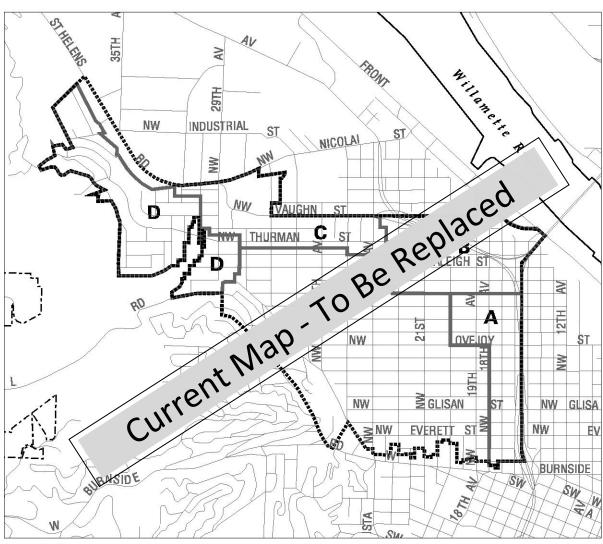
Northwest District Plan Urban Character Area E: Vaughn Corridor, Page C-23

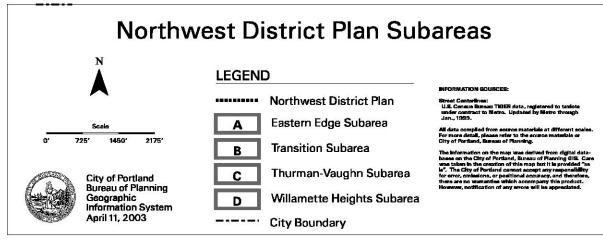
Urban Character Area E: Vaughn Corridor

The Vaughn Corridor, like the Eastern Edge, is an "edge" area characterized by a great variety of architecture and development patterns. NW Vaughn Street is a busy traffic arterial that serves both the Northwest District's mixed-use areas and the Guild's Lake Industrial area. It also serves as the interface between the industrial operations of the industrial area and the residential and mixed-use neighborhood to the south and the emerging mixed-use and employment area to the north. The corridor's architectural diversity reflects the historically dynamic, changing relationship between industrial, employment, and residential uses in the area.

Map 5: Northwest District Plan Area and Subarea Boundaries. Deletes existing Map 5.

Map 5: Northwest District Plan Area and Subarea Boundaries, Page E-3

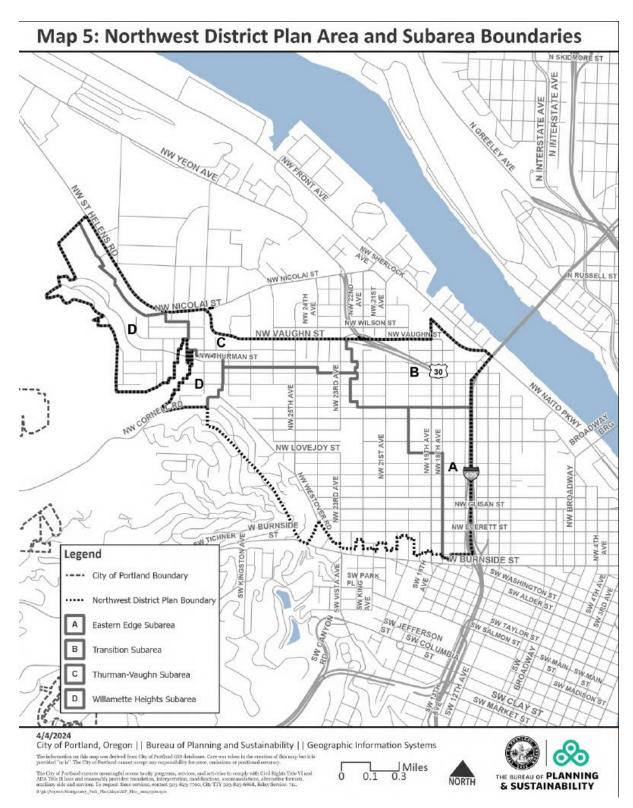




Map 5: Northwest District Plan Area and Subarea Boundaries.

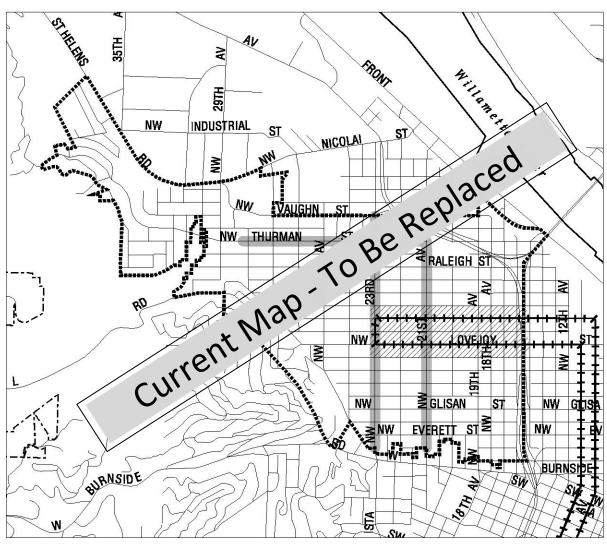
Replaces Map 5, Northwest District Plan Area and Subarea Boundaries. Amends the boundary of Subarea C to remove the area within the MPAP plan area, aligning the northern border of Subarea C with the Vaughn/Wardway corridor.

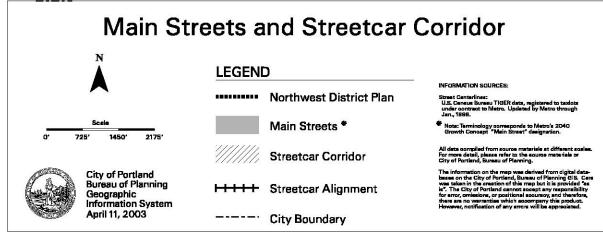
Map 5: Northwest District Plan Area and Subarea Boundaries, Page E-3



Map 6: Main Streets and Streetcar Corridor. Page E-4 Deletes existing Map 6.

Map 6: Main Streets and Streetcar Corridor, Page E-4

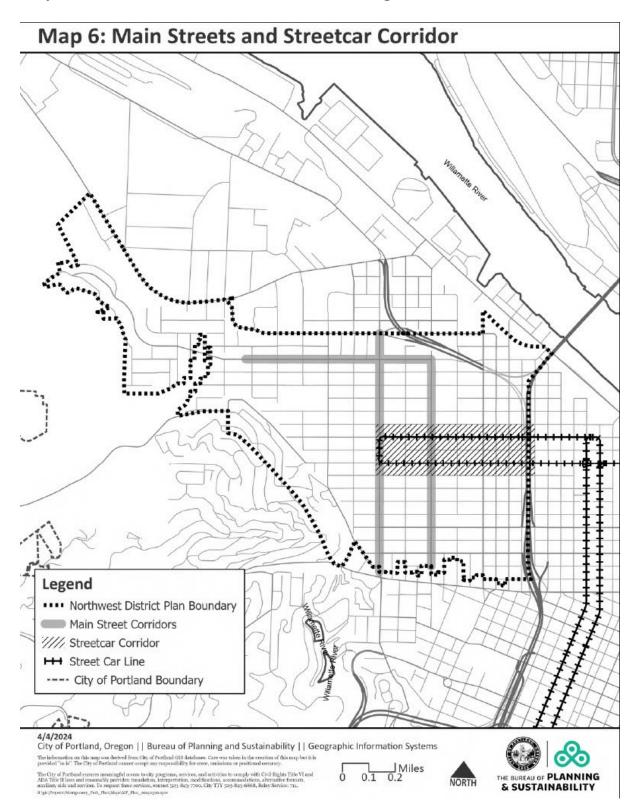




Map 6: Main Streets and Streetcar Corridor. Page E-4

Replace Map 6, Main Streets and Streetcar Corridor. Amends the Northwest District Plan boundary to remove the existing area within the MPAP plan area, aligning the northern boundary of the Northwest District plan with the Vaughn/Wardway corridor.

Map 6: Main Streets and Streetcar Corridor, Page E-4



Policy 15: Thurman-Vaughn Subarea, Page E-69

Amends paragraph describing Vaughn Street to include references to the MPAP. The amendment removes the existing statement of recognition that Vaughn Street acts as a boundary between the mixed-use area south of Vaughn and the industrial area north of Vaughn to reflect the expansion of the existing mixed-use area to north of Vaughn Street as part of the adoption of the MPAP. Adds footnote specifying that the paragraph was amended with adoption of the MPAP.

Northwest District Plan Policy 15- Thurman-Vaughn Subarea, Page E-69

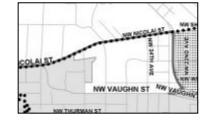
Discussion

The Thurman-Vaughn Subarea Policy intends to retain the established pattern of residential and commercial development, while acknowledging the subarea's proximity to the Industrial Sanctuary. NW Thurman Street east of NW 28th Avenue is a designated main street with both neighborhood commercial and residential development. Many needed neighborhood services are found here, including a grocery store and Friendly House community center. In addition, the new Northwest branch of the Multnomah County Library at NW Thurman and NW 23rd Avenue attracts people to the subarea. The policy seeks to enhance the pedestrian environment of the main street and overall subarea, through pedestrian safety and transit service improvements.

The subarea contains a mix of older and newer housing, including a number of live-work units. The older units include clusters of modest housing built before World War 1 that are remnants of the working class "Slabtown" neighborhood. Some of the newer units are built as rowhouses. This plan includes *Comprehensive Plan map* changes for a number of

properties along NW Thurman Street to encourage residential uses between commercial nodes and along the south side of NW Vaugh Street.

The-NW Vaughn Street corridor, has, in the past, been a dividing corridor between the mixed-use neighborhood to the south and the industrial area to the North. NW Vaughn



Street carries traffic from the I-405 freeway to destinations to the north and west, including Montgomery Park, a major office development. This plan recognizes the difference between the north and south sides of NW Vaughn Street and the potential conflicts that can occur between residential and industrial uses. The plan includes zoning changes that encourage a continuous frontage of commercial buildings along the south side of NW Vaughn Street. New development along the south side of NW Vaughn Street will be encouraged to provide design elements that unify the streetscape and establish a more attractive corridor. The "Guild's Lake Industrial Sanctuary Plan Amendments" chapter of this document includes amendments for a five block area on the north side of NW Vaughn Street that complement the provisions applied along the south side of the street The Montgomery Park Area Plan (MPAP), includes changes that extend mixed-use land use designations and zoning to the area between Vaughn and Nicolai. The MPAP changes include development and design requirements and guidelines that will help unify the streetscape on NW Vaughn⁴.

⁴ Amended with the adoption of the Montgomery Park Area Plan, ____ 2024.

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About City of Portland Bureau of Planning and Sustainability

The Bureau of Planning and Sustainability (BPS) develops creative and practical solutions to enhance Portland's livability, preserve distinctive places, and plan for a resilient future.



http://portland.gov/bps 503-823-7700 bps@portlandoregon.gov

Montgomery Park Area Plan

As-Amended Draft - Exhibit B

Volume 5: Appendix

- A. MPAP Draft Public Benefits Terms Sheet, As Amended September 2024 (p. 2)
- B. MP2H Northwest Urban Design Report (p. 13)
- C. MP2H Northwest Opportunities and Challenges Report (p. 61)
- D. MP2H Existing Conditions Report (p. 84)
- E. MP2H Equitable Development Report January 2023 (p. 234)
- F. MP2H March 2020 Open House Public Comments Summary (p. 447)
- G. MP2H Urban Design Concept Open House Public Comments Summary Report (p. 472)
- H. 2019 Preliminary Northwest Racial Equity Analysis 2019 Northwest Streetcar Extension and Land Use Alternatives Analysis (p. 606)
- I. 2019 Northwest Streetcar Extension and Land Use Alternatives Analysis (p. 627)

December 4, 2024





Montgomery Park Area Plan

Draft Public Benefits Agreement Term Sheet As Amended – September 2024

The Montgomery Park Area Plan (MPAP) proposes land use and transportation changes to establish a new transit-oriented district in Northwest Portland west of Highway 30 between NW Vaughn and NW Nicolai streets. The Plan seeks to transition the area into a mixed-use employment district that will support both job growth and housing development. The MPAP includes proposed land use changes to promote equitable, transit oriented development and complement a future extension of the Portland Streetcar. The land use changes include amendments to Portland's Comprehensive Plan map, zoning map, zoning code, and design guidance for future development.

In addition to the regulatory measures above, the MPAP includes an anticipated Public Benefits Agreement with property owners of key large sites (Montgomery Park; American Can Complex; 1535 LLC/Former ESCO Steel site) to achieve plan objectives and equitable development outcomes.

The attached Draft Public Benefits Terms Sheet outlines the key parameters of a future Public Benefits Agreement between the City of Portland and the owners of the large properties noted above. The Public Benefits Agreement is expected to be developed over the coming months and presented to Portland City Council for adoption along with other provisions of the Montgomery Park Area Plan. The future Public Benefits Agreement will complement the regulatory aspects of the plan and addresses the following issues:

- Provision of Affordable Housing
- Creation of Middle-Wage Jobs
- Wealth Building via Opportunities for Affordable Commercial Space
- Creation of a Public Open Space or Park
- Commemoration of York and Cultural Placemaking
- Transportation Funding

The Draft Public Benefits Terms Sheet is attached.



City of Portland, Oregon | Bureau of Planning and Sustainability | www.portland.gov/bps 1810 SW 5th Avenue, Suite 710, Portland Oregon, 97201 | Phone: 503-823-7700 | Relay: 711

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Traducción e Interpretación | Biên Dịch và Thông Dịch | अनुवादन तथा व्याख्या | 口笔译服务 | Устный и письменный перевод | Turjumaad iyo Fasiraad | Письмовий і усний переклад | Traducere și interpretariat | Chiaku me Awewen Kapas | 翻訳または通訳 | ການແປພາສາ ຫຼື ການອະທິບາຍ | الترجمة التحريرية أو الشفهية | Portland.gov/bps/accommodation

Montgomery Park Public Benefits Agreement Preliminary Draft Term Sheet - As Amended

Introduction

The City of Portland has developed a land use and transportation plan that will create a new mixed-use district in Northwest Portland, focused on the area west of Highway 30 between NW Vaughn and NW Nicolai streets. The plan will change current zoning to allow greater development intensities and a greater mix of uses on properties currently zoned for industrial and employment uses in an area served by extension of an existing streetcar line. This plan builds on the City's previous action which removed the Industrial Comprehensive Plan designation on the former ESCO site and replaced it with the Mixed Employment Comprehensive Plan designation. The plan would create the opportunity for several thousand new housing units, and hundreds of new regulated affordable units. A 1.6-mile extension of the Portland Streetcar (.80 miles each way) would serve the new development. Two large sites in the area are in development transition: the Montgomery Park office complex and the former ESCO Steel manufacturing site.

