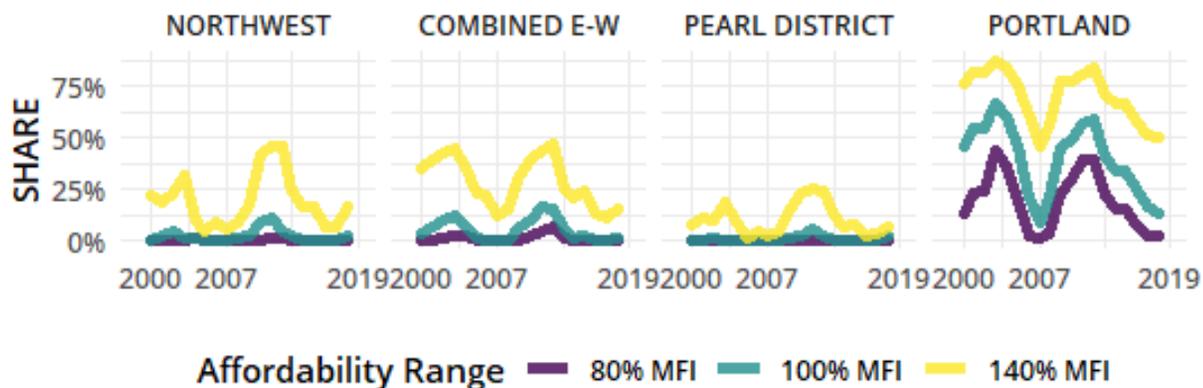
Source: Regional Multiple Listings Services (RMLS).

TREND IN MEDIAN CONDO SALE PRICE



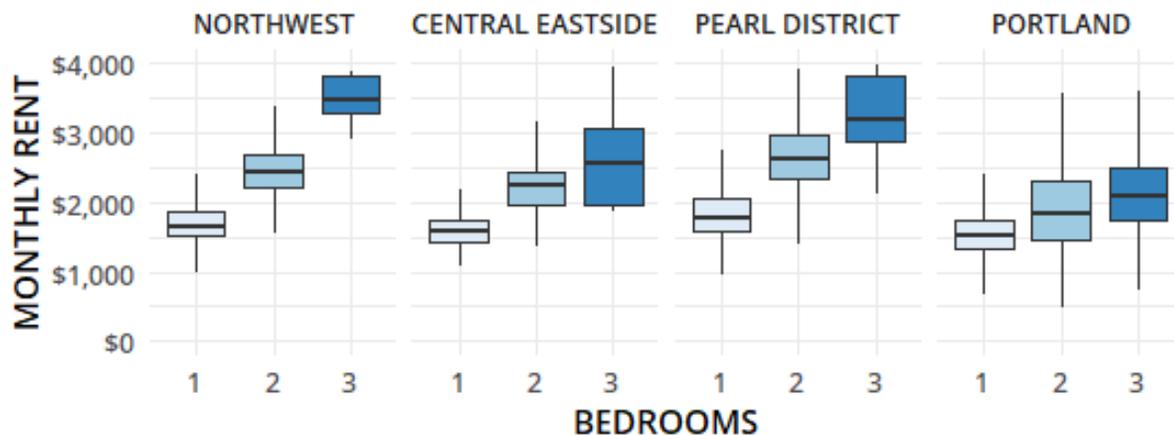
Source: Regional Multiple Listings Services (RMLS).

TREND IN SHARE OF HOME SALES BY AFFORDABILITY THRESHOLD



Source: Regional Multiple Listings Services (RMLS).

DISTRIBUTION OF MONTHLY RENTS BY BEDROOM COUNT, 2019



Source: Craigslist.

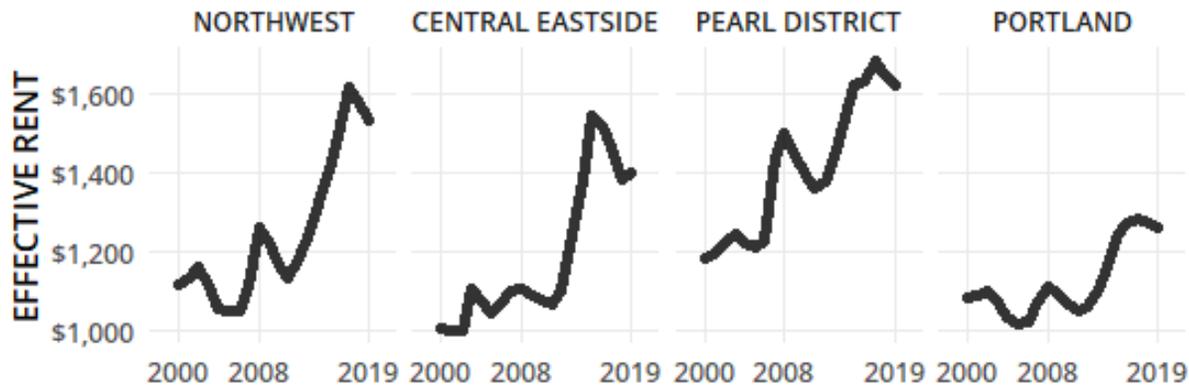
FOR-SALE AFFORDABILITY

Despite the range in sale prices, **homes in Northwest are largely unaffordable to most Portland households.** In 2018 only 16% of all home sales were affordable to a family earning 140% of the median family income (MFI), which was about \$91,000 for a family of two in 2018. Citywide, about half of the homes sold in 2018 were affordable at 140% MFI.

RENTAL MARKET

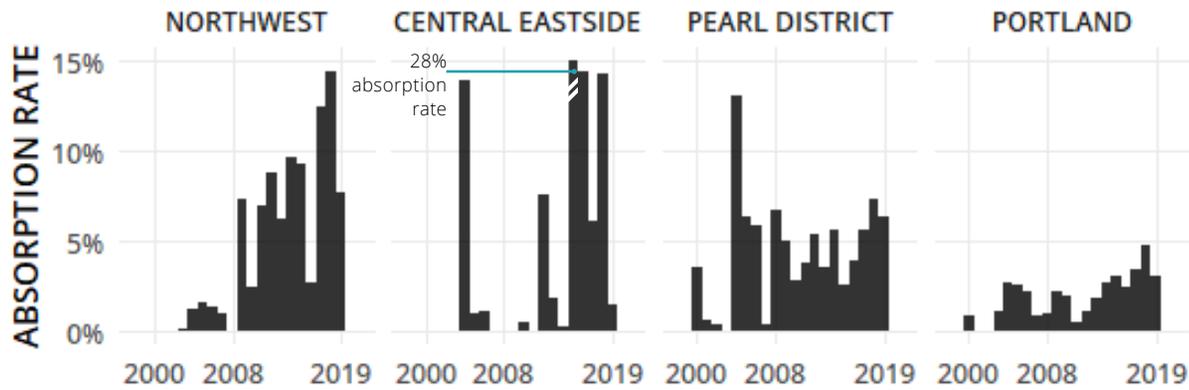
Rents in Northwest vary by bedroom count but start as low as \$1,000 per month for a one-bedroom unit and go as high as \$3,900 per month for a three-bedroom. Overall, **median rent is around \$1,800 per month**, compared to the citywide median of \$1,600. Three-bedroom units are very uncommon. In 2019 in Northwest, only about 30 three-bedroom listings appeared on Craigslist, an online platform that many apartment-seekers use, compared to about 2,500 one-bedroom listings. The cost per ft² is similar across bedroom counts at about \$2.40 per ft², compared to \$2.20 citywide.

TREND IN MULTI-FAMILY MONTHLY RENTS



Source: CoStar; Prosper Portland.

TREND IN MULTI-FAMILY ABSORPTION RATES



Source: CoStar; Prosper Portland.

MULTI-FAMILY ABSORPTION

Since 2008, the multi-family housing stock in Northwest has more than doubled, from 2,000 units to about 5,500 today. Since new construction tends to be at higher price points, the trend in multi-family rents has grown considerably, increasing by 22% between 2008 and 2019, compared to about 8% in the Pearl and 13% citywide. The multi-family new construction in Northwest represents about 13% of the citywide multi-family deliveries. One of the largest deliveries was The Carson (built 2018) at NW 22nd and Savier, which has over 380 units. Other major deliveries include Modera (290 units) in the Pearl and the Waterline (240 units) and Rivage (260 units) along Front Ave.

The Carson (2018) with over 380 residential units



Source: Pamplin Media.

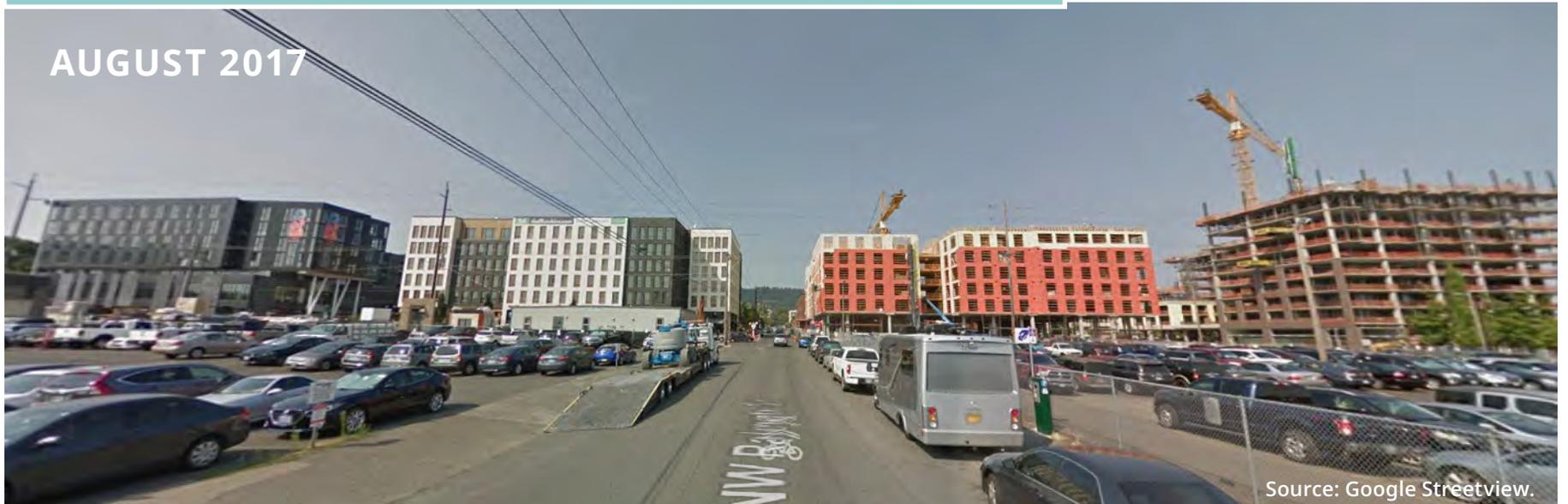
APRIL 2014



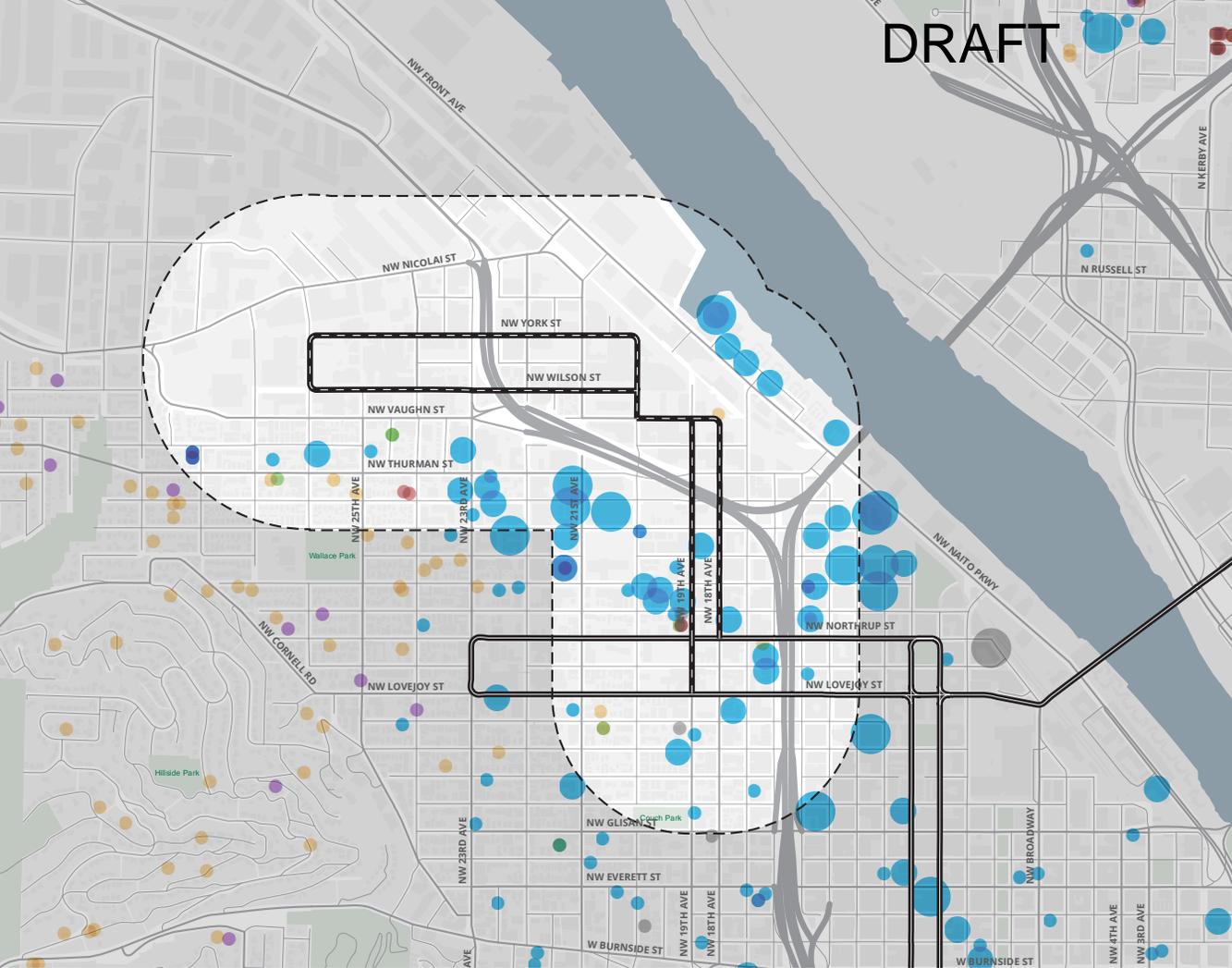
Source: Google Streetview.

NW Raleigh looking toward NW 21st Ave (Slabtown). The area west of 19th added more than 1,800 new units since 2008.

AUGUST 2017



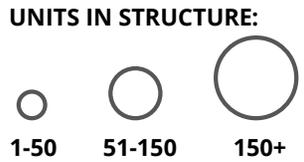
Source: Google Streetview.



PERMIT ACTIVITY | 2000-2019

The Northwest study area has seen a considerable amount of development since 2000. For residential development, the vast majority were multi-dwelling units. The number of units produced in 2000-04 and 2005-09 were roughly similar at about 600 units each. This increased to roughly 800 units in the 2010-2014 period. The 2015-2019 period saw a significant increase to 1,666 units. This is consistent with a citywide increase during this period which saw a recession come to an end.

- ACCESSORY DWELLING UNIT
- APARTMENTS/CONDOS
- DUPLEX
- SINGLE-FAMILY
- TOWNHOUSE/ROWHOUSE
- OTHER STRUCTURE



ABOUT THIS DATA SOURCE: RMLS

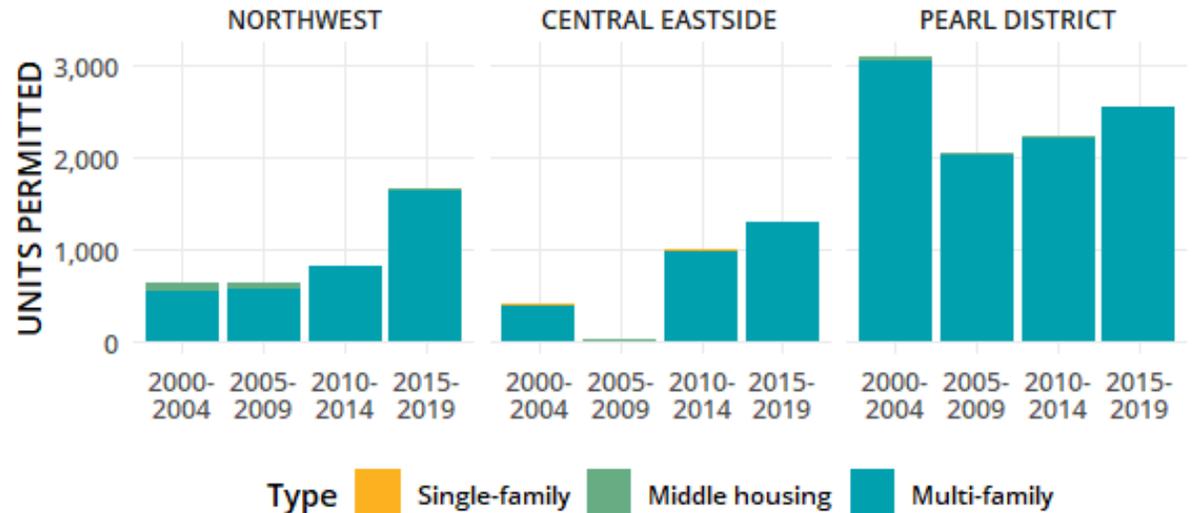
The **Regional Multiple Listings Service (RMLS)** is a proprietary database that realtors use to access and create current home listings and view past listings. The Portland Bureau of Planning and Sustainability maintains a subscription to the service and updates their database annually with recent sales. For each home sold in the Portland region, the database contains hundreds of datapoints on the sale, such as the location, sale price and number of bedrooms. Single-family homes, condos, townhomes, attached houses and floating homes are captured in this database.

ABOUT THIS DATA SOURCE: BDS PERMIT DATA

Residential permit activity data come from the **Bureau of Development Services**. Permits are processed building-wise, meaning that multiple buildings on a single parcel or site would require multiple permits. Multi-family permits contain multiple units. The analysis here summarizes permit activity based on the number of units within each permit.

Only permits that are “issued”, “under inspection” or “finaled” are counted, meaning that at a minimum, the permit applicant has to have paid all permit application fees and system development charges (SDCs). This differs slightly from the number of units actually built, since applicants may choose to delay construction.

RESIDENTIAL PERMIT ACTIVITY



Single-family is detached single-family homes only.

Middle housing includes duplexes, triplexes, four-plexes, townhomes and accessory dwelling units (ADUs).

Multi-family are buildings with 5 or more units.

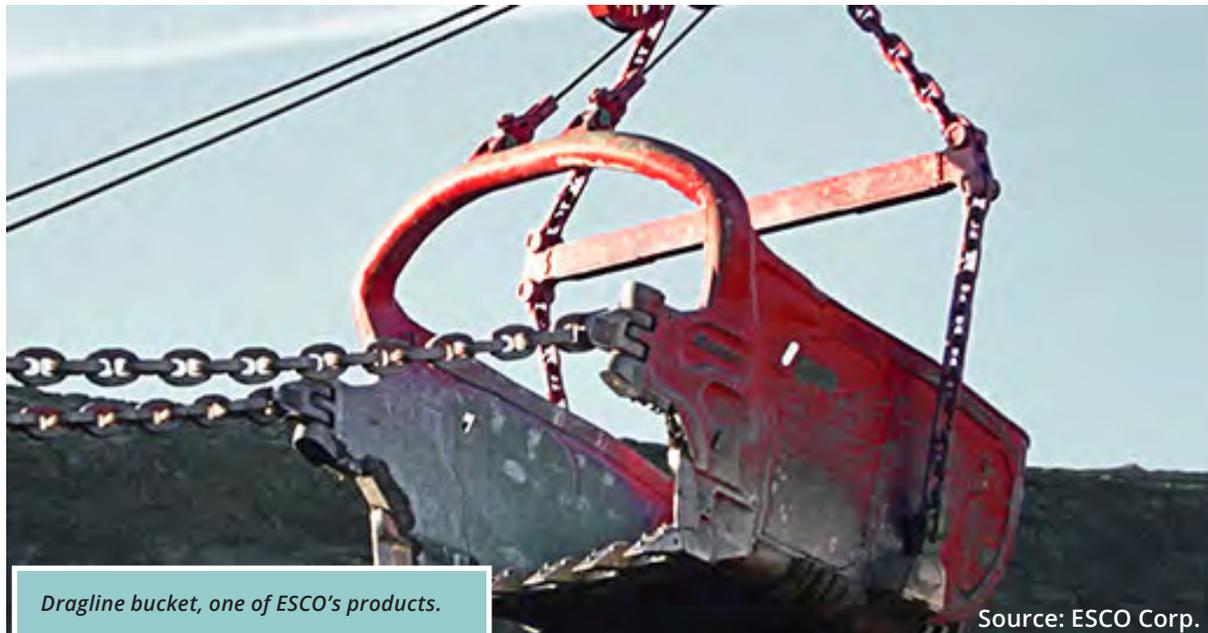
Source: Bureau of Development Services (BDS).

Jobs & Businesses

The Northwest study area is home to over 1,100 businesses employing almost 16,900 people. In the northern segment, industrial activity plays a prominent role in this area's contribution to the overall economic health of the city and region, including manufacturing and industrial headquarter offices. Northwest is also a retail hub, with bustling, active streets along NW 23rd, 21st and Thurman. The study area also picks up employers in the Pearl District, such as Microsoft and REI.

MAJOR EMPLOYERS

Although the vast majority of businesses in Northwest have fewer than 20 employees (about 82%), as much as 42% of total employment is concentrated in 30 firms with 100 or more employees. This is about the same as the citywide average.



Dragline bucket, one of ESCO's products.

Source: ESCO Corp.

- **Rejuvenation and Schoolhouse Electric**, which both manufacture lighting fixtures, are located in the industrial area to the north and have a retail presence.
- **Amazon** has a fulfillment center at the newly constructed New York building at NW 22nd and York.
- **Grand Central Bakery** has an industrial bakery on NW 22nd and York.
- **ESCO**, which manufactures metals, has their headquarters at NW 25th and Vaughn.
- **EC Electric**, which provides specialized electronics construction services, has a 68,000 ft² warehouse and office at NW 21st and Thurman.
- **XPO Logistics** (formerly Conway), which provides logistics services, has their headquarters in a 298,000 ft² office at NW 21st and Savier.
- Although Legacy Good Samaritan Hospital falls outside the study area, **Legacy Health Systems** administrative office at NW 19th and Lovejoy (122,000 ft²) is within the study area. Many of the jobs at this office are off-site employees, such as in-home care workers.
- **Montgomery Park** is home to over 50 businesses employing over 2,700 jobs. This historic office park has over 657,000 ft² of office space, with tenants such as Kaiser Permanente, the U.S. Forest Service, OnPoint Credit Union, Wells Fargo, WebMD and Adidas.

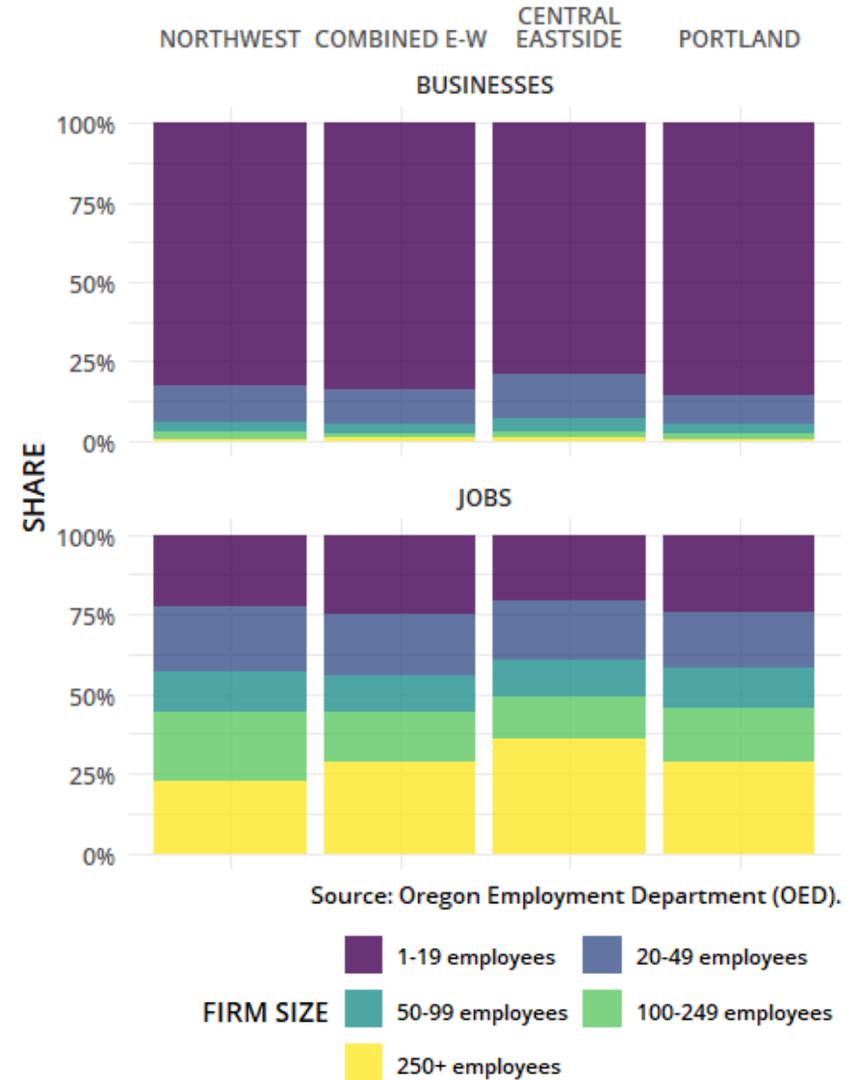
BUSINESS & EMPLOYMENT MIX

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, employing 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 ESCO and XPO Logistics, have their headquarters in the area, which are arguably also production and distribution jobs.

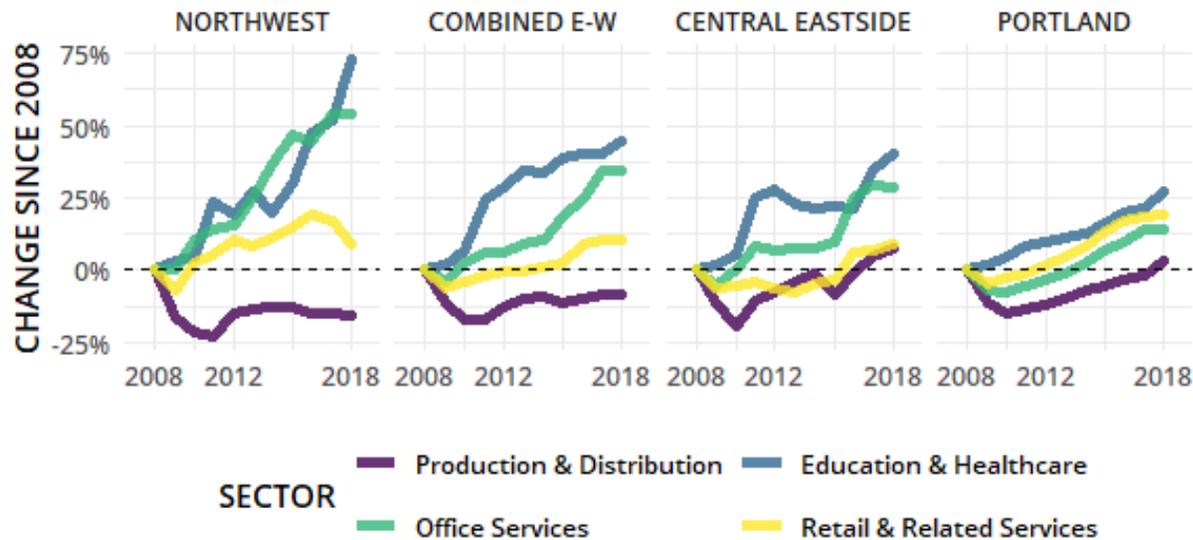
BUSINESS AND EMPLOYMENT MIX BY EMPLOYMENT SECTOR, 2018

| | NORTHWEST | COMBINED E-W | CENTRAL EASTSIDE | PORTLAND |
|---------------------------|---------------|---------------|------------------|----------------|
| BUSINESSES | 1,115 | 4,220 | 1,836 | 34,401 |
| Production & Distribution | 19% | 14% | 20% | 18% |
| Education & Healthcare | 10% | 11% | 7% | 11% |
| Office Services | 45% | 42% | 39% | 35% |
| Retail & Related Services | 26% | 32% | 34% | 36% |
| JOBS | 16,860 | 61,439 | 37,067 | 455,478 |
| Production & Distribution | 28% | 20% | 24% | 22% |
| Education & Healthcare | 10% | 15% | 14% | 24% |
| Office Services | 44% | 38% | 36% | 30% |
| Retail & Related Services | 17% | 26% | 26% | 24% |

BUSINESS AND EMPLOYMENT MIX BY FIRM SIZE, 2018



CHANGE IN EMPLOYMENT RELATIVE TO 2008 BY EMPLOYMENT SECTOR



Source: Oregon Employment Department (OED).

JOB GROWTH

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 (NAICS 541), 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 that the area has not been able to recover. 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.

ABOUT THIS DATA SOURCE: QCEW

The **Quarterly Census of Employment and Wages (QCEW)** is a State and Federal program jointly administered by the Oregon Employment Department (OED) and the Bureau of Labor Statistics (BLS). Each quarter, all employers covered by the State of Oregon's unemployment insurance (UI) laws must report to the Census of Employment and Wages. Self-employed individuals and other types of employment are not counted by QCEW; however, over 95% of all jobs are covered by QCEW.

There are two versions of this dataset:

1. A **public-facing dataset** containing aggregate data on employment, wages and count of businesses maintained by the BLS.
2. A **confidential dataset** maintained by the Oregon Employment Department containing establishment-level data on individual employers.

The second dataset was used in this analysis. It contains quarterly employment and wages within each firm, their industry classification using the [NAICS system](#), and the location of the business.

For more information, visit: [OED](#) or [BLS](#).

Commercial Space

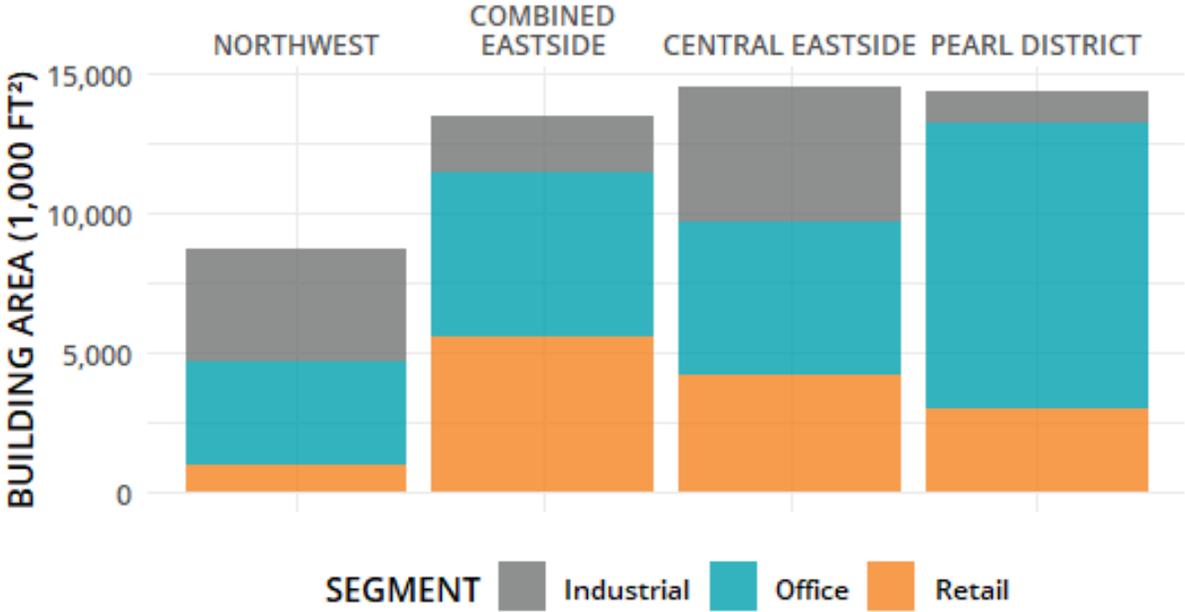
MARKET SNAPSHOT

Tracking jobs also requires considering the industrial, office and retail space available to prospective tenants and employers. The baseline metrics for understanding the health of commercial real estate markets are rentable building area; lease rates (cost per square foot); vacancy rates; deliveries (new construction); and net absorption (leasable area coming online in a period). The table here provides a snapshot of 2019 Q4 to-date (Dec 1, 2019) for these metrics.

| | BUILDINGS | TOTAL AREA (1,000 FT2) | TOTAL VACANT (1,000 FT2) | VACANCY RATE | YTD NET ABSORPTION (1,000 FT2) | SF UNDER CONSTRUCTION (1,000 FT2) | LEASE RATE |
|-------------------|-----------|---------------------------|-----------------------------|--------------|--------------------------------------|---|------------|
| INDUSTRIAL | | | | | | | |
| Northwest | 156 | 4,028 | 233 | 5.8% | -3 | 0 | \$11.40 |
| Central Eastside | 294 | 4,803 | 357 | 7.4% | -144 | 0 | \$14.50 |
| Pearl District | 54 | 1,127 | 57 | 5.0% | -27 | 0 | \$10.30 |
| Portland | 2,757 | 84,605 | 3,691 | 4.4% | -1,747 | 788 | \$9.50 |
| Office | | | | | | | |
| Northwest | 157 | 3,688 | 635 | 17.2% | -15 | 69 | \$30.60 |
| Central Eastside | 149 | 5,530 | 291 | 5.3% | 50 | 329 | \$28.60 |
| Pearl District | 258 | 10,282 | 1,264 | 12.3% | -72 | 156 | \$30.20 |
| Portland | 2,529 | 55,250 | 4,907 | 8.9% | -18 | 1,339 | \$28.00 |
| Retail | | | | | | | |
| Northwest | 123 | 926 | 34 | 3.7% | 11 | 0 | \$22.20 |
| Central Eastside | 252 | 4,153 | 109 | 2.6% | 56 | 0 | \$16.00 |
| Pearl District | 289 | 2,937 | 150 | 5.1% | -27 | 0 | \$24.70 |
| Portland | 4,882 | 38,921 | 1,241 | 3.2% | -168 | 11 | \$20.70 |

Source: CoStar; Prosper Portland.

RENTABLE BUILDING AREA BY MARKET SEGMENT, 2019



Source: CoStar; Prosper Portland.

RENTABLE BUILDING AREA

Northwest has over 8.6 million ft² of commercial space spread across 436 buildings. This inventory is about half the size of the Pearl District and Central Eastside streetcar alignment areas. About half of the commercial space is industrial with another 40 percent office and about 10 percent retail. Compared to the Central Eastside, the distribution is skewed more toward industrial and has considerably less retail.

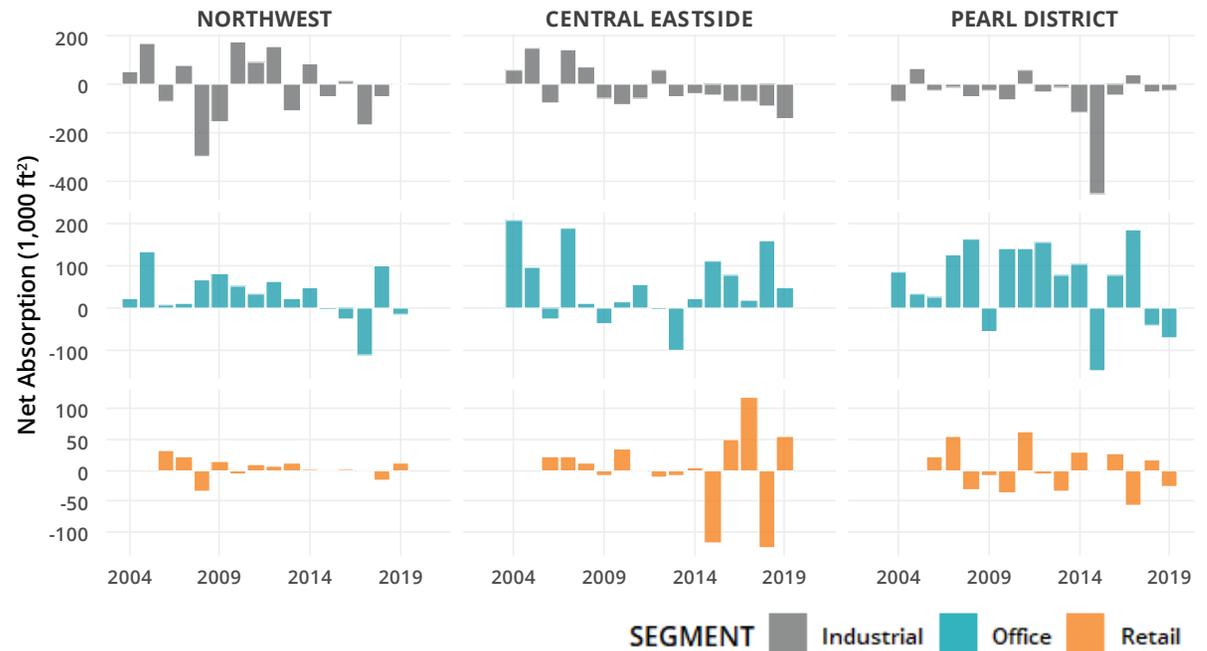
ABOUT THIS DATA SOURCE: COSTAR

Information on commercial space, including lease rates, vacancy rates and absorption come from a proprietary data source called **CoStar**. This is one of the most expansive datasets nationwide that real estate developers and brokers use to track trends across multiple market segments. CoStar surveys thousands of buildings in the Portland region and produces market analytics on things like the inventory of commercial space, lease rates that property owners charge tenants, which firms occupy space within a building, and numerous other trends.