The vision of the project is to transform the area from a largely low intensity industrial area to a mixed-use neighborhood that includes employment, housing, and other community-serving land uses. Increased density and transit-oriented development support the City's goals to reduce carbon emissions and create additional capacity for housing and jobs. The plan would also create additional land value through city actions, including land use regulation changes and transportation investments — and these city actions must address City policies that call for equitable development. In this instance, the public benefits of the project must address the loss of industrial land and the middle-wage jobs that might have been supported by industrial development and must contribute to solving Portland's acute need for housing, including affordable units.

The terms summarized below seek to address these public needs, even as they recognize that the land in question is privately owned – and thus these benefits can only be realized through the opportunity created by future development.

The requirements listed here are intended to outline the means to direct some of the value created from the change in land use regulations and transportation investments toward providing broader public benefits. These benefits include middle-wage jobs, affordable rental housing, wealth building opportunities, and a new publicly accessible open space or park.

As part of this agreement, the City and the property owners acknowledge that these benefits rely in part on future development, and the proposal is intended to enable that development. The proposed agreement seeks to strike a balance between private value created and benefits to the larger community – while recognizing the area's previous industrial character and uses.

Because there is no housing currently developed on either the former ESCO site or the Montgomery Park site, this plan presents no risk of housing displacement on those sites. Instead, with the opportunity for an increase in middle wage job growth and additional affordable housing, there is an opportunity for future developments with a more equitable distribution of benefits to be realized from city and private investment.

This project has the potential to provide meaningful community benefits. It presents an opportunity to help address Portland's housing crisis by increasing housing choices and affordable housing supply in an opportunity-rich and low-carbon neighborhood. The transit-oriented nature of this new community means that new residents can meet their daily needs without a personal vehicle. Increased density in an area with improved access to high quality, low-cost, and low-carbon transportation options that connect people to both nearby and regional destinations and job centers can reduce development pressure on Portland's edges. This, in turn, lowers city development expenditures, helps preserve open spaces and farmland in a growing region, and supports more equitable and sustainable urban living.

Proposed Public Benefit Package Summary

- 1. <u>Middle Wage Jobs.</u> A target of 800 middle wage jobs to be provided on site. If the job goal is not met within 10 years from the effective date of this agreement, a proportionate per-job payment will be required, which will be used to fund workforce development and training programs, up to a maximum payment of \$4 million;
- 2. <u>Small Business Job Creation.</u> Incentives for below-market-rate, for-sale and for-rent commercial spaces; and
- 3. <u>Minimum Affordable Rental Housing Units.</u> Construction of 200 units affordable to households making 60% of Area Median Income (AMI) prior to or concurrent with any market rate units and within seven (7) years of the effective date of this agreement or each housing project must include 15% of its dwelling units at 60% of AMI;
- 4. <u>Public Open Space.</u> Provision of a single, contiguous, publicly accessible open space that is a minimum of 40,000-square-foot in size and is centrally located within Subdistricts B, C and D of the Vaughn-Nicolai Plan District;
- 5. <u>Commemoration of York.</u> Commemoration of York through public art and placemaking in a significant publicly accessible location within the development.
- 6. <u>Transportation.</u> Commitment of private property owners to fund a portion of the public Portland Streetcar extension project through formation of a Local Improvement District;

Proposed Public Benefits Package Components and Considerations

1. Middle Wage Jobs. The middle-wage jobs benefits package is intended to help offset the loss of prime industrial land and to continue to support middle wage jobs in this area. Prior to closure of the ESCO foundry the 16-acre campus had 800 jobs. This equates to 871 building square feet per lost industrial job. This calculation is confirmed by two sources: the US Energy Information Administration Survey of space utilization averages for specific building types which lists 1,500 square feet per industrial job and the landowner's own current job density statistics for operating factories which ranges from 890 square feet to 2,500 square feet per employee. Thus, the actual job loss from the rezoning of industrial land is estimated at 800 jobs. Net new job production in Subdistricts B, C and D must therefore be equal to or greater than 800 new middle-wage jobs on site. If these job targets are not realized within 10 years from the effective date of this agreement, the property owners will make a proportionate payment of \$5,000 for each job under 800 not yet created, up to a total possible payment of \$4,000,000. Payment shall

be made into the Middle Wage Jobs Fund (MWJF) to support business development and/or jobs programs associated with the following programs: The Oregon Manufacturing Extension Program (OMEP) and Oregon Manufacturing Innovation Center (OMIC) or similar.

- a. A middle-wage job is defined as:
 - i. A job where the starting annual salary is a minimum of \$57,000 or greater than 50% of area median income (AMI) for a family of four, as published by the Federal Department of Housing and Urban Development, for the year in which the evaluation is taking place; and
 - ii. Does not require a four-year college degree or more to qualify; and
 - ii. Is within five priority industry clusters (Athletic & Outdoor, Green Cities, Food & Beverage Manufacturing, Metals & Machinery, and Software & Media), other traded sector industry, or otherwise meets criteria i. and ii.
- b. <u>Small Business Job Creation</u> Middle Wage Job Requirement Reduction: Commercial condominiums sold at a cost that is 15% below market value to buyers from priority communities or affordable commercial space leased to priority communities at 20% below market rents would qualify for a reduction in middle wages jobs. The allowable reduction in middle wage jobs is one (1) employee for every 200 square feet of non-residential floor area sold or leased at below market value. For-rent, affordable non-residential spaces shall be leased at below-market rents for a period of no less than 10 years. A reduction in middle wage jobs in exchange for affordable for-rent or for-sale commercial space shall not exceed 20% of the required middle wage jobs.
 - i. Eligible renters or buyers shall initially be identified by contacting one or more Qualified Culturally Specific Organizations (QCSO). The developer/property owners shall make all reasonable efforts in this regard. The definition for a QCSO is the same as that used by Oregon Housing and Community Services (OHCS)]:
- c. Reporting, Monitoring, and Enforcement of Middle Wage jobs.
 - i. At intervals of 5, 7 and 10 years after the effective date of this agreement, the property owners will provide reports on how many net new total jobs and middle wage jobs have been created onsite since the effective date of the agreement.
 - ii. Progress toward the middle wage job requirements will be measured at the three reporting intervals: 5, 7 and 10 years after the effective date of this agreement. Independent verification of the property owners middle wage jobs production performance is required. To accomplish this, the property owners will pay to Prosper Portland \$25,000 at the beginning of the fiscal year in which each of the three reporting intervals occurs. Prosper Portland will use these funds to verify and enforce compliance with the middle wage jobs requirements and affordable commercial offsets. The funds will be used to hire and/or contract with an independent third party that will be tasked with verifying compliance with middle wage job requirement performance and for reimbursement of any associated staff

costs. The report produced by the third party will help form the basis for enforcement actions, if any. Additional fees, up to a maximum of an additional \$25,000 and not to exceed \$50,000 for each year in which reporting is required, may be assessed if necessary to offset the cost of verifying and enforcing compliance with middle wage jobs requirements and affordable commercial offsets. In its program administration and compliance monitoring role in this project area, Prosper Portland will use existing programs to market the area to target industry cluster employers and businesses to help achieve middle wage job targets within the first five years.

- iii. Reporting, monitoring and enforcement provisions of this agreement including those pertaining to middle wage job creations will be contained in a legally binding agreement that runs with the land.
- iv. Enforcement of non-compliance with the middle wage jobs production requirements will occur through payment of liquidated damages to the MWJF in the amount equal to \$5,000/job in the first year of this agreement, which shall increase annually at a constant rate of 3%.
- v. At each reporting milestone, property owners will either demonstrate job creation equivalent to the job target for that milestone or will be required to make a payment in an amount equivalent to any shortfall in the number of jobs required to meet the job target for that milestone, as outlined below:
 - 1. Year 5: 50% of job target or 400 jobs
 - 2. Year 7: 70% of job target for a total of 560 jobs or an additional 160 jobs from Year 5
 - 3. Year 10: 100% of the job target for a total of 800 jobs or an additional 240 jobs from Year 7

For example, if only 200 middle wage jobs are created by Year 5, then property owners shall make a payment of \$1.12 M to the MWJF at the time of the Year 5 reporting milestone. The payment amount includes the 3% annual escalation.

- 4. Reductions may be permitted through the lease or sale of commercial space at below -market rates consistent with applicable provisions of this agreement (see Small Business Job Creation).
- vi. The MWJF will be administered by Prosper Portland (or its successor) which will use the 5-, 7- and 10-year performance reports and any other tools of its choosing to assist in administration. Prosper Portland may use the MWJF to fund any of its then extant jobs-related programs at its sole discretion. Prosper Portland will be entitled to retain an administrative fee not to exceed 10% of the value of MWJF.
- 2. **Affordable Rental Housing.** The affordable rental housing benefits package is intended to address the acute need for affordable housing in the near-term and to gain regulated affordable rental housing units in this high opportunity area to achieve a mixed income community.
 - a. The first housing units to be built in Subdistricts B, C D and F shall contain a minimum of 200 units of rental or ownership housing units, which may be provided in one or more buildings, and will be characterized by, at minimum:

- i. All units will be affordable at 60% of Area Median Income (AMI); and
- ii. Rents and other requirements will be regulated by the Portland Housing Bureau (PHB), or its successor in accordance with the Inclusionary Housing program rules and requirements extant on the date the Agreement is executed; and
- iii. The building will be deemed a Consolidated Building for purposes of Inclusionary Housing compliance for future development up to a maximum of 2,000 market rate units and will comply with all laws, rules, regulations, and ordinances that exist on the date the initial land use application is submitted for the Consolidated Building, consistent with PCC 33.700.080.A;
- iv. To qualify the building must be located within a parcel or site bounded by NW Wardway to the west, NW Vaughn Street to the south, NW 24th Ave. to the east and NW York St. Extension to the north. The area defined above consists of roughly Subdistricts B, C, D and F in the proposed Vaughn-Nicolai Plan District; and
- v. Reasonable Equivalency: The parties recognize that the goal of this agreement is to incentivize the early construction of affordable housing and to allow those affordable units to serve as a bank for the inclusionary housing requirement of future market-rate development. The parties also recognize that the banked affordable housing must be equal or superior to the average size and quality of a unit found in the market.

The unit size, bedroom mix and quality of finishes will be determined by a market analysis of comparable developments in the Census Tracts that comprise the broader Northwest Study Area, as defined in the Montgomery Park to Hollywood Equitable Development Report. The market analysis shall be completed by the property owner/developer and shall be submitted to the city at the time of or prior to submittal of a land use application for the Consolidated Building. The market analysis shall have been completed no longer than six months prior to the submittal of the land use application. The Consolidated Building shall be constructed with a unit size, bedroom mix and quality of finishes that is equal or superior to recent comparable developments in the area, as determined by the market analysis. Implementation details will be further described in the public benefit agreement.

vi. The Consolidated Building may not request or receive any city-controlled subsidy of any kind, with the exception of system development charge and real estate tax exemptions.

b. Enforcement Options:

- No other residential building permits may be issued until the city issues a building permit for the Consolidated Building, all necessary financing has closed, and the property owner/developer has issued a notice to proceed to its general contractor, or
- ii. If the Consolidated Building does not meet the requirements of Section 2 a or a market rate building elects to build its own Inclusionary Housing units, all housing developments up to 2,000 units will be subject to a requirement to provide 15% Inclusionary Housing units at 60% AMI, or

- iii. Alternatively, property owners may comply with the requirement to provide 15% IH units at 60% AMI by paying the applicable Inclusionary Housing Fee In Lieu in the amount equivalent to the IH unit requirement, in accordance with the city's inclusionary housing regulations.
- 3. **New Park/Open Space.** The New Park/Open Space benefits package is intended to provide at least one quality publicly accessible parks or open space in this new mixed use area, which is expected to accommodate thousands of new jobs and housing units.
 - a. <u>Park Obligation</u>. The property owners will be required to create at least one park on their current property, totaling a minimum of 40,000 square feet and having at least two public street or public easement frontages of a minimum of 100 linear feet. The park design will be determined through a public process, working with Portland Parks & Recreation (PP&R), but generally should be oriented to passive recreational uses and be characterized by significant vegetation and tree canopy and should include facilities for children and children's play.
 - b. <u>Park Ownership.</u> PP&R agrees that the land upon which the park is built may be owned by the property owners and/or their successors only if the property owners agree to maintain public access to the park in perpetuity and will record an easement or similar legal document(s) to that effect, benefiting the city of Portland by and through PP&R or its successor.
 - c. Park Maintenance. PP&R will provide basic maintenance for the park in keeping with the current level of service as defined by PP&R. Maintenance over and above PP&R's basic standard will be provided by the property owners and/or their successors, exclusively at their cost. PP&R and the property owners agree to collaborate on creation of a park maintenance agreement detailing levels of service, roles and responsibilities and payment of capital and ongoing costs. The park's operation and maintenance will be further detailed in coordination with PP&R.
 - d. <u>Key Park Features.</u> Consistent with park function and character described above, key features of the park shall include:
 - i. The park will be open to the public for free;
 - ii. The park hours of operation will be at 5 a.m. to midnight every day of the year and will be open and accessible to the public during those hours. The hours of operation could be less, if determined by the current director of PP&R to be consistent with typical hours of operation in the current park system.
 - iii. The park must be free of physical barriers to entry and surveillance equipment within the park, and it must also comply with the American Disabilities Act
 - iv. The park will include at minimum the following amenities:
 - 1) Provide primarily green vegetated infrastructure with appropriate public accessways through it;
 - 2) Minimum of 20% canopy cover.
 - 3) Increase the urban tree canopy using a mix of tree species and sizes adapted to our changing climate and urban context (favoring large form canopy trees):
 - 4) Permanent seating areas with access walkways

- 5) Water feature or other urban park amenities
- e. <u>Park Location.</u> The open space shall be centrally located (between NW 24th and NW Wardway Avenues and, between NW Vaughn and a future NW York Street) in Subdistricts B, C and D or among the subdistricts.
- f. Upon issuance of a building permit for the first market rate residential project on Subdistrict B, C or D, a site plan shall be provided that identifies the location of the required 40,000 square foot park. The site plan detailing this location, once approved by the city, shall be considered an addendum to this agreement.
- g. Build out of the 40,000 square foot park shall be required at the time of the completion of construction of the 1,000th dwelling unit or within ten years of the effective date of this agreement, whichever comes first.
- h. The property owners will be eligible for a reduction in Parks systems development charges (SDCs) equivalent to the value of the agreed upon improvements, which will be determined in coordination with the PP&R. Any other properties in the plan area that contribute to the development of open space may also be eligible for SDC credits. [to be determined]
- i. The property owners and/or their developers will pay all SDCs due until such time as PP&R, or its successor, has issued a confirmation letter that a Park has been created that meets the requirement herein.
- j. The property owners are considering one or more parks or recreation facilities in addition to the required park outlined above. In particular, enhanced connections or parking access to nearby Forest Park have been discussed. Such park or facilities are not required as part of this agreement, however, should the property owners and PP&R agree to such park or facility, PP&R may consider providing additional SDC exemptions or credits, above and beyond the SDC reduction provided for the required 40,000 square foot park, as part of a negotiation with the property owners.
- k. Commemoration of York is outlined in Section 4 below. The property owners and PP&R will consider whether to include such commemoration in the required park outlined above. Location within the required park is optional, not required.
- I. A maximum of 12 fee-for-entry events are permitted annually in the park; to the extent feasible, a portion of the park should remain accessible for free to the general public throughout the duration of the fee-for-entry events.
- 4. **Commemoration of York.** The Commemoration of York public benefit is intended to celebrate the contributions of York, an enslaved member of the Lewis and Clark Expedition and the first documented person of African descent to visit what would become Portland, Oregon, and for whom NW York Street, which exists in the area, is named.
 - a. The property owners and/or developers/owners must partner with the City Arts
 Program, through a Request for Proposal or other appropriate process, to work with the
 York Work Group to determine how York will be commemorated in the areademonstrate
 a partnership between them and the Regional Arts and Culture Council (RACC) or its
 successor, as determined by the City of Portland, a process that will result in the funding
 and installation of one or more features memorializing York at the intersection of NW
 York Street in the area between NW 24th and NW 26th avenues. The owner/developer

- may propose any other bona fide organization or organizations in place of RACC and must consult with representatives of interested community groups.
- b. All required contributions to the 2% for Art program by the city or Portland Streetcar Inc. will be made to a Montgomery Park Area Plan fund established by the City Arts ProgramRACC or its successor. All funds must be spent on memorializing York or contributions of other Black/African American people to the district, city, region or state of Oregon and otherwise generally commemorate the history of the area, as determined in partnership with the York Work Group.
- 5. **Transportation.** Broadly, transportation improvements in the project area can be broken into two categories: 1) those where costs will be shared by the City and the property owners; and 2) those where costs will be borne exclusively by the property owners.
 - a. <u>Shared Transportation Costs</u>. Shared-cost transportation improvements will apply to the following streets:
 - i. NW Roosevelt Street between NW 24th and NW 26th avenues
 - ii. NW Wilson Street between NW 24th and NW 26th avenues
 - iii. NW 23rd Avenue between NW Lovejoy and NW Roosevelt streets, by virtue of participation in the district-wide Local Improvement District
 - iv. In addition:
 - 1) These streets are/will be part of the new Streetcar track alignment.
 - 2) Where these streets are on or cross the property owners' property, right-of-way dedications to the city will be required.
 - 3) The City, in partnership with Portland Streetcar Inc., will design and contract for construction of all improvements.
 - 4) Payment for design and improvements is anticipated to come from:
 - i. Federal Transportation Administration (FTA) match, which the City will diligently pursue and maximize to the greatest extent possible.
 - ii. City of Portland funds
 - iii. A Local Improvement District (LID) in which the property owners will be significant contributors. The LID formation will require a separate public process in which property owners will actively participate. Participation and contribution to the LID will be based upon formal assessment and legal requirements, as such that costs borne by property owners are relational to their assessed benefit resulting from the improvements.
 - iv. Property owner contribution outside the LID, if necessary.
 - v. Dedication of rights-of-way for above streets
 - Property owner streets. Property owners will be required to comply with the Montgomery Park Area Transportation Plan, as well as City Design Standards for Public Streets. The Montgomery Park Area Transportation Plan includes the following streets, at minimum:
 - i. NW 25th Avenue from NW Wilson Street to NW Roosevelt Street.
 - ii. Extensions of the street grid as required through development review to meet street spacing and connectivity standards.
 - iii. In addition:

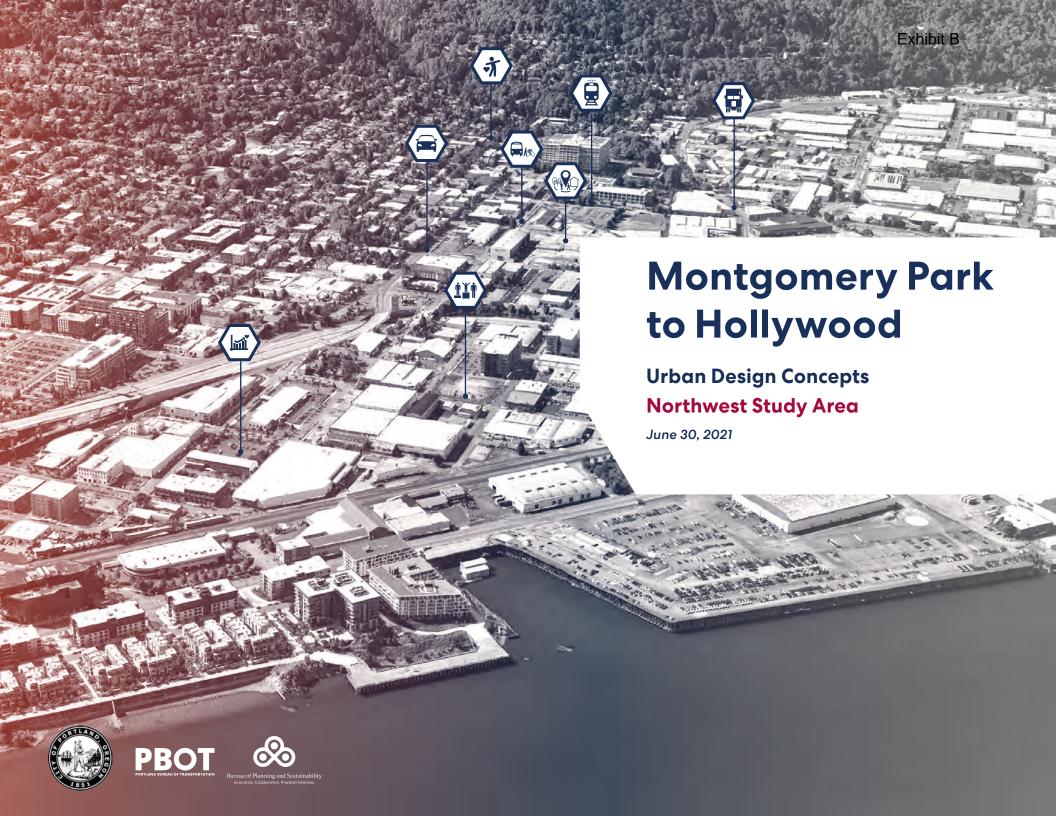
1) In keeping with standard practice, it is expected that the property owners will pay for all costs for these streets; this includes the right of way dedications and associated infrastructure, per City codes.

- 2) Design of the streets will comply with the City's design standards and will be consistent with the Montgomery Park Area Transportation, which can be found at a conceptual level in the Montgomery Park Area Plan and which will be finalized through development review.
- 3) Contracting and management of construction of streets to be constructed as part of the streetcar project will be negotiated between the city and the property owners prior to and during design.
- c. Commitments made by the City of Portland.
 - i. The City shall demonstrate significant progress toward the design, funding and construction of the extension of Portland Streetcar within a reasonable time frame following adoption of the related land use plan and associated Comprehensive Plan and zone changes. Demonstration of progress includes but is not limited to seeking adoption of a Locally Preferred Alternative (LPA) from Portland City Council, TriMet and Metro before December 31, 2024; an application to enter project development with the Federal Transit Administration before June 30, 2025; and a commitment to form a local improvement district to assist in funding streets and streetcar related investments, prior to any building permits are issued for private development projects in the project area.
 - ii. The City shall make every effort to fund and build the extension of Portland Streetcar as agreed upon in this document and to do so in a timely and costeffective manner; however, there is no legal nexus between the land use decisions, zoning changes, and development agreements and the construction of streetcar.
- 6. Infrastructure Planning. The area, which consists of large unsubdivided parcels, will require new transportation, water, sanitary sewer and stormwater infrastructure to support future higher intensity, mixed use development. The property owners/developers agree to work with the public works bureaus to develop a comprehensive plan for the public infrastructure to ensure it will be appropriately phased, sited, and sized and that their connections to existing infrastructure will make effective use of existing system capacity. The intent is to provide greater certainty for both the city and property owners/developers in order to simplify later permit processes. Implementation details, including the timing of such plans, will be further described in the public benefit agreement.

7. Other Agreement Terms and Obligations

- a. Agreement Term: 10 years
- b. Upon issuance of a Temporary Certificate of Occupancy for a residential unit total of 2,000 or more and if there are no additional unmet obligations, all requirements of this

- agreement shall be deemed complete and the developers/owners shall have no further obligations under this agreement.
- c. Racial equity in construction subcontracting firm and workforce participation. Property owners shall make best efforts to engage and involve as many as possible of the culturally-specific construction-related technical service providers in each development project. As of the date of this agreement, those include the National Association for Minority Contractors (NAMC), Professional Business Development Group (PBDG), LatinoBuilt and the Oregon Association for Minority Entrepreneurs (OAME).
- d. The property owners/developers will first market all the regulated affordable units in all housing development projects to culturally specific organizations through PHB's network of CDCs.
- e. Creation of a homeownership down payment assistance fund for priority communities, up to a maximum of \$5 million, if equivalent financial offsets through reductions in other fees and charges can be identified, to the satisfaction of the parties to this agreement.
- 8. Any agreement between the City and the Developers/Property Owners will recognize the right to extend the period for performance of obligations for unforeseeable causes beyond the control of either or both of the parties without fault or negligence.





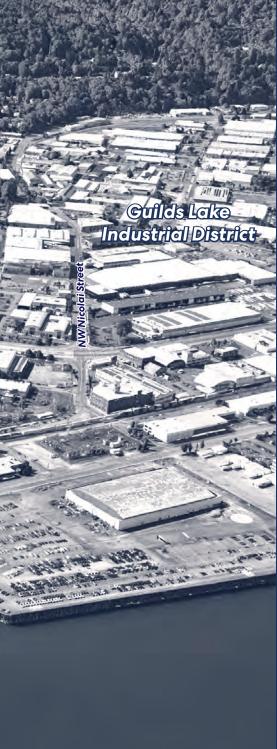


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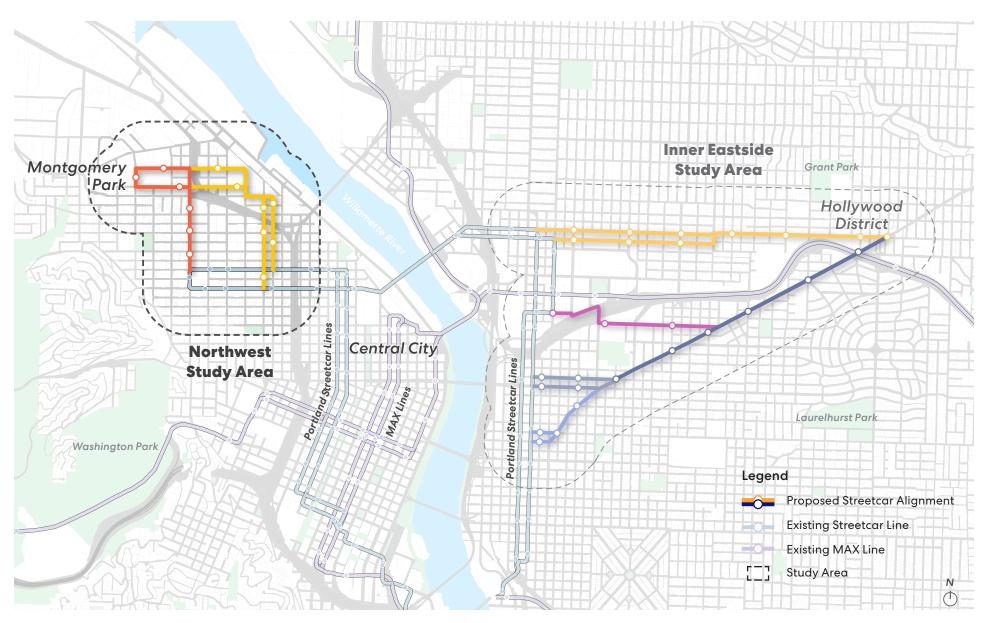




Overview

The Montgomery Park to Hollywood Transit and Land Use Development Strategy (MP2H) aims to create an equitable development plan for potential transit-oriented districts in Northwest Portland (extending from the Central City to Montgomery Park) and Northeast Portland (extending from Central City to the Hollywood District). This project is co-led by the City of Portland's Bureau of Planning and Sustainability (BPS) and Portland Bureau of Transportation (PBOT), in partnership with Metro.

The Urban Design Concepts for the Northwest Study Area is a document that outlines an aspiration vision for future transformation of the Northwest District. This vision includes recommendations and best practices for land use and community infrastructure that upholds the 2035 Comprehensive Plan's vision for prosperous, equitable, transit-oriented communities. All scenarios consider opportunities for economic development and community benefits to support the City's racial equity, climate justice, employment, and housing goals.



Study Area Map



Planning Goals

The Urban Design Concepts were guided by the following planning goals developed by the City of Portland project team.



Support City of Portland's
2035 Comprehensive Plan
and Climate Action Plan goals
for reducing carbon emissions
and for improving human and
environmental health, equity
and resilience.

Focus growth in centers and corridors with high levels of services and amenities.

Increase opportunities for employment and housing, particularly middle wage jobs and affordable housing.



Improve access to affordable housing, middle wage jobs, nature and recreation through high quality, reliable, and frequent transit service and other multi-modal options.

Ensure that under-served, under-represented communities and those most vulnerable to impacts from land use and transportation proposals have an opportunity to meaningfully participate in the planning process, and to benefit from project outcomes.

Advance equitable outcomes
by developing community
benefits strategies to
accompany land use
decisions and transportation
investments.





Northwest Study Area

The Northwest study area is at a pivotal moment in its history. For many generations, the area was a thriving industrial center for the city. However, recent changes in property ownership and rethinking of future land uses for some of the large parcels has lessened the industrial footprint and changed the mix of jobs in the area. The arrival of streetcar can shape responsible growth and strategic investment to create a prosperous, equitable, working transit-oriented community. This aligns with the City's goals and policies to support the following:

- > Fostering a strong and diverse economy through investment in high quality, frequent transit service;
- Leveraging the streetcar's development potential to build mixed-income housing and employment on large opportunity sites;
- > Investment in green, community infrastructure to ensure that the district helps build diverse, healthy communities;
- > Ensures that established businesses remain in the district while providing appropriate space for new businesses.