CoStar also provides information on trends in multi-family markets, including detailed rental information. However, only buildings in CoStar's inventory are tracked, which typically includes only larger buildings with 50 or more units. This represents only a segment of the entire rental housing stock, making it only one of many sources policy makers must use to understand housing dynamics in an area.

For more information, visit <https://www.costar.com/products/costar-market-analytics>.

TREND IN ABSORPTION RATES BY MARKET SEGMENT

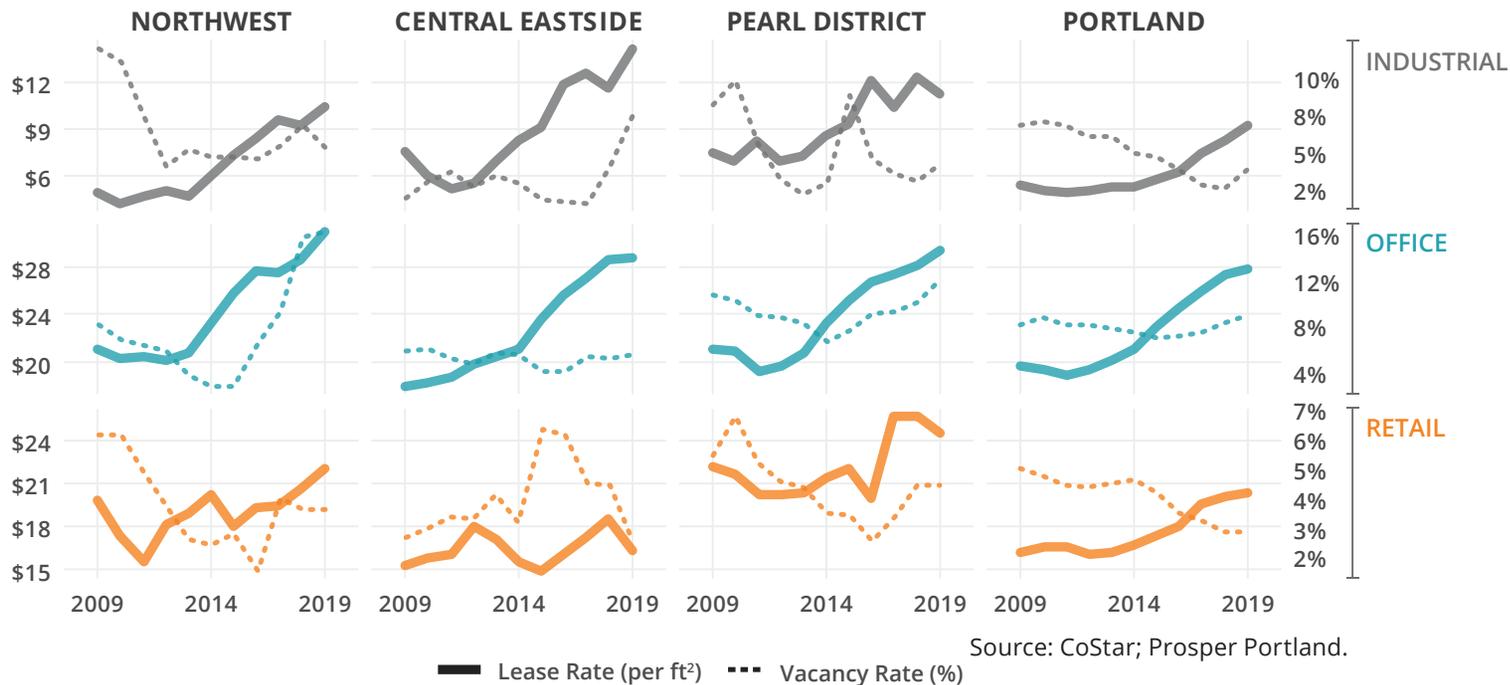


Source: CoStar; Prosper Portland.

ABSORPTION

Another key metric in looking at the market for commercial space is absorption. This is the net amount of square footage that became available (tenants moving out or market deliveries) or was leased up. Positive net absorption means more space was leased than was returned to the market. Negative net absorption means more space was vacated and hence an increase in the available supply. Commercial rents in positive net absorption scenarios tend to increase; and they decrease in negative net absorption scenarios. Northwest office absorption has tended to be positive, reflecting the high demand for office space.

TREND IN LEASE AND VACANCY RATES BY MARKET SEGMENT



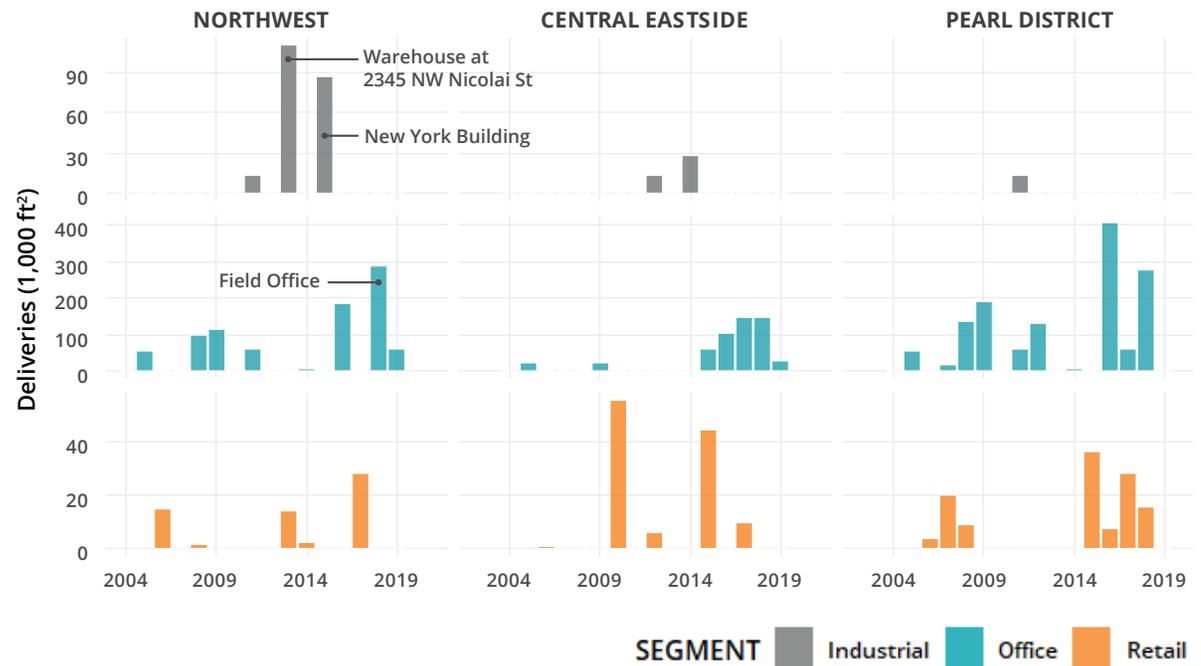
LEASE RATES

Multiple factors influence lease rates, including demand for space, new deliveries, and submarket dynamics that make some areas more desirable than others. The cost to occupy commercial space in Northwest is comparable to similar markets and Portland as a whole. Industrial rates are presently lower than the Central Eastside at \$11 per ft². Office lease rates have risen since 2013, which has been driven by the growth in office sector jobs in Northwest. Retail lease rates have been relatively stable between \$18 to \$22 per ft².

VACANCY RATES

There is more than 900,000 ft² of vacant commercial space in Northwest, and about 70% of it is office space. The vacancy rate for office is high at about 17%. This is primarily because of new market deliveries since 2016 that have not been fully leased. The retail market in the Northwest study area is primarily along NW 21st, NW Thurman, and segments in the Pearl District, which are desirable locations. As such, vacancy rates are low in Northwest, like many desirable locations in the city.

TREND IN DELIVERIES BY MARKET SEGMENT



Source: CoStar; Prosper Portland.

DELIVERIES

Since 2014, about 820,000 ft² of commercial space was delivered to the market in Northwest, 75% of which was office space (or about 614,000 ft²). For comparison, the Central Eastside alignment area delivered 540,000 ft² of office in the same time period. In Northwest, the Field Office buildings and Redfox Commons both came online in the past 18 months with 350,000 ft² of office space, which has 80% vacancy. For industrial, the New York building came online with 87,000 ft² in 2015 and is now fully occupied.

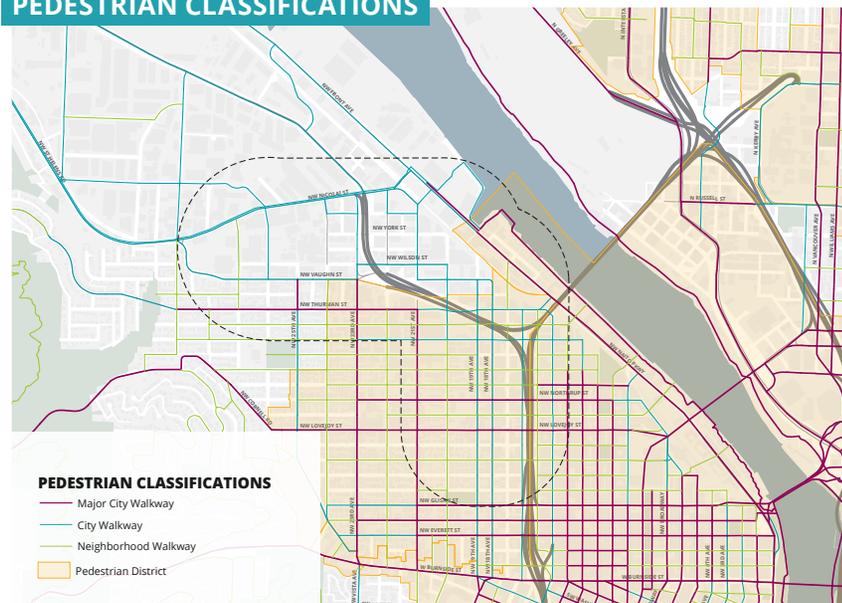
Transportation

TSP CLASSIFICATIONS

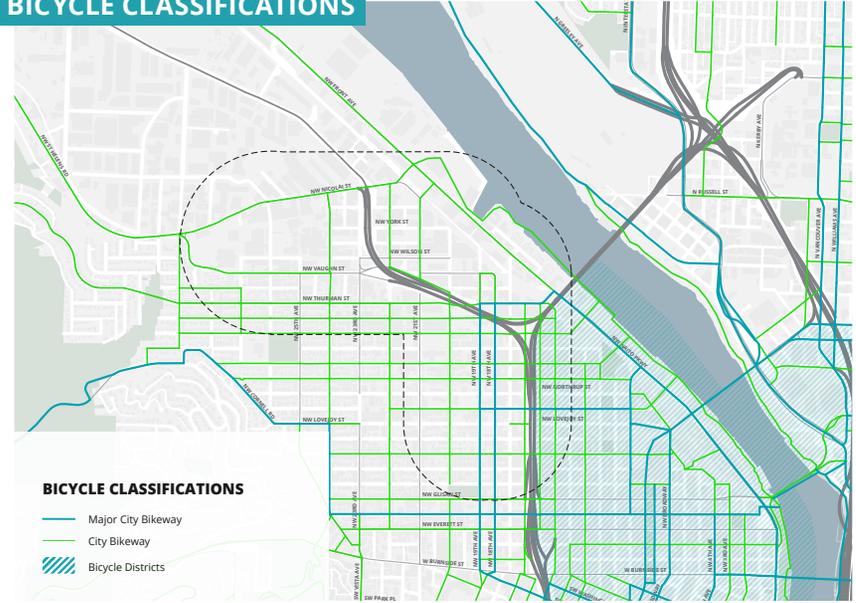
TSP classifications are a system of roadway categories determined in the Transportation System Plan. The TSP is a 20-year plan for transportation improvements in the City of Portland with the goal of providing transportation choices for residents, employees, visitors and firms doing business in Portland. The classifications determine what how a street should function and the primary purpose it fills. Classification descriptions are used to describe how streets should function for each mode of travel, not necessarily how they are functioning at present. Together the functional streets should form a network where some streets are more suited for longer distance and freight travel, while others are more suited to local trips made by those on foot, bicycle, or in slow moving vehicles.

The highest pedestrian classification is a major city walkway and are often in busy commercial districts such as NW 21st, 23rd and Thurman Street. Within the study area, NW 18th and 19th are classified as major city bikeways as they functions as the north-south backbone of bicycle travel in the district. US 30 and NW Vaughn Street are each classified as regional transitways and major transit priority streets, while several other streets carrying bus and streetcar traffic are classified as major transit priority streets. US 30 and Nicolai have the highest freight classifications while US 30 and I 405 carry the most traffic. Much of the northernmost portion of the Northwest study area falls within a freight district.

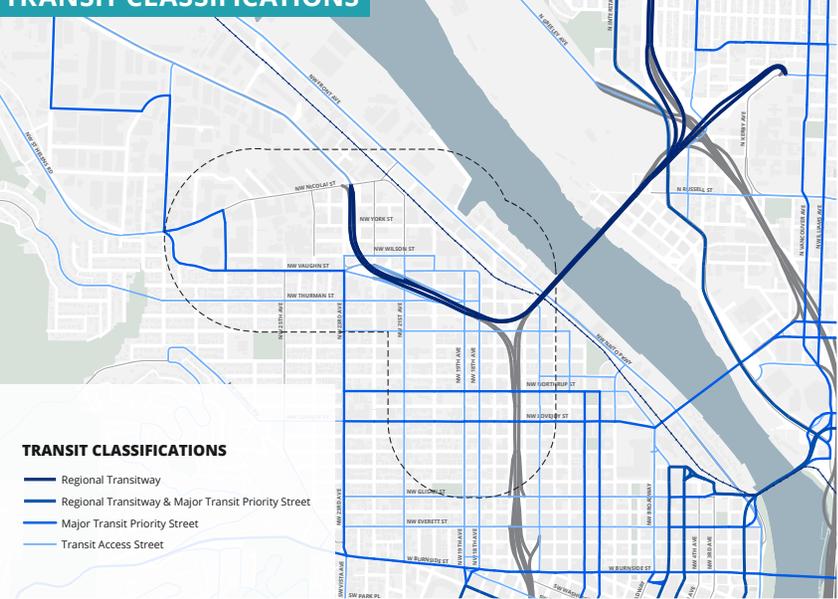
PEDESTRIAN CLASSIFICATIONS



BICYCLE CLASSIFICATIONS



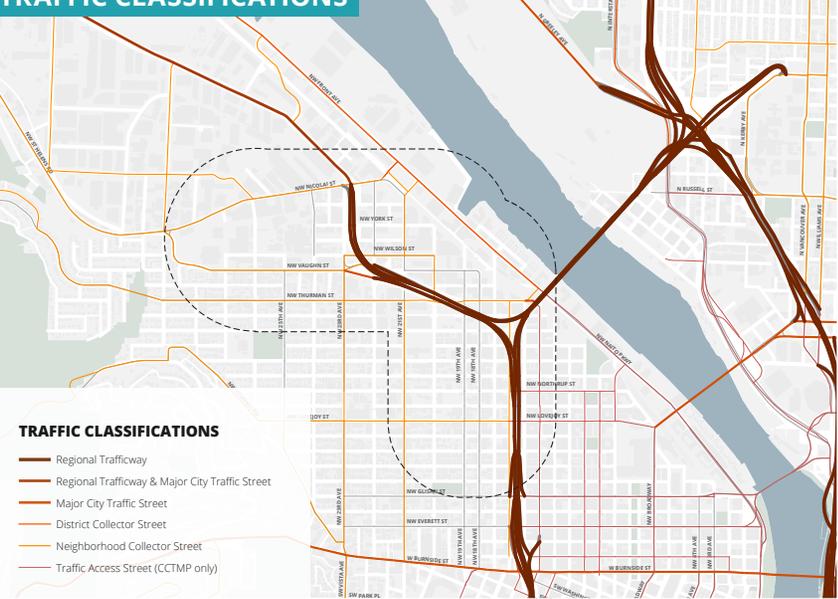
TRANSIT CLASSIFICATIONS



FREIGHT CLASSIFICATIONS



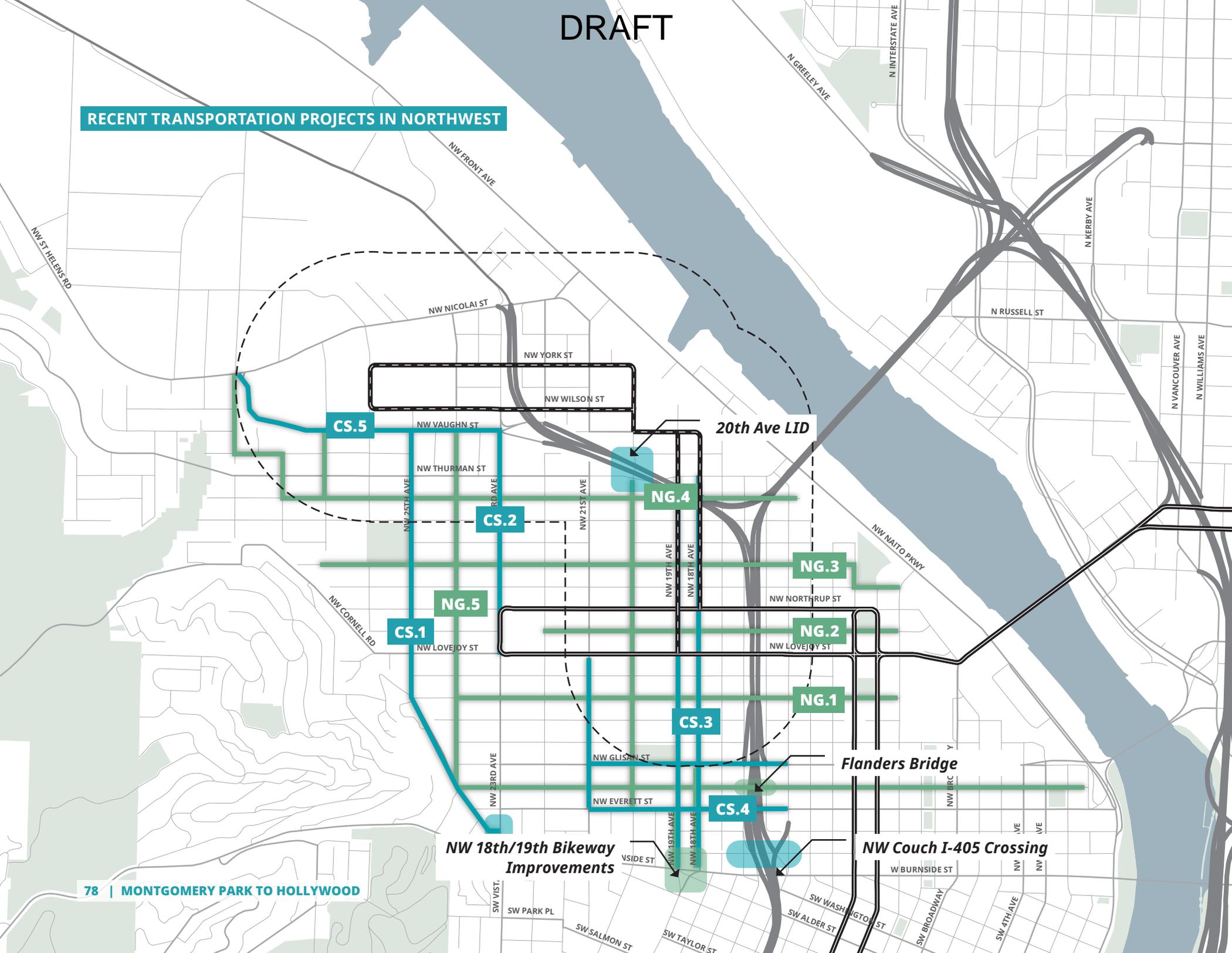
TRAFFIC CLASSIFICATIONS



EMERGENCY RESPONSE CLASSIFICATIONS



RECENT TRANSPORTATION PROJECTS IN NORTHWEST



RECENT TRANSPORTATION PROJECTS IN NORTHWEST

Northwest in Motion is recently completed five year implementation plan for projects to improve walking, biking and safe access to transit in Northwest Portland. The plan's recommended projects are divided into two project types: Neighborhood Greenways & Corridor Improvements. The following ten projects were identified as Tier 1 projects with funding secured for implementation in the next five years.

NG.1 NW Johnson St

Retrofit existing neighborhood greenway to meet established guidelines for traffic speed and volume.

NG.2 NW Marshall St

Retrofit existing neighborhood greenway from NW 9th to NW 16th to meet established guidelines for traffic speed and volume. Extend neighborhood greenway west to NW 20th Ave.

NG.3 NW Pettygrove / NW Overton St

Design and implement a new neighborhood greenway on NW Pettygrove St that meets established guidelines for traffic speed and volume. Add a bikeway connection to NW 9th Ave via NW 11th Ave and NW Overton St.

NG.4 NW Xavier St

Design and implement a new neighborhood greenway that meets established guidelines for traffic speed and volume, with connections north to Vaughn and Nicolai employment areas.

NG.5 NW 24th Ave

Retrofit existing neighborhood greenway to meet established guidelines for traffic speed and volume. Extend bikeway to NW Flanders St Neighborhood Greenway.

CI.1 NW 25th Ave / Westover Rd

Calm traffic along NW 25th Ave and NW Westover Rd by adding traffic slowing devices and enhanced pedestrian/bicycle crossings.

CS.2 NW 23rd Ave

Improve the safety and asset condition of the northern section of NW 23rd Ave by reconstructing the roadway, rebuilding an aging signal, improving pedestrian crossings, and enhancing transit stops.

CI.3 NW 18th / 19th Ave

Provide improved crossings, transit islands, and reduced bike/bus conflicts on NW 18th/19th to serve the Line 24 Extension.

CI.4 NW Everett / Glisan St

Improve safety along the NW Everett/Glisan couplet by adding crossing improvements and reducing traffic speeds. Improve bus stop accessibility and reduce transit delay on the Line 77 from NW District to the Pearl District and Old Town / Chinatown.

CI.5 NW Vaughn St

Improve safety along NW Vaughn St and NW Wardway by adding improved crossings, bikeway enhancements, and transit priority treatments. CI.1 NW 25th Ave / Westover Rd Calm traffic along NW 25th Ave and NW Westover Rd by adding traffic slowing devices and enhanced pedestrian/bicycle crossings.

ADDITIONAL RECENTLY COMPLETED OR FUNDED PROJECTS IN NORTHWEST

In addition to the projects identified in Northwest in Motion, there have been multiple major investments in Northwest Portland in recent years:

NW Flanders Bikeway:

A low-stress bikeway connection between Northwest Portland and Naito Parkway.

Flanders Bridge over I-405:

A new bicycle, pedestrian and emergency vehicle bridge across I-405 to improve connectivity and improve connectivity between Northwest and the Pearl District.

20th Ave Extension LID:

An extension of NW 20th Ave beneath the HWY 30 onramps to provide between connectivity between the Conway area and the industrial area to the north. Complementary to this project are signal and circulation improvements at the busy intersection of NW Vaughn and NW 23rd Ave.

NW Couch / I-405 Crossing:

Intersection reconfiguration and crossing improvements to provide a better pedestrian and biking connection across I-405.

NW 18th / NW 19th Bikeway

Improvements: Extension of existing buffered bike lanes and a protected intersection at W Burnside to improve safety of people biking between Northwest and Goose Hollow.

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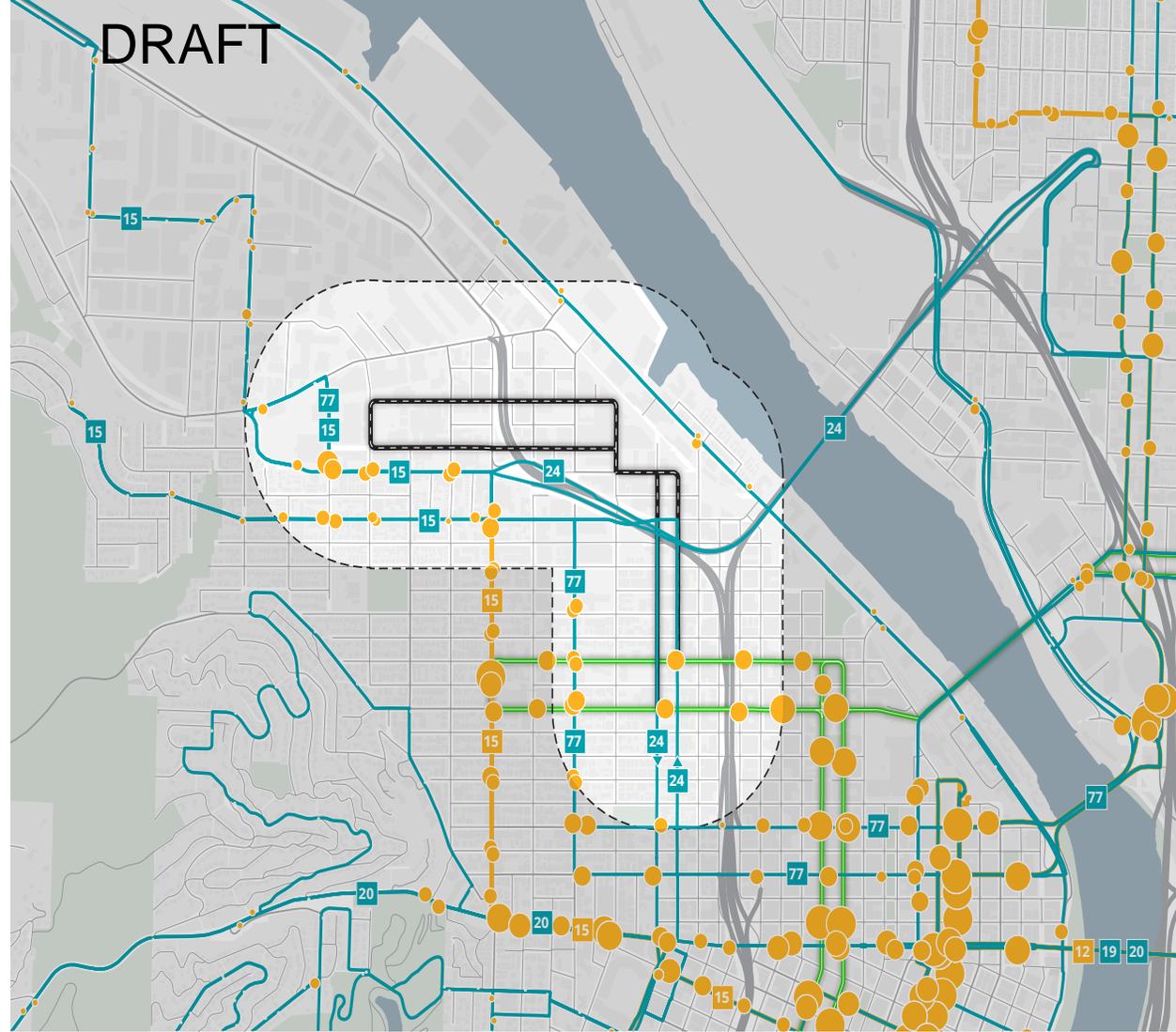
TRANSIT ACTIVITY

Within the Northwest study area, the 24 and 77 bus lines provide north-south connectivity, while the 15 runs north-south at the south end of the are and east to west in the northern study area.

Line 24 provides service between Gateway Transit Center, Legacy Emanuel Hospital and Providence Park and operates on 18th/19th in study area.

Line 77 connects Montgomery Park, NW Portland, Portland City Center, the Rose Quarter, Hollywood, outer NE Portland, Fairview and Troutdale. Within the study area, Line 77 operates on Vaughn, Thurman, 21st, and Everett/ Glisan.

Line 15 connects Gateway, SE Portland, Portland City Center, and Nob Hill. The route operates on NW 23rd and alternates connections to Nob Hill to NW Gordon via Thurman and north to Montgomery Park and the NW Industrial neighborhood via Vaughn and 29th.



BUSIEST TRANSIT STOPS | WESTSIDE STUDY AREA

| Transit Station | Total Daily Boardings | Transit Services |
|-------------------------------------|-----------------------|-------------------------|
| NW 27th & Vaughn at Montgomery Park | 1,128 | Line 15, Line 77 |
| NW 21st & Northrup | 569 | Portland Streetcar (NS) |
| NW 21st & Lovejoy | 483 | Portland Streetcar (NS) |
| NW 13th & Lovejoy | 455 | Portland Streetcar (NS) |
| NW 23rd & Thurman | 346 | Line 15 |

Roadway Cross Sections

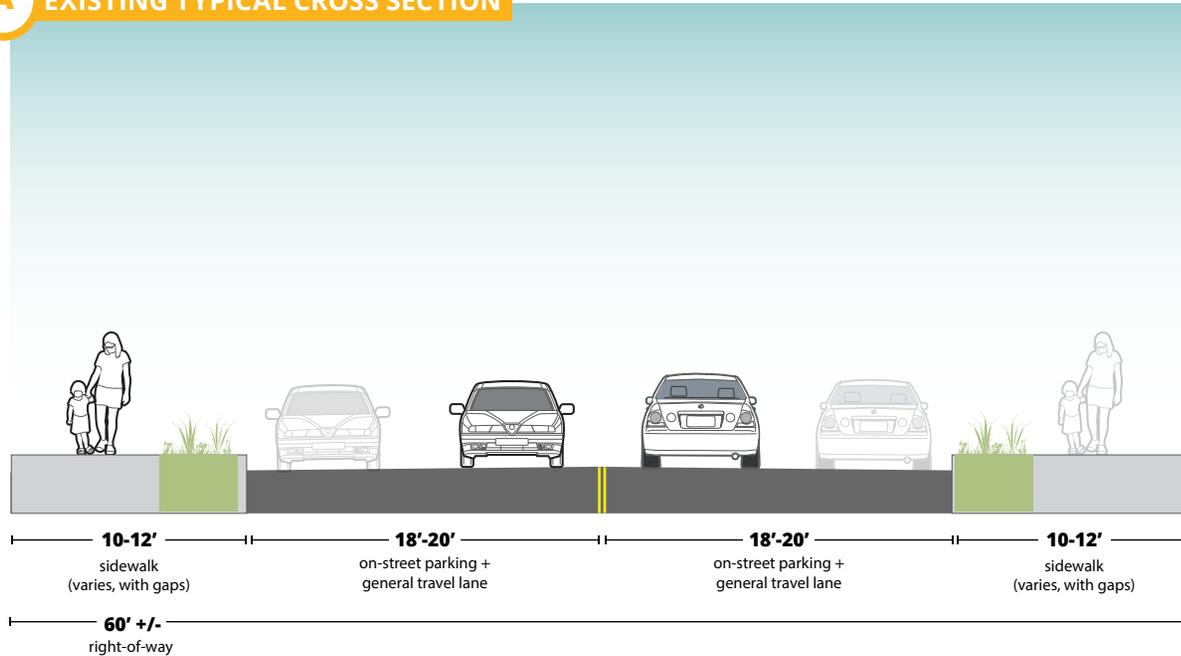
NW WILSON & YORK



In Northwest, the proposed streetcar extension alternative would operate on NW York and NW Wilson Street. The streets in the area are not uniform, with many lacking typical sidewalks, formalized parking, and bike facilities. The alignment shown would rely on the City of Portland gaining easements and right-of-way from private property owners. For example, today NW York Avenue terminates at NW 24th. One block of NW Wilson street between 24th and 25th is also privately owned.

The typical cross section has about 40 feet of roadway width, with a lane in each direction and informal parking. Part of the NW Wilson Street has a centerline, while other sections are a shared environment with no striping. NW York Ave largely operates as a shared environment without roadway striping.

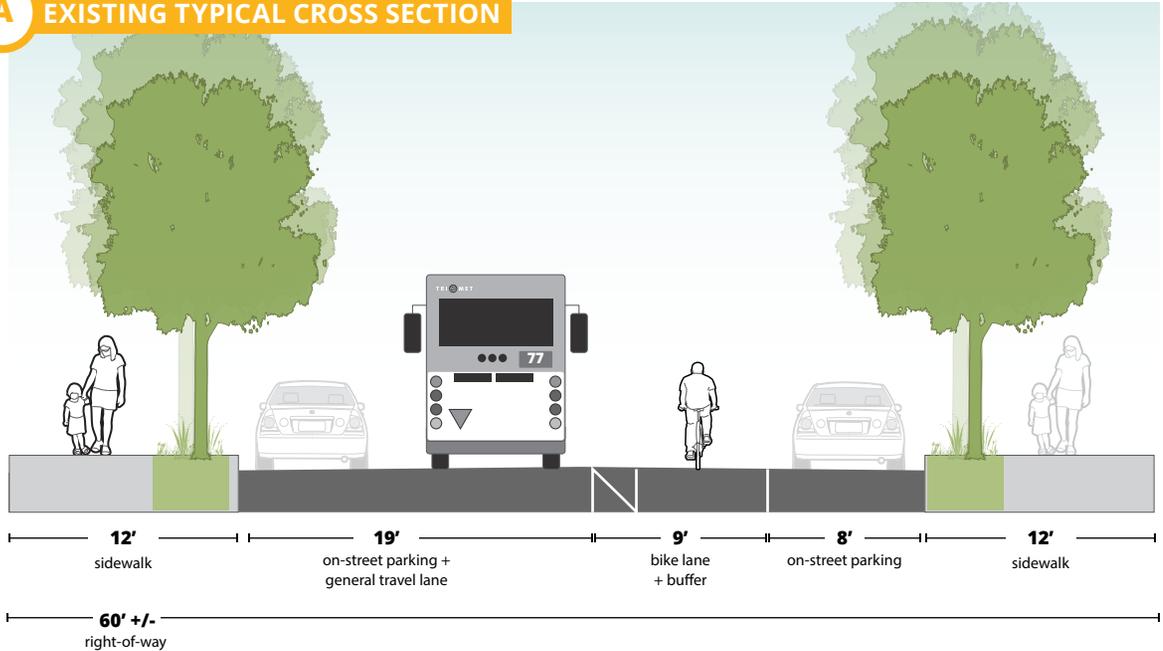
A EXISTING TYPICAL CROSS SECTION





The streetcar extension alternative operates on NW 18th and 19th to tie into the existing streetcar line at NW Northrup and NW Lovejoy. NW 18th and 19th form a couplet, a bike buffered bike lane, and a vehicle lane shared with buses. Twelve foot sidewalks are separated by a landscape strip or street furniture. The full right of way is approximately 60 feet.

A EXISTING TYPICAL CROSS SECTION



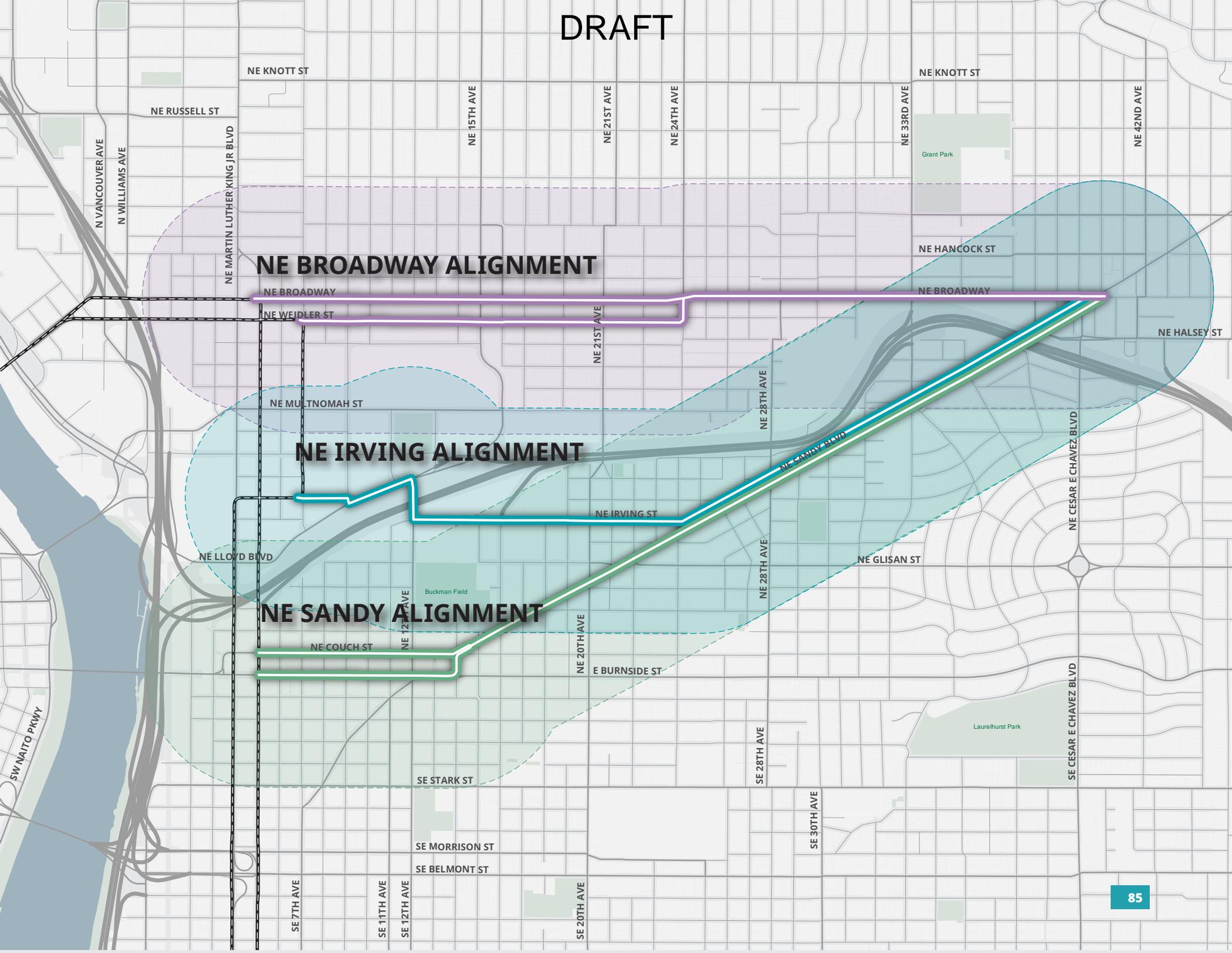
EASTSIDE | ALIGNMENT DETAIL

The Eastside study area, also referred to as the Northeast study area, consists of a quarter-mile buffer around alternative potential streetcar routes that connect the Hollywood District, a designated town center, to the existing Portland Streetcar network. Three different alignment options are being studied on the eastside:

- **NE Broadway**, which connects to the existing streetcar system in the Lloyd District and continues along NE Broadway and a portion of NE Weidler to Hollywood.
- **NE Irving**, which connects to the existing streetcar system near the Oregon Convention Center, crosses Interstate 84, continues along NE Irving to roughly NE 24th and then continues on Sandy to Hollywood.
- **NE Sandy**, which connects to the existing streetcar system on Burnside/Couch couplet near the Burnside Bridgehead, connects to NE Sandy at NE 12th and continues along NE Sandy to Hollywood.