The following urban design concepts are intended to help the City of Portland and community stakeholders make informed long-term decisions. Capturing the full potential of a new transit-oriented community will require new plans, policies, funding, and infrastructure investments to bring this vision to implementation.

The Study Area

The Northwest study area consists of quarter-mile buffer areas around potential streetcar alignments. The study area is primarily within the Northwest District, extending as far south as Couch Park, and north into the Guild's Lake Industrial District.

The neighborhoods surrounding the NW 18th/19th alignment are a mix of single and multi-family homes and buildings. The NW 23rd Avenue alignment consists of historic and new mixed-use development with a ground floor that consist of a diversity of retail and restaurant destinations.

The study area includes some of the City's fastest growing neighborhoods including Slabtown and the western edge of the Pearl District.

South of NW Vaughn Street, the study area is served by existing streetcar service, TriMet bus service, access to the region's freeway system, and a pedestrian and bicycle network. The existing transportation network is going to be expanded and enhanced through the recently adopted Northwest in Motion Plan.

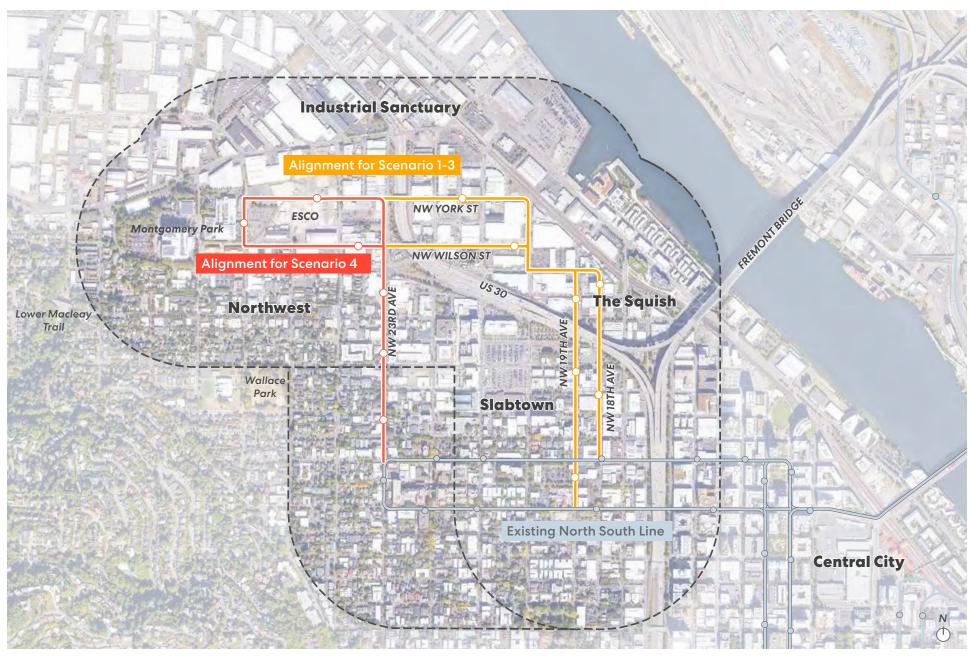
North of NW Vaughn Street, the eastern portion of the study area is largely zoned industrial, while the western half includes large parcels of mixed use, and general employment. Businesses range from manufacturing, light industrial, office, and storage. This portion of the study area is lacking in community infrastructure such as sidewalks, bike facilities, and public open spaces. The area bounded by NW Nicolai Street to the north, NW Vaughn Street to the south NW Wardway Street to the west and NW 23rd Avenue to the east is most likely to see near-term land use change.

Potential Alignments

The Northwest study area explores two separate high-capacity transit alignments to Montgomery Park. These transit corridors were assessed to determine which alignments have the best potential for future streetcar investment and will help support the City's Comprehensive Plan's guiding principles to create prosperous, equitable, mixed use, transit-oriented communities.

The alignment for Scenarios 1-3 extends north off the existing North-South Streetcar Line onto NW 18th Avenue and NW 19th Avenue to connect to the NW Wilson Street and NW York Street couplet.

The alignment for Scenario 4 extends north from the terminus of the north-south streetcar line at NW 23rd Avenue to connect to the NW Wilson Street and NW York Street couplet.



Northwest Alignments and Study Areas

Key Urban Design Considerations

The following urban design considerations are national best practices utilized for the planning and design of good Transit Oriented Communities (TOC).

- A Diverse and Balanced Economy: TOCs
 provide a diversity of jobs and opportunities
 for upward mobility while reducing the risk
 of displacement of established businesses.
 Investment in a walkable environment also
 supports new local retail, and other services.
- Housing Choices for Everyone: TOCs offer a range of housing choices for people at all income levels.
- A Respect for Local Context: Future urban form should strike the balance between catalyzing compact, urban development while also demonstrating deference for historic landmarks and surrounding lower density neighborhoods. For this district, the City should explore setting building height limitations and establishing scenic viewpoints and corridors to ensure that landmarks like Montgomery Park remain a prominent feature in the district's skyline.

- A Compact and Walkable Urban
 Environment: TOCs offer easy access to everyday needs by allowing employees, residents, and visitors to navigate the district and connect to the region's robust transit network without need to drive. A multimodal transportation network enhances the optimal user experience, through seamless mobility of high-capacity transit to active transportation options.
- An Engaging and Vibrant Public Realm:
 An Engaging and Vibrant Public Realm:
 TOCs prioritize activity at the street level—including shops, places to eat, and maker spaces to support the sale of goods by local manufacturers. Additionally, the public realm must support safe people spaces to help support diverse communities. This includes strengthening neighborhoods through identifying opportunities for spaces that foster and strengthen social connection such as community centers, event venues, and schools.





The Preferred Scenario: Balanced Growth

In September 2019, the City of Portland published the Northwest Portland Streetcar Extension and Land Use Alternatives
Analysis that summarized preliminary findings about how land use changes and streetcar investment might support economic development, equity, and climate change goals, including the potential creation of affordable housing and job sites. This city-led analysis identified preliminary questions and trade-offs around streetcar investment and land use changes in Northwest Portland that became the basis for further evaluation of streetcar alignment and land use decisions.

Perkins&Will developed three initial urban design concepts to further explore urban form, transportation, and public realm

outcomes for each of the land use scenarios in Northwest Portland. Perkins&Will built on the land use scenarios previously analyzed by City of Portland staff with a deeper dive into block and site level impacts of transportation investments and land use changes.

Scenario 4, the preferred scenario was developed as an outcome of initial evaluation of the previous three scenarios and to reflect updated thinking around a new transit alignment on NW 23rd Avenue. The pivot to this new transit corridor, allowed for a hybrid model that supported new mixeduse development while also supporting the preservation of existing industrial land.



Evaluation Characteristics and Considerations



Transit
Supportive
Uses and Streets

- High-density mixed-use development is applied broadly, elevating the study area to an urban center comparable to Slabtown.
- Create opportunity for more than 2,000 new housing units within this new district.



Sense of Place

- Land use focus unifies Montgomery Park, American Can Building, and ESCO site into a cohesive neighborhood.
- NW 23rd Avenue alignment connects the alphabet district north of NW Vaughn Street to Montgomery Park.



Health

- New park or other community serving use in district.
- NW Roosevelt street has the opportunity to provide a key pedestrian connection.



Economic Prosperity

 Transit supportive, high-density mixed-use allowances are applied to large 'opportunity sites' enabling potential for new jobs including retail, personal services, restaurants, office, and industrial.



Equity

- New affordable housing units are provided through inclusionary zoning and other benefits agreements.
- Keeping the transit alignment west of I-30 allows for the preservation of existing industrial land and new industrial jobs.
- Substantial increase in land value that can be captured for community benefits.



Preferred Scenario District Concept

Land Use and Urban Form

Mixed Use

Mixed use development is concentrated in the area west of I-30, bordered by Northwest Reed Street and NW Vaughn Street. Highdensity mixed-use zoning is concentrated at the Montgomery Park, American Can Building, and the ESCO site. Height allowances would permit 6 to 10 story buildings. New development would not exceed the height of the historic Montgomery Park Building.

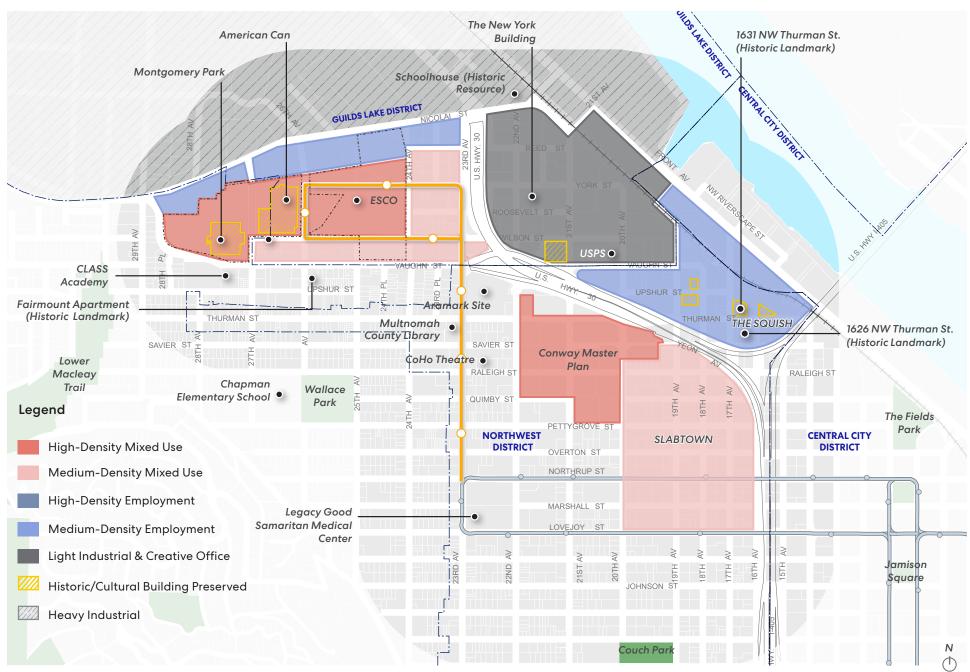
Medium density mixed use zoning along Vaughn and NW 24th Avenue will allow a gradual step down to the lower density neighborhoods within the Northwest District. Height allowances would permit 4 to 6 story buildings.

Industrial

The portion of the study area east of Highway 30 is maintained as primarily industrial land use. This will allow traditional manufacturing and distribution sectors to remain in the district in typically one-story buildings on large sites. However, larger-scale industrial office development, such as the New York Building, would still be allowed.

Employment

The Preferred Scenario also contains more flexible mixed employment zoning, allowing for a wider range of business sectors and jobs within the study area. This is located along the southern edge of Nicolai, creating a transition between the mixed-use zoning at Montgomery Park and the heavy industrial in the Guilds Lake District. This zoning is also found in the area commonly referred to as 'The Squish', a historic industrial area with several turn of the century and mid-century industrial structures. Due to its proximity to the Central City and Slabtown, the Squish is currently home to diversity of uses. Height allowances would permit 4 to 6 story buildings.



Preferred Scenario Land Use and Urban Form

Transportation

The land use changes in the study area create opportunities to improve neighborhood connections across Vaughn Street, building off of existing and proposed active transportation routes from the adopted Northwest in Motion plan.

New Streets

The concept includes extension and completion of three existing streets: NW York Street, NW Wilson Street, NW 25th Avenue, and a pedestrian connection between NW 24th Street and NW 26th Street on Roosevelt Street.

Transit Streets

Streetcar: The new transit streets are: NW Wilson Street, NW York Street, NW 26th Avenue and NW 23rd Avenue. These streets will serve auto, bike, pedestrian, and transit needs.

Bus: At a minimum, bus transit is expected to serve the district via the existing transit routes on NW Vaughn Street, NW 23rd Street, NW Thurman Street, NW 25th Avenue, with shorter segments on NW 27th Street and NW Nicolai Street. Streetcar stops are located in coordination with bus stops to facilitate ease of transfer.

Bikeways

City bikeways include protected bicycle lanes on NW York Street and NW Wilson Street as well as a section of NW 26th Street, NW 27th Street and the NW 24th Avenue greenway. Bike lanes on sections of NW Vaughn Street, NW Thurman Street, NW 21st and NW 22nd connect to the NW 18th and 19th Street buffered bike lane couplet. Additional detail included in the Montgomery Park District Transportation Plan.

Pedestrian Routes

City walkway designation is anticipated for NW York Street and NW Wilson Street west of NW 23rd, NW 22nd Street and NW 27th Street. Neighborhood walkway designation is anticipated for NW 24th Street. Additional detail included in the Montgomery Park District Transportation Plan.

Community Corridor

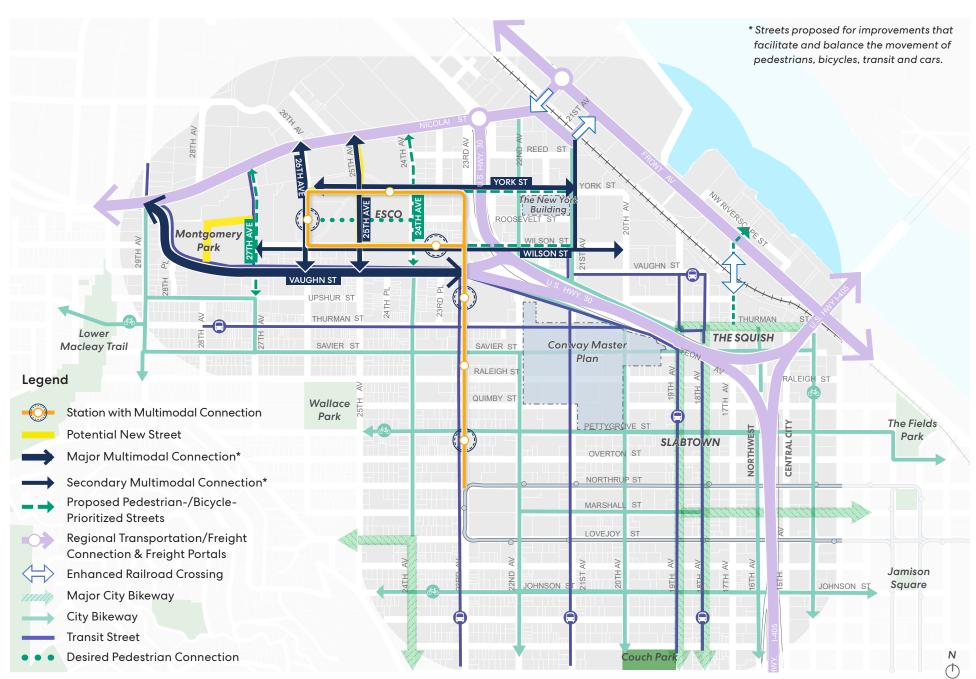
Community Corridor street design classification is anticipated to remain on NW Vaugh Street.