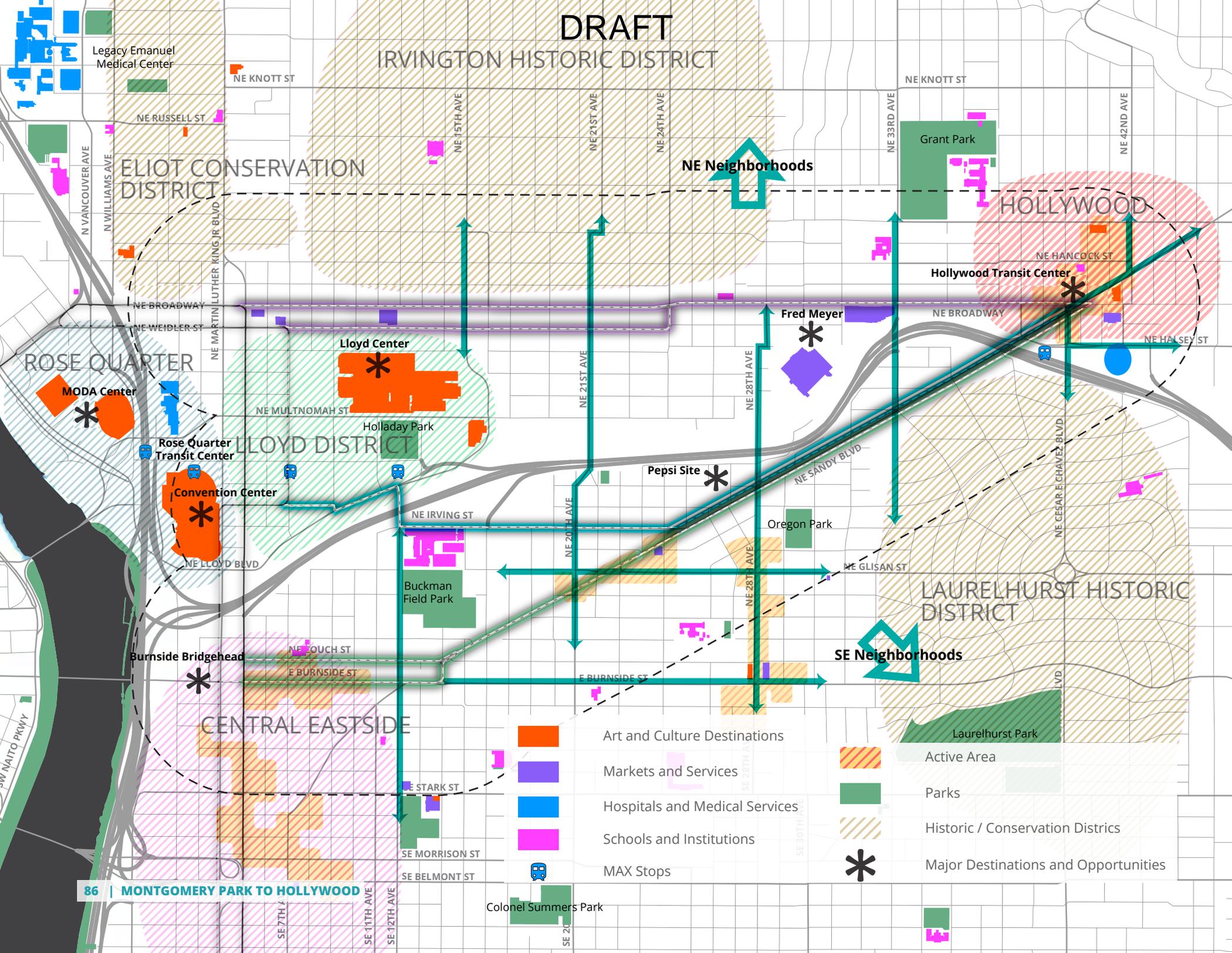
The combined study area covers many different districts, including portions of the Lloyd District (NE Broadway), Central Eastside Industrial District (NE Sandy), the Banfield Portal (NE Irving), as well as the Hollywood District and several “inner ring” neighborhoods.

The neighborhoods surrounding the alignments are typically a mix of single and multifamily homes and buildings. Broadway and Sandy are historically commercial streets and are lined with a variety of commercial uses including retail office and services. Recent development has seen the introduction of mid-rise mixed use buildings along all of the alignments. The Irving alignment is home to a broad array of uses ranging from Industrial (bakeries, dairies, manufacturing, etc.) to public facilities (Benson High School), to housing.



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IRVINGTON HISTORIC DISTRICT



NE Neighborhoods

SE Neighborhoods

- Art and Culture Destinations
- Markets and Services
- Hospitals and Medical Services
- Schools and Institutions
- MAX Stops
- Active Area
- Parks
- Historic / Conservation Districts
- Major Destinations and Opportunities



Large triangles of unused roadway space are a unique feature of the Sandy corridor, where the diagonal roadway crosses the typical street grid.



Older multifamily housing stock mixes with newer developments creating some naturally occurring affordable housing in the area .



The arcades on Burnside Street are a unique placemaking design feature not found elsewhere in the City.



The Zipper is a popular destination off Sandy that provides indoor and outdoor spaces to gather and enjoy food from the adjoining restaurant cluster.

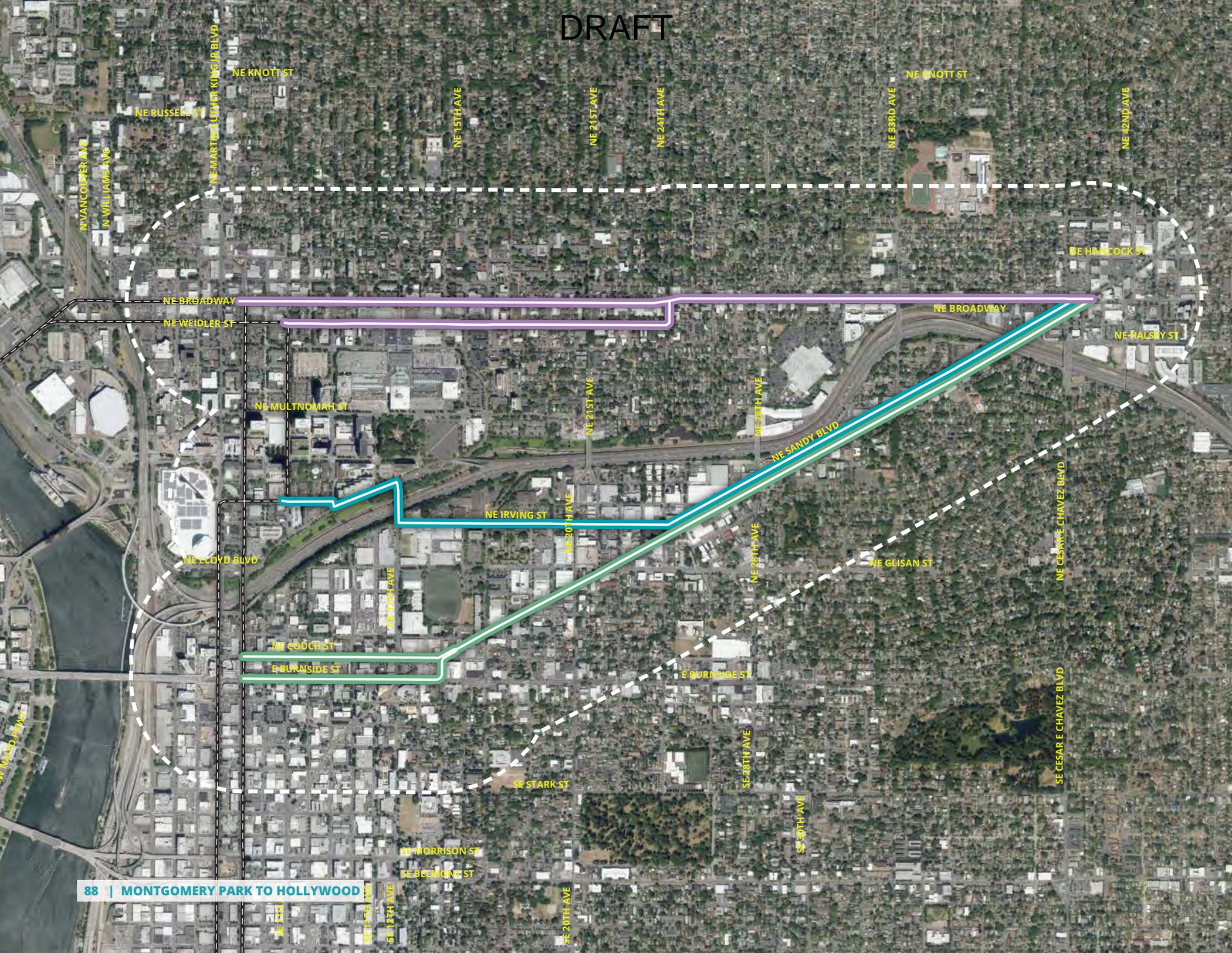


Recent, large scale residential construction in the Sandy portal and East Burnside /SE 12th blocks are adding significant numbers of residents to the area.



NE Irving serves an area where residential, municipal, and commercial uses are intermixed.

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NE VANCOUVER AVE
N WILLIAMS AVE
NE RUSSELL ST
NE MARTIN LUTHER KING JR BLVD
NE KNOTT ST
NE 15TH AVE
NE 21ST AVE
NE 24TH AVE
NE 33RD AVE
NE 42ND AVE
NE BROADWAY
NE WEIDLER ST
NE MULTNOMAH ST
NE IRVING ST
NE SANDY BLVD
NE HANCOCK ST
NE HALSEY ST
NE LLOYD BLVD
NE 20TH AVE
NE 21ST AVE
NE 28TH AVE
NE 28TH AVE
NE GLISAN ST
NE CESAR E CHAVEZ BLVD
NE COOCH ST
E BURNSIDE ST
E BURNSIDE ST
SE STARK ST
SE MORRISON ST
SE BETMONEST ST
SE 20TH AVE
SE 21ST AVE
SE 11TH AVE
SE 11TH AVE
SE 20TH AVE
SE 20TH AVE
SE 30TH AVE
SE 30TH AVE
SE CESAR E CHAVEZ BLVD

EASTSIDE URBAN CHARACTER

The Eastside study area has a diverse urban character and includes portions of eight neighborhoods, including the Lloyd District, Sullivan’s Gulch, Irvington, Kerns, Buckman, Laurelhurst, Grant Park, and Hollywood. The NE Broadway alignment begins in the northern part of the Lloyd District, a Central City subdistrict characterized by large, mid- and high-rise buildings, predominantly in commercial and major entertainment uses, although more residential development has occurred here in recent years. This area has some of the largest building floorplates, lots and block sizes in the city.

NE Broadway has a commercial main street character running from the major intersection at NE Grand to the Hollywood District, with the historic Irvington neighborhood along its north side from NE 7th to NE 27th. NE Weidler has a mix of uses along its western section, transitioning at NE 16th to a more residential character through the Sullivan’s Gulch neighborhood. The Lloyd Center shopping mall lies a block to the south, between the Broadway and Irving alignments. The NE Irving alignment begins in the Lloyd District, crossing over Sullivan’s Gulch and I-84 on the 12th Avenue bridge and proceeds east along NE Irving past historic Benson High School. Low-rise mid-century office developments with large amounts of surface parking lie along NE Irving between NE 12th and NE 19th, transitioning to a mix of older, mid-rise multi-family and commercial developments until it meets NE Sandy Blvd. at NE 25th.

The NE Sandy alignment begins along the Burnside/Couch couplet in the Central Eastside with a mix of low- to mid-rise commercial and industrial developments, meeting Sandy Blvd. at NE 14th Ave. Sandy Blvd. is one of Portland’s rare diagonal streets, breaking the typical rectilinear street grid and creating distinctive street and site patterns and triangular blocks. The length of Sandy to the Hollywood district is characterized by a mix of predominantly low-rise commercial development, interspersed with residential buildings, including some larger mid-rise apartments. A large redevelopment opportunity is located at the former Pepsi bottling plant at NE 26th Ave. The historic Laurelhurst single-family residential neighborhood lies to the south of Sandy before it crosses the freeway and enters the mixed-use Hollywood Town Center.

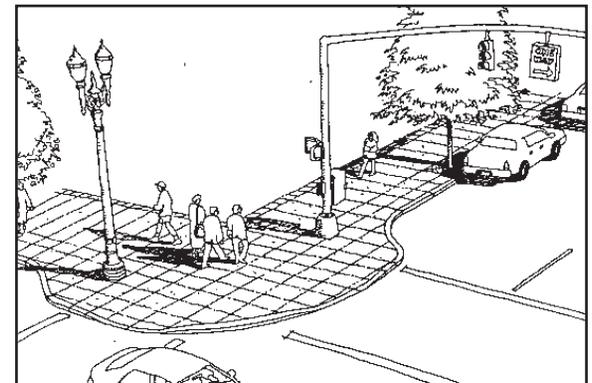
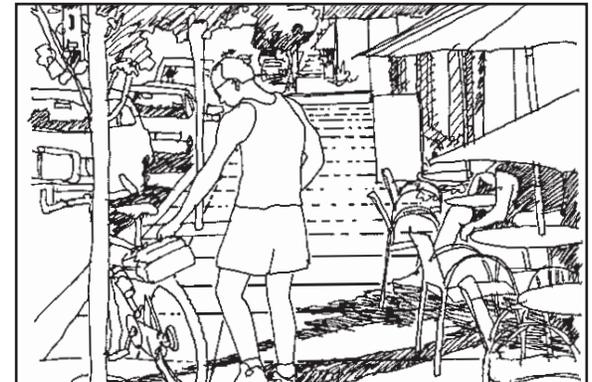
Eastside Planning Context

BROADWAY WEIDLER COORIDOR

NE Broadway is a major city street in NE Portland which runs from inner NE Portland near the Moda Center, through the Lloyd District to the Hollywood District. Between roughly Interstate 5 and NE 24th Avenue, the street is a one-way couplet with NE Weidler. A former streetcar route, the street is adjoined by a variety of land uses - from housing to commercial to mixed-use - which have evolved over time. The Broadway Weidler Corridor Plan, adopted in 1996, proposed an 'enhancement of the one-way couplet' to balance the Main Street vision with the requirements of a Major City Traffic Street. The proposed couplet is envisioned to have wider sidewalks, bike lanes, curb extensions at intersections, more traffic signals and a continuous and consistent streetcape. The City is currently engaging in an update to this plan, working with the community to refine the Main Street vision.

HISTORIC IRVINGTON DISTRICT

A portion of the Irvington Historic District lies along the north side of the Broadway alignment, between NE 7th Avenue and NE 28th Avenue (see map #). The district is listed in the National Register of Historic Places as an excellent example of a "streetcar suburb" that includes Queen Anne, Arts and Crafts, and Period Revival-style residential architecture from 1891 to 1948. Although this large district is primarily composed of single-family dwellings, the southern portion within the Eastside Study area contains a mix of single-dwelling and multi-dwelling housing and commercial development along NE Broadway. Future new development and alterations of existing development within the district are subject to the City's Historic Resource review and demolition of historic structures requires approval through a Demolition Review process.



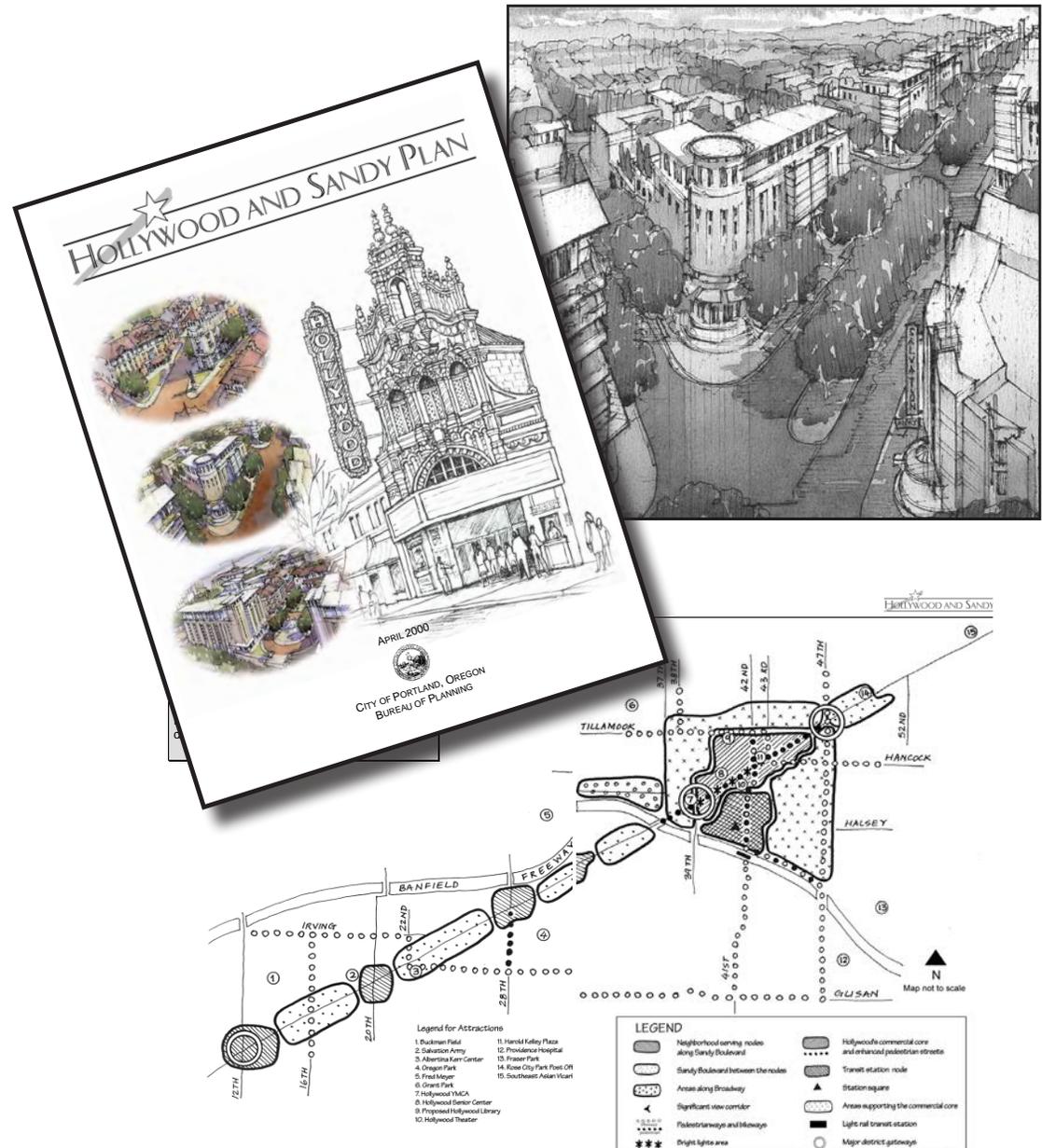
HOLLYWOOD & SANDY PLAN (2000)

The Hollywood and Sandy Plan, adopted in 2000, is an area plan focused on the Hollywood town center and Sandy Boulevard main street areas. The Hollywood District has been a center of community activity on the eastside of Portland since the early 1920s. Named after the historic Hollywood Theatre, the district is a Metro 2040 designated town center, has functioned as a commercial center for central northeast Portland, and is the location of a MAX station, a transit center, as well as the location for access to Interstate 84. Sandy Boulevard, a major city street, runs diagonally through the area.

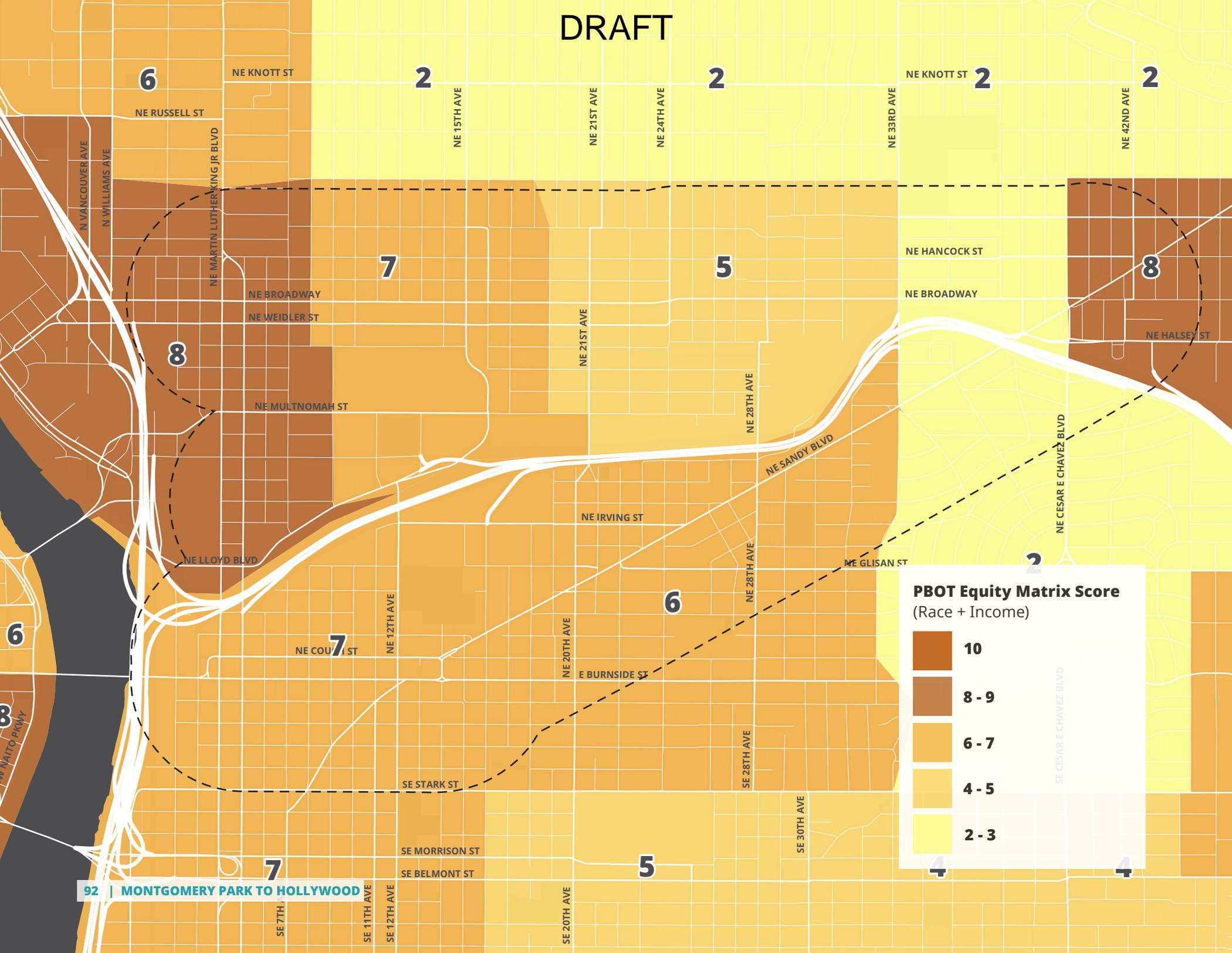
Sandy Boulevard is a major city street in NE and SE Portland which runs diagonally from roughly NE 12th Avenue to roughly NE 99th Avenue, before continuing east along the Columbia Corridor to Troutdale. A former streetcar route, state highway and US 30, the street is adjoined by a variety of land uses - from housing to commercial to mixed-use - which have evolved over time.

The Hollywood and Sandy Plan, adopted in 2000, established a new direction for more urban mixed-use development in the area along Sandy from NE 12th to NE 54th Avenues, which is partially implemented through zoning by the Hollywood Plan District (PCC 33.536), and Sandy Boulevard Plan District (PCC 33.575).

The Hollywood and Sandy Plan area also encompasses an area along NE Broadway from the Hollywood town center to NE 33rd Avenue. On the south side, between Broadway and the Banfield Expressway (I-84), the area is planned to transition from employment focuses uses to mixed use development.



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People & Place

STUDY AREA DEMOGRAPHICS & EQUITY INDEX

The Portland Bureau of Transportation (PBOT) created an Equity Matrix to better refine our approaches and understand the impact of our work on marginalized groups. See page 15 for full explanation. The Equity Matrix identifies areas with higher than the citywide average concentration of people of color; people with limited English proficiency; and people below the median household income. This strategy centers race and has intersectionality with people with disabilities.

The areas with the highest concentrations of marginalized populations are in the Rose Quarter area adjacent to I-5 and north of I-84. This census tract has a racial equity score of 3, reflecting concentrations that match citywide averages. The tract has an income equity score of 5, meaning that it is home to high concentrations of the lowest-income Portlanders. The median income for the area is \$41,200. Almost 2% of households have limited English proficiency.

The census tract at the east end of the study area in the Hollywood district has a slightly lower composite equity score. The area has the same racial equity score of 3, but a slightly lower income equity score (4). This reflects slightly lower concentrations of low-income Portlanders, but still ranks above the citywide average. This census tract has a median income of \$49,000 and about 2% of households have limited English proficiency.

The tables on this page show characteristics of the population in the Eastside alignment study areas compared to Portland overall. In general, the population in the Eastside study areas includes fewer families in poverty, and a higher per-capita income than the city overall. There is a slightly lower percentage of people of color than citywide, as well as somewhat fewer children than the city overall. Among the study areas, the NE Sandy area has the lowest percentage of seniors over age 64, while NE Irving and NE Broadway have a considerably higher percentage of seniors than Sandy, and a slightly higher percentage than the citywide average.

| Population Characteristics | NE Sandy | NE Irving | NE Broadway | Portland |
|----------------------------|----------|-----------|-------------|----------|
| Total Population | 8,456 | 8,230 | 10,863 | 630,331 |
| Per Capita Income | \$42,588 | \$43,946 | \$46,175 | \$37,382 |
| Total Families | 1,412 | 1,425 | 2,074 | 135,543 |
| Share Families in Poverty | 5% | 4% | 5% | 10% |
| Share People of Color | 21% | 21% | 22% | 29% |

| Race/Ethnicity | NE Sandy | NE Irving | NE Broadway | Portland |
|---------------------|----------|-----------|-------------|----------|
| Black | 5% | 6% | 7% | 7% |
| Native American | 4% | 3% | 2% | 2% |
| Asian | 5% | 6% | 6% | 10% |
| Pacific Islander | 0% | 0% | 0% | 1% |
| Another race | 2% | 2% | 2% | 3% |
| Hispanic | 8% | 8% | 7% | 10% |
| White, not Hispanic | 79% | 79% | 78% | 71% |

| Age Characteristics | NE Sandy | NE Irving | NE Broadway | Portland |
|---------------------|----------|-----------|-------------|----------|
| Median Age | 35.1 | 36.4 | 38.4 | 36.8 |
| Share under 18 | 12% | 11% | 12% | 18% |
| Share 18 to 64 | 78% | 75% | 72% | 70% |
| Share over 64 | 9% | 14% | 16% | 12% |

People & Place

RESIDENTIAL GENTRIFICATION & DISPLACEMENT RISK

The tables on this page show characteristics of households, educational attainment, and the types of dwelling units in the Eastside alignment study areas compared to Portland overall.

In general, households in the Eastside study area are somewhat smaller than the citywide average, and are composed of a greater percentage of renter households. Median household income is somewhat below the citywide average, and among the three areas, income is highest in the Broadway area. The educational attainment of the population is considerably higher than the city overall, with between 64% to 66% of the population over 18 holding a 4-year degree or higher. The population in the Eastside study areas has a greater percentage of people that live in multi-dwelling units than citywide, and about 30% that live in detached units.

The map on the adjacent page shows displacement risk for the eastside study areas. See page 17 for more information on displacement typologies.

| Household Characteristics | NE Sandy | NE Irving | NE Broadway | Portland |
|---------------------------|----------|-----------|-------------|----------|
| Total Households | 4,262 | 4,145 | 5,458 | 260,949 |
| Owner-Occupied | 29% | 31% | 33% | 53% |
| Renter-Occupied | 71% | 69% | 67% | 47% |
| Average Household Size | 1.93 | 1.95 | 1.99 | 2.35 |
| Median Household Income | \$55,809 | \$57,668 | \$60,402 | \$63,032 |

| Highest Educational Attainment | NE Sandy | NE Irving | NE Broadway | Portland |
|--------------------------------|----------|-----------|-------------|----------|
| Total Adults 25 or Older | 6,812 | 6,693 | 9,028 | 462,362 |
| Less than HS Diploma | 2% | 2% | 1% | 8% |
| High School Diploma | 10% | 8% | 10% | 16% |
| Some College | 24% | 24% | 22% | 28% |
| Four-Year Degree | 43% | 43% | 38% | 29% |
| Advanced Degree | 21% | 23% | 28% | 19% |

| Housing Unit Characteristics | NE Sandy | NE Irving | NE Broadway | Portland |
|------------------------------|----------|-----------|-------------|----------|
| Total Housing Units | 4,552 | 4,369 | 5,715 | 277,499 |
| Detached | 31% | 30% | 27% | 56% |
| Small Multi-dwelling | 18% | 16% | 17% | 14% |
| Med. Multi-dwelling | 19% | 18% | 25% | 11% |
| Large Multi-dwelling | 31% | 35% | 31% | 18% |
| Other Type | 1% | 1% | 0% | 2% |

People & Place: Employment Patterns & Travel Behavior

WORKERS PER MI²



321 OR MORE



241 TO 320



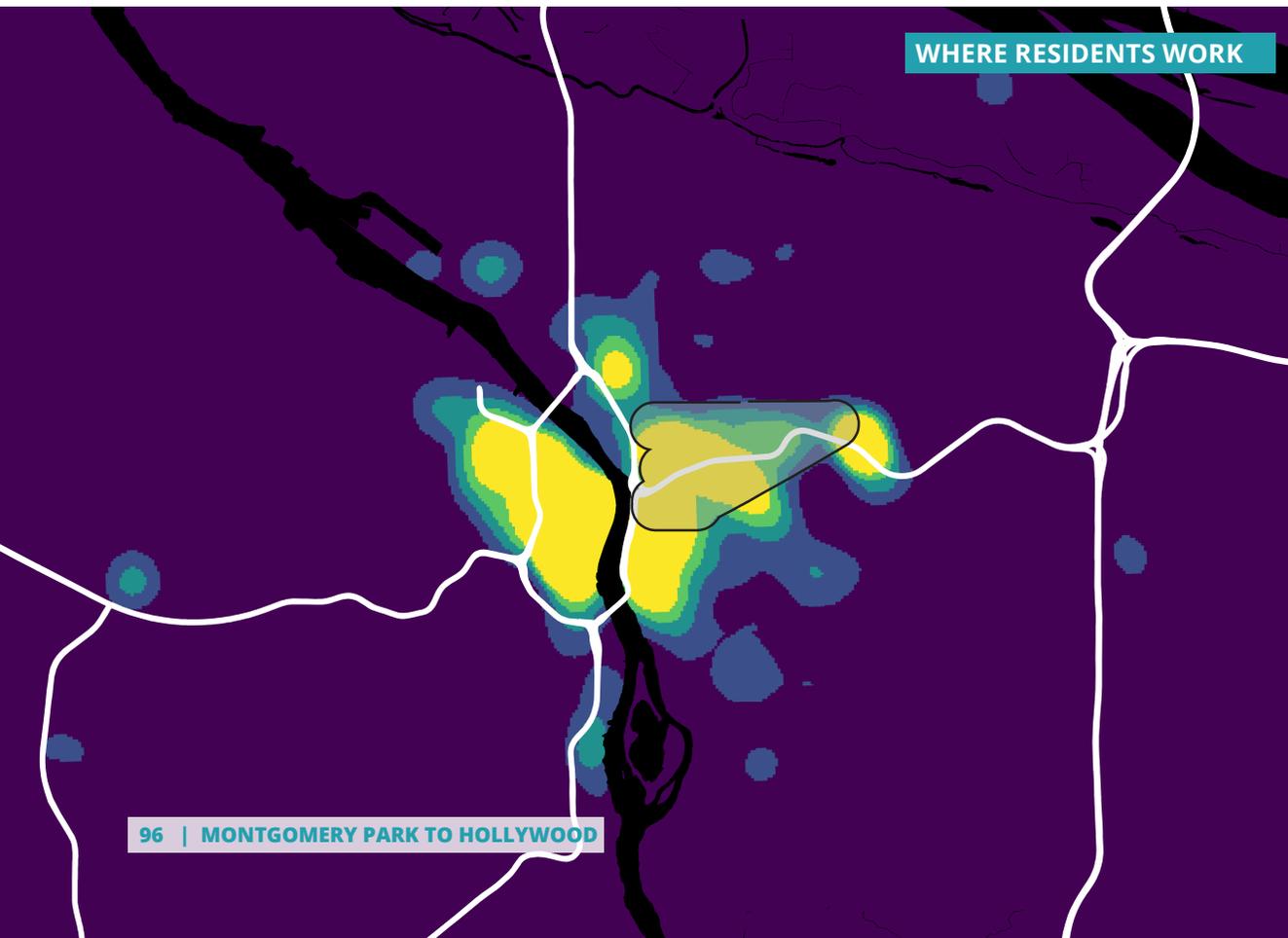
161 TO 240



81 TO 160



80 OR LESS



JOBS LOCATION

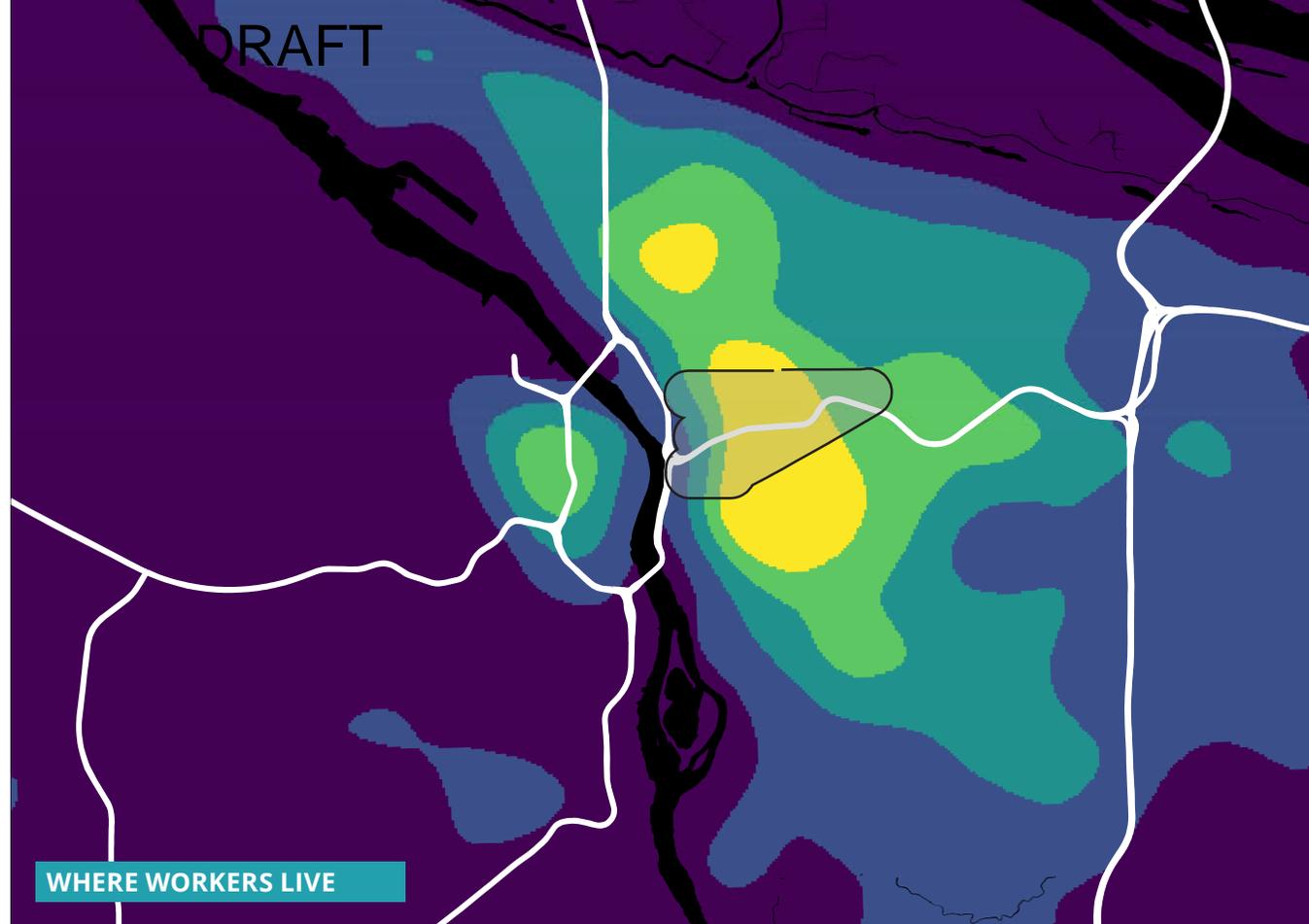
The map here shows the concentration of workplaces of people who live in the Eastside study area. Residents living in the study area work largely in the inner eastside of Portland, downtown in the Central City, and near Emanuel Hospital in the North Vancouver/Williams corridor.