A pedestrian refuge at NW 24th Street and crossing improvements associated with the Montgomery Park Master Plan will improve crossing safety and reduce the sense of NW

Vaughn Street as a barrier. Additional detail included in the Montgomery Park District Transportation Plan.

Freight Streets

NW Nicolai Street and U.S. Highway 30 are the primary freight streets in the district. The concept includes revised signage near the intersection of NW Nicolai Street and NW Wardway Street clarifying NW Nicolai Street's role as the freight/truck route.



Public Realm

Transit Main Streets

By connecting to the existing N-S streetcar line at NW 23rd, the preferred transit alignment will extend comparable public realm design standards and investment to NW Wilson and NW York Streets. This includes comfortable pedestrian throughways with safe crossings, the integration of green infrastructure such as plantings and stormwater facilities, as well as requirements for active frontages on the ground floor.

District Connectors

The preferred scenario features two important pedestrian connectors within the district. NW Wilson Street plays a major role as a district connector linking the Montgomery Park campus east through the district to connect to the Willamette River. The Roosevelt Street alignment provides an opportunity to create a linear park/plaza-like green pedestrian connection between NW 26th and NW 24th Avenues. The design of this space should encourage pedestrians, and potentially could include ground-level building activities - such as opportunities for outdoor dining, and other gathering spots that create a special sense of place.

Activity Centers

The preferred transit alignment should have requirements for active ground floor frontages. Retail spaces should be concentrated at prominent intersections within the study area. This includes the end-of-line station which is envisioned as an activity center with intermodal connections and activated public space.



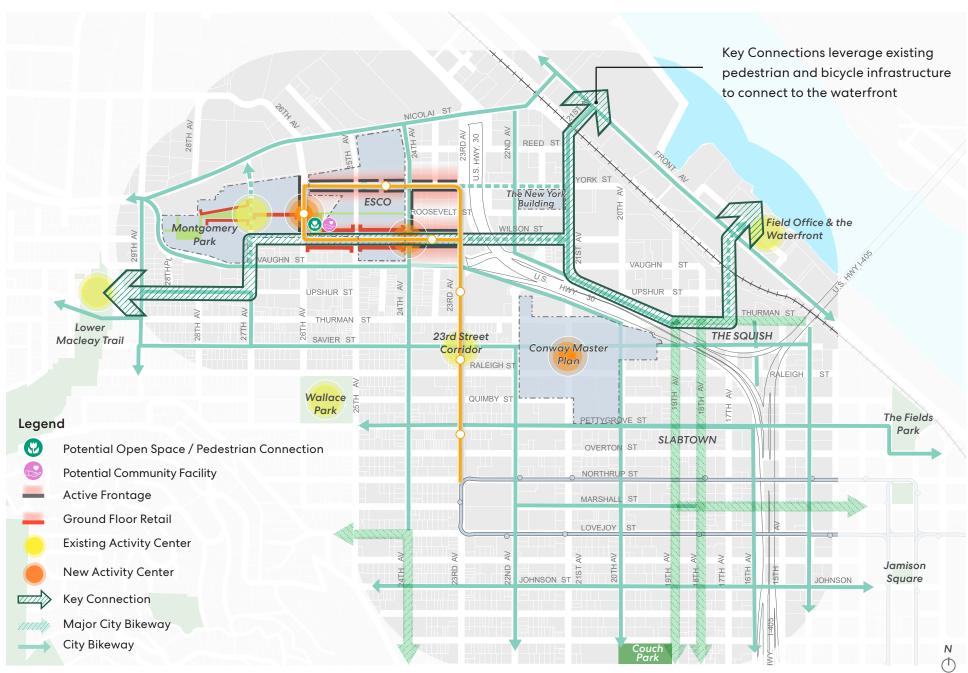
Georgia Street, Indianapolis, IN



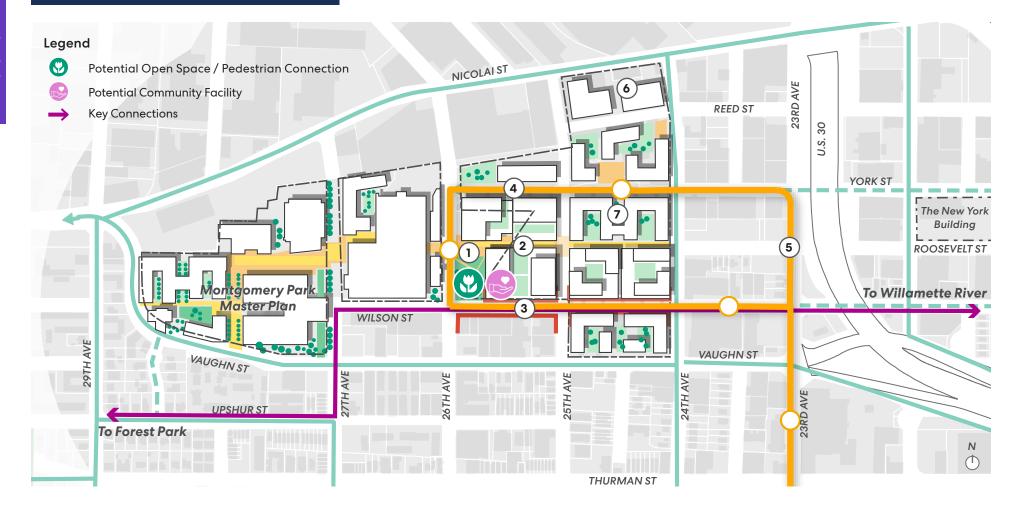
Marine Gateway, Vancouver, BC



Piazza Mazzini, Jesolo, Italy



This diagram above highlights urban design opportunities and the east-west connection through the area, connecting the district to Forest Park to the west and the Willamette River to the east.













buffering development from U.S. 30







Summary of Alternative Scenarios







Scenario 1

Scenario 2

Scenario 3

Enhanced Industrial Employment

Mixed-Use

Scenario 1:

Enhanced Industrial



Evaluation Characteristics and Considerations



Transit
Supportive
Uses and Streets

- New residential units are limited to Montgomery Park and areas south of Vaughn.
- Retail cluster located at Montgomery Park at end-ofline station.
- Industrial corporate campus on ESCO site.
- The streetcar extensions ties into the N-S Streetcar line at NW 18th and 19th, requiring extensive investment in new infrastructure to connect to Montgomery Park.



Sense of Place

- Urban industrial character with mixed use residential nodes at Montgomery Park and Slabtown.
- An industrial main street overlay encourages maker spaces for local manufacturers and retailers.



Health

- A small pocket park at end-of-line station
- Improvements on existing City Bikeways



Economic Prosperity

 Creates the second highest number of new jobs split mostly between office and industrial sectors.



Equity

- Intensification of industrial lands creates additional industrial jobs.
- Preservation of industrial lands prevents the displacement of existing industrial businesses.
- Limited increase in land value that can be captured for community benefits. The least of amount of any scenario.

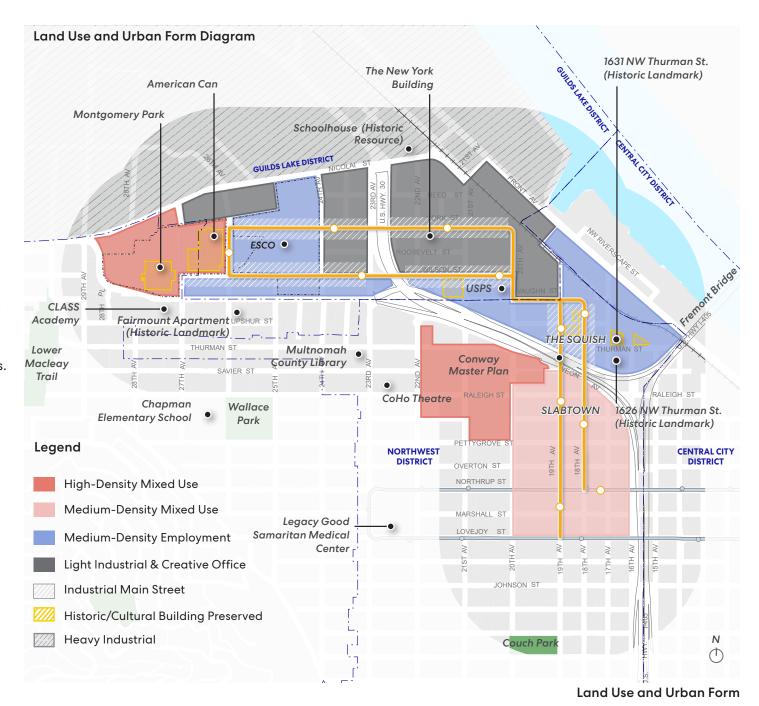
1201 Bryant Street, San Francisco, CA



District Concept

Land Use and Urban Form

This scenario allows an industrialfocused zoning pattern with more flexibility for creative office in the industrial zones. The enhanced industrial allowances is based on the current IG zone in the Central Eastside developed for the Southeast Quadrant Plan and the Central City 2035 Plan. The typical urban form for industrial zone is one-story buildings on large sites with the exception of newer industrial office typologies like the New York Building, which is 5 stories. The typical urban form for medium density employment zones would allow 4 to 6 story buildings.



Transportation

Transit Streets

The NW 18th and 19th couplet and the NW Wilson and NW York couplet accommodates streetcar/bus, freight, autos, bicycles, and pedestrians. Each transit station seamlessly connects to active transportation network.

Multi-Modal Streets

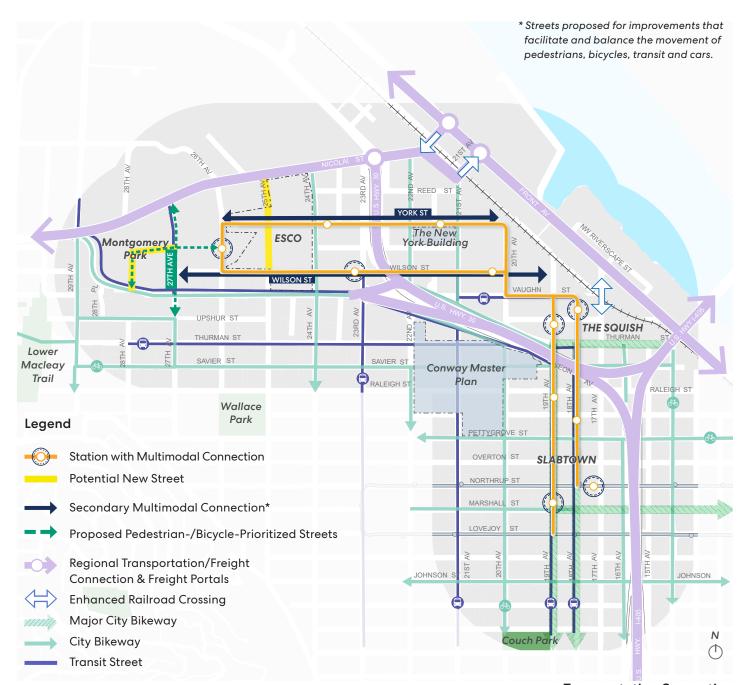
Existing multi-modal corridors such as NW Vaughn Street, NW Thurman Street, NW 23rd Avenue and NW 21 Avenue have improved pedestrian crossings, bikeway enhancements, and transit priority treatments.

Active Transportation Streets

Existing City Bikeways identified in Northwest in Motion Plan and the TSP are improved.

Freight Streets

Freight streets and portals are enhanced for truck movement and access throughout the district and onto the regional freeway system. This includes improved crossings over the heavy rail line to connect to Front Avenue.



Public Realm

Industrial Main Street

Along the transit streets, the industrial main street overlay requires special ground floor standards for new industrial development. The ground floor spaces provide smaller, affordable spaces for small manufacturers and promote economic diversity. Street level standards could include façade design, ceiling height, shop space depth, and other elements of building design to ensure new space is designed to support the success of smaller industrial tenants.

Activity Centers

Because much of the area is focused on industrial and employment uses, retail spaces are concentrated at the end-of-line station at NW 26th Avenue and NW Roosevelt Street which connects to additional a new activity center and retail destination at Montgomery Park.

Open Space

A small pocket park is siting adjacent to the end-of-line station at NW 26th Avenue and NW Roosevelt Street. This pocket park accommodates intermodal facilities such as bike share, scooters as well as spill out for adjacent retail spaces.

ESCO

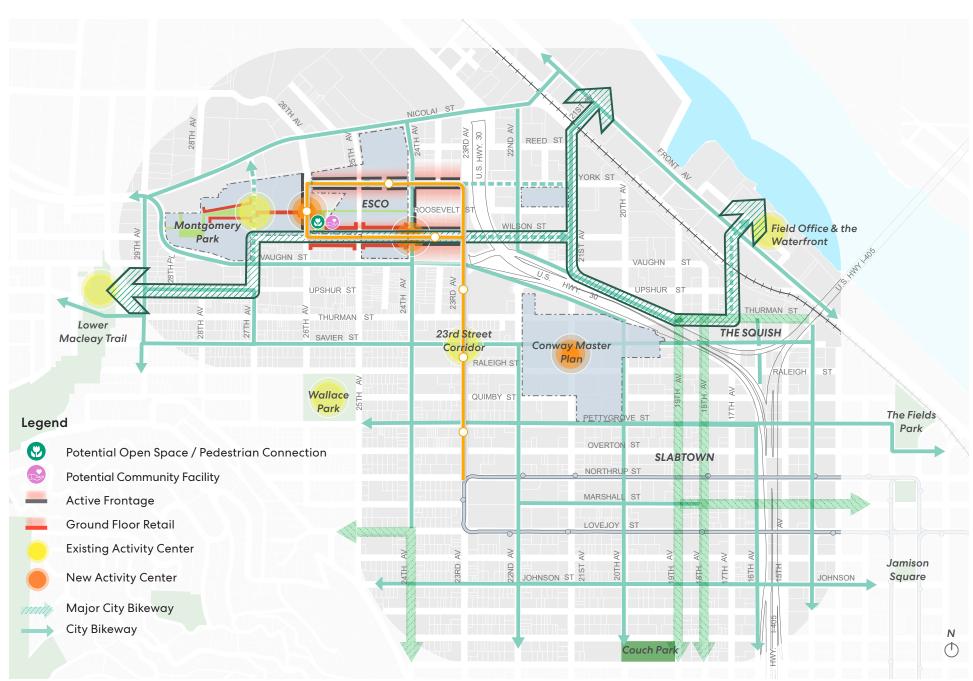
ESCO parcels are kept large with minimal new street connections in order to support a corporate campus, which requires large industrial building footprints.



Potential frontage character of Industrial Main Street



Potential character of a pocket park



Scenario 2:

Mixed-Use

Employment

Evaluation Characteristics and Considerations





Transit Supportive Uses and Streets -

- There are limited opportunities for new market rate residential units outside of the Montgomery Park Master Plan.
- Retail cluster located at Montgomery Park at end-of-line station.

Exhibit B

ESCO is a high-density office center with multiple commercial tenants across employment sectors.

......

The streetcar extensions ties into the N-S Streetcar line at NW 18th and 19th, requiring extensive investment in new infrastructure to connect to Montgomery Park.



Sense of Place

- High-density mixed-use employment area with intense mixed use residential nodes at Montgomery Park and Slabtown.
- An industrial main street overlay encourages maker spaces for local manufacturers and retailers.



Health

- A small pocket park at end-of-line station
- NW Roosevelt is green street to Forest Park and Willamette River
- New pedestrian/bike bridge crossing US-30.



Economic Prosperity

- Creates the most jobs of all scenarios, many of which are in the
- Broader mix of employment uses applies across the existing industrial zones.



- Intensification of industrial lands creates additional industrial jobs.
- New affordable housing units created through inclusionary zoning are mostly limited to Montgomery Park, the Vaughn corridor, and areas south of Vaughn.
- Moderate increase in land value that can be captured for community benefits. The second least of amount of any scenario.

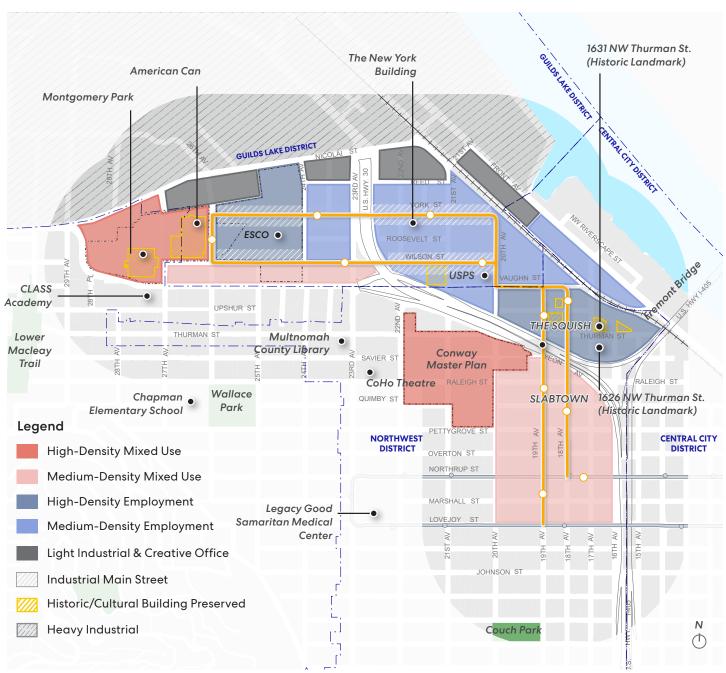
n Design Framework



District Concept

Land Use and Urban Form

This scenario allows intense employment uses including modified office allowances in existing industrial zones and increased density to support traditional and campus office type uses on larger sites throughout the study area. A high-density employment zone (with no housing allowed) is applied to the ESCO site, allowing upwards of 8 to 10 story buildings. High-density mixed use is allowed at Montgomery Park and the American Can Building. Medium density mixed use designation serves as a buffer to the lower density neighborhoods south of NW Vaughn Street.



Transportation

Transit Streets

The NW 18th and 19th couplet and the NW Wilson and NW York couplet accommodates streetcar/ bus, freight, autos, bicycles, and pedestrians. Each transit station seamlessly connects to active transportation network.

Multi-Modal Streets

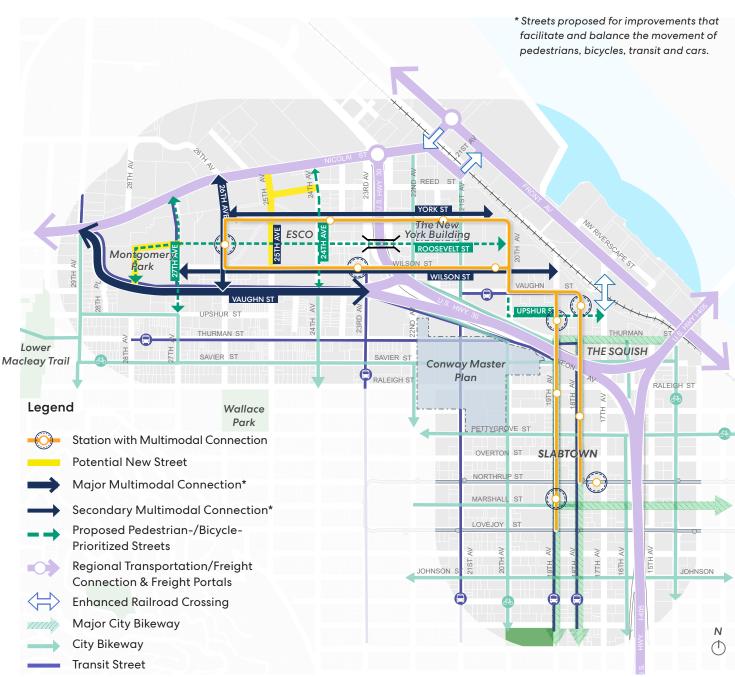
NW Vaughn Street, NW 26th Avenue, and NW 24th Avenue have improved pedestrian crossings, bikeway enhancements, and transit priority treatments.

Active Transportation Streets

Pedestrian and bicycle streets prioritized across the study area, including new internal streets at the ESCO site. A new pedestrian/bicycle bridge crosses I-30 is proposed along Roosevelt Street.

Freight Streets

Major freight streets such as Nicolai Street and Front Avenue are enhanced to support truck movement and access onto the regional freeway system.



Public Realm

Industrial Main Street

Along the transit streets, a main street overlay requires special ground floor standards for new industrial development. The ground floor spaces would provide smaller, affordable spaces for small manufacturers and promote economic diversity. Street level standards could include façade design, ceiling height, shop space depth, and other elements of building design to ensure new space is designed to support the success of smaller industrial tenants.

Activity Centers

The industrial main street is punctuated by two activity centers along the transit alignment that concentrates traditional ground floor retail spaces next to the transit station. The southern activity center is located at NW Upshur Street in between the NW 18th / 19th Avenue Transit Streets. This supports the emerging development occurring in The Squish. The northern activity center is located at the end-of-line station at NW 26th Avenue and NW Roosevelt Street which would connect to additional retail activity at Montgomery Park.

Open Space

Roosevelt Street serves as a linear open space, making a low-stress park like connection between the Lower Macleay Trail and the Willamette River.



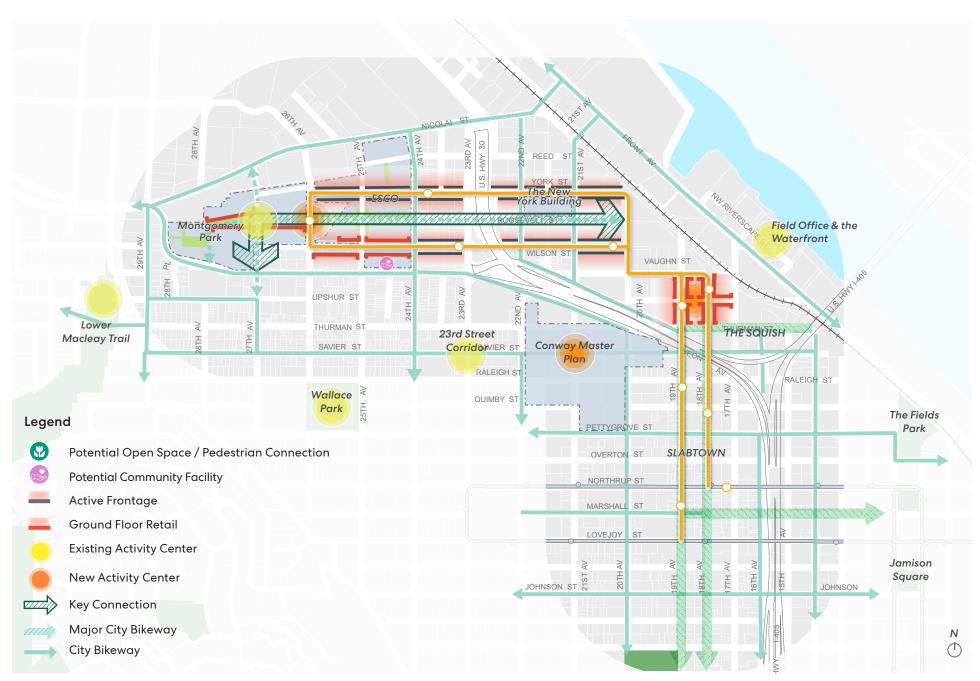
Potential frontage character of office center



Potential character of active ground floor around activity centers



Potential character of open space



Scenario 3:

Mixed





Evaluation Characteristics and Considerations



Transit Supportive Uses and Streets

- High-density mixed-use development is applied broadly, elevating the study area to an urban center comparable to Slabtown.
- Opportunity for thousands of new market rate residential units within the study area.
- Multiple retail clusters throughout the study area.
- High density mixed-use land-use unifies Montgomery Park, American Can Building, and ESCO site into a cohesive neighborhood.
- The streetcar extensions ties into the N-S Streetcar line at NW 18th and 19th, requiring extensive investment in new infrastructure to connect to Montgomery Park.



Sense of Place

A main street overlay encourages active ground floor uses including for local manufacturers and retailers.



Health

- Proposed public open space on ESCO site next to end-of-line station and smaller pork along NW 20th Avenue.
- NW Roosevelt is green street to Forest Park and Willamette Rive.



Economic Prosperity

- This scenario creates the fewest jobs of any scenario. This is due to redevelopment of industrial land for residential/mixed-uses.
- New jobs are likely to be commercial retail, services or office positions.



Equity

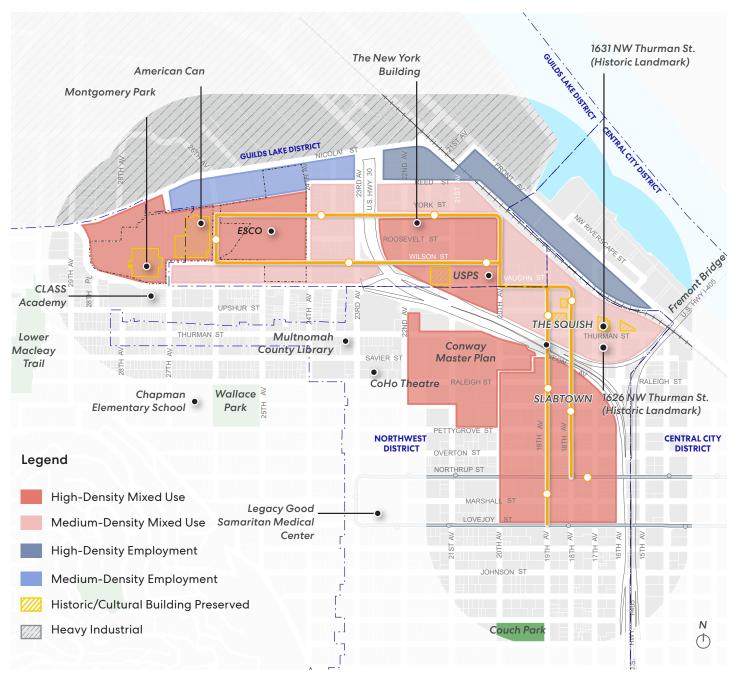
- Potential for hundreds of affordable units through inclusionary zoning.
- Densities support a community center or vocational school.
- Increase in land value leads to safer streets, inclusive park spaces, and other community benefits.

Conway Master Plan Development, Portland, OR Credit: DOWL



Land Use and Urban Form

This scenario allows a broader mix of uses including residential, office, retail, and industrial. Residential uses are applied broadly throughout the district with limitations on housing development for areas adjacent to Nicolai and between the rail line at Northwest Front Street. Urban form reflects some of the city's densest town centers with allowances for 6 to 10 story buildings.



Transportation

Transit Streets

The NW 18th and 19th couplet and the NW Wilson and NW York couplet accommodates streetcar/ bus, freight, autos, bicycles, and pedestrians. Each transit station seamlessly connects to active transportation network.

Multi-Modal Streets

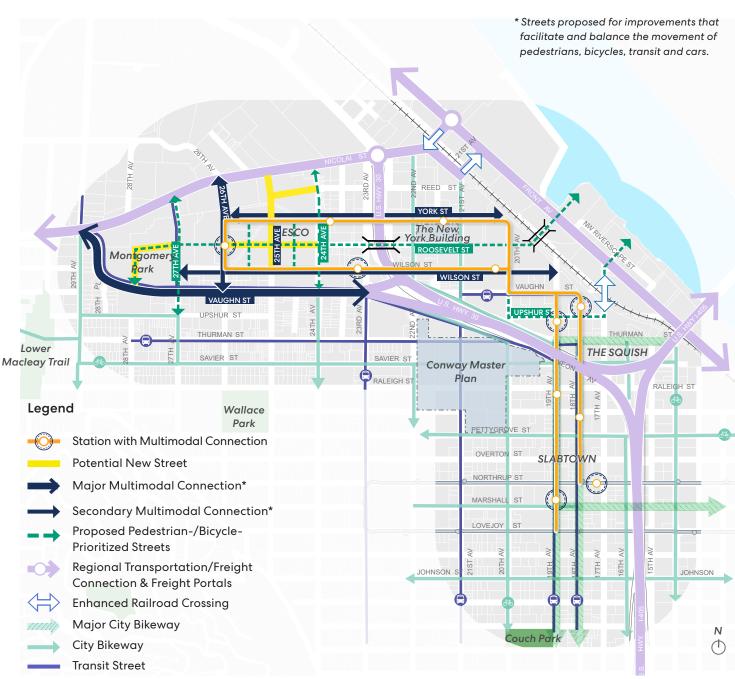
NW Vaughn Street, NW 26th Avenue, and NW 24th Avenue have improved pedestrian crossings, bikeway enhancements, and transit priority treatments.

Active Transportation Streets

Pedestrian and bicycle streets prioritized across the study area, including new internal streets at the ESCO site. Two new pedestrian / bicycle bridges connect Forest Park to the Willamette River.

Freight Streets

Major freight streets such as Nicolai Street and Front Avenue are preserved to support truck movement and access onto the regional freeway system.



Public Realm

Activity Centers

This scenario features two activity centers with a concentration of ground floor retail. The southern activity center is located at NW Upshur Street in between the NW 18th / 19th Avenue Transit Streets. This supports the emerging development occurring in The Squish. The northern activity center is located at the end-of-line station at NW 26th Avenue and NW Roosevelt Street which would connect to additional retail activity at Montgomery Park. Ground floor activity is promoted along the streetcar alignment - potentially implemented with a main street overlay or similar regulatory tool.