ABOUT THIS DATA SOURCE: LODES

The **Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES)** is a program run by the U.S. Census Bureau. The Census Bureau coordinates with state employment agencies to gather administrative data from state Unemployment Insurance and Quarterly Census of Employment and Wages (QCEW). This administrative data is then linked to Census surveys using encoded social security numbers (PIKs). From this dataset, the Census Bureau statisticians use a method called “fuzzing” to inject noise into the dataset to make it hard to identify individual employers, resulting in a **partially synthetic dataset** that policy makers can use to understand the dynamics between people and their workplace.

The LODES data contains a matrix showing showing the number of workers that commute between Census blocks. Users can input a study area to retrieve the characteristics about the people who work there as well as those who live in the study area. Users can track where residents go to work and where workers in the area commute from.

Knowing this information is useful for considering the demand to get from one point to another. The dataset also reveals the dynamics relating to wage, race, sex, age, industry and educational attainment. More information here: <https://lehd.ces.census.gov/data/lodes/LODES7/LODESTechDoc7.4.pdf>



HOUSING LOCATION

People who work in the Eastside study area live across a more dispersed area of Portland. The highest concentration of Eastside study area workers live in inner northeast and southeast neighborhoods. There are also large concentrations of workers living east of I-5 in the Boise, Humbolt, King, Sabin and Woodlawn neighborhoods. Some workers commute from downtown Portland across the river.

RESIDENTS PER MI²



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PEOPLE TAKING TRANSIT

Transit mode share is highest in the study area south of I-84 and west of NE 20th. West of Cesar Chavez Blvd (39th Ave), study area residents have higher transit mode share than the city as a whole (12%).

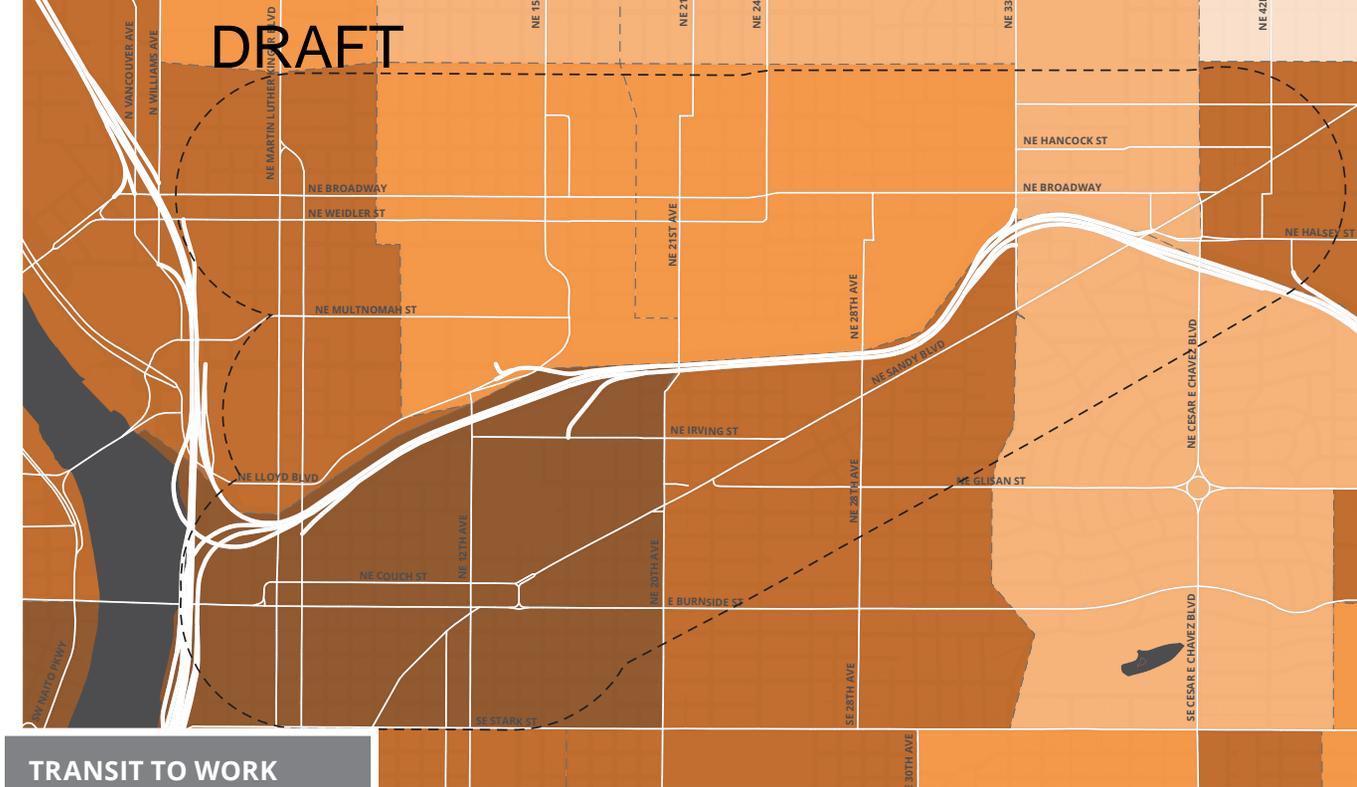
TRANSIT TO WORK - MODE SHARE



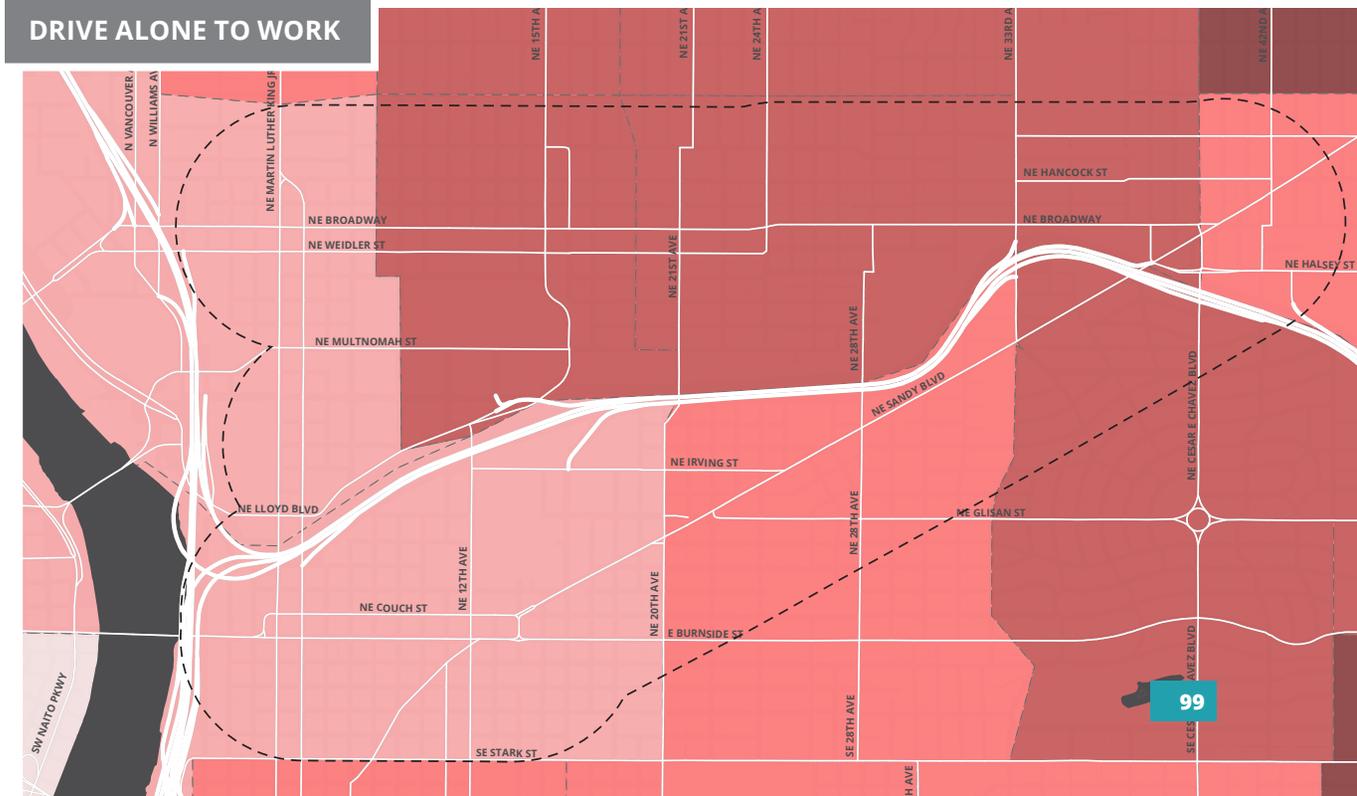
PEOPLE DRIVING ALONE

People living in the NE study area have a lower drive alone mode share. Among the three study areas, the NE Sandy and NE Irving study areas have a lower percentage of SOV commuters than NE Broadway, but all three are below the citywide average. Similiary, households in the NE study areas have fewer households that own multiple vehicles.

DRIVE ALONE TO WORK - MODE SHARE



TRANSIT TO WORK



DRIVE ALONE TO WORK

Land Use: Comprehensive Plan

COMP PLAN DESIGNATIONS

The three Eastside study area alignments feature different Comprehensive Plan designations.

NE Broadway: This alignment passes through the Central City west of NE 16th where Central Commercial designations are applied. East of 16th, the Comprehensive Plan designation adjacent to the alignment is Mixed Use Urban Center.

NE Sandy: The Comprehensive Plan designations adjacent to this alignment are primarily Mixed Use Urban Center. Parts of the area surrounding E Burnside and NE Couch are designated Central Employment. The area north of NE Couch Street is in the Industrial Sanctuary.

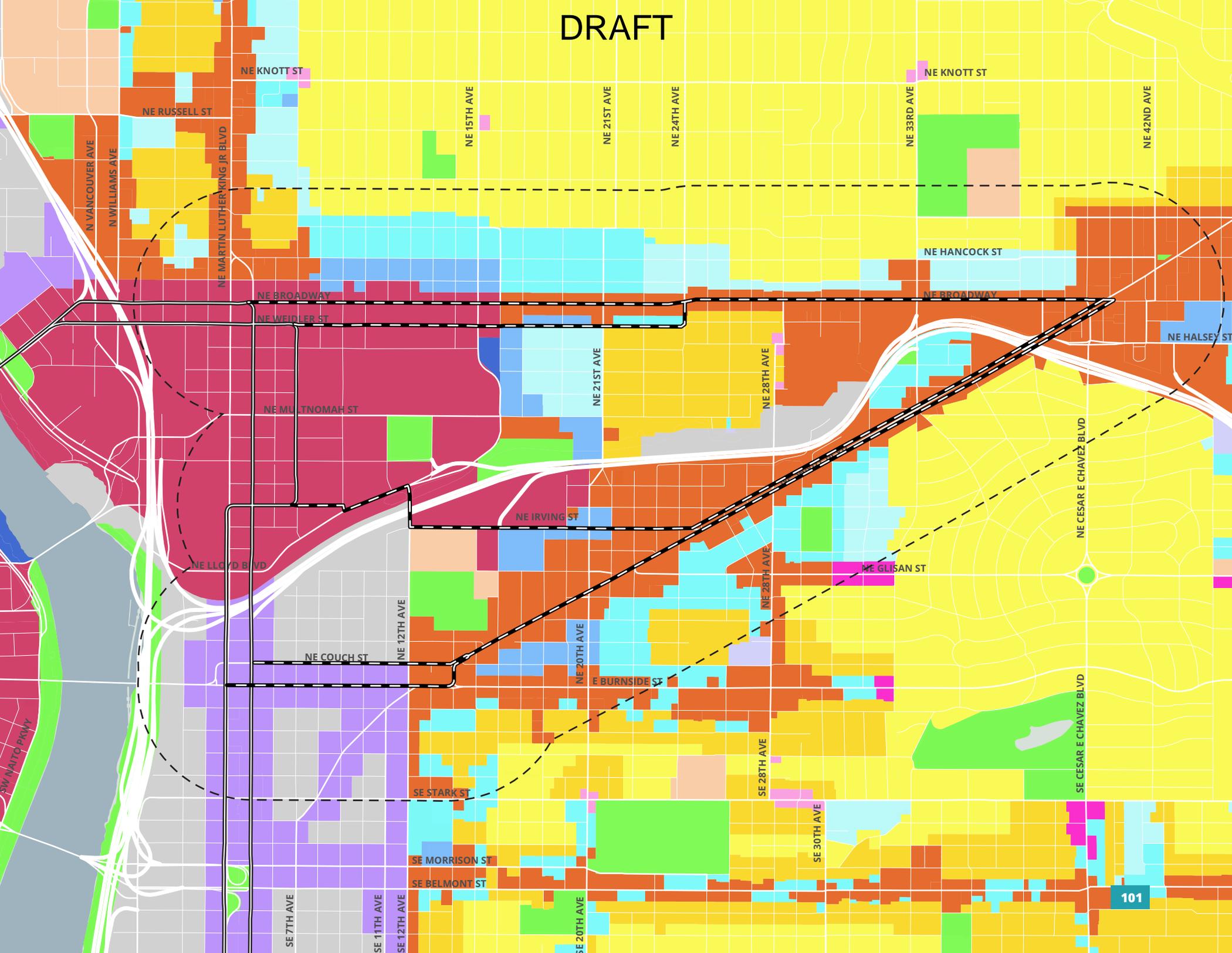
NE Irving: North of I-84, this alignment is in the Central City and land is designated Central Commercial. South of I-84, the alignment interfaces with Central Commercial, Institutional Campus, High-density Multi-Dwelling and Mixed Use Urban Center designations.

COMPREHENSIVE PLAN DESIGNATIONS

- Single-Dwelling 10,000
- Single-Dwelling 7,000
- Single-Dwelling 5,000
- Single-Dwelling 2,500
- Multi-Dwelling 2,000
- Multi-Dwelling 1,000
- High Density Multi-Dwelling
- Central Residential
- Institutional Campus
- Mixed Use – Dispersed
- Mixed Use – Neighborhood
- Mixed Use – Civic Corridor
- Mixed Use – Urban Center
- Central Commercial
- Central Employment
- Mixed Employment
- Industrial Sanctuary
- Open Space

| GENERALIZED COMPREHENSIVE PLAN DESIGNATIONS | NE SANDY | NE IRVING | NE BROADWAY | PORTLAND |
|---|------------|------------|-------------|---------------|
| AREA (ACRES) | 820 | 756 | 765 | 89,042 |
| SINGLE-DWELLING | 12% | 11% | 20% | 35% |
| MULTI-DWELLING | 10% | 9% | 15% | 6% |
| MIXED USE/COMMERCIAL | 33% | 44% | 33% | 7% |
| INSTITUTIONAL | 1% | 2% | 1% | 2% |
| EMPLOYMENT | 5% | 0% | 0% | 2% |
| INDUSTRIAL | 8% | 5% | 1% | 16% |
| OPEN SPACE | 2% | 3% | 1% | 17% |
| RIGHT-OF-WAY | 28% | 26% | 30% | 15% |

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Land Use: Zoning

On the Eastside, the three study areas feature different zoning map designations along the length of the alignments being studied.

NE Broadway: This alignment passes through the Central City west of NE 16th where Central Commercial (CX) designations are applied. East of NE 16th, the Zoning map designation adjacent to the alignment is primarily CM2, a medium-scale commercial/mixed use zone.

At NE 33rd, a lot is zoned CE (commercial employment), and the area along the south side of Broadway east of NE 33rd to Hollywood is zoned CM3, a larger scale commercial/mixed use zone. In some portions of the alignment, the depth of this zoning is very shallow. Surrounding these zones, the land is zoned single dwelling and low density multi-dwelling residential.

CITY OF PORTLAND | ZONING

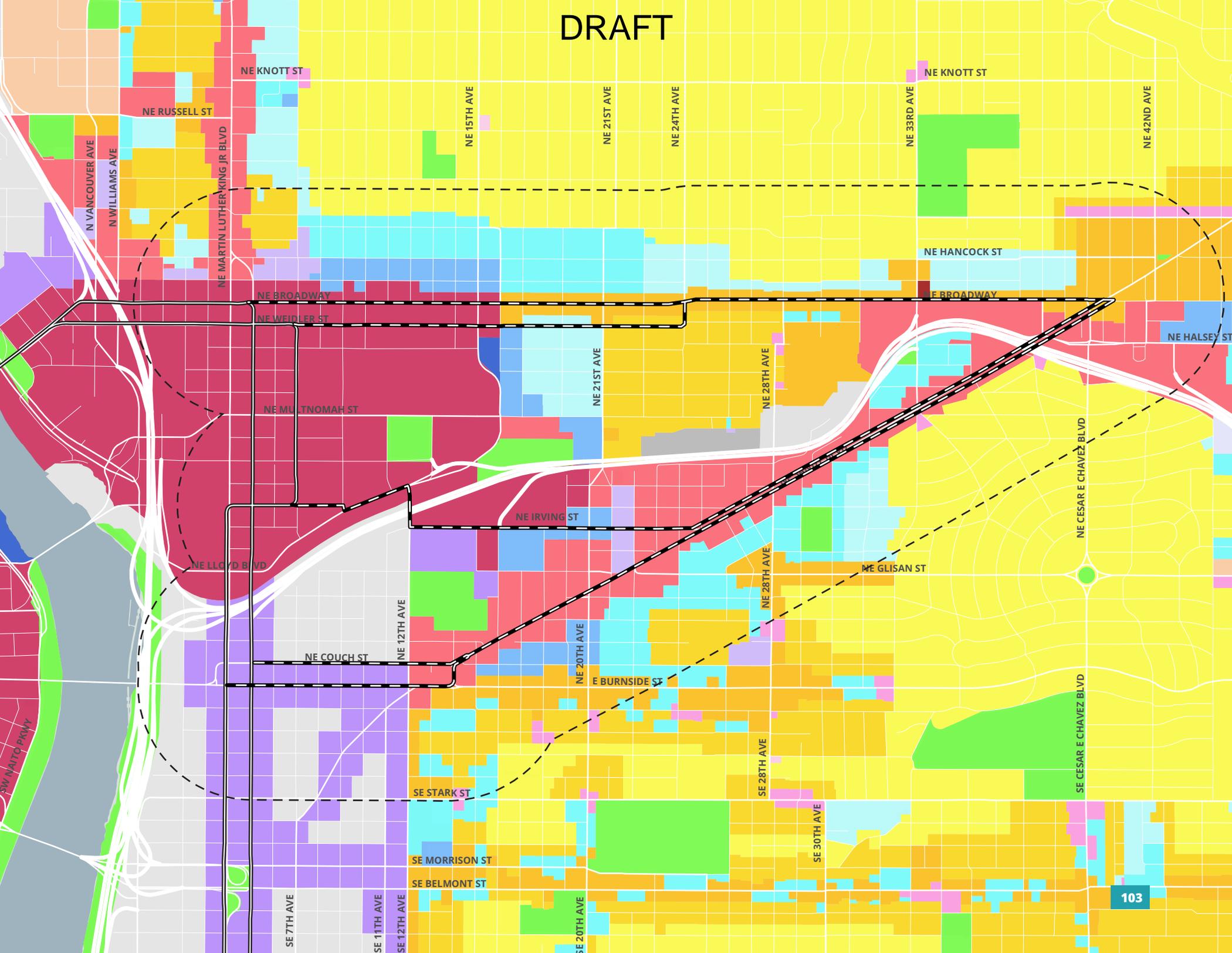
| | |
|---|--|
|  Residential 10,000 (R10) |  Commercial Residential (CR) |
|  Residential 7,000 (R7) |  Commercial Mixed Use 1 (CM1) |
|  Residential 5,000 (R5) |  Commercial Mixed Use 2 (CM2) |
|  Residential 2,500 (R2.5) |  Commercial Mixed Use 3 (CM3) |
|  Residential 2,000 (R2) |  Commercial Employment (CE) |
|  Residential 1,000 (R1) |  Central Commercial (CX) |
|  High Density Residential (RH) |  General Employment 1 (EG1) |
|  Central Residential (RX) |  General Employment 2 (EG2) |
|  General Industrial 1 (IG1) |  Central Employment (EX) |
|  General Industrial 2 (IG2) |  Campus Institutional 1 (CI1) |
|  Heavy Industrial (IH) |  Campus Institutional 2 (CI2) |
| |  Open Space (OS) |

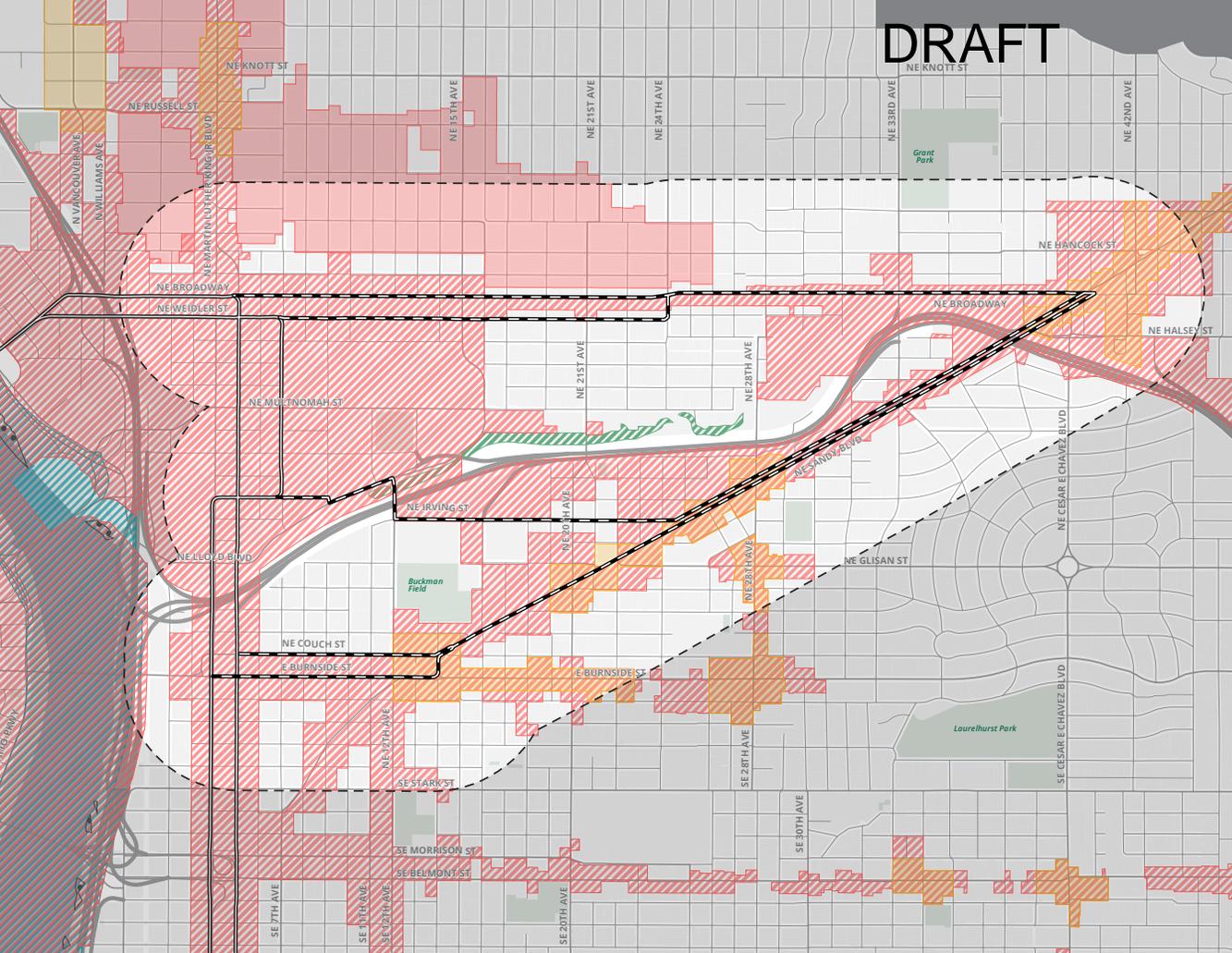
NE Sandy: The Zoning map designations adjacent to the NE Burnside and NE Couch portion of this alignment are primarily Central employment (EX) and industrial (IG1). Along NE Sandy, the adjacent land is primarily zoned CM3, a large scale commercial/mixed use zone. The depth of zoning varies, and some lots are irregularly shaped due to the diagonal street. Nearby lots have a variety of zones, including CM3, RH and R1 (multi-dwelling residential), and R5 (single dwelling) in the Laurelhurst area.

NE Irving: North of I-84, this alignment is in the Central City and land is zoned CX (Central Commercial). South of I-84 along Irving, the alignment interfaces with CX, CI (Institutional Campus), IG (industrial), RH (high-density multi-dwelling) and CM3 (commercial mixed/ use) zoning designations. East of NE 26th, the alignment follows NE Sandy, and is generally adjoined by R1 (multi-dwelling residential), and R5 (single dwelling) in the Laurelhurst area.

| ZONING DESIGNATIONS | NE SANDY | NE IRVING | NE BROADWAY | PORTLAND |
|----------------------|----------|-----------|-------------|----------|
| AREA (ACRES) | 820 | 756 | 765 | 89,042 |
| SINGLE-DWELLING | 12% | 11% | 21% | 35% |
| MULTI-DWELLING | 10% | 9% | 15% | 6% |
| MIXED USE/COMMERCIAL | 33% | 43% | 32% | 7% |
| INSTITUTIONAL | 0% | 0% | 0% | 2% |
| EMPLOYMENT | 7% | 2% | 1% | 2% |
| INDUSTRIAL | 8% | 5% | 1% | 16% |
| OPEN SPACE | 2% | 3% | 1% | 17% |
| RIGHT-OF-WAY | 28% | 26% | 30% | 15% |

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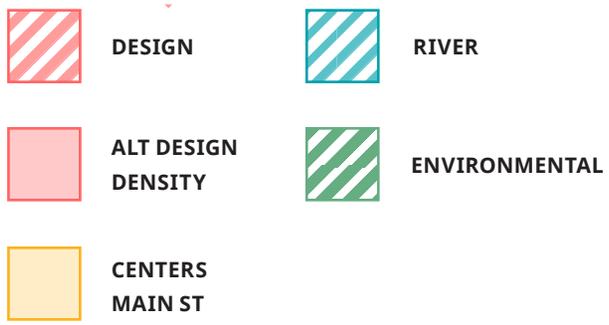


OVERLAY ZONES

Overlay zones are zoning tools that augment the regulations of the “base zones” and are applied to areas in various parts of the city that have either a similar characteristic or similar desired zoning effect. In the Eastside study area, the following overlay zones are applied.

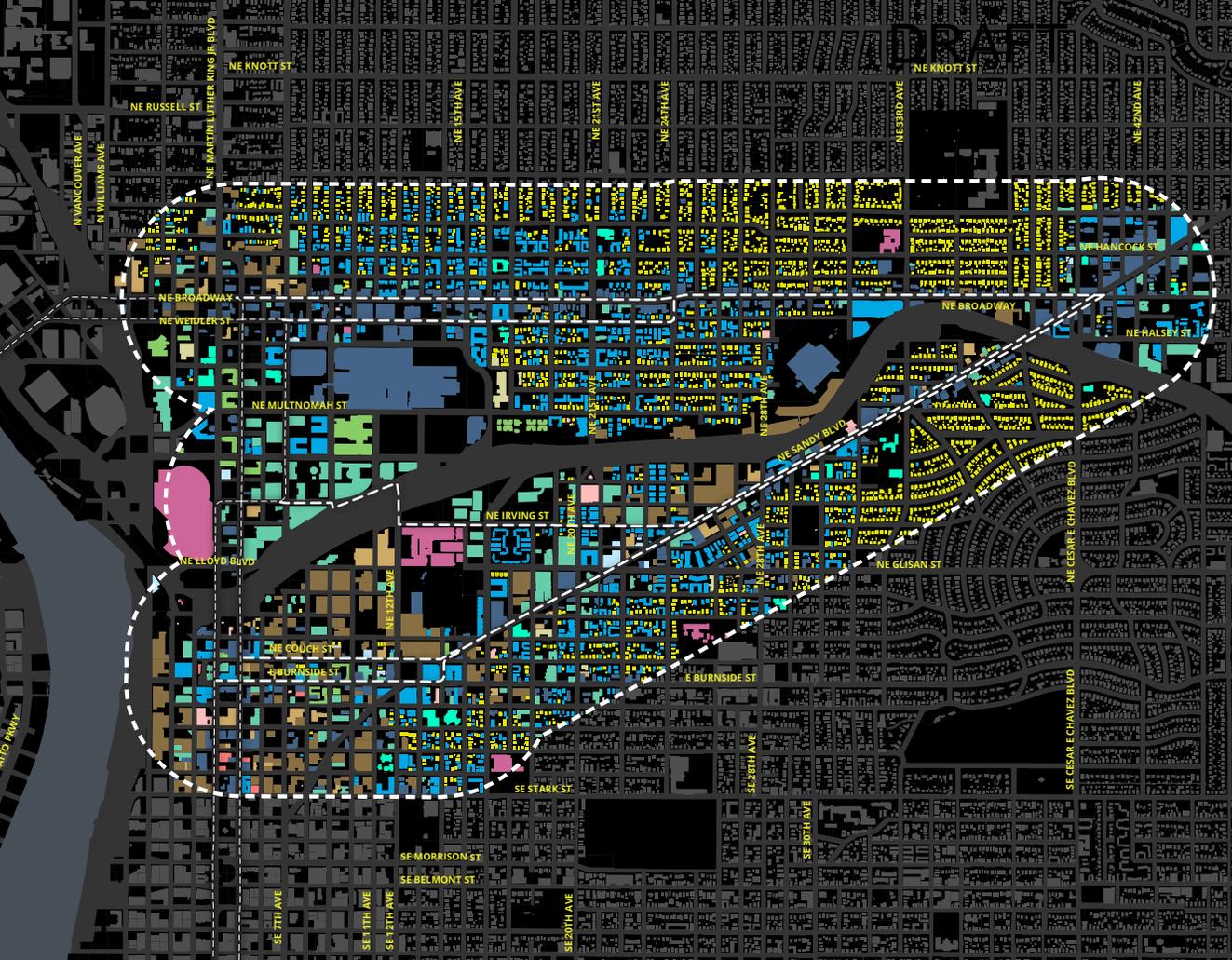
The **Design overlay zone (“d”)**, implemented by 33.420, is applied in areas where new development is subject to a greater degree of design control due to special character of an area, or the scale of anticipated development. This overlay is applied along much of the three alignment alternatives.

The **Centers Main Street overlay zone (“m”)**, implemented by 33.415, is applied to areas designated as neighborhood or town centers to evoke active urban development. This overlay is applied along portions of the NE Sandy and NE Irving alignments in the area between NE 19th and NE 29th Avenues to implement a neighborhood center designation. It is also applied in parts of Hollywood along NE Sandy and NE 42nd Ave.



The **Environmental Conservation overlay zone (“c”)**, implemented by 33.430, is applied to protect natural resources that have been identified in the Comprehensive Plan. This overlay zone is applied in vegetated areas of Sullivan’s Gulch along the Banfield Expressway (I-84).

The **Alternative Design overlay zone (“a”)**, implemented by 33.405, is applied to areas to allow increased density for development that meets additional design compatibility requirements.



LAND USES

Current land uses in the Eastside study area include a wide array of uses. The area south of Sandy is primarily a mix of commercial and mixed use along the street, transitioning to adjacent residential uses at varying intensity. The west end of the area has a higher concentration of multi-dwelling uses which transitions to predominantly single-dwelling houses west of NE 28th into the Laurelhurst neighborhood. The north side of Sandy, which also includes the NE Irving alignment, is adjoined by commercial and industrial type uses, transitioning to a mix of industrial, multi-dwelling residential and office uses. The area also includes Benson High School.

The NE Broadway alignment corridor is also flanked primarily by commercial/retail uses; the surrounding area is a mix of commercial and residential uses. On the west end through NE 16th, land uses in the Central City are an intense mix of commercial (including Lloyd Center), offices, and high density residential uses. East of NE 16th, the intensity of the residential uses diminishes and transitions to low-intensity multi-dwelling and single-dwelling houses. A notable exception is the Fred Meyer department store near NE 28th Avenue.

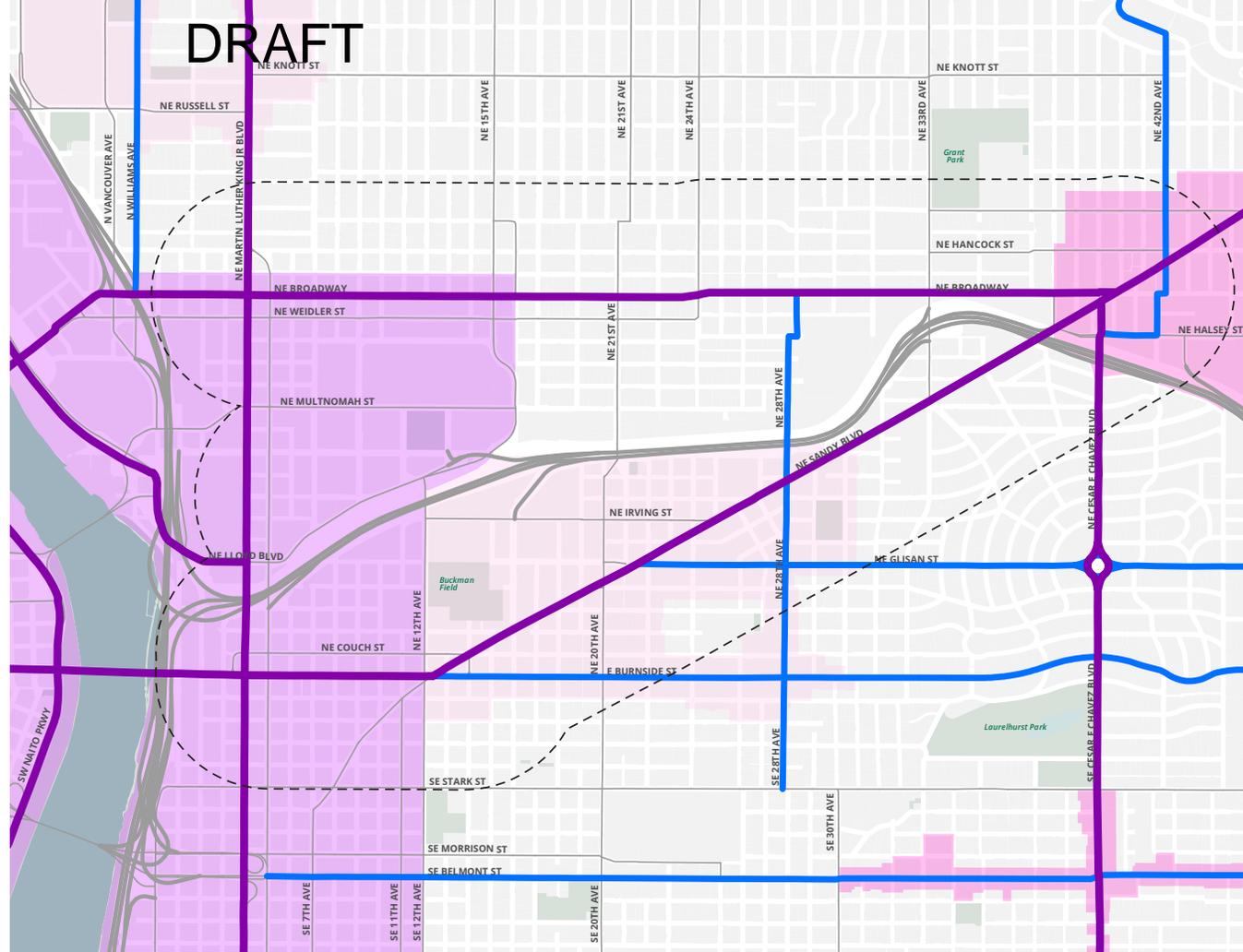
All alignments terminate in Hollywood, a mixed use district that features a concentration of commercial uses on Sandy and other district streets, interspersed with office and multi-dwelling residential uses.