Open Space

In this scenario. Roosevelt Street serves as a linear open space, making a low-stress park like connection between the Lower Macleay Trail and the Willamette River. Additional open space opportunities are proposed on the ESCO Site as well as at the intersection of NW 20th Avenue and NW Wilson Street.

ESCO Site

This scenario features 200' x 200' blocks to ensure compact, urban development.

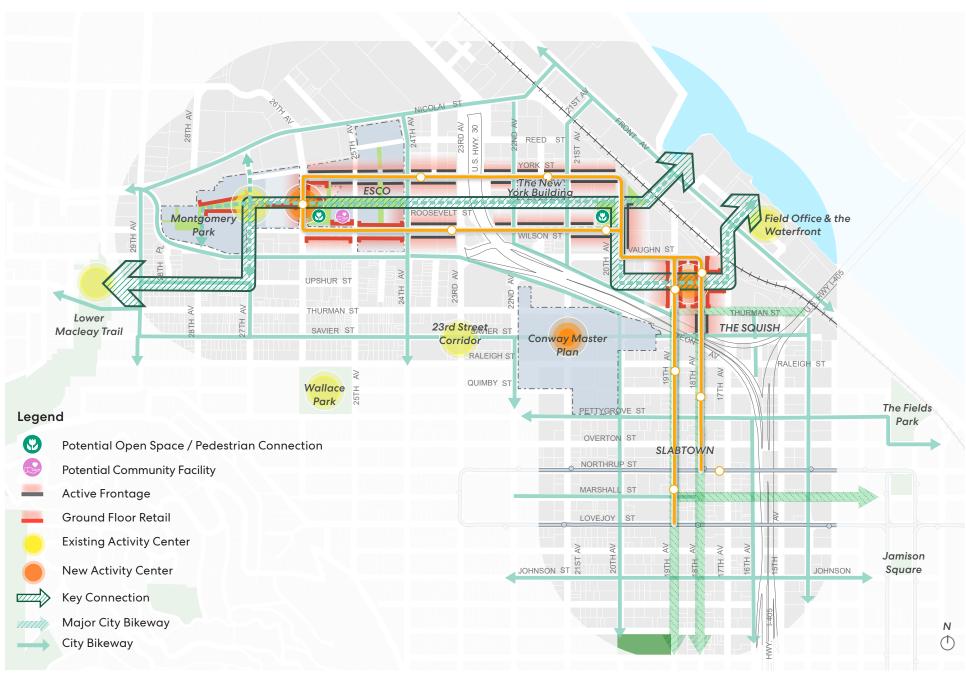


Potential character of mid-block open space and pedestrian path



Potential character of ground floor retail with spill- Potential character of open space out space





Summary and Conclusion

This study evaluated three alternative land use scenarios each with a different focus: 1) Enhanced Industrial, 2) Employment, and 3) Mixed Use. Each alternative presented unique opportunities and challenges for the area.

Scenario 1, Enhanced Industrial, retained the emphasis on industrial uses and employment, but was less-supportive of future transit investments and service.

Scenario 2, Employment, fostered dense employment, but with the potential of resulting in a district lacking all-day activity, and the potential to overburden transportation systems.

Scenario 3, Mixed Use, achieved a dense mix of uses including opportunity for housing, but had impacts on the viability of industrial jobs in the area.

With the opportunity to revise the transit alignment to focus on NW 23rd Avenue, a new hybrid fourth scenario became possible. This hybrid scenario is the "Preferred Scenario" because it retains a significant amount of industrial land and job opportunity east of Highway 30, and provides opportunity for transformative new mixed use development, that can be effectively served by transit, in the area west of Highway 30.

The next step to implement the Preferred Concept in this report is for the City of Portland to develop more detailed draft implementation measures. The concepts and draft implementation measures will be available for public review. Ultimately, the concepts and draft implementation measures will be considered by city decision-making bodies - Portland Planning and Sustainability Commission and Portland City Council - at public hearings.

Following a successful adoption process, the City of Portland will update City policies and codes guiding land use and transportation in the study area, north of NW Vaughn Street. Policy updates should reflect the broad needs of the larger community - including inclusive economic opportunity and equity measures to protect businesses and residents, create a safe and welcoming public realm, and reduce disparities in accessing opportunity.

Redevelopment in this area may take time, and flexibility in decision making should be preserved and guided by the values adopted in the City of Portland's 2035 Comprehensive Plan.





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

April 26, 2021

Prepared for: City of Portland Bureau of Planning and Sustainability

City of Portland Bureau of Transportation

Final Report



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1. Executive Summary

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

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

2. Project purpose

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

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

Montgomery Park to Hollywood:
Northwest Study Area

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

Source: ECONorthwest

3. Overview of Process

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

Figure 2. Spectrum of Potential Land Use Changes

SPECTRUM OF LAND USE SCENARIOS

LESS MORE CHANGE

Source: City of Portland Bureau of Planning and Sustainability

Relationship to the Urban Design Process

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

Urban Design Scenario 1: Enhanced Industrial

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

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Figure 3. Enhanced Industrial Scenario

Urban Design Scenario 2: Employment

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

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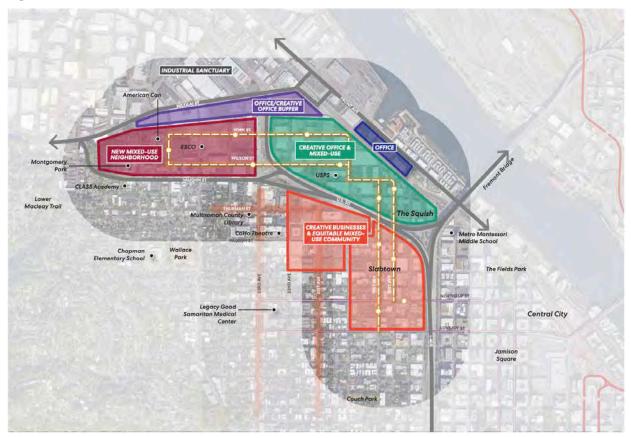
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Figure 4. Employment Scenario

Urban Design Scenario 3: Mixed-Use Scenario

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

Figure 5. Mixed-Use Scenario



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

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

OFFICE CREATIVE OFFICE BUFFER

VOID 37

MANUFACTURING CREATIVE A INDUSTRIAL OFFICE & MAKER SPACE

Wallace Park

Wallace Park

Wallace Park

Wallace Park

Existing Streetcar Alignment

Neighborhood Corridor

Neighborhood Corridor

Figure 6. Hybrid Industrial and Mixed-Use Scenario

Summary of Land Use Scenarios Evaluated

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

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

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

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

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

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

4. Key Findings

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

Summary of Scenario Results

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

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

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

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

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

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

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

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

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

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

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

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

Zoning)

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

5. Analysis Approach and Methodology

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

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

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

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

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

Zoning Designations and Development Prototypes

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

Table 4: Zones from a	all scenarios plus respective prototypes ev	
Zone	Prototypes allowed by base	Prototypes allowed by bonus
	entitlements	entitlements
IH	Traditional low-rise industrial:	N/A
	warehouse and manufacturing	
	1 story, 0.6 FAR	
IG1	Traditional low-rise industrial:	N/A
	warehouse, manufacturing, and flex	
	1 story, 0.6 FAR	
IG1 Central City -	Traditional low-rise industrial:	N/A
IG1 zone with	warehouse, manufacturing, and flex;	
industrial office	Central City office; urban flex	
allowance	4 stories, 3.4 FAR	
EG1	Traditional low-rise industrial:	N/A
	warehouse, manufacturing, and flex;	
	urban flex; low-rise office	
	6 stories, 2.1 FAR	
EG2	Traditional low-rise industrial:	N/A
	warehouse, manufacturing, and flex;	
	urban flex; low-rise office	
=>/	6 stories, 2.1 FAR	
EX	Traditional low-rise industrial:	Traditional low-rise industrial:
	warehouse, manufacturing, and flex;	warehouse, manufacturing, and
	urban flex; low-rise office; low to mid-	flex; urban flex; low-rise office; low
	rise residential	to mid-rise residential
	6 stories, 2.1 FAR – Flex	5 stories, 4.6 FAR
TV Deed dietwiet	4 stories, 3.4 FAR – CC Indus.	To ditional law size in destricts
EX - Pearl district	Traditional low-rise industrial:	Traditional low-rise industrial:
height/FAR	warehouse, manufacturing, and flex;	warehouse, manufacturing, and
	urban flex; low-rise office; low to mid- rise residential	flex; urban flex; low to high-rise
	6 stories, 2.1 FAR – Flex	office; low to high-rise residential 10 stories, 9.3 FAR
	4 stories, 3.4 FAR – CC Indus.	TO Stories, 9.5 I AIX
EX – no housing	Traditional low-rise industrial:	Traditional low-rise industrial:
LA - 110 Housing	warehouse, manufacturing, and flex;	warehouse, manufacturing, and
	Central City office; urban flex; low-rise	flex; Central City office; urban flex;
	office	low-rise office
	6 stories, 2.1 FAR - Flex	6 stories, 3.4 FAR - Flex
	4 stories, 3.4 FAR – CC Indus.	5 stories, 4.4 FAR – CC Indus
EX - 7 stories	Traditional low-rise industrial:	Traditional low-rise industrial:
(testing height	warehouse, manufacturing, and flex;	warehouse, manufacturing, and
bonus allowed in	Central City office; urban flex; low-rise	flex; Central City office; urban flex;
EX zone)	office	low-rise office
	6 stories, 2.1 FAR - Flex	7 stories, 6.5 FAR - MU Res
	4 stories, 3.4 FAR - CC Indus.	
CM1	Low-rise residential; low-rise office	Low-rise residential; low-rise office
	3 stories, 1.3 FAR	3 stories, 2.0 FAR
CM2	Low to mid-rise residential; low-rise	Low to mid-rise residential; low-rise
	office	office
	4 stories, 2.1 FAR	5 stories, 4.0 FAR
CM3	Low to mid-rise residential; low-rise	Low to mid-rise residential; low-rise
	office	office
	4 stories, 2.1 FAR	5 stories, 4.6 FAR

CX	Low to mid-rise residential; low-rise	Low to mid-rise residential; low to	
OA	office	mid-rise office	
	1 - 111-2		
	4 stories, 1.6 FAR	8 stories, 7.6 FAR	
RM1	Low-rise residential	Low-rise residential	
	2 stories, 1 FAR	3 stories, 1.3 FAR	
RM2	Low-rise residential	Low to mid-rise residential	
	3 stories, 1.3 FAR	4 stories, 2.1 FAR	
RM3	Low-rise residential	Low to mid-rise residential	
	4 stories, 1.6 FAR	4 stories, 2.1 FAR	
RM4	Low to mid-rise residential	Low to mid-rise residential	
	5 stories, 4.0 FAR	5 stories, 4.6 FAR	
RX	Low to mid-rise residential	Low to mid-rise residential	
	4 stories, 1.6 FAR	7 stories, 6.5 FAR	

Zoning Designations Analyzed by Land Use Scenario

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

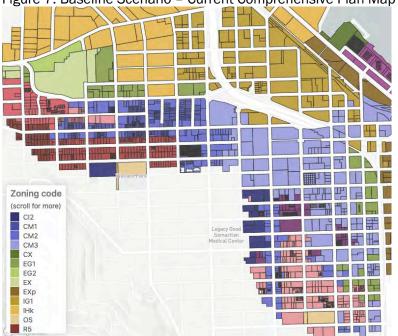


Figure 7. Baseline Scenario - Current Comprehensive Plan Map and Zoning

Source: ECONorthwest

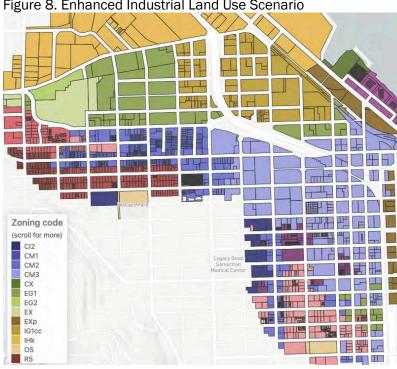
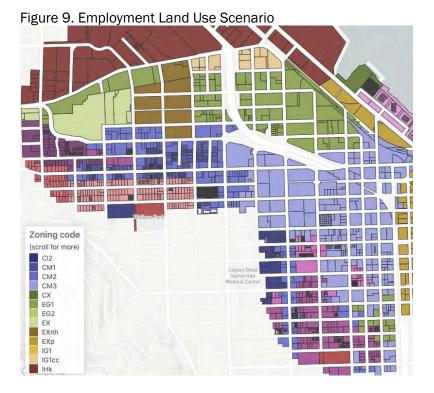


Figure 8. Enhanced Industrial Land Use Scenario

Source: ECONorthwest



Source: ECONorthwest

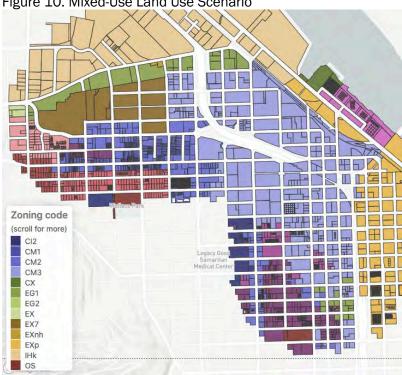
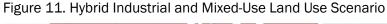
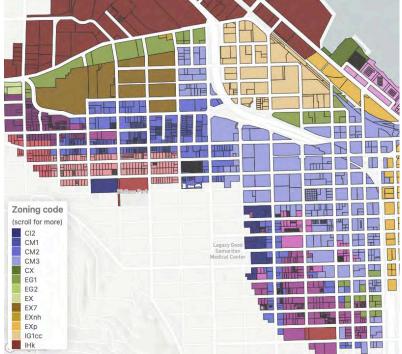


Figure 10. Mixed-Use Land Use Scenario

Source: ECONorthwest





Source: ECONorthwest

Evaluating Deeper Affordable Housing Targets

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

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

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

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

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

Source: ECONorthwest

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

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

Source: ECONorthwest



MONTGOMERY PARK to HOLLYWOOD

TRANSIT & LAND USE DEVELOPMENT STUDY

EXISTING CONDITIONS

JANUARY 2020









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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