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COMP PLAN CENTERS & CORRIDORS

The 2035 Comprehensive Plan identifies a number of “Centers” and “Corridors” throughout Portland. These are places where growth and change are expected.

The three alignments feature different designations. The alignments all terminate in Hollywood, which is Town Center. The Broadway and Irving alignments both pass through a portion of the Central City, the region’s largest center. NE Broadway and NE Sandy are both designated Civic Corridors. NE Irving does not have a corridor designation. The NE Sandy and NE Irving lines also run through a designated Neighborhood Center.



 REGIONAL CENTER

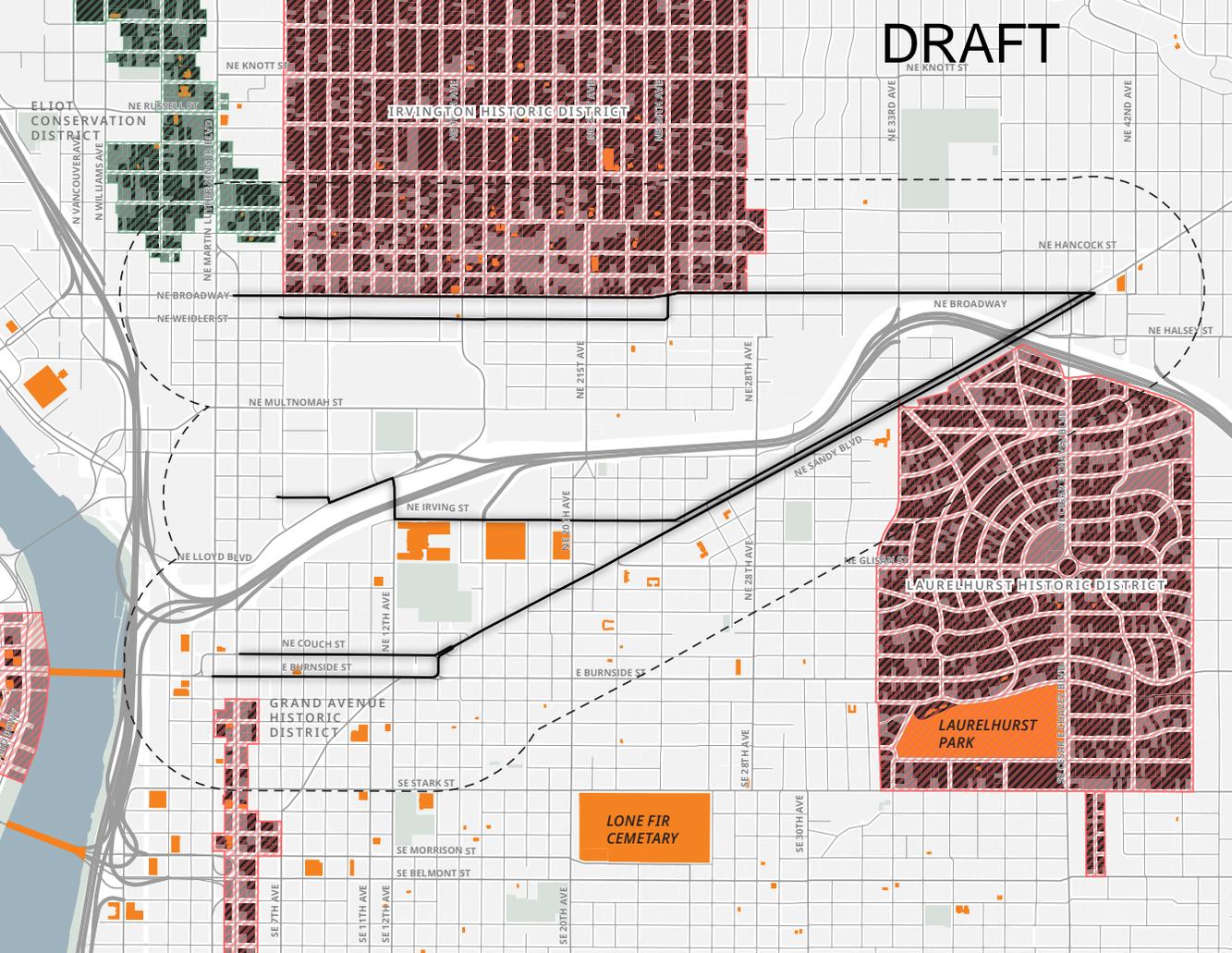
 CIVIC CORRIDOR

 TOWN CENTER

 NEIGHBORHOOD CORRIDOR

 NEIGHBORHOOD CENTER

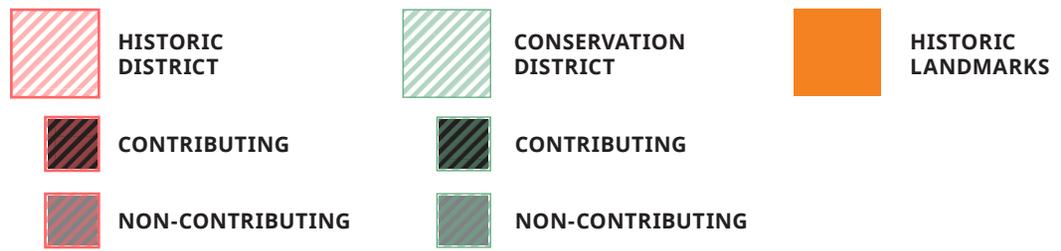
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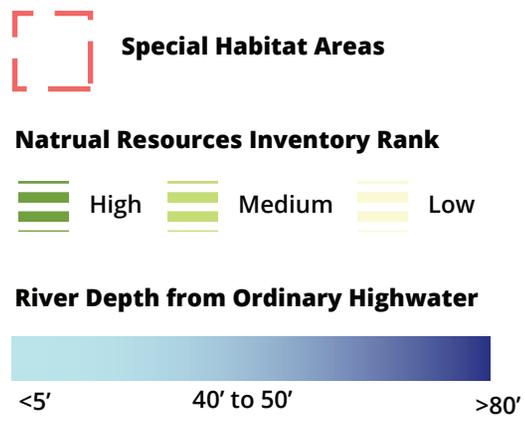
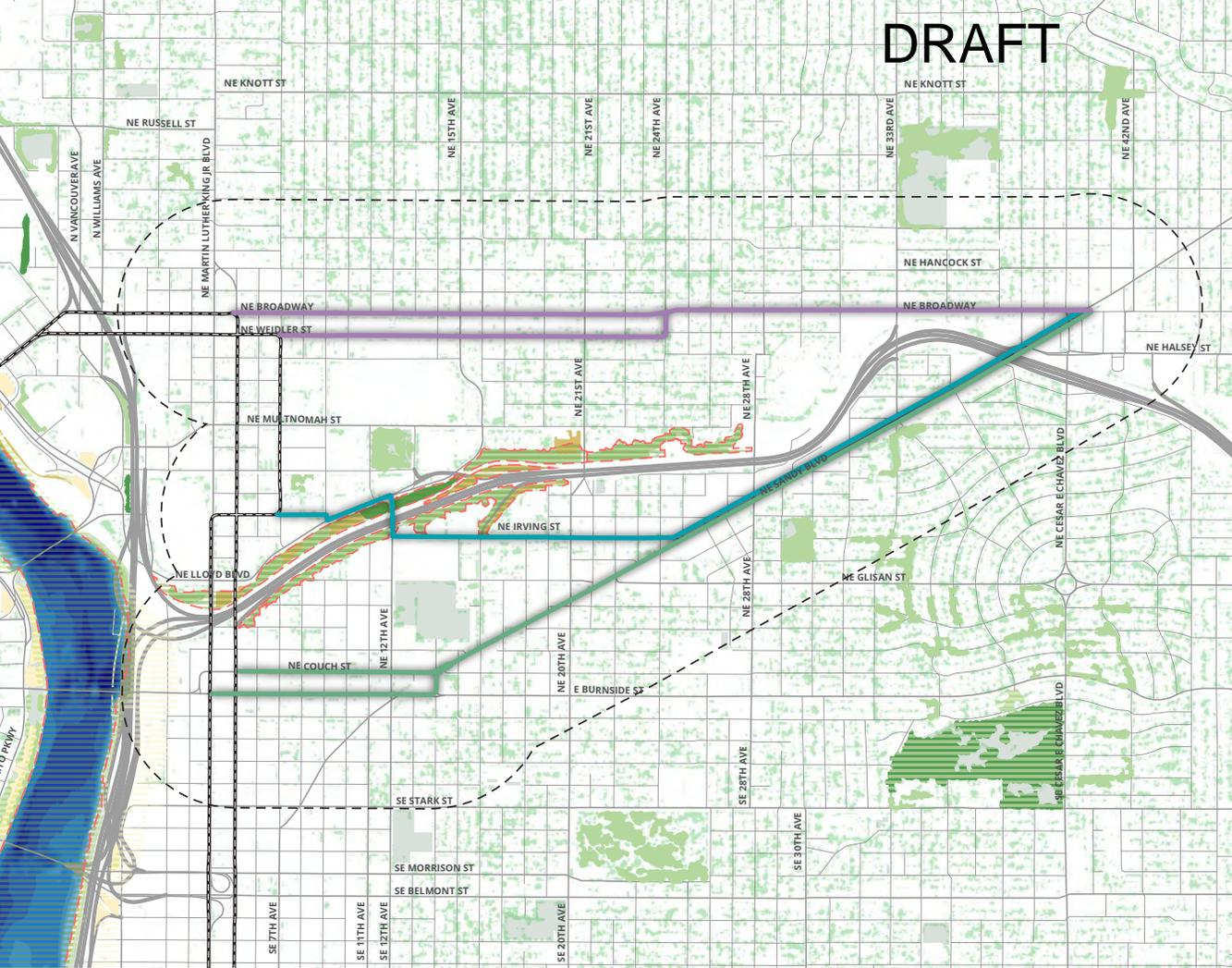
HISTORIC RESOURCES

The Irvington Historic District lies along the north side of the Broadway alignment, between NE 7th Avenue and NE 28th Avenue. The district is listed in the National Register of Historic Places as an excellent example of a “streetcar suburb” that includes Queen Anne, Arts and Crafts, and Period Revival-style residential architecture from 1891 to 1948. Although this large district is primarily composed of single-family dwellings, the southern portion along Broadway is characterized by low- and medium-rise main street commercial and mixed-use development.

The south side of the Irving alignment includes the locally designated landmark Benson High School, and the National Register listed Parkview Apartments and Jantzen Knitting Mills building. The Laurelhurst Historic District lies to the south of NE Sandy between NE 33rd and the I-84 crossing. This district is characterized by large single-family residences in a variety of styles from the early 20th century and picturesque curvilinear streets, not typically found in Portland. The most prominent historic resource in the Hollywood district is the 1926 Hollywood Theater, with its elaborate and colorful terracotta façade. The surrounding neighborhood derives its name from this prominent and beloved Portland landmark.



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NATURAL RESOURCES

Natural resources include the Willamette River, shallow water habitat, river banks—both vegetated and non-vegetated—flood area and upland vegetation, notably the Sullivan’s Gulch Special Habitat Area.

The Willamette River and river banks provide important functions including river flow moderation, water storage, sediment and nutrient control, channel dynamics, food web and nutrient cycling and fish and wildlife habitat. The shallow water areas provide critical habitat for Endanger Act Species-listed fish. The flood area, both developed and not developed, provides water storage during large flood events. Upland vegetation captures and stores rainwater, cools the air and provide wildlife habitat.

Along I-84 is a steeply-sloped, largely vegetated corridor, known as Sullivan’s Gulch. The vegetation is comprised of black cottonwoods to the east, indicating the presence of surface or subsurface water, and big leaf maple to the west; there is also Oregon white Oak present. The understory is a mix of hawthorn, English holly, Pacific dogwood, ivy, clematis, Himalayan blackberry and Scot’s broom. Steep slopes in Portland are relatively prone to wildfire and landslides.

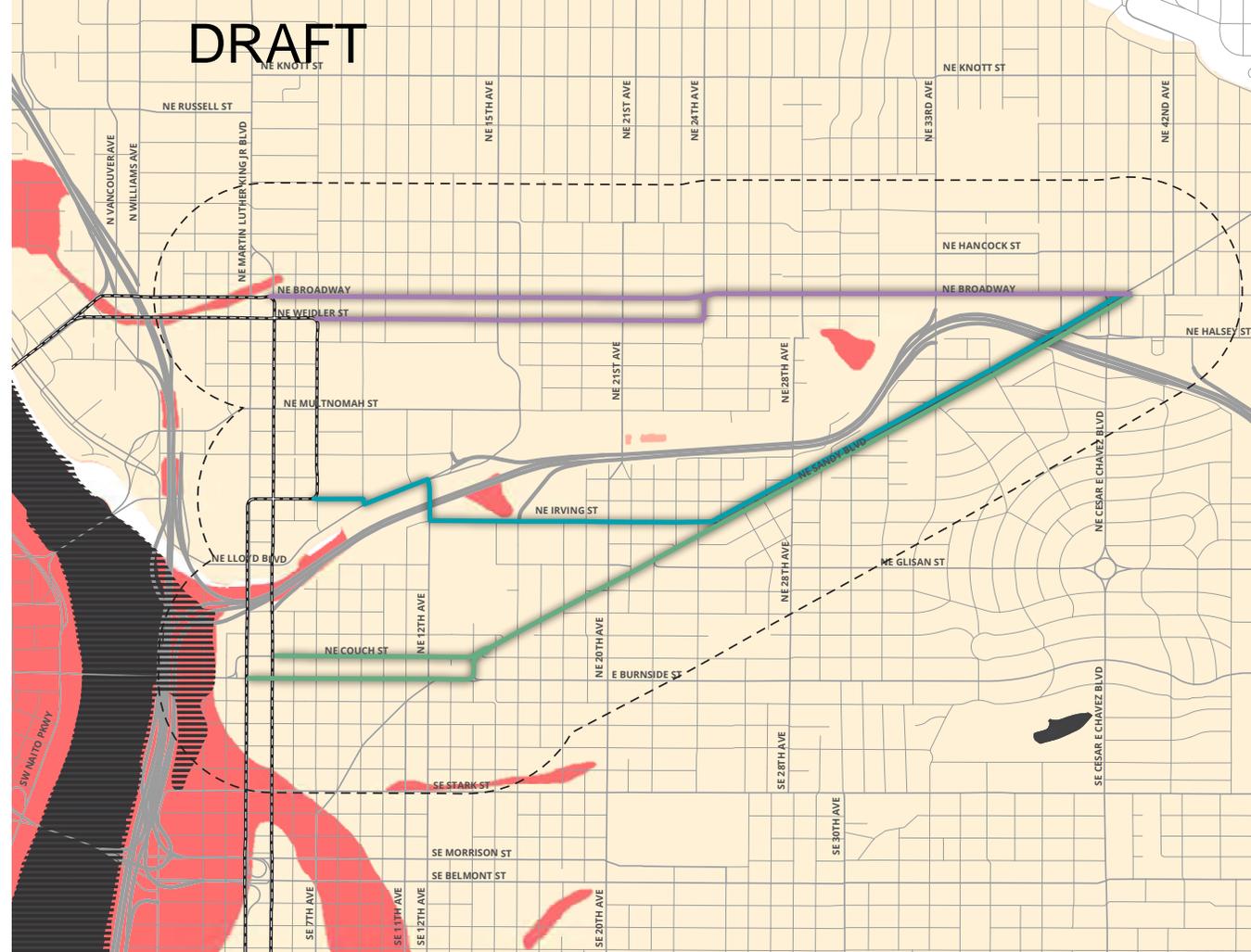
During a spring 2011 site visit, a variety of native songbird species were observed in Sullivan’s Gulch. Two mallards were observed in standing water under the I-84/I-5 onramp.

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RESILIENCY

A 2018 study prepared for the Regional Disaster Preparedness Organization (RDPO) measured and evaluated the impacts of multiple major seismic events in the greater Portland area. One of the scenarios modeled was the effects of the Cascadia Subduction Zone earthquake with an assumed Richter scale measurement of 9.0. As part of their evaluation, the team looked at the risk of permanent ground deformation as a result of soil liquefaction caused by the earthquake's shaking. The effects of ground liquefaction on the built environment can be devastating and permanently damage transportation infrastructure.

The eastside alignment options lie almost entirely outside of areas with elevated liquefaction risk or flooding risk. However, in the proximate area where Sullivan's Gulch meets the Willamette river, there is a notable risk of flooding and liquefaction. This area falls within the buffer of the NE Sandy alignment option and is currently a mix of railroad and industrial uses.



CASCADIA EARTHQUAKE LIQUIFACTION RISK
[MAGNITUDE 9.0]

- HIGH**
- MEDIUM**
- LOW**

FEMA 100-YEAR FLOODPLAIN + 1996 FLOOD EXTENT

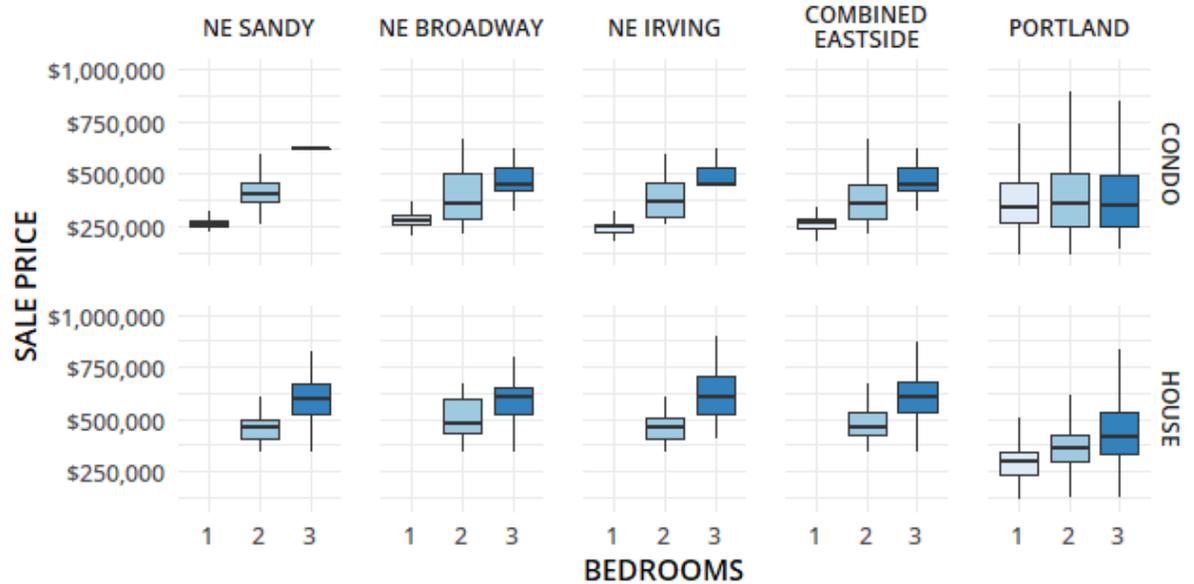


Housing

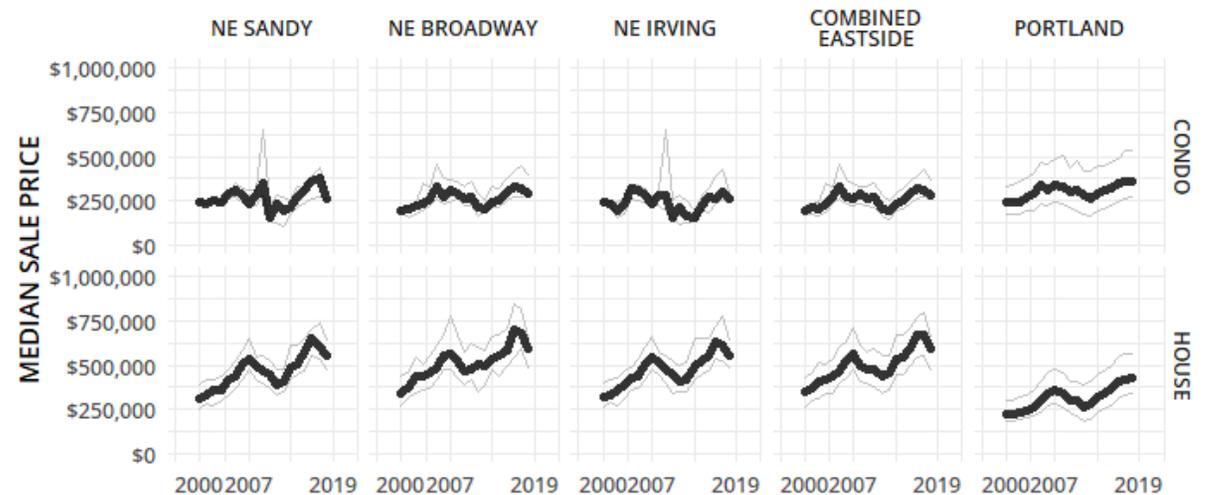
FOR-SALE MARKET

The for-sale housing market in the combined eastside study areas is moderately sized, with sales of 91 single-family type homes and 41 condos in 2018. The study area with the largest for-sale stock is NE Broadway, which touches numerous larger condo buildings and single-family neighborhoods. **The current median sale price in the combined eastside is about \$593,000 for single-family homes and \$287,000 for condos.** Homes range from about \$210 per ft² to \$280 per ft², and the average home is about 2,500 ft².

DISTRIBUTION OF HOME SALES BY BEDROOM COUNT AND HOME TYPE, 2017-18

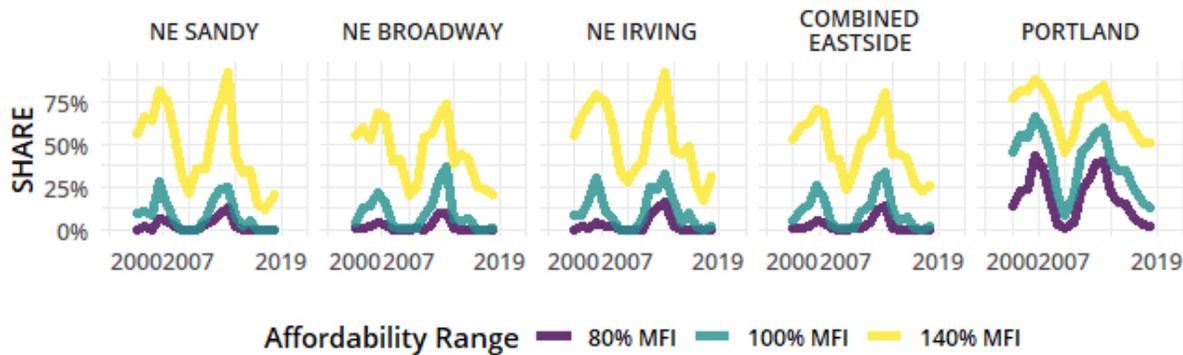


TREND IN MEDIAN SALE PRICE BY HOME TYPE



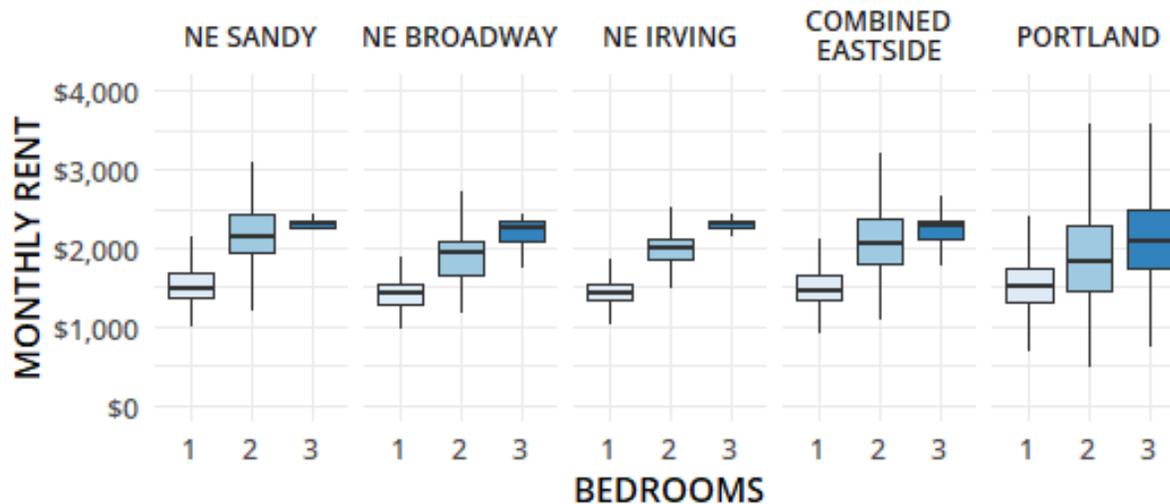
Source: Regional Multiple Listings Services (RMLS).

TREND IN SHARE OF HOME SALES BY AFFORDABILITY THRESHOLD



Source: Regional Multiple Listings Services (RMLS).

DISTRIBUTION OF MONTHLY RENTS BY BEDROOM COUNT, 2019



Source: Craigslist.

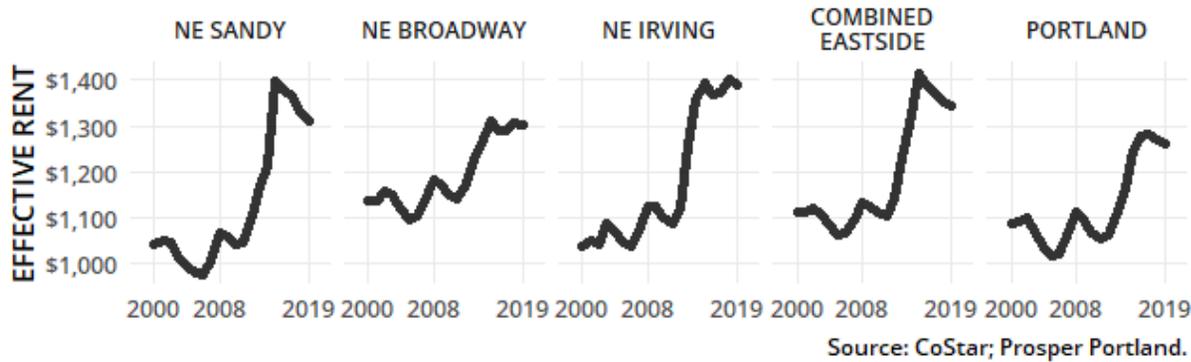
FOR-SALE AFFORDABILITY

Despite the range in sale prices, **homes in the eastside study areas are largely unaffordable to most Portland households.** In 2018 only 25% of all home sales were affordable to a family earning 140% of the median family income (MFI), which was about \$103,000 for a family of three in 2018. This share is half the citywide rate, where about 50% of homes sold in 2018 were affordable at 140% MFI.

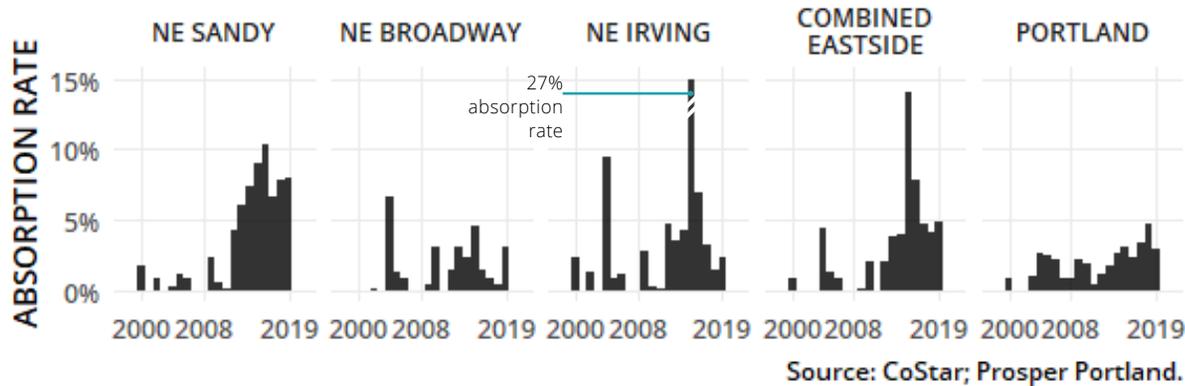
RENTAL MARKET

The market on the eastside for rental units is much stronger than it is for for-sale units. Rents in the area vary by bedroom count but start as low as \$1,000 per month for a one-bedroom unit and go as high as \$3,000 per month for a two-bedroom. Overall, **median rent is around \$1,700 per month**, compared to the citywide median of \$1,600. Three-bedroom units are relatively uncommon, with only about 60 three-bedroom listings in 2019 having appeared on Craigslist, an online platform that many apartment-seekers use. This compares to about 2,000 one-bedroom listings. The cost per ft² ranges from \$2.10 in the NE Broadway study area to about \$2.30 in the NE Sandy study area.

TREND IN MULTI-FAMILY MONTHLY RENTS



TREND IN MULTI-FAMILY ABSORPTION RATES



MULTI-FAMILY ABSORPTION

Since 2008, the multi-family housing stock in the combined eastside study areas has grown by about 70%, from 4,600 units to about 7,800 today. NE Sandy saw the biggest increase, doubling its stock in that time period. Since new construction tends to be at higher price points, the trend in multi-family rents has grown considerably, increasing by 19% between 2008 and 2019, compared to about 22% in the Northwest study area and 13% citywide. One of the largest deliveries was Hassalo on Eighth (built 2015) in the NE Irving study area, which has almost 660 units. Other major deliveries include Grant Park Village (210 units) at NE Broadway and 32nd and The Yard (280 units) at the Burnside bridgehead.

Hassalo on Eighth (2015) with 660 residential units



MAY 2014



Source: Google Streetview.

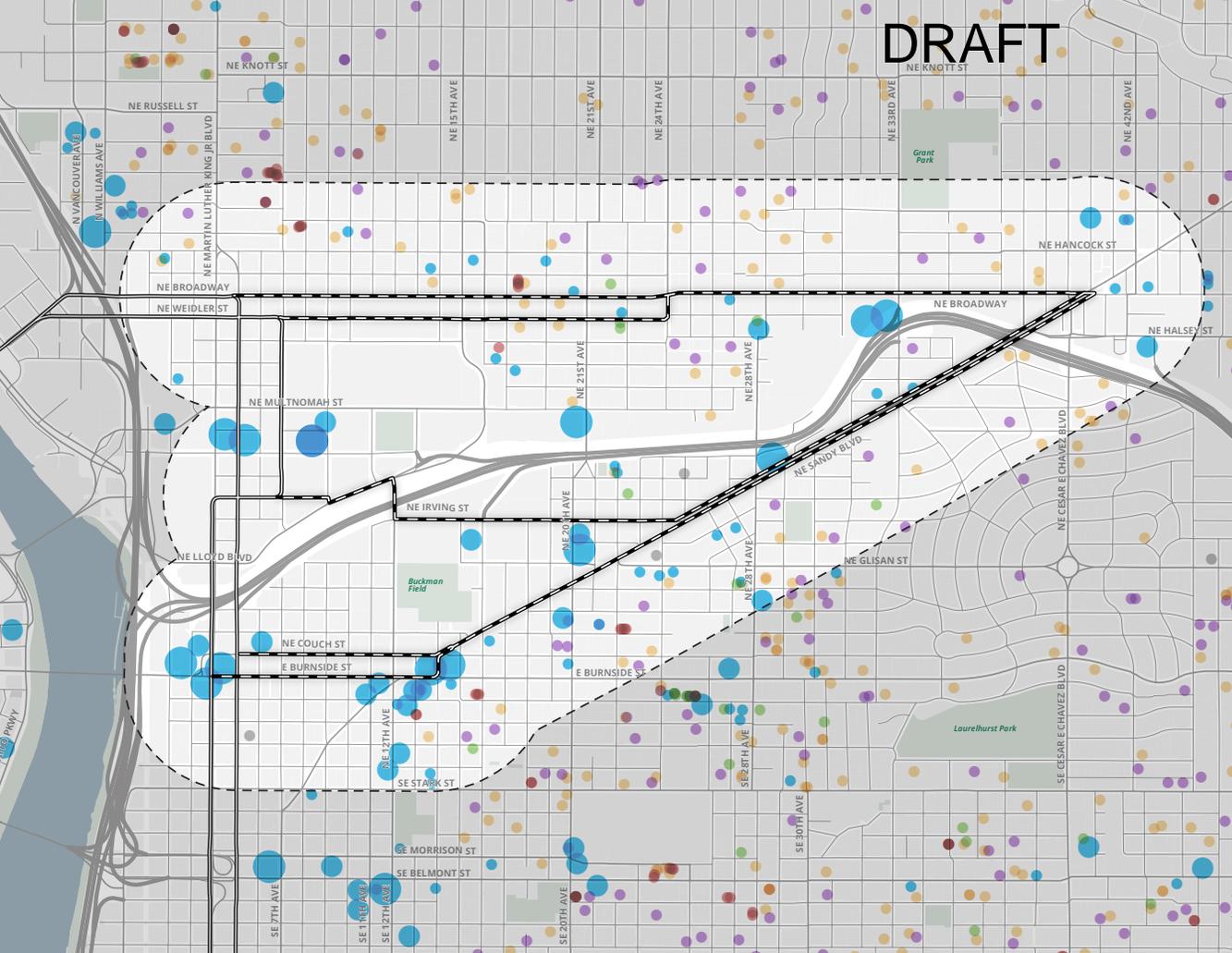
E Burnside looking east toward 13th Ave intersection. These three new buildings in the NE Sandy study area added over 450 units.

JUN 2019

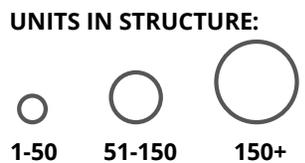


Source: Google Streetview.

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- ACCESSORY DWELLING UNIT
- APARTMENTS/CONDOS
- DUPLEX
- SINGLE-FAMILY
- TOWNHOUSE/ROWHOUSE
- OTHER STRUCTURE



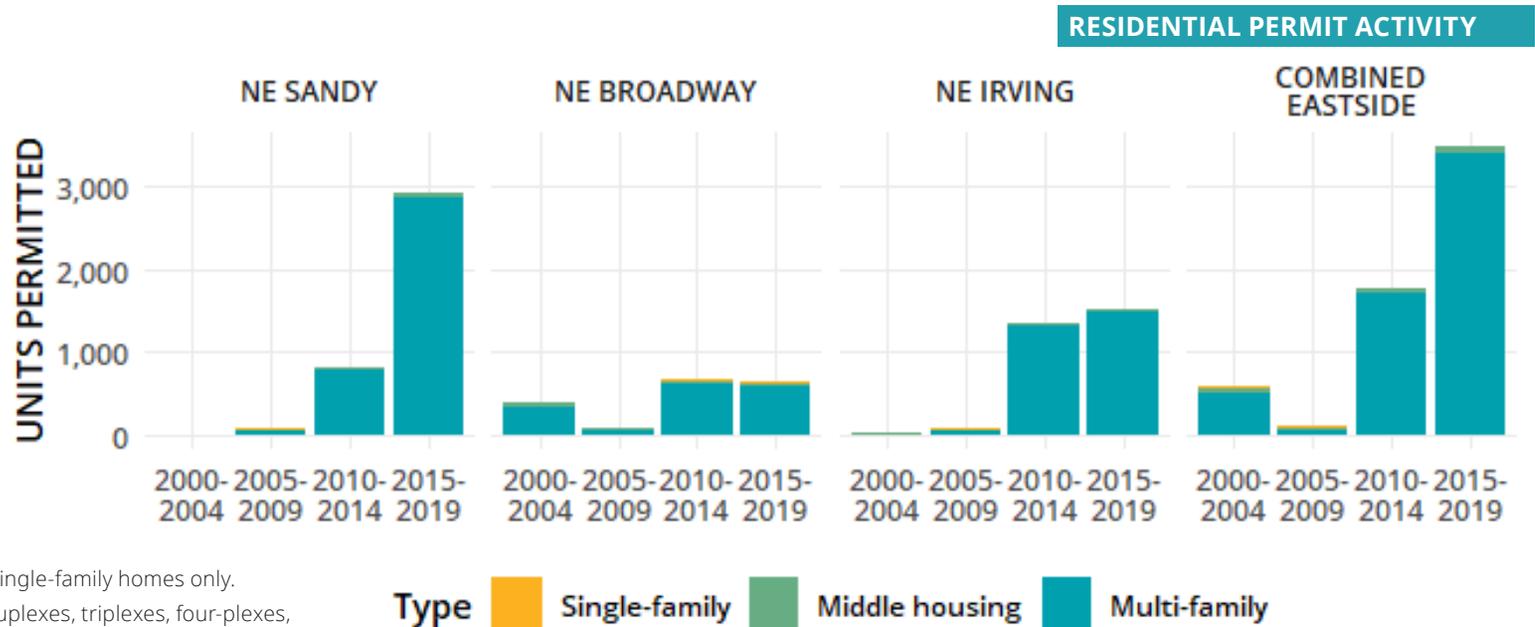
PERMIT ACTIVITY | 2000-2019

The Eastside study area alignments have seen varying degrees of development since 2000. For residential development, overall the vast majority in all study areas were multi-dwelling units.

NE Sandy: The number of units permitted in 2000-04 and 2005-09 were relatively few—under 100 combined. In the 2010-2014, the number of units increased significantly to over 800 units. Residential development permitted in the 2015-2019 period increased dramatically to over 2,900 units, the largest number among all the alignments. Many of these units are located in the Burnside corridor, and many units in the Sandy corridor are still under construction.

NE Broadway: Among the Eastside alignments, this area saw the most residential units permitted in the 2000-04 period with 393 units. This dropped to 95 in the 2005-09. The 2010-14 and 2015-19 periods were roughly the same at 662 and 634 units respectively. This alignment has seen the least activity in recent years.

NE Irving: Similar to Sandy, the number of units permitted in 2000-04 and 2005-09 were relatively few - about 100 combined. In the 2010-2014, the number of units increased significantly to over 1300 units. Residential development permitted in the 2015-2019 period increased to over 1500 units. This alignment has some areas of overlap with both NE Broadway and NE Sandy, so units may be double counted.



Source: Bureau of Development Services (BDS).

Single-family is detached single-family homes only.
Middle housing includes duplexes, triplexes, four-plexes, townhomes and accessory dwelling units (ADUs).
Multi-family are buildings with 5 or more units.

ABOUT THIS DATA SOURCE: BDS PERMIT DATA

Residential permit activity data come from the **Bureau of Development Services**. Permits are processed building-wise, meaning that multiple buildings on a single parcel or site would require multiple permits. Multi-family permits contain multiple units. The analysis here summarizes permit activity based on the number of units within each permit.

Only permits that are “issued”, “under inspection” or “finalized” are counted, meaning that at a minimum, the permit applicant has to have paid all permit application fees and

system development charges (SDCs). This differs slightly from the number of units actually built, since applicants may choose to delay construction.

ABOUT THIS DATA SOURCE: RMLS

The **Regional Multiple Listings Service (RMLS)** is a proprietary database that realtors use to access and create current home listings and view past listings. The Portland Bureau of Planning and Sustainability maintains a subscription to the service and updates their database annually with recent sales. For each home sold in the Portland region, the database contains hundreds of datapoints on the sale, such as the location, sale price and number of bedrooms. Single-family homes, condos, townhomes, attached houses and floating homes are captured in this database.

Jobs & Businesses

The combined eastside study areas are home to over 2,400 businesses employing almost 34,500 people. The area contains a mix of employment sectors, with industrial toward the river primarily in the NE Sandy study area and office jobs in the Lloyd Center along the Irving study area. The combined eastside has active retail along several major corridors as well as a regional shopping mall.

MAJOR EMPLOYERS

Most businesses (84%) in the eastside study areas have fewer than 20 employees, but most of the jobs (42%) are in firms with 100 or more employees. However, the NE Sandy study area has a disproportionately large share of employment in smaller firms, with 57% of employment in small firms with fewer than 50 employees.



Pepsi Bottling's distribution center on Sandy Blvd.

- **Utilities companies** such as **Bonneville Power Administration and PacifiCorp** have their headquarters in the Lloyd Center.
- **The Lloyd Center** has many other headquarters or regional offices, including **Kaiser Permanente, Liberty Mutual, and KinderCare Education**.
- **The Lloyd Center Mall** has dozens of retail stores and close to 2,000 jobs.
- **Numerous government offices**, such as Metro, DEQ, Fish and Wildlife Services, and other State of Oregon and federal offices.
- **At the Burnside bridgehead, Pacific Coast Fruit** has their main wholesale and distribution center, and the headquarters for **American Medical Response (AMR)**—the primary paramedic services in Portland—is also at the bridgehead.
- Although just outside of the study area, **Providence Hospital** in Hollywood is a major regional employer.
- **The Oregon Convention Center** is a top employer and major destination.
- **Franz Bakery** has their industrial bakery on NE 12th and NE Couch St and **Pepsi's** bottling and distribution site is just off NE Sandy Blvd and NE 26th.
- Grocery stores including **Fred Meyer, Whole Foods, New Seasons and Trader Joes** are clustered in Hollywood.

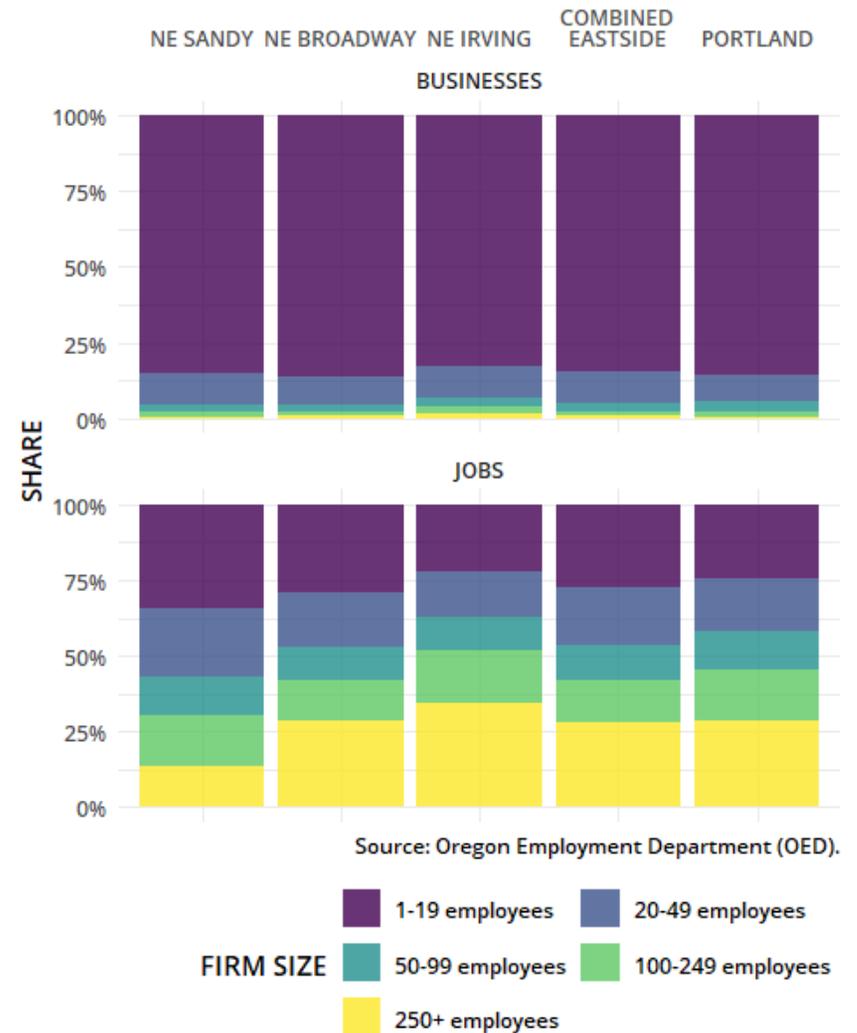
BUSINESS & EMPLOYMENT MIX

There are over 2,400 businesses and 34,500 jobs in the combined eastside study area spanning a range of industries. The largest industry classification is office services, capturing about 40% of jobs and businesses. Compared to the citywide average, the business industry mix along the alignments contains less production and distribution jobs and more office jobs. Despite a citywide decrease in the mix of production and distribution businesses, the NE Irving study area has seen a slight increase. Retail services also play a major role in the business mix.

BUSINESS AND EMPLOYMENT MIX BY EMPLOYMENT SECTOR, 2018

| | NE SANDY | NE BROADWAY | NE IRVING | COMBINED EASTSIDE | PORTLAND |
|---------------------------|---------------|---------------|---------------|-------------------|----------------|
| BUSINESSES | 1,393 | 1,197 | 1,211 | 2,432 | 34,401 |
| Production & Distribution | 15% | 8% | 11% | 13% | 18% |
| Education & Healthcare | 13% | 14% | 13% | 12% | 11% |
| Office Services | 38% | 36% | 41% | 39% | 35% |
| Retail & Related Services | 34% | 41% | 34% | 36% | 36% |
| JOB | 16,639 | 15,498 | 21,042 | 34,504 | 455,478 |
| Production & Distribution | 22% | 10% | 14% | 17% | 22% |
| Education & Healthcare | 16% | 12% | 10% | 12% | 24% |
| Office Services | 27% | 38% | 48% | 40% | 30% |
| Retail & Related Services | 35% | 41% | 28% | 31% | 24% |

BUSINESS AND EMPLOYMENT MIX BY FIRM SIZE, 2018



JOB GROWTH

Since 2008, the combined Eastside study area has grown by about 4,200 jobs, or 12%. This is slightly lower than the citywide average of 13% growth. The NE Irving study area has the most jobs (about 20,000), which are primarily office jobs, but it has also seen the least amount of growth. Job growth in the combined study area has been led primarily by office and retail jobs, specifically management, professional services and food services. The fastest growth was in the NE Sandy study area, which grew by 4,800 jobs, or 42%.

ABOUT THIS DATA SOURCE: QCEW

The **Quarterly Census of Employment and Wages (QCEW)** is a State and Federal program jointly administered by the Oregon Employment Department (OED) and the Bureau of Labor Statistics (BLS). Each quarter, all employers covered by the State of Oregon's unemployment insurance (UI) laws must report to the Census of Employment and Wages. Self-employed individuals and other types of employment are not counted by QCEW; however, over 95% of all jobs are covered by QCEW.

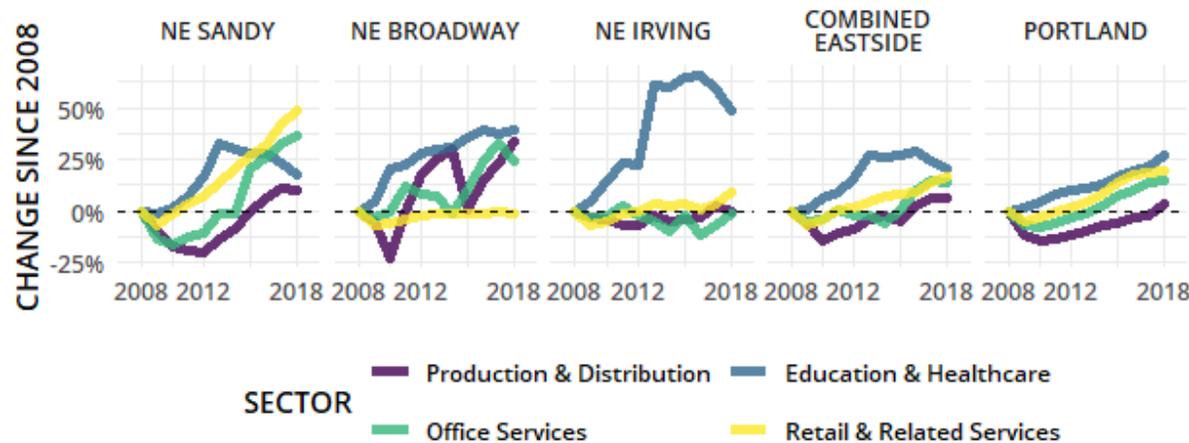
There are two versions of this dataset:

1. A **public-facing dataset** containing aggregate data on employment, wages and count of businesses maintained by the BLS.
2. A **confidential dataset** maintained by the Oregon Employment Department containing establishment-level data on individual employers.

The second dataset was used in this analysis. It contains quarterly employment and wages within each firm, their industry classification using the [NAICS system](#), and the location of the business.

For more information, visit: [OED](#) or [BLS](#).

CHANGE IN EMPLOYMENT RELATIVE TO 2008 BY EMPLOYMENT SECTOR



Source: Oregon Employment Department (OED).

Commercial Space

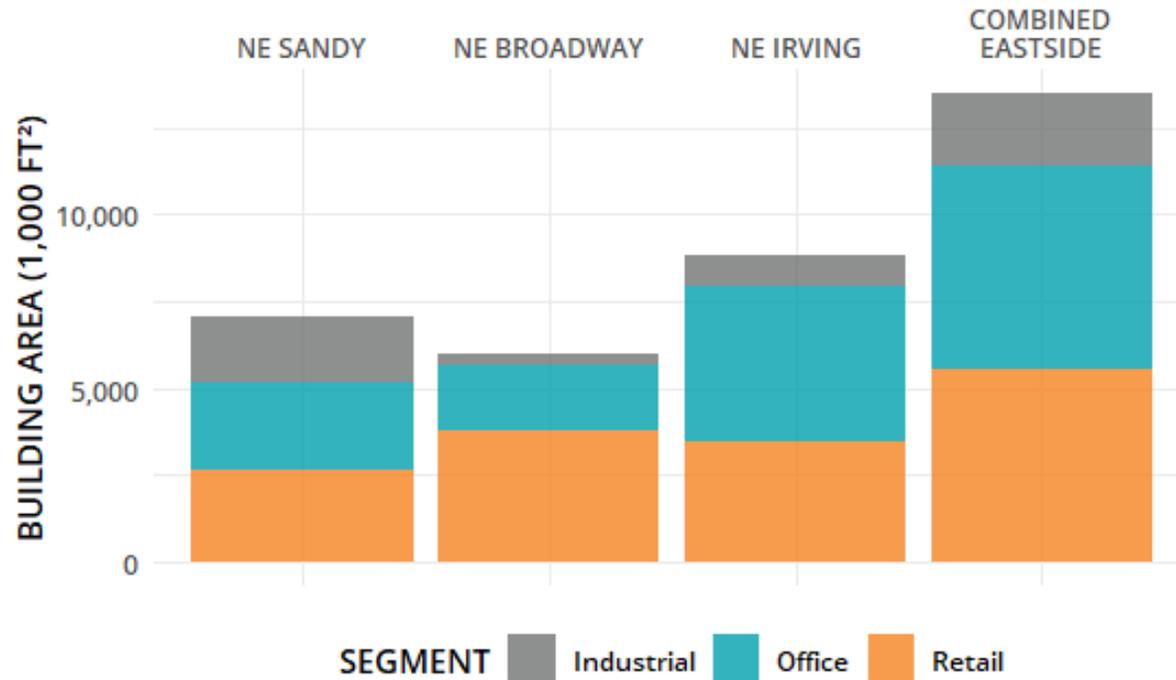
MARKET SNAPSHOT

Tracking jobs also requires considering the industrial, office and retail space available to prospective tenants and employers. The baseline metrics for understanding the health of commercial real estate markets are rentable building area; lease rates (cost per ft²); vacancy rates; deliveries (new construction); and net absorption (leasable area coming online in a period). The table here provides a snapshot of 2019 Q4 to-date (Dec 1, 2019) for these metrics for the eastside alignment areas.

| | BUILDINGS | TOTAL AREA (1,000 FT2) | TOTAL VACANT (1,000 FT2) | VACANCY RATE | YTD NET ABSORPTION (1,000 FT2) | SF UNDER CONSTRUCTION (1,000 FT2) | LEASE RATE | |
|-------------------|-------------------|---------------------------|-----------------------------|--------------|--------------------------------------|---|------------|---------|
| INDUSTRIAL | | | | | | | | |
| | NE Sandy | 106 | 1,874 | 77 | 4.1% | -57 | 0 | \$14.00 |
| | NE Broadway | 21 | 303 | 16 | 5.3% | -8 | 0 | \$13.40 |
| | NE Irving | 44 | 867 | 14 | 1.6% | -14 | 0 | \$14.60 |
| | Combined Eastside | 121 | 2,053 | 93 | 4.5% | -65 | 0 | \$13.80 |
| | Portland | 2,757 | 84,605 | 3,691 | 4.4% | -1,747 | 788 | \$9.50 |
| OFFICE | | | | | | | | |
| | NE Sandy | 196 | 2,570 | 132 | 5.1% | 12 | 120 | \$24.60 |
| | NE Broadway | 130 | 1,905 | 24 | 1.3% | 31 | 0 | \$29.40 |
| | NE Irving | 136 | 4,481 | 106 | 2.4% | 96 | 0 | \$28.70 |
| | Combined Eastside | 284 | 5,907 | 176 | 3.0% | 117 | 120 | \$27.50 |
| | Portland | 2,529 | 55,250 | 4,907 | 8.9% | -18 | 1,339 | \$28.00 |
| RETAIL | | | | | | | | |
| | NE Sandy | 290 | 2,644 | 151 | 5.7% | -65 | 0 | \$12.90 |
| | NE Broadway | 247 | 3,789 | 99 | 2.6% | 82 | 0 | \$28.60 |
| | NE Irving | 193 | 3,460 | 70 | 2.0% | 107 | 0 | \$19.60 |
| | Combined Eastside | 460 | 5,542 | 189 | 3.4% | 29 | 0 | \$18.00 |
| | Portland | 4,882 | 38,921 | 1,241 | 3.2% | -168 | 11 | \$20.70 |

Source: CoStar; Prosper Portland.

RENTABLE BUILDING AREA BY MARKET SEGMENT, 2019



Source: CoStar; Prosper Portland.

RENTABLE BUILDING AREA

The combined study area has over 13.5 million ft² of commercial space spread across 865 buildings. Each study area has between 5 million and 8 million ft². NE Irving contains the most office space. NE Sandy has the most industrial. NE Broadway has the most retail space.

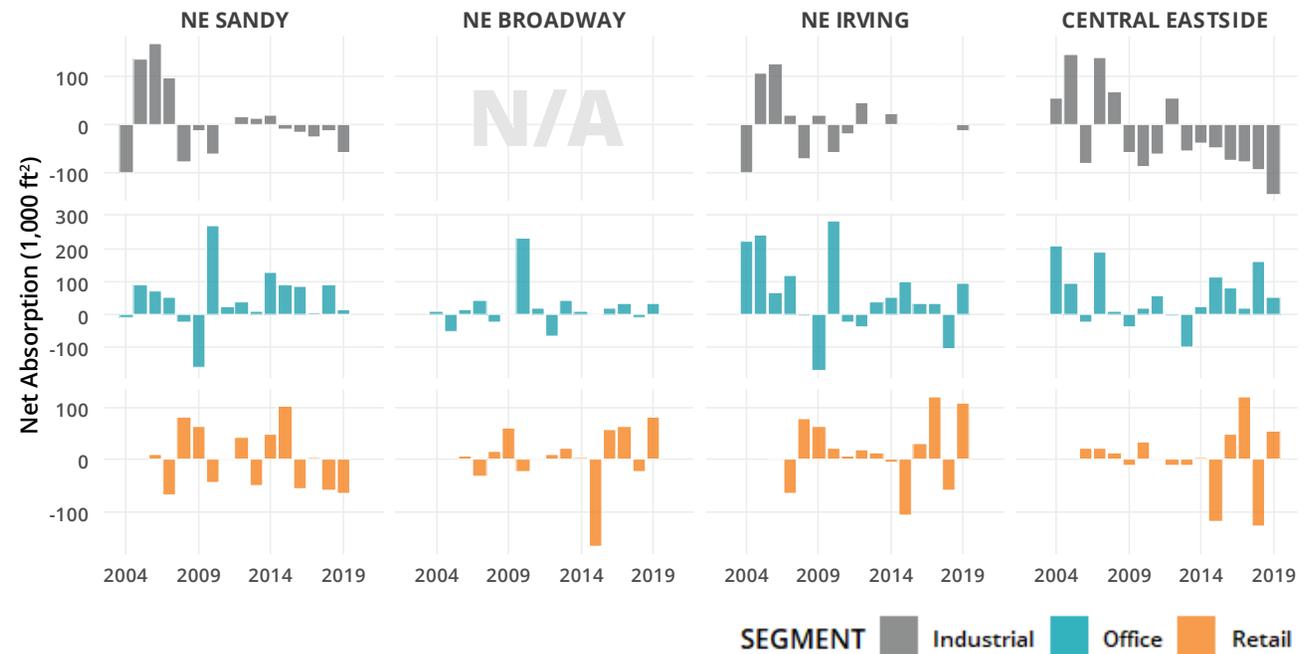
ABOUT THIS DATA SOURCE: COSTAR

Information on commercial space, including lease rates, vacancy rates and absorption come from a proprietary data source called **CoStar**. This is one of the most expansive datasets nationwide that real estate developers and brokers use to track trends across multiple market segments. CoStar surveys thousands of buildings in the Portland region and produces market analytics on things like the inventory of commercial space, lease rates that property owners charge tenants, which firms occupy space within a building, and numerous other trends.

CoStar also provides information on trends in multi-family markets, including detailed rental information. However, only buildings in CoStar's inventory are tracked, which typically includes only larger buildings with 50 or more units. This represents only a segment of the entire rental housing stock, making it only one of many sources policy makers must use to understand housing dynamics in an area.

For more information, visit <https://www.costar.com/products/costar-market-analytics>.

TREND IN ABSORPTION RATES BY MARKET SEGMENT



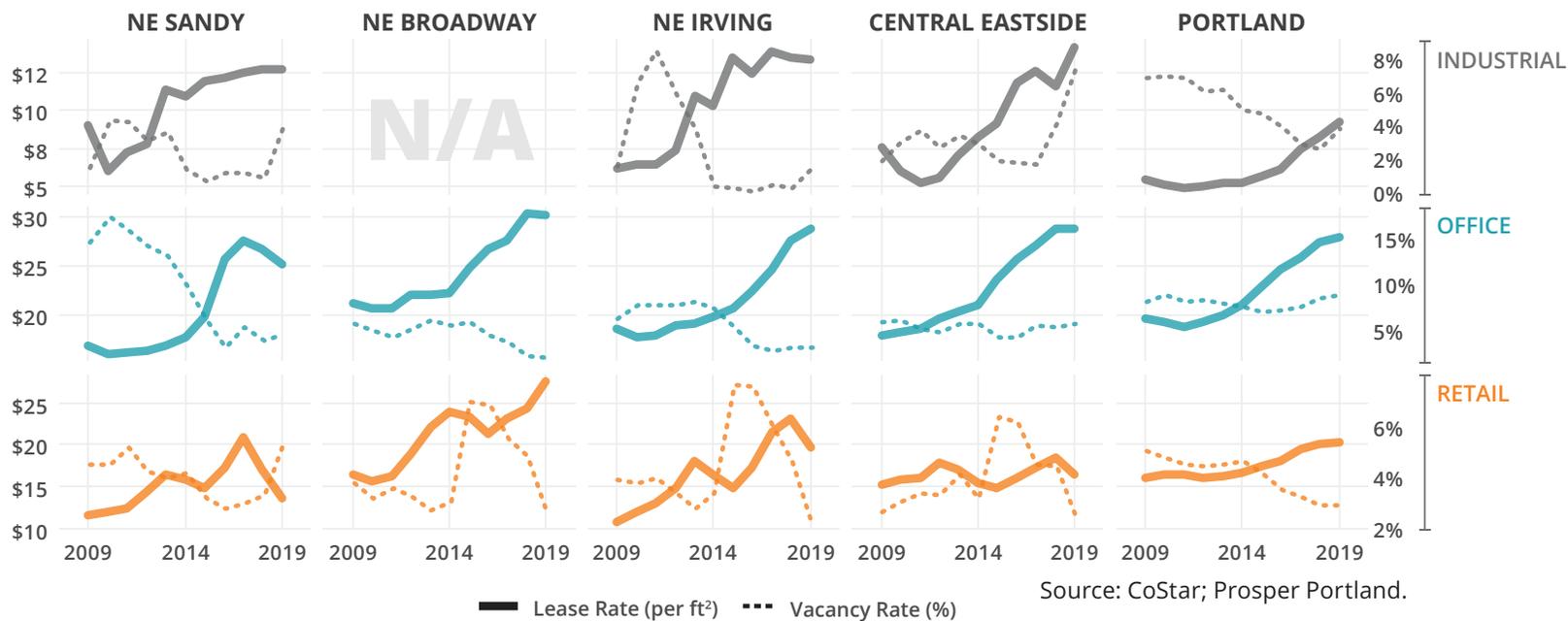
Source: CoStar; Prosper Portland.

ABSORPTION

Another key metric in looking at the market for commercial space is absorption. This is the net amount of square footage that became available (tenants moving out or market deliveries) or was leased up. Positive net absorption means more space was leased than was returned to the market. Negative net absorption means more space was vacated and hence an increase in the available supply. Commercial rents in positive net absorption scenarios tend to increase; and they decrease in negative net absorption scenarios.

Since 2014, the combined eastside study areas have absorbed 453,000 net ft² of office space. This indicates a higher demand for space, primarily in the NE Sandy and NE Irving alignment areas. This is reflected in the increase in office lease rates.

TREND IN LEASE AND VACANCY RATES BY MARKET SEGMENT



LEASE RATES

Multiple factors influence lease rates, including demand for space, new deliveries, and submarket dynamics that make some areas more desirable than others. The cost to occupy commercial space in the alignment areas is comparable to similar markets and Portland as a whole. NE Broadway has the highest office lease rates at about \$30 per ft². Industrial rates in the NE Sandy study area are higher than citywide rates but comparable to the Central Eastside at about \$12 per ft². Office lease rates have risen since 2013 across the study areas, which has been driven by the demand

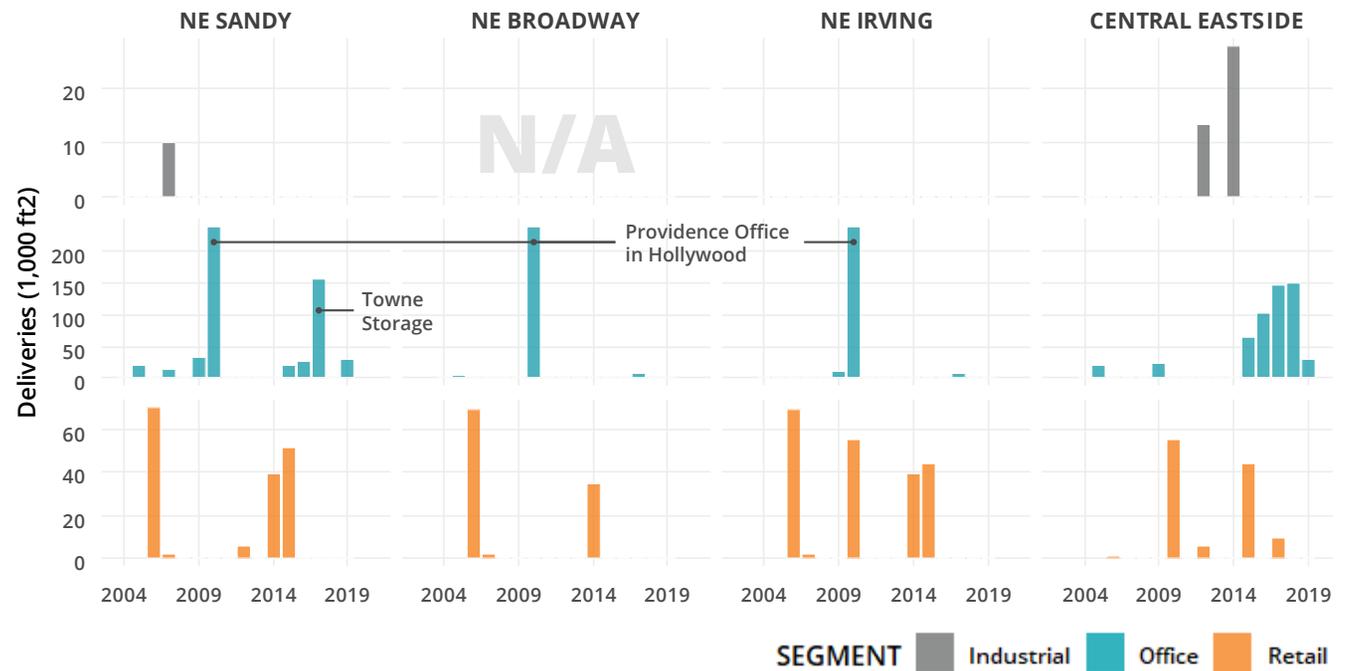
for space in these locations. Retail lease rates are considerably higher, particularly along NE Broadway which have reached almost \$29 per ft², compared to the citywide average of \$21 per ft².

VACANCY RATES

There is more than 458,000 ft² of vacant commercial space in the combined study areas, and the highest amount is in the NE Sandy study area. Sandy's retail space is about 5.7 percent vacant, compared to 3.4% overall in

the combined study areas. Office vacancies in NE Sandy have declined considerably, from as high as 14.5% in 2009 to 5.1% at the end of 2019. Office vacancy is effectively zero in the Broadway study area, with about 24,000 ft² of vacant office space (or 1.3%). All three corridors are a regional destination for retail activity, from shops to restaurants and nightlife, and vacancy rates are low in the combined area at 3.4%. Retail vacancy rates spiked considerably along the NE Broadway and NE Irving study areas from 2015 to 2018, likely due to a large-format tenant relocating.

TREND IN DELIVERIES BY MARKET SEGMENT



Source: CoStar; Prosper Portland.

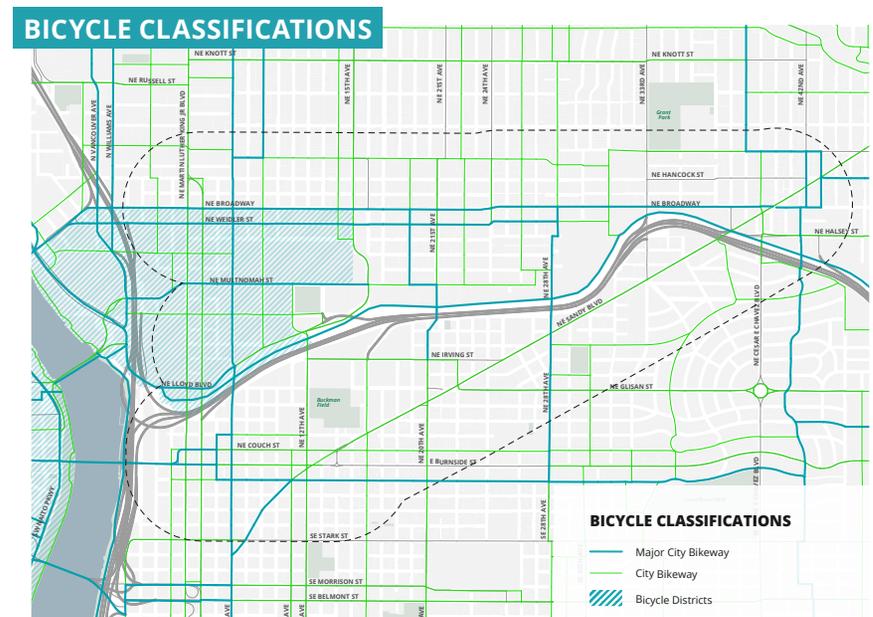
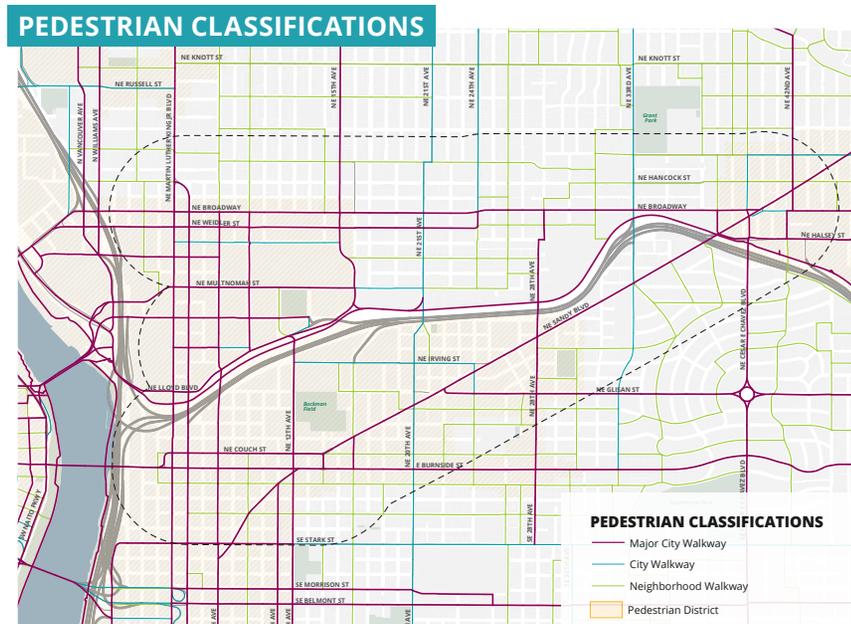
DELIVERIES

Since 2014, about 365,000 ft² of commercial space was delivered to the market in the combined study areas, 63% of which was office space (or about 230,000 ft²). For comparison, the existing Pearl District streetcar alignment area delivered 752,000 ft² of office in the same time period. The largest addition was the Towne Storage building in 2017 in the NE Sandy study area, which brought on 100,000 ft² of office space and is now fully leased.

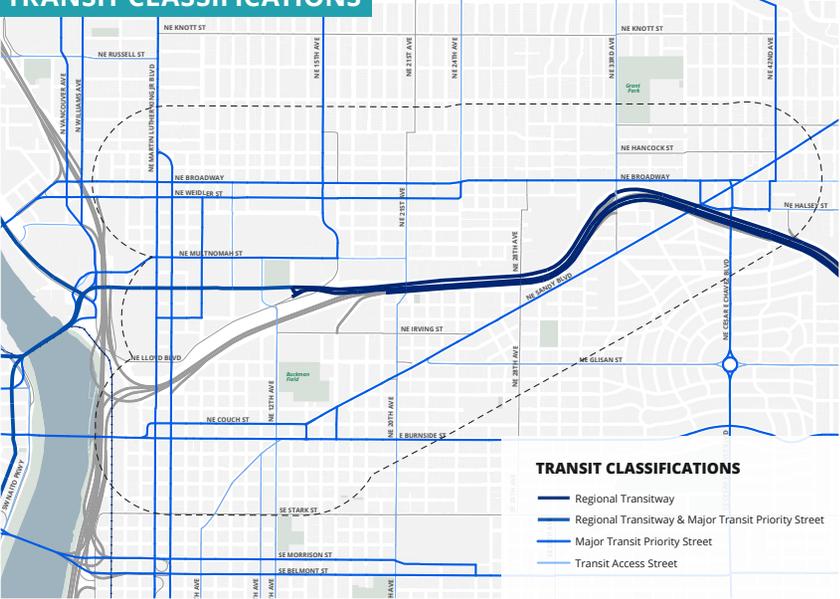
Transportation Classifications

The Portland Transportation System Plan classifies each street according to its role in the traffic, transit, bicycle, pedestrian, and freight system. The higher the classification, the more important the role the street plays for each travel mode.

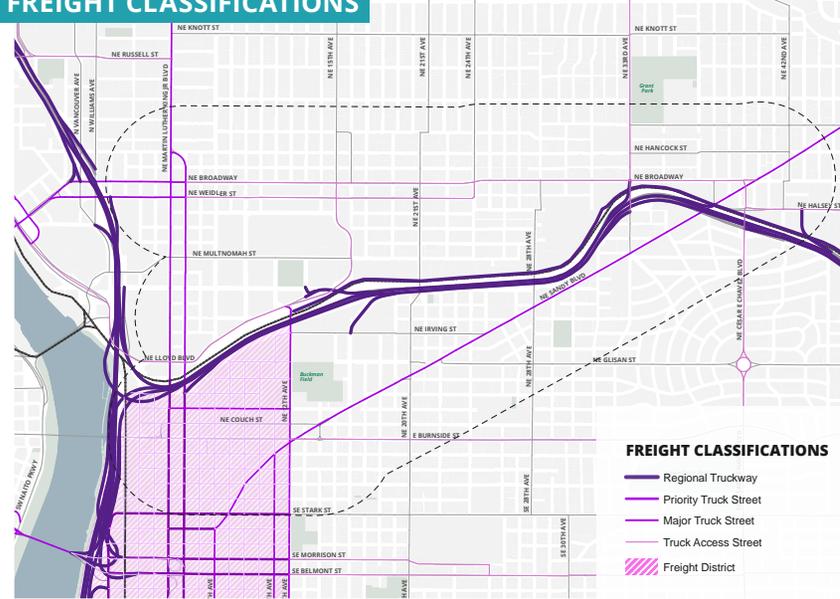
| Street | Traffic | Transit | Bicycle | Pedestrian | Freight |
|--------------------------------|------------------------|------------------------|---------------------|--------------|--------------------|
| NE Broadway/ NE Weidler | Major City Traffic | Major Transit Priority | Major City Bike-way | City Walkway | Truck Access |
| NE Oregon Street | Local Street | Local Street | Local Street | City Walkway | Local Street |
| NE Lloyd Boulevard | Local Street | Local Street | City Bikeway | City Walkway | Truck Access |
| NE Irving Street | Neighborhood Collector | Local Street | City Bikeway | Local Street | Local Street |
| Sandy Blvd. | Major City Traffic | Major Transit Priority | City Bikeway | City Walkway | Major Truck Street |
| NE Couch Street/ E Burnside St | Major City Traffic | Major Transit Priority | City Bikeway | City Walkway | Freight District |



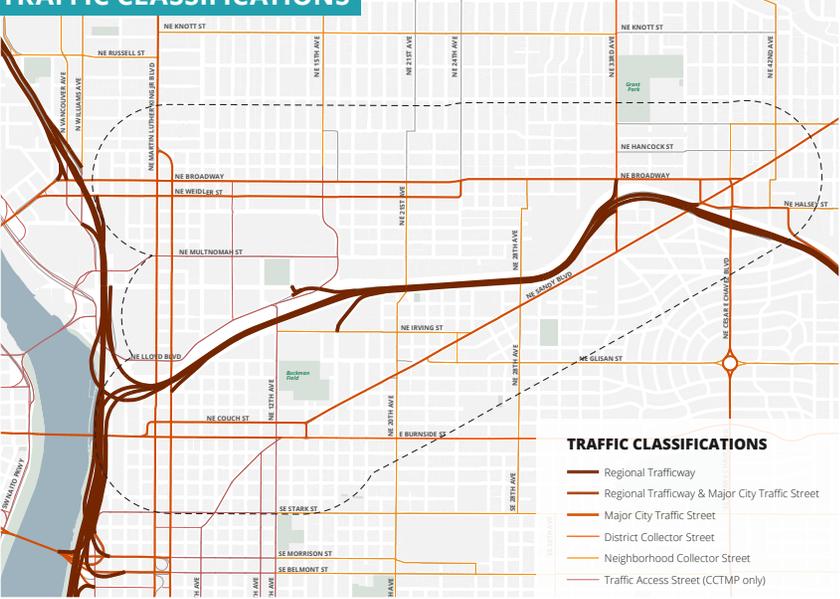
TRANSIT CLASSIFICATIONS



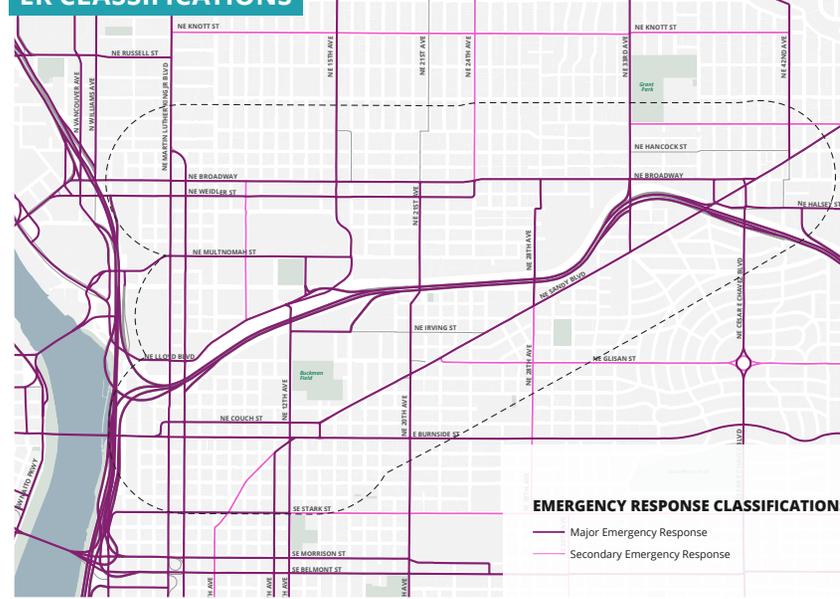
FREIGHT CLASSIFICATIONS



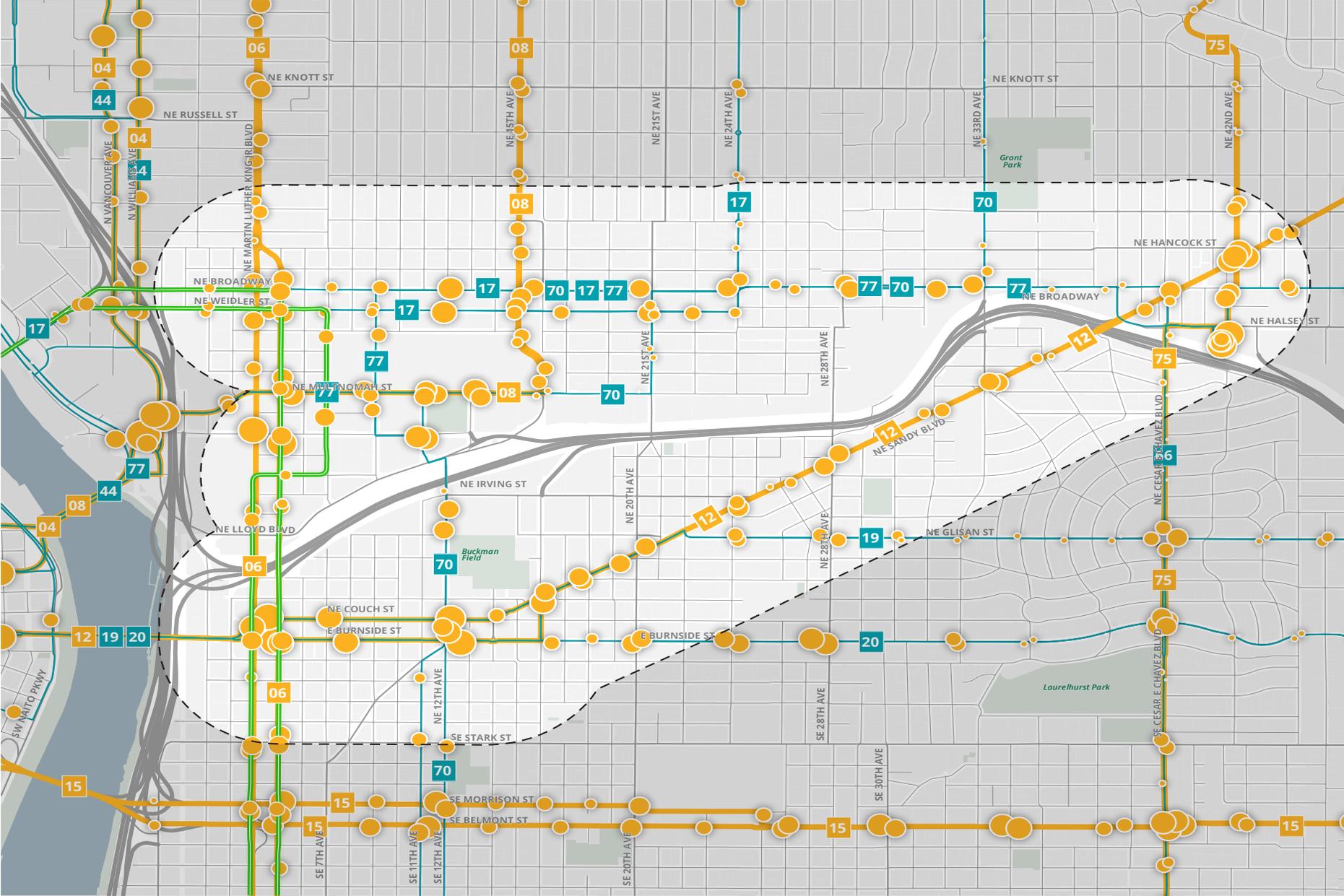
TRAFFIC CLASSIFICATIONS



ER CLASSIFICATIONS



TRANSIT ACTIVITY MAP



EXISTING BUS ACTIVITY

Ten bus lines serve the eastside study area. Bus lines that serve the proposed corridors include Route 12, 17, 19, 20, 77, and 70.

Line 12 runs along NE Sandy Blvd, connecting Tigard Transit Center and Parkrose/Sumner Transit Center. Lines 19 and 20 also provide east-west connections. Line 19 serves E Burnside, NE Couch, and NE Glisan, connecting Mt Scott/112th, Portland City Center, and Gateway Transit Center. Line 20 runs along E Burnside and NE Couch and connects the Beaverton and Gresham Transit Centers.

The 17 and 77 bus lines provide east-west connectivity along NE Broadway and NE Weidler. Line 70 partially runs along NE Broadway and NE Weidler but primarily serves as a north-south connection between Milwaukie City Center and Columbia River Correction Center.

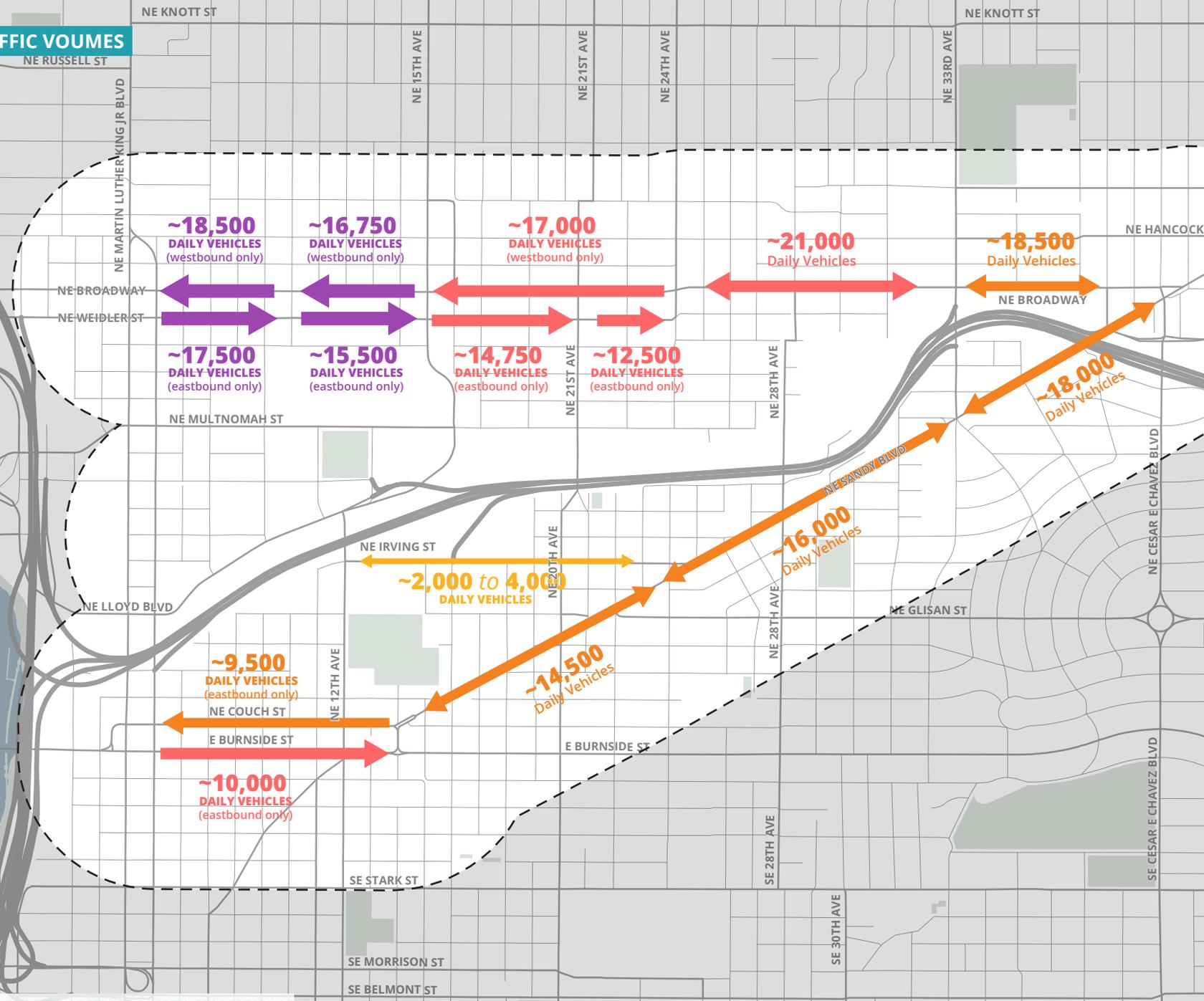
The Portland light rail MAX, also operates from the City Center to the Lloyd Center Mall and the Hollywood Transit Center. Both destinations are served by the Green, Red, and Blue lines.

BUSIEST TRANSIT STOPS | EASTSIDE STUDY AREA

| Transit Station | Total Daily Boardings | Transit Services |
|--------------------------|-----------------------|------------------------------------|
| E Burnside & NE Grand | 2,031 | Line 12, Line 19, Line 20 |
| Hollywood Transit Center | 2,029 | Line 75, Line 76, Line 77, Line 66 |
| E Burnside & SE Sandy | 1,632 | Line 12, Line 19, Line 20 |
| NE Couch & 12th | 1,584 | Line 12, Line 19, Line 20 |
| NE Couch & Grand | 1,347 | Line 12, Line 19, Line 20 |
| NE Multnomah & 13th | 1,064 | Line 8, Line 77 |
| E Burnside & SE 8th | 789 | Line 12, Line 19, Line 20 |
| NE Couch & 7th | 750 | Line 12, Line 19, Line 20 |
| NE M L King & Holladay | 746 | Line 6 |
| NE 42nd & Broadway | 718 | Line 75, Line 77 |

DRAFT

TRAFFIC VOLUMES



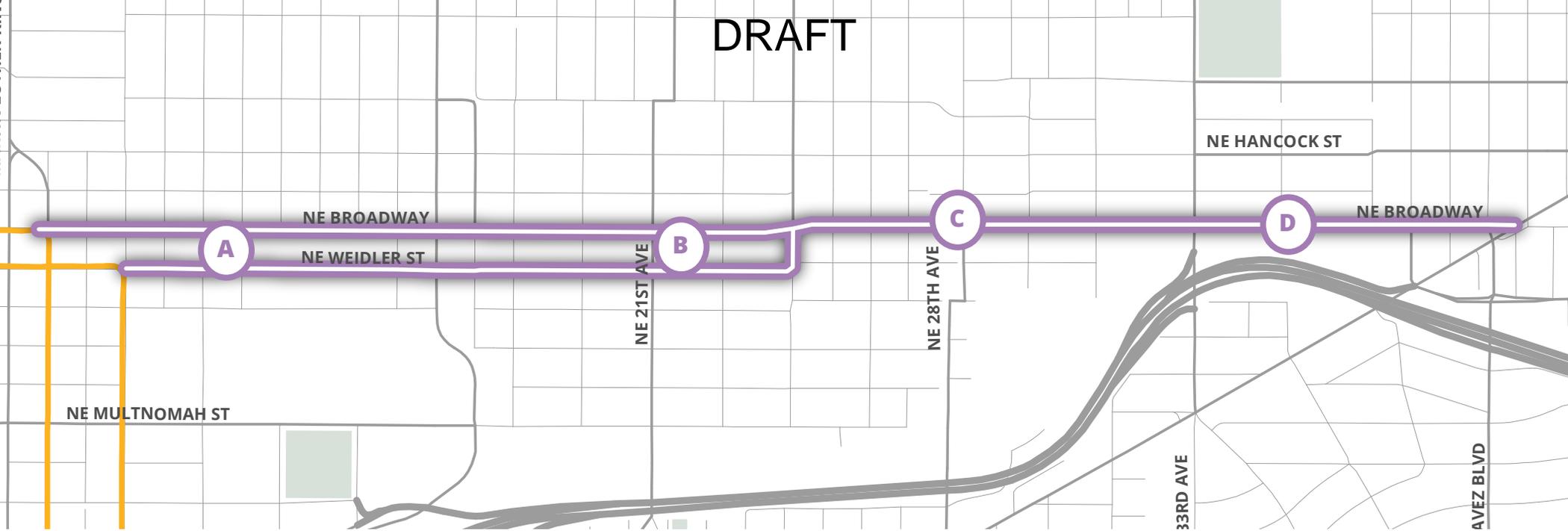
TRAFFIC VOLUMES DISCUSSION

This map shows the daily traffic volumes for the proposed alignments. The Broadway/Weidler alignment has the highest total daily vehicles compared to the Irving/Sandy and Burnside/Couch/Sandy alignments.

Per the 2035 Transportation System Plan, NE Broadway is primarily classified as a Major City Traffic street. NE Weidler is also classified as a Major City Traffic street between NE Victoria and NE 24th and a Local Service Street between NE 24th and NE 32nd. Major City Traffic Streets serve as the principal routes for interdistrict traffic and have higher people carrying capacity than Local Service Streets, which distribute local traffic and provide access to local residences or commercial uses.

TRAFFIC VOLUME STATISTICS

| | BROADWAY & WEIDLER | IRVING & SANDY | SANDY & BURNSIDE |
|---|---|---|---|
| Segment with the lowest volume of daily vehicles | NE Weidler, NE 21st to NE 24th: ~12,500 daily vehicles | NE Irving, NE 12th to NE 23rd: ~2,000 to 4,000 daily vehicles | NE Couch, NE Grand to NE Sandy: ~9,500 daily vehicles |
| Segment with the highest volume of daily vehicles | NE Broadway, NE 24th to NE 33rd: ~21,000 daily vehicles | NE Sandy, NE 33rd to NE Ceasar E Chavez Blvd ~18,000 daily vehicles | NE Sandy, NE 33rd to NE Ceasar E Chavez Blvd ~18,000 daily vehicles |



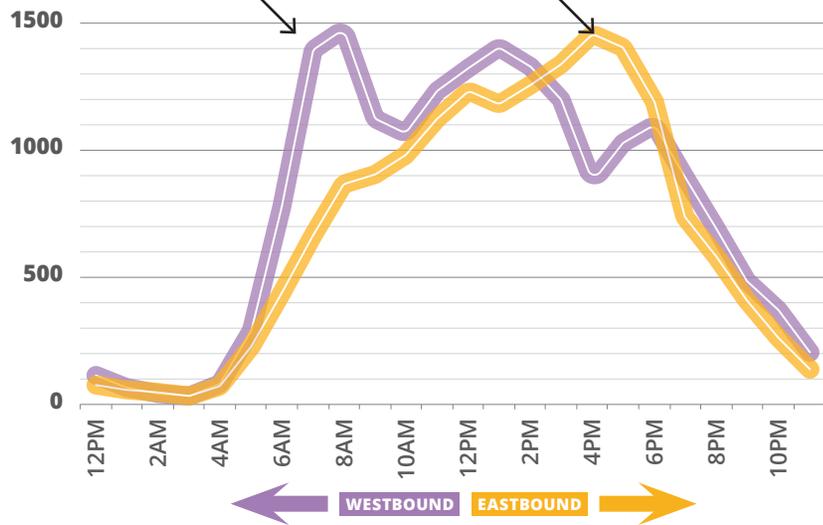
TRAFFIC VOLUMES DISCUSSION

The figures to the right show traffic volumes per hour at four intersections along the corridor. The figures demonstrate strong direction flow with peak west-bound traffic in the AM on Broadway everywhere except Broadway and 35th. This may be due to neighborhood traffic traveling west bound to the access I-84 freeway interchanges. East bound traffic peaks in the PM and experiences sharper peaks than AM traffic. Broadway & 35th does not follow this trend, where it has peaks in the AM and PM and stays busy throughout the middle of the day.

NE Broadway and NE Weidler at NE 9th has the highest traffic volumes throughout the day—almost 1,500 vehicles at 8am, about 1,400 at 1pm, and over 1,000 at 6pm. Broadway at NE 26th and NE 35th have lower traffic volumes—under 1,000 throughout the day—compared to Broadway and Weidler at NE 9th and NE 19th.

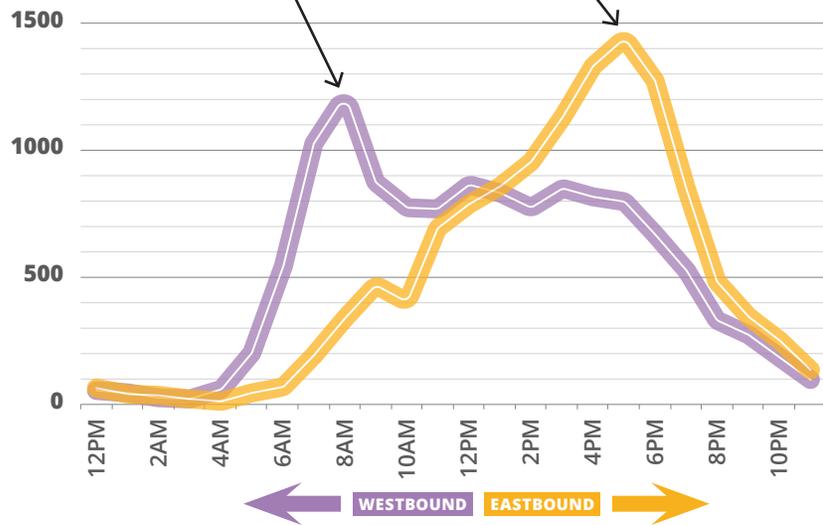
A BROADWAY & WEIDLER AT NE 9TH AVE

AM Peak: 1,476 vehicles (westbound) PM Peak: 1,458 vehicles (eastbound)



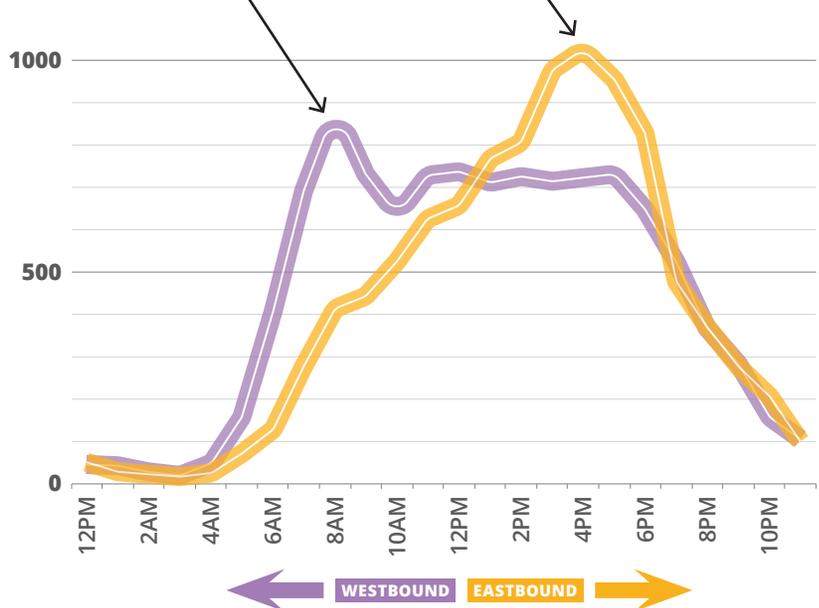
B BROADWAY & WEIDLER AT NE 21ST AVE

AM Peak: 1,220 vehicles (westbound) PM Peak: 1,458 vehicles (eastbound)



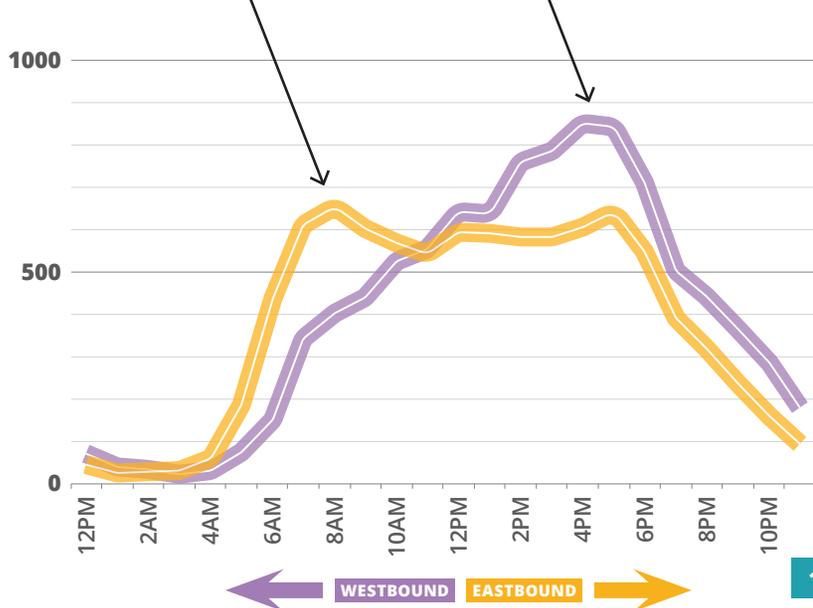
C BROADWAY AT 26TH AVE

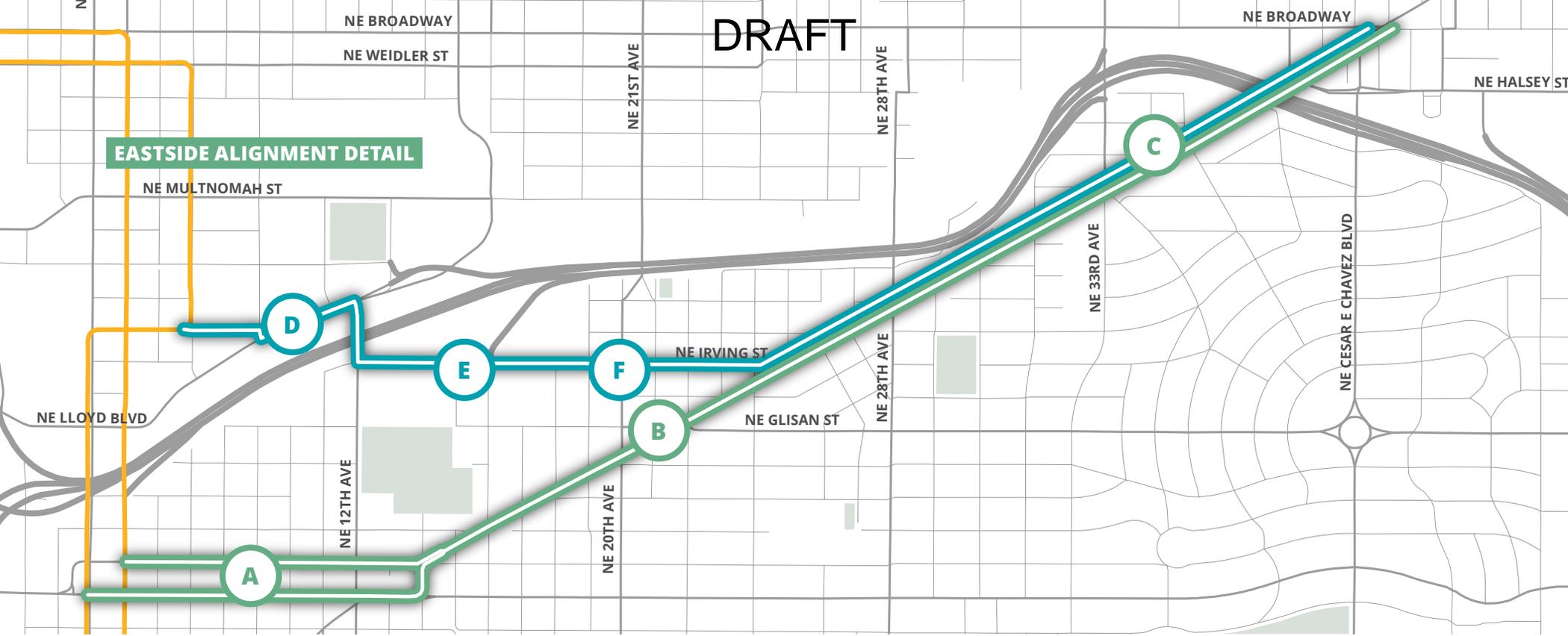
AM Peak: 840 vehicles (westbound) PM Peak: 1,027 vehicles (eastbound)



D BROADWAY AT 35TH AVE

AM Peak: 654 vehicles (eastbound) PM Peak: 851 vehicles (westbound)



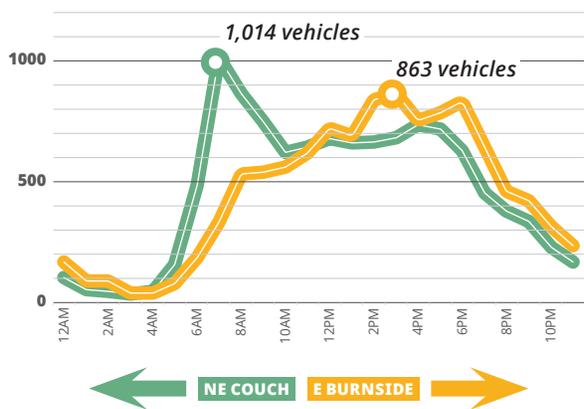


TRAFFIC VOLUMES DICISUSSION

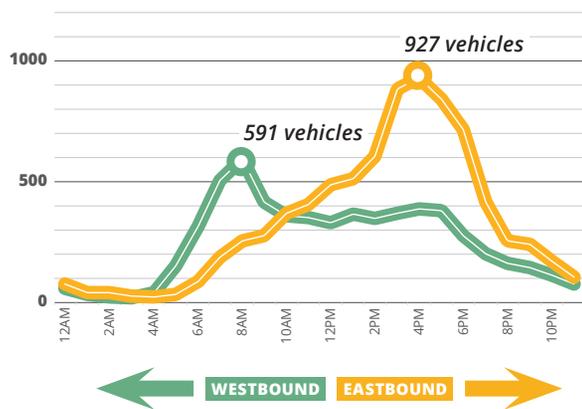
Per the 2035 Transportation System Plan, the Burnside/Couch/Sandy alignment includes Major City Traffic Streets and Local Service Streets. The charts to the right (top row) show traffic volumes per hour at three intersections along the corridor. E Burnside/NE Couch at NE 8th has the highest AM peak—about 1,000 vehicles at 7am—and PM—over 700 vehicles at 4pm. NE Sandy at NE 22nd has the lowest vehicle volumes throughout the day.

The Irving/ Sandy alignment includes Major City Traffic Streets, Traffic Access Streets, Neighborhood Collector Streets, and Local Service Streets. The charts to the right (bottom row) show traffic volumes per hour at three intersections or segments along the corridor. NE Lloyd between NE 7th and NE 9th has the highest traffic volumes throughout the day—over 500 vehicles at 8am and 1pm and about 450 vehicles at 4pm. NE Irving at NE 15th and NE 22nd have lower traffic volumes—under 200 vehicles per hour except for the 8am peak—compared to NE Lloyd between NE 7th and NE 9th.

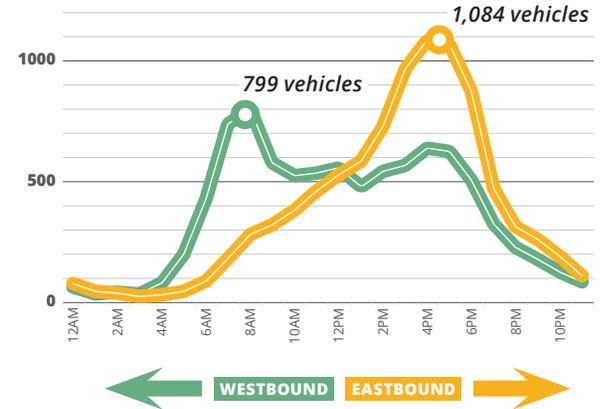
A E BURNSIDE / NE COUCH AT NE 8TH AVE



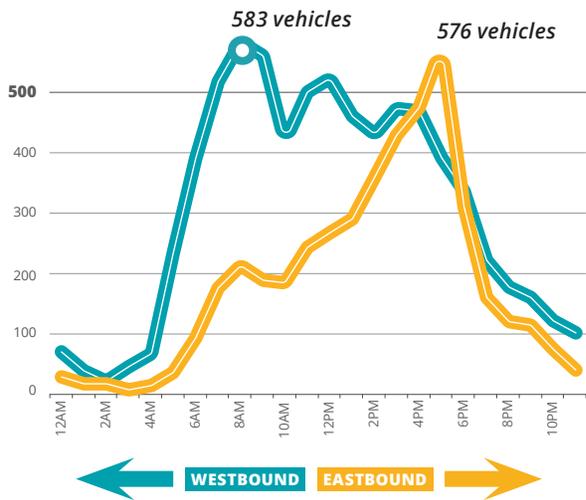
B NE SANDY BLVD AT NE 22ND AVE



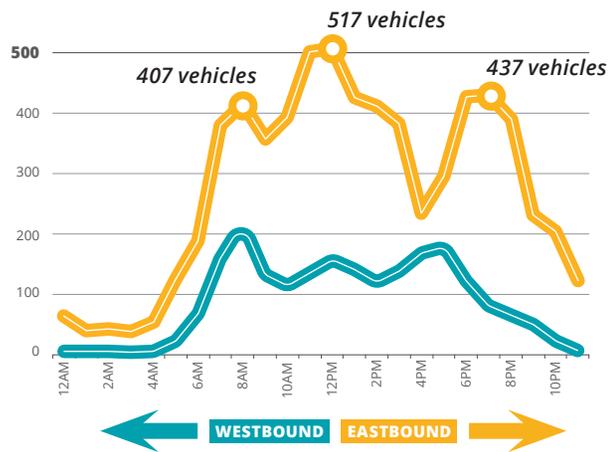
C NE SANDY BLVD AT NE 35TH AVE



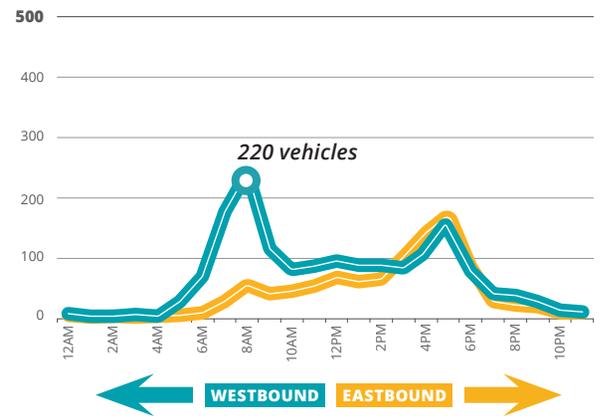
D NE LLOYD | BETWEEN 7TH & 9TH AVE



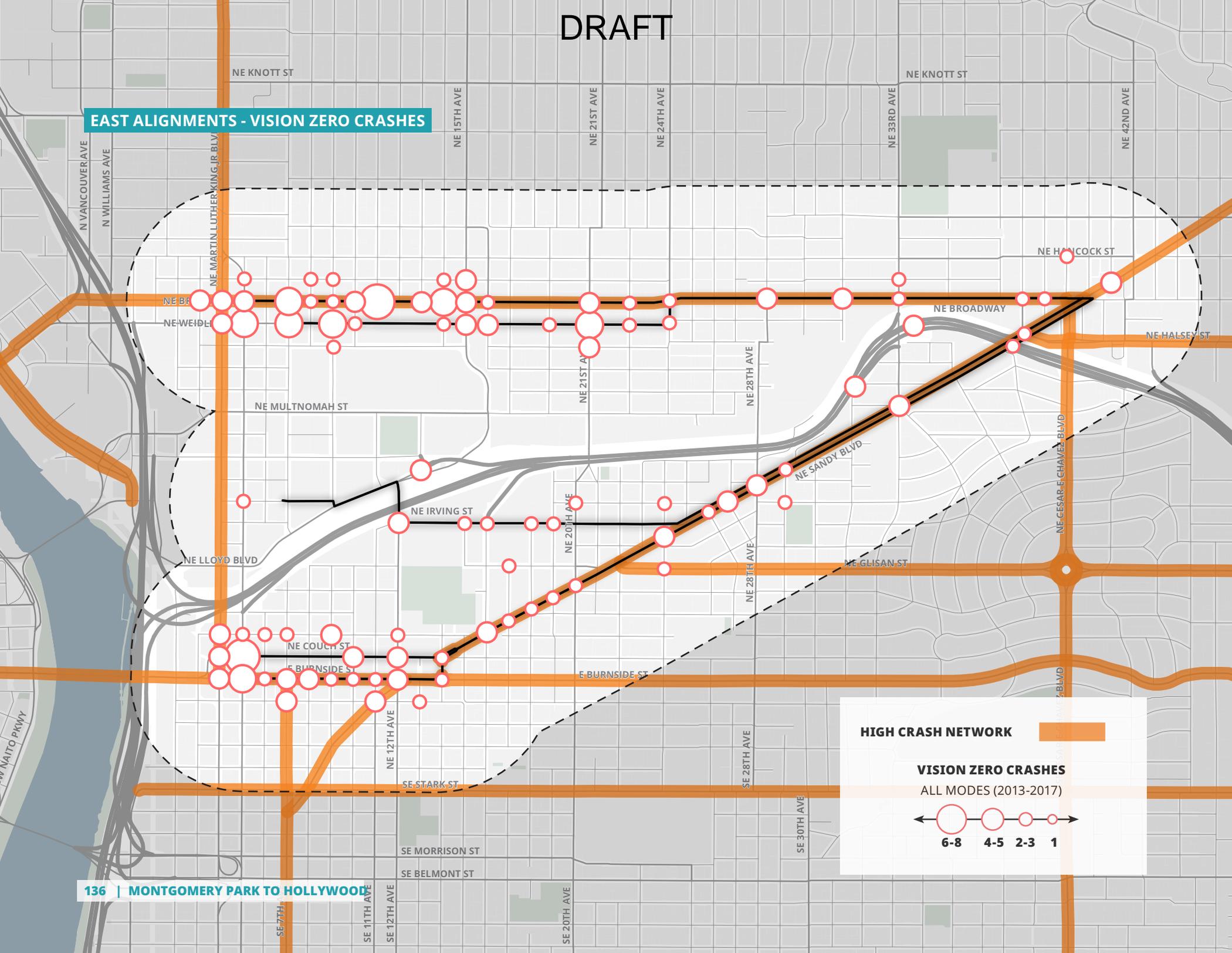
E NE IRVING AT NE 15TH AVE



F NE IRVING AT NE 22ND AVE



EAST ALIGNMENTS - VISION ZERO CRASHES



HIGH CRASH NETWORK

VISION ZERO CRASHES

ALL MODES (2013-2017)



VISION ZERO | EAST SIDE ALIGNMENTS

Portland’s Vision Zero Plan is a strategy document that sets out specific, measurable actions to move toward zero traffic deaths or serious injuries on Portland streets. That Plan was passed by City Council in 2016 in response to a 2015 unanimously passed City Council resolution committing Portland to Vision Zero. The Plan maps the most dangerous streets in Portland for pedestrians, bicyclists, automobile drivers, and details the major contributing crash factors for serious injuries and deaths on these streets. These factors inform the two- and five-year actions.

The eastside MP2H study area includes the following roadways that are part of the Vision Zero High Crash Network: Burnside Street, Sandy Boulevard, Broadway, and SE 7th Ave.

Over the past seven years, there have been four reported fatalities with the study area. They occurred along E Burnside and NE Sandy. There have been no reported fatalities to date along the NE Broadway/Weidler alignment.

TRAFFIC DEATHS | EAST ALIGNMENTS

| Location | Person killed while. | Date |
|-------------------------|----------------------|--------------|
| E Burnside & E 17th Ave | Driving | May 2019 |
| E Burnside & E 22nd Ave | Walking | Feb 2012 |
| NE Sandy & NE 20th Ave | Walking | August 2018 |
| BE Sandy & NE 23rd Ave | Driving | October 2018 |

HIGH CRASH NETWORK | EAST ALIGNMETNS

| Corridor | High Crash Network Ranking (Out of 20) | | |
|------------------------|---|--------|---------|
| | Walking | Biking | Driving |
| Burnside (East & West) | #3 | #3 | #5 |
| NE Sandy Blvd | #8 | #17 | #8 |
| NE Broadway | #5 | #1 | #18 |

VISION ZERO CRASHES: NE BROADWAY & WEIDLER

Most crashes along the NE Broadway and Weidler alignment involve people walking and people biking. NE Weidler has a higher number of crashes that involve people biking compared to NE Broadway which has a higher number of crashes that involve people walking. The highest number of crashes involving people driving occurs at the intersection of NE Broadway and NE 11th. There have been no reported fatalities to date along this alignment but NE Broadway has been identified as the most dangerous corridor in Portland for people biking, the fifth most dangerous for people walking, and the 18th most dangerous for people driving.

PEOPLE WALKING



PEOPLE BIKING



PEOPLE DRIVING



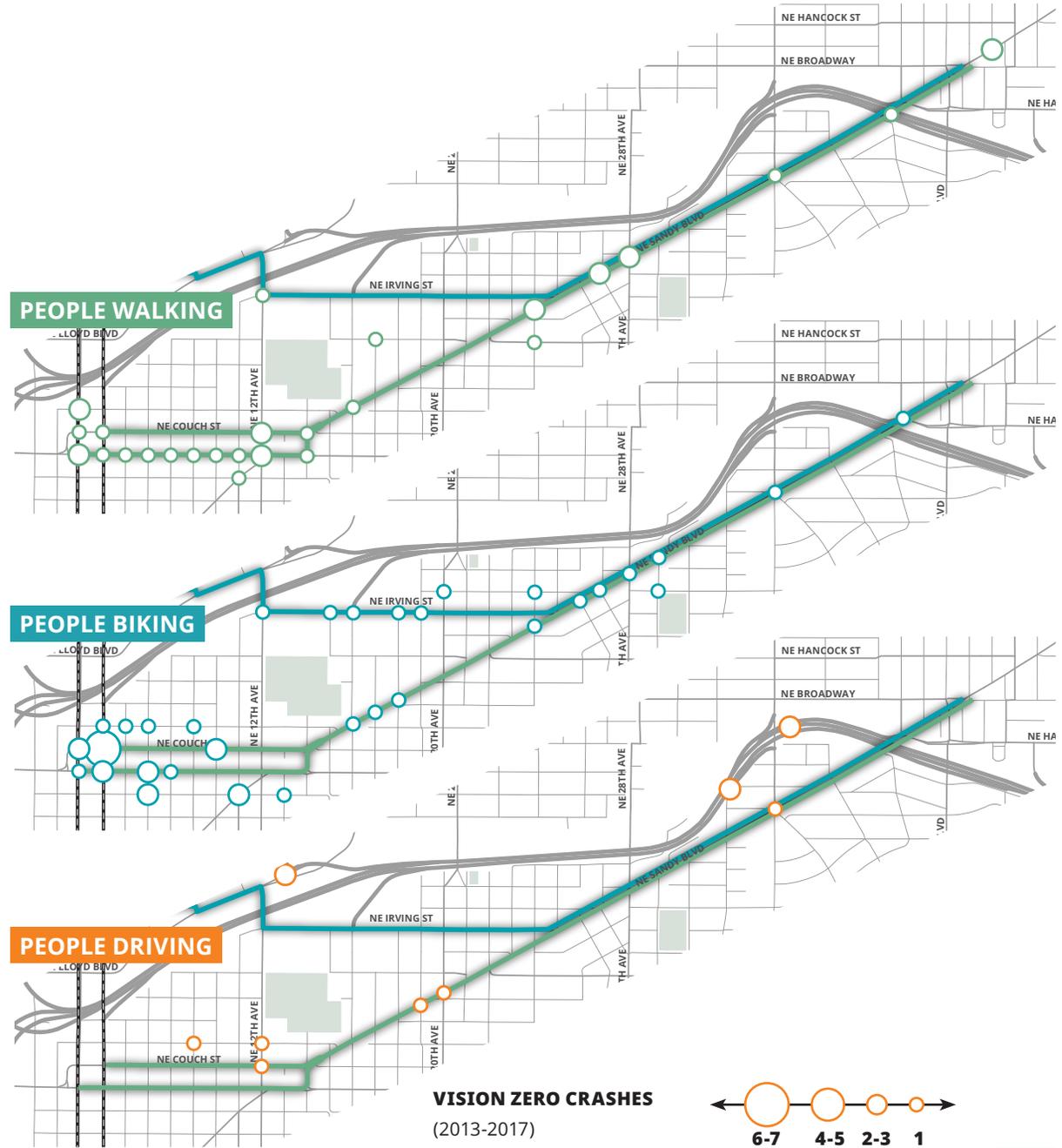
VISION ZERO CRASHES
(2013-2017)



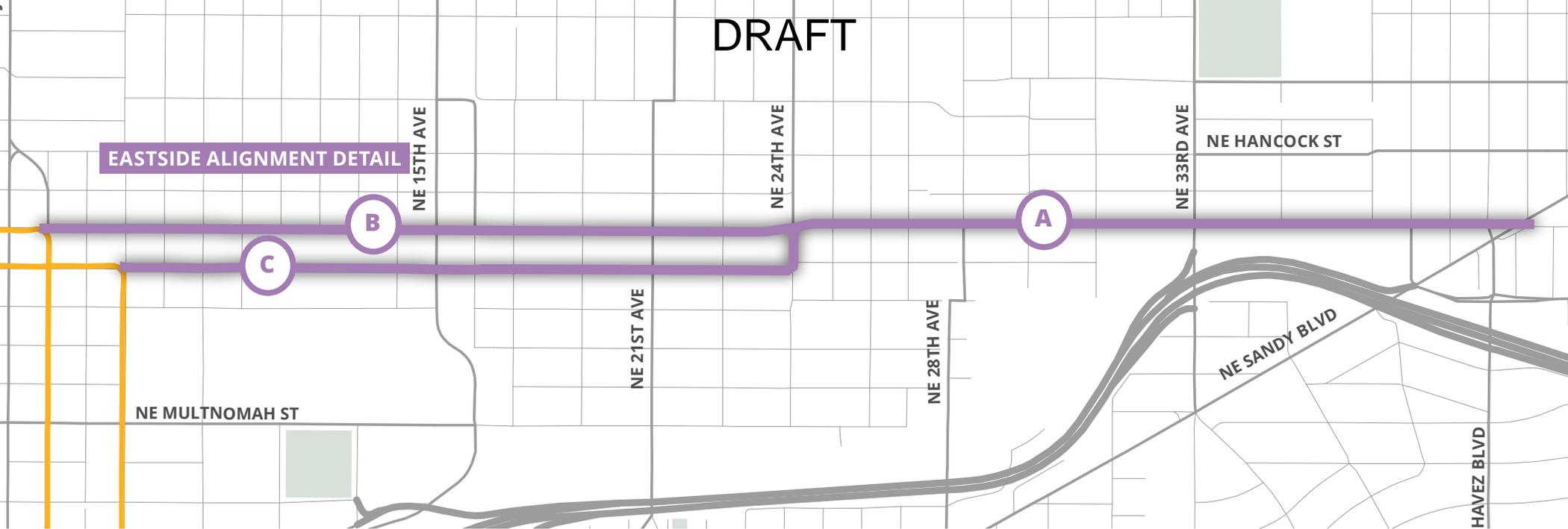
VISION ZERO CRASHES: NE SANDY & IRVING ALIGNMENTS

Few crashes along the Burnside/Couch/Sandy and Irving/Sandy alignments involve people driving. The majority of crashes include people walking and people biking. On the Burnside/Couch/Sandy alignment, crashes that involve people walking are clustered along E Burnside. The intersection of NE Couch and NE Grand has the highest number of crashes with people biking.

Both Burnside (including both E and W) and NE Sandy are identified as a high crash corridor for people walking, biking, and driving. Burnside is the third most dangerous street for people biking and people walking, and the fifth most dangerous street for people driving. NE Sandy is identified as the eighth most dangerous street for people walking and people driving, and the 17th most dangerous for people biking.



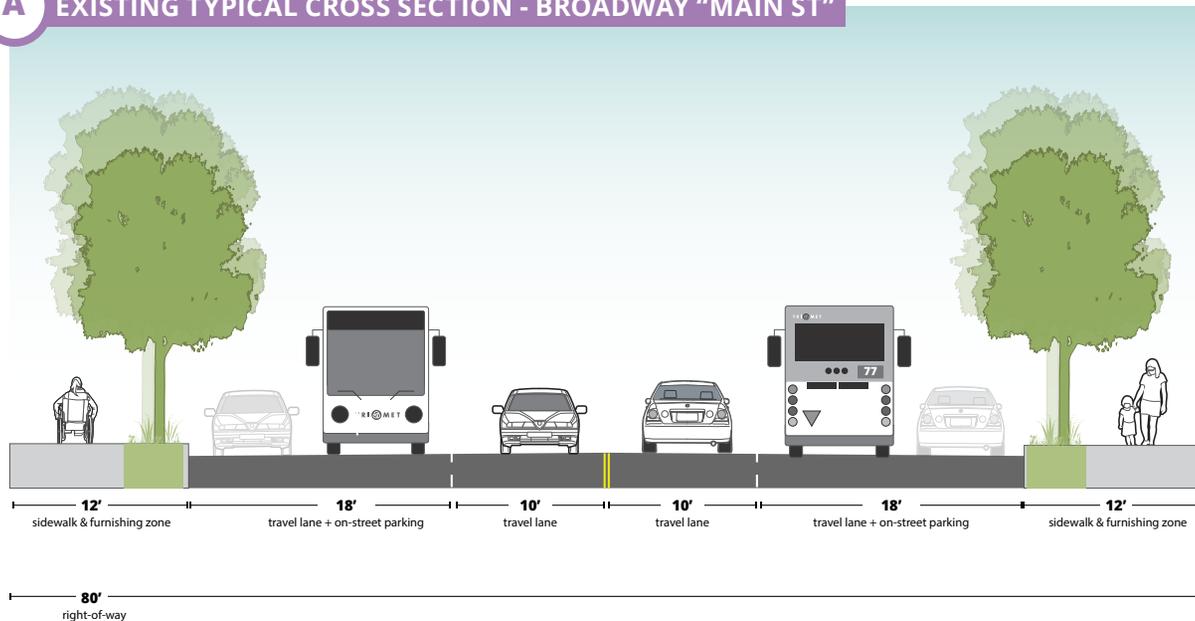
EASTSIDE ALIGNMENT DETAIL



BROADWAY (MAIN ST)

The typical NE Broadway cross section between NE 24th Ave and the Hollywood District has an 80 foot right-of-way. The sidewalk and furnishing zone is 12 foot, including trees, plantings, and street furniture. The outside lane is 18 feet from the curb and includes a parking lane. The outer lane is shared with standard traffic and TriMet buses. There is also a 10 foot travel lane that runs along the centerline of the street. East- and west-bound lanes share the same cross section.

A EXISTING TYPICAL CROSS SECTION - BROADWAY "MAIN ST"



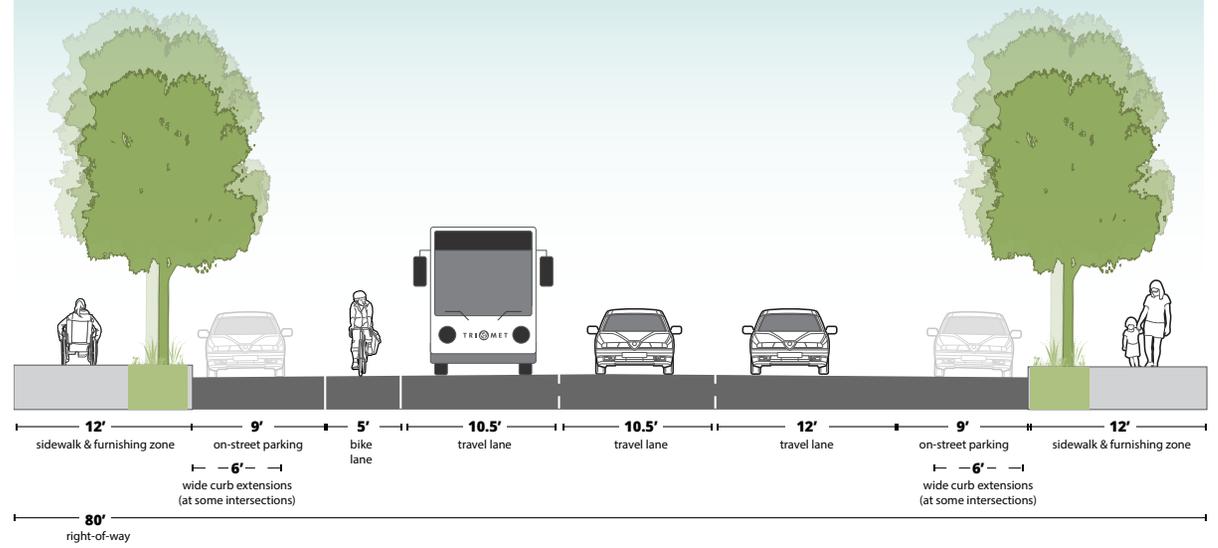
BROADWAY/WEIDLER COUPLET CROSS SECTION

West of NE 24th, Broadway and Weidler act as a couplet, with Broadway carrying west-bound traffic and Weidler carrying east-bound traffic.

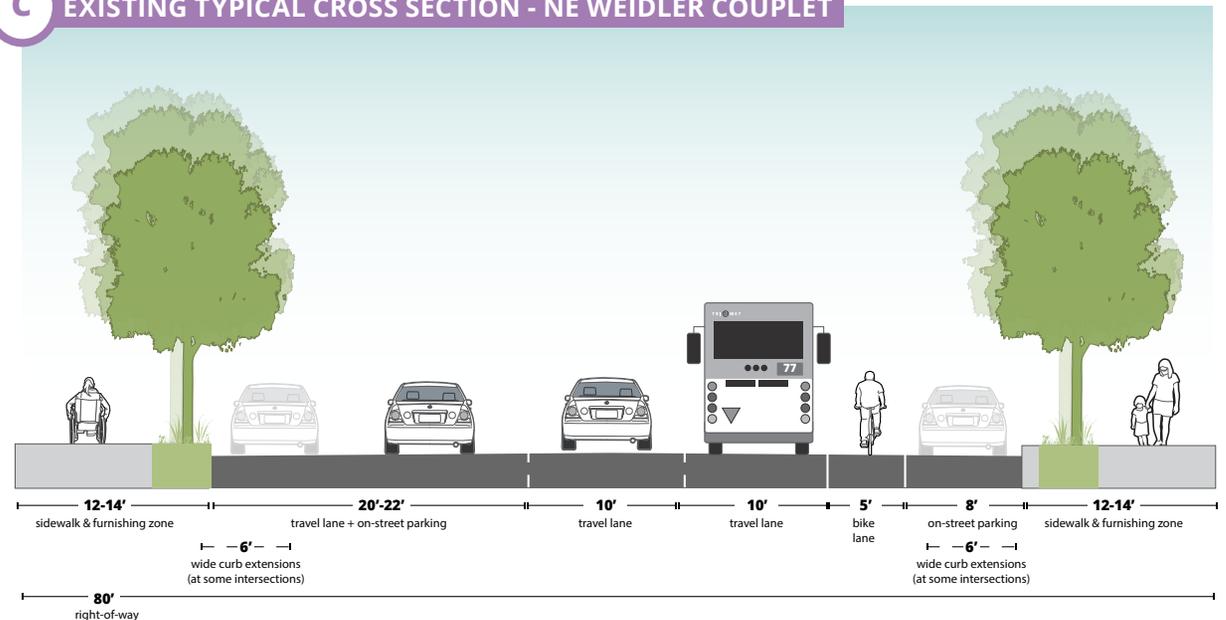
The typical cross section for NE Broadway west of NE 24th has an 80 foot right-of-way. Sidewalks and furnishing zones are twelve feet wide. Both sides of the street have 9 foot parking lanes, with 6 foot curb extensions at some corners. The southernmost lane is 12 feet wide. The two northern lanes are both 10.5 feet wide, with the right lane containing both automobiles and TriMet bus service. On the north side of the street, there is a 5 foot parking adjacent bike lane.

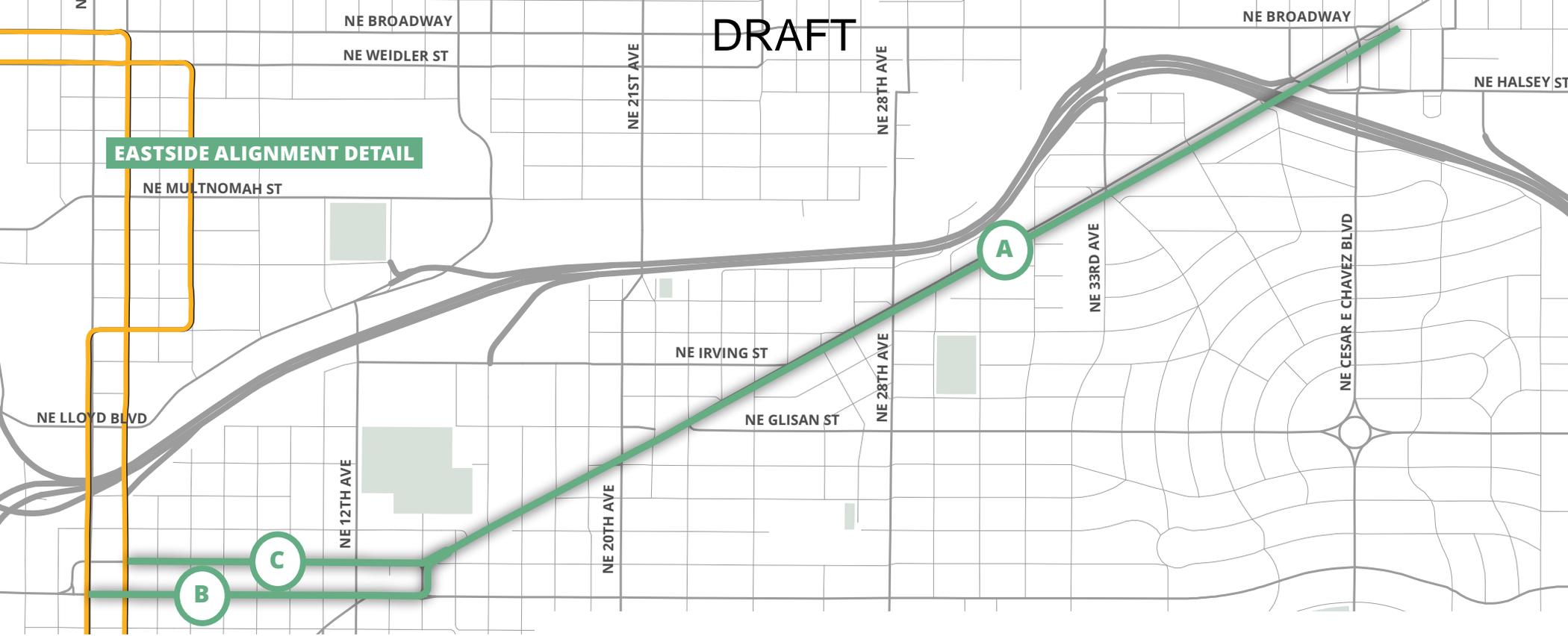
The typical NE Weidler cross section is 80 feet. Sidewalks and furnishing zones are 12-14 feet wide. Along the northern curb is 20-22 feet of parking and a travel lane; the width of the parking is not marked on the roadway. Next to this lane are two 10 foot travel lanes, with the southern lane accommodating TriMet buses. A 5 foot wide bike lane sits between the travel lane and 8 feet of parking that hugs the curb. At some intersections, the curb extends 6 feet into the roadway, which effectively creates parking bays for some blocks.

B EXISTING TYPICAL CROSS SECTION - NE BROADWAY COUPLET



C EXISTING TYPICAL CROSS SECTION - NE WEIDLER COUPLET



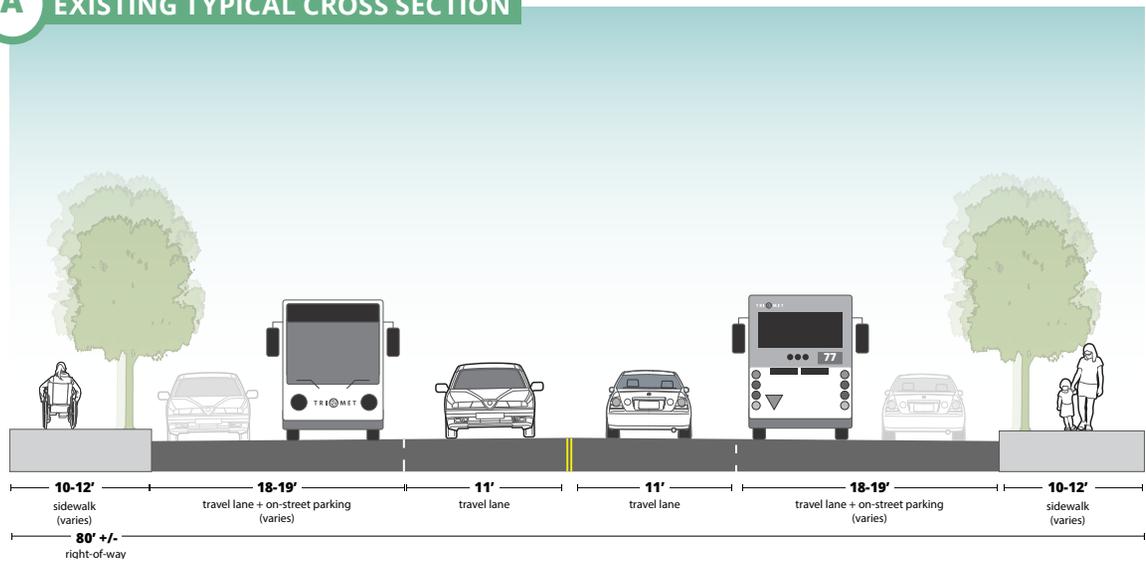


SANDY BLVD CROSS SECTION

The right-of-way on Northeast Sandy Blvd is typically 80 ft wide with 60 ft of distance between curb lines.

Today it is configured with 10 ft wide sidewalks, on-street parking on both sides of the street, and a pair of undivided travel lanes in each direction. At major intersections, the cross section changes by removing parking to allow space for a center turn lane.

A EXISTING TYPICAL CROSS SECTION

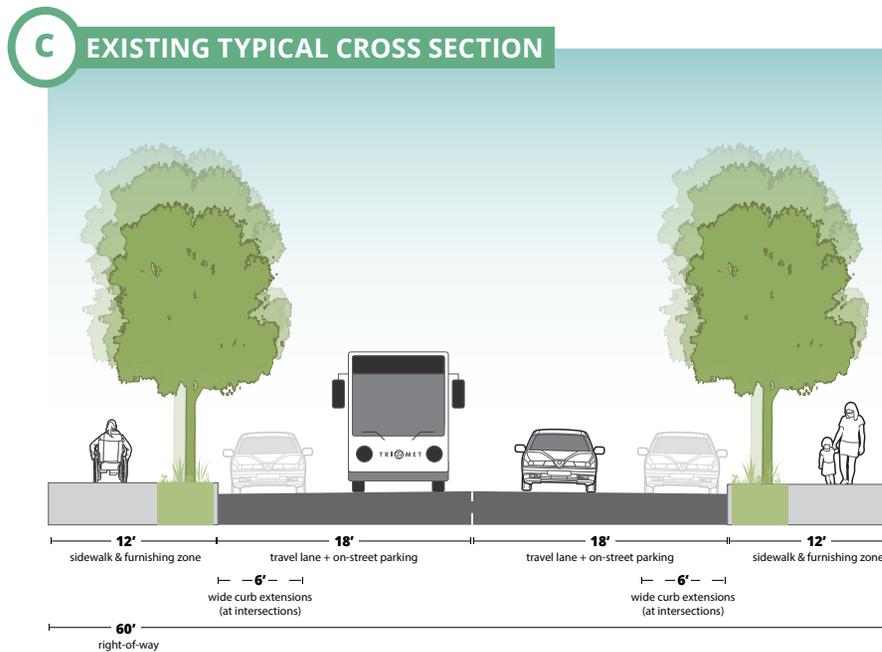
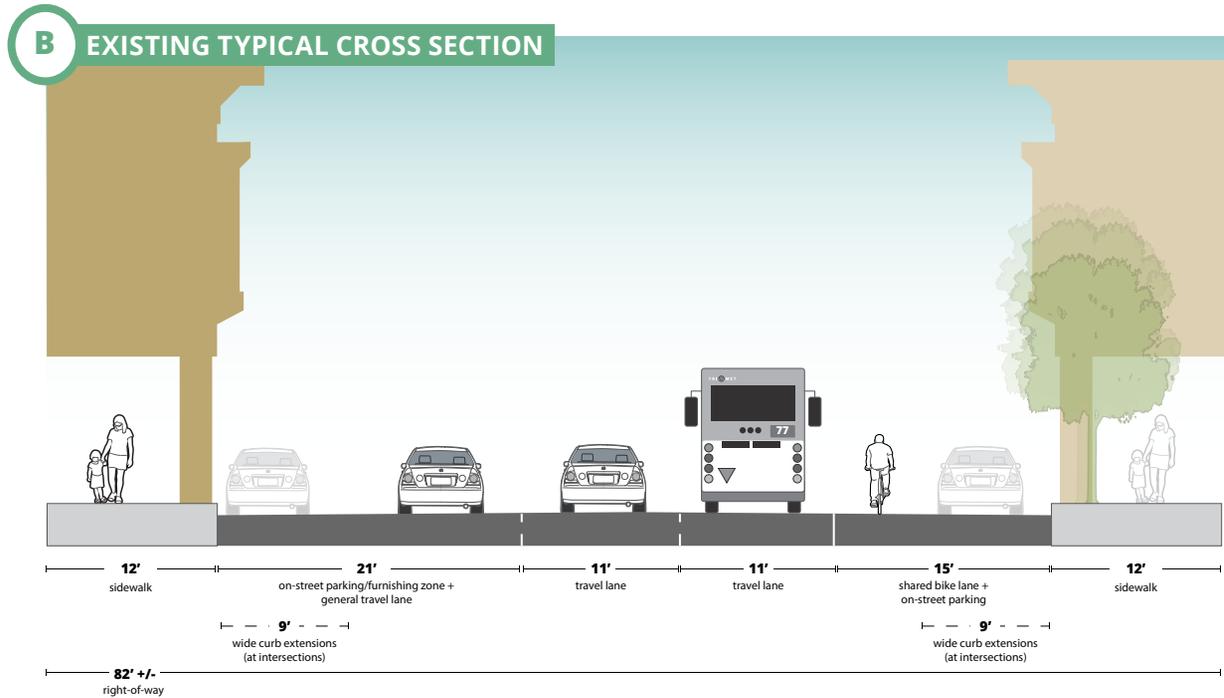


BURNSIDE / COUCH COUPLET CROSS SECTION

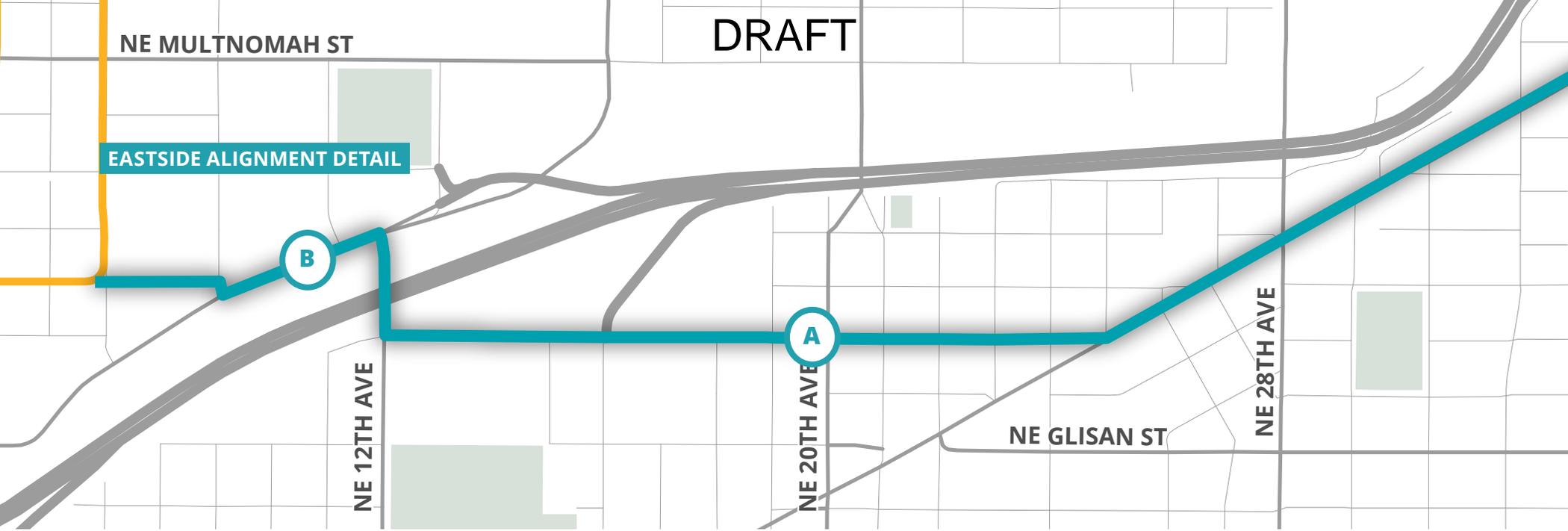
The streetscape of Inner East Burnside has been reimagined many times over the past century and has a peculiar and unique history related to transportation, urban design, and placemaking.

Following the opening of the Burnside Bridge in 1926, East Burnside street was widened to allow space for four travel lanes (two in each direction). To accommodate this additional travel area, the city and adjacent property owners agreed to create an easement through the existing first floor of abutting buildings, resulting in a pedestrian arcade, or covered sidewalk, through the district. This unique design is unique to this area within the City of Portland.

In 2010, the City of Portland reconfigured E Burnside and NE Couch St as a couplet. The new design allowed additional space for a total of three travel lanes and one bike lane on East Burnside St, and two westbound travel lanes on NE Couch St. Both streets have 12ft sidewalks, curb extensions and on-street parking on both sides of the street.



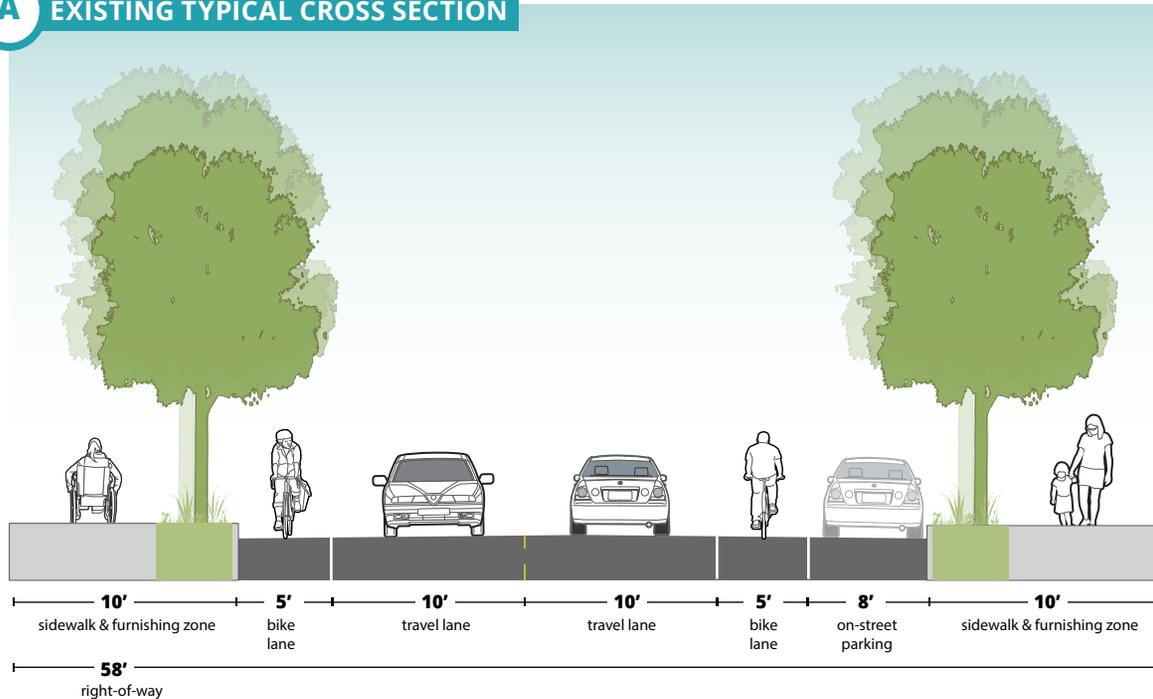
EASTSIDE ALIGNMENT DETAIL



NE IRVING ST CROSS SECTION

NE Irving is a two-way street with a marked centerline and bike lanes. The street has 10 foot travel lanes, one for each direction, bounded by 5 foot bike lanes without buffers. The bike lane on the north side of the street hugs the curb, while the south side has 8 feet of parking against the curb. There are 10 foot sidewalks on both sides of the street, which contains plantings, lighting, bike racks, and various sidewalk furniture. The total width of the right-of-way is 58 feet.

A EXISTING TYPICAL CROSS SECTION



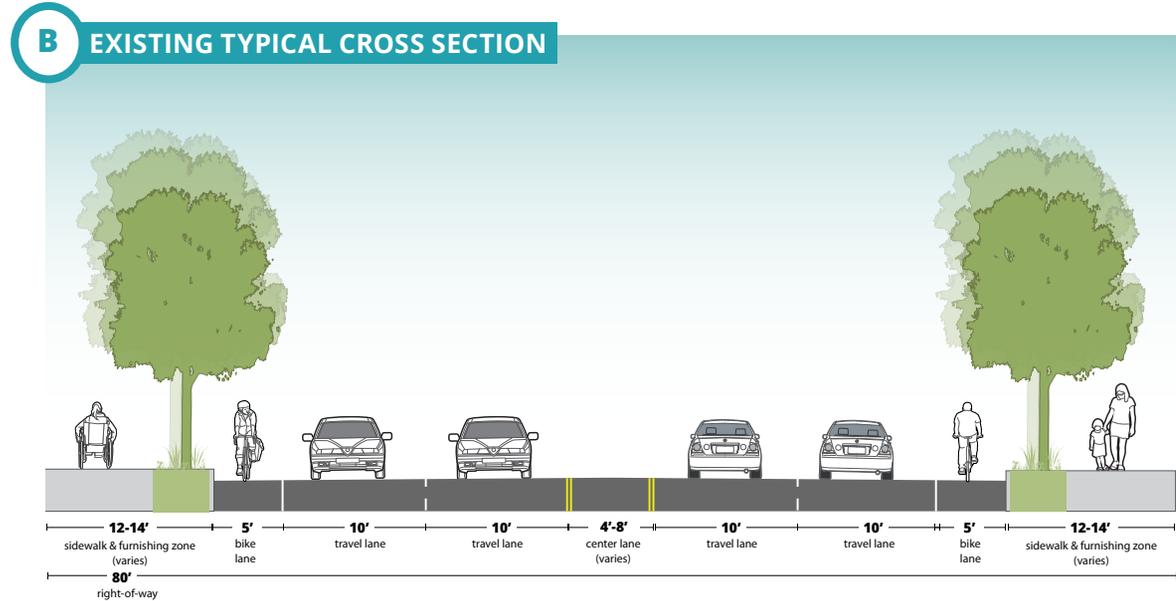
NE LLOYD BLVD CROSS SECTION

NE Lloyd Blvd is a two-way street with bike lanes. In general, both directions consist of two 10 foot travel lanes and a 5 foot bike lane with no buffer. On both sides of the street are 12-14 foot sidewalks that contain plantings, lighting, and other sidewalk furniture. In the center of the street is a painted median that varies between 4 and 8 feet wide. The total width of the right-of-way is 80 feet.

CENTRAL CITY IN MOTION:

In autumn of 2018, Portland's City Council adopted Central City in Motion (CCIM), a plan to implement pedestrian, bicycle, and transit improvements in the central part of Portland, spanning both sides of the Willamette River. While the plan aims to make many improvements, there are 18 key projects are prioritized. Of those projects, NE Lloyd Blvd is identified as a higher priority corridor for phase one implementation.

The project will transform Lloyd to one travel lane in each direction with a center turn lane. The south side of the roadway will have a wide contraflow bike lane that is separated from traffic with buffer. Both sides of the street will continue to have sidewalks.



In conjunction with CCIM, PBOT will also be constructing the Earl Blumenauer Bridge over I-84 - a pedestrian and bicycle bridge at NE 7th Ave. NE 7th is slated for further bicycle and pedestrian improvements from both CCIM and planned Green Loop projects. The Green Loop and CCIM projects will intersect NE Lloyd at a critical intersection for pedestrians, bicyclists, and transit riders.