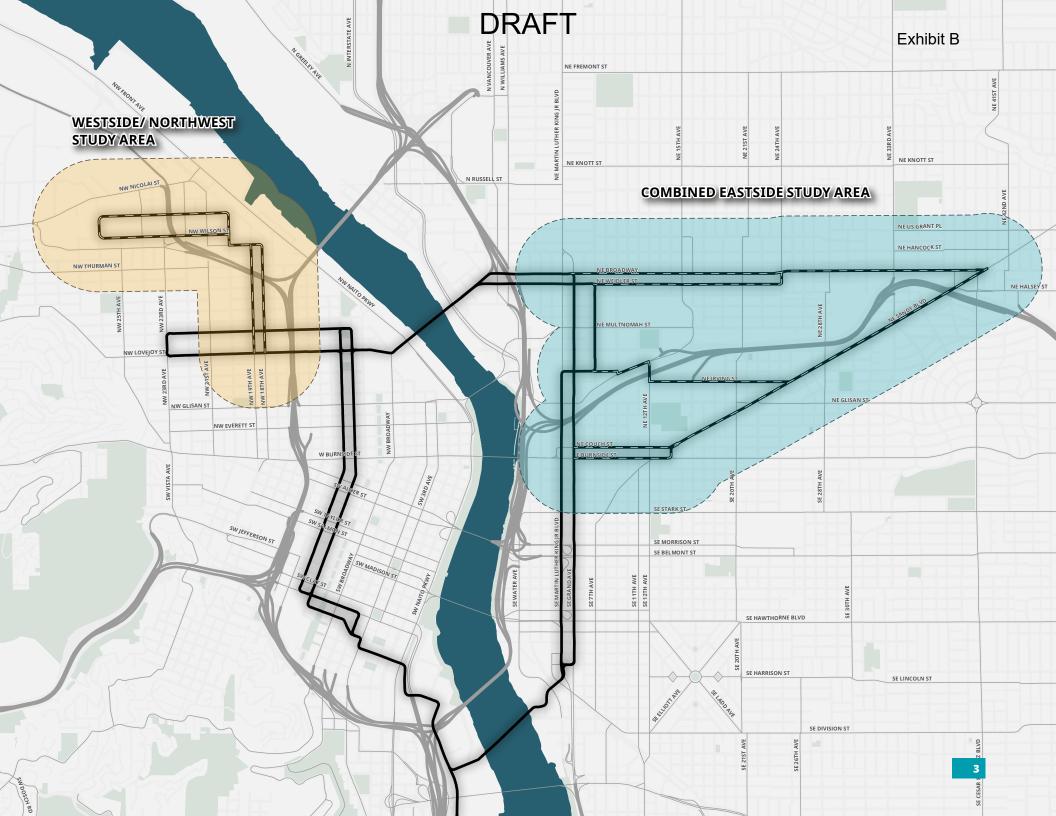
The eastside study area includes a quarter-mile buffer around three potential streetcar alignment alternatives. These alignments are spaced closely enough that the buffers around each alignment overlap. The northernmost alignment operates on the NE Broadway/Weidler couplet, tying into the existing streetcar 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 highcapacity 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.

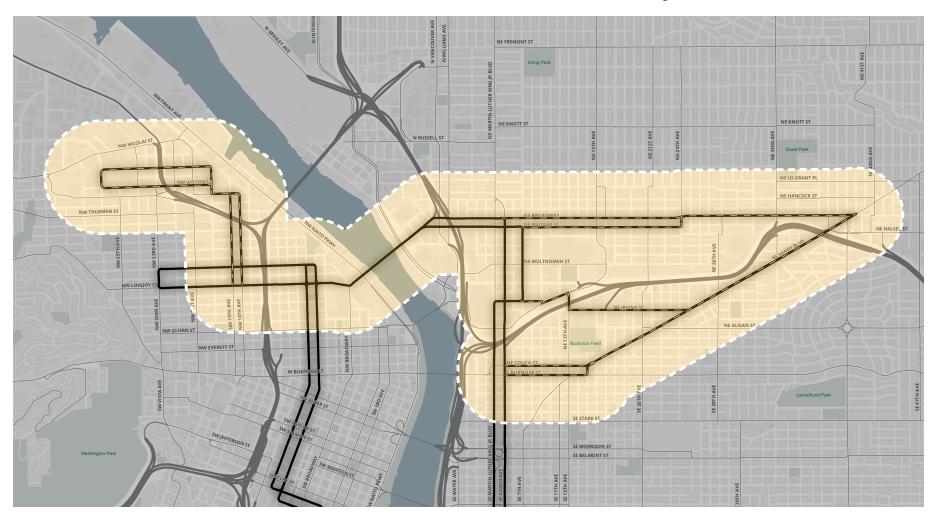


ADDITIONAL STUDY AREAS

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.

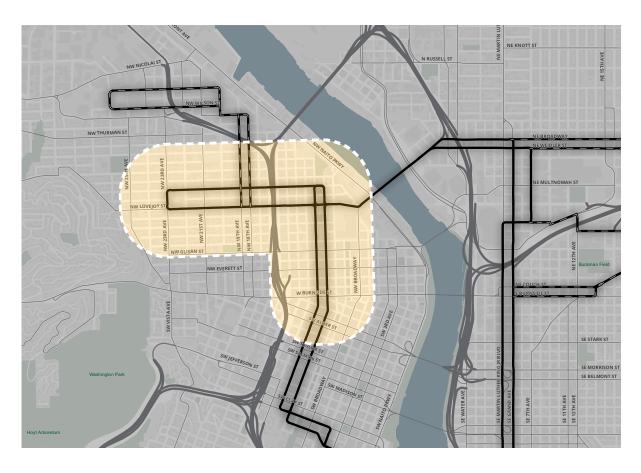


PEARL DISTRICT ALIGNMENT

The Pearl District study area is a quarter-mile buffer around the existing Streetcar alignment along the NW Lovejoy/Northrup couplet and along the NW 10th/11th couplet to W Burnside St. This study area is characterized by high-density development in the core Pearl District area as well as in Northwest.

CENTRAL EASTSIDE ALIGNMENT

The Central Eastside study area is a quarter-mile buffer along the existing Streetcar alignment on the eastside, running along the Grand/MLK Jr. couplet until the Lloyd center where it jogs to NE 7th Ave, and east-west along the NE Broadway/Weidler couplet. This study area is similar the Northwest alignment in its mix of industrial uses and pockets of higher-density housing.





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.

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.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 highwage 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 though 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.

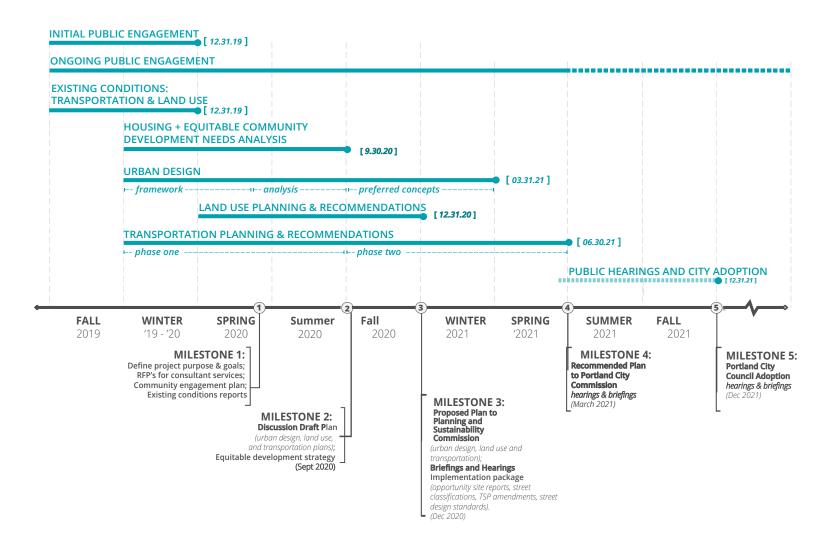
Policy 9.27 Transit service to centers and corridors. Use transit investments as a means to shape the city's growth and increase transit use. In partnership with TriMet and Metro, maintain, expand, and enhance Portland Streetcar, frequent service bus, and high-capacity transit, to better serve centers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

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.

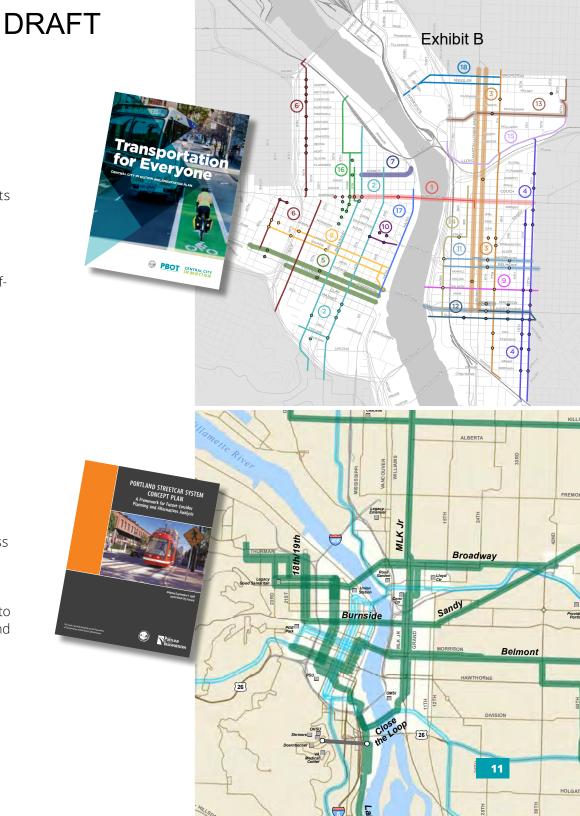


CENTRAL CITY IN MOTION

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 18/th/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

2009 — The Streetcar System Concept is adopted by Council. 1988 — The Central This report identifies City Plan updates and and evaluates more 1970 — The number expands the Downtown 2006 — Portland Aerial than 20 possible 2001 — The Portland of housing units in Plan vision, and Tram opens, and a streetcar lines with Portland's Central proposes an additional Streetcar opens, streetcar extension on several recommended for further study 5,000 Central City initially running from Moody links the City to City falls to 11,000, a significant decrease housing units with a to support the Northwest Portland the South Waterfront, the OSU extension and from the 28,000 that "trolley" and a central to Portland State Comprehensive Plan existed in 1950. city transit loop. University. Marquam Hill. Update. 1995 — The adopted 1972 — The Downtown 2003 — Northwest 2007 — Adopted Plan adopted, leading River District District Plan adopted, Transportation System to the Portland Transit Plan envisions with policy supporting Plan includes capital redevelopment of the projects list with Mall, removal of the extension of the Harbor Drive, and Hoyt Street Rail Yards streetcar to the streetcar lines to: Lake Oswego, and a line aggressive new policies into a mixed use new Montgomery Park area. connecting NW 18th, for new housing district with streetcar as development in the a central element. Burnside, and Sandy. Central City.

2013 — The Federal Transit Administration (FTA) funds the Streetcar Evaluation Methods Report to conduct real estate and economic impact analysis of possible system expansion options.

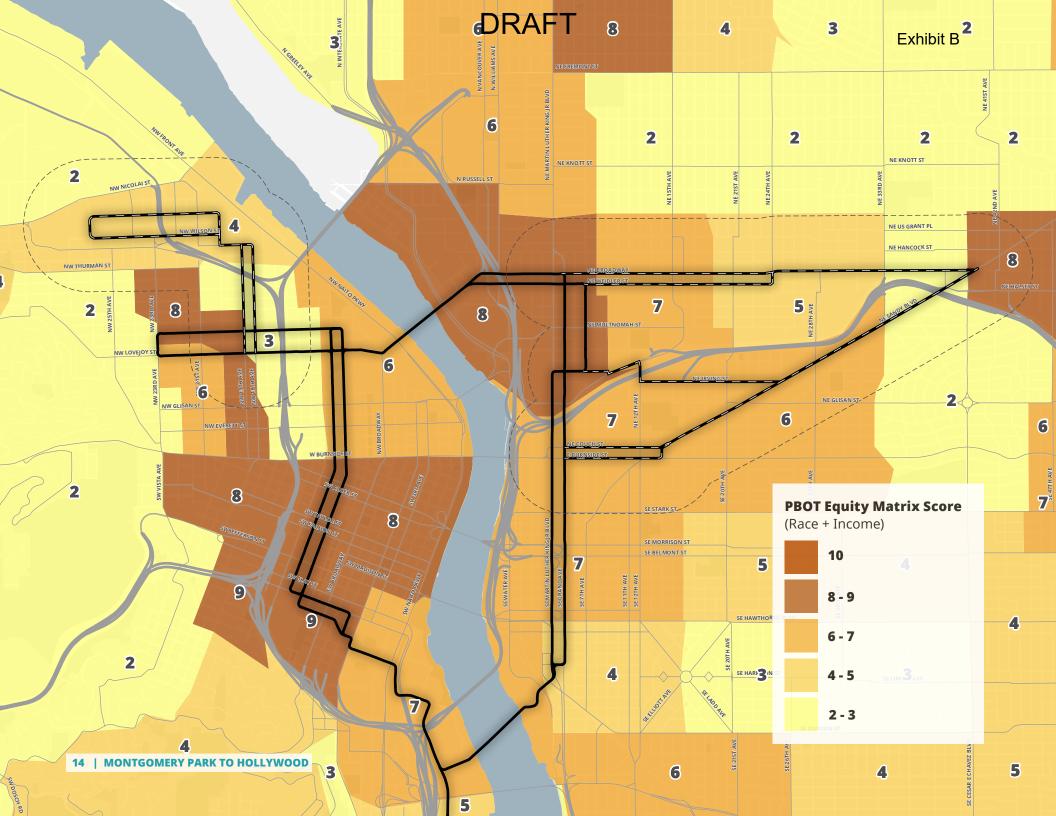
2015 — Tillikum Crossing opens, realizing the 1988 vision for a Central City transit loop. The number of housing units in the Central City surpasses 30,000.

2017 — Portland Streetcar completes technical analysis of the potential extensions identified in the TSP, including engineering feasibility, early cost estimates, and ridership. 2018 — The Regional Transportation Plan is adopted with a regional transit network that includes proposed streetcar extensions to Montgomery Park on the 2027 constrained project list.

2012 — The Central Loop opens, extending modern streetcar service east of the Willamette River. 2014 — Portland
Streetcar and URS
evaluate ten study
corridors with updated
data analysis. The
Portland Auditor
releases a report on
streetcar goals.

2016 — A new
Transportation System
Plan is adopted with
recommendations
to include several
streetcar lines for
further evaluation,
including extensions
south to Macadam,
west to Montgomery
Park, east to Hollywood,
and north on MLK.

2018 — The Central City 2035 Plan is adopted, establishing a renewed vision for the Central City growth through 2035. The plan anticipates there will be almost 60,000 housing units in the Central City by 2035. 2019 — The Bureau of Planning and Sustainability develops land use scenarios for the NW Montgomery Park extension. A revised alignment along NW Wilson and York Streets prompts discussion of potential zoning changes. The FTA awards a grant for additional land use planning for the NW Montgomery Park and Hollywood Extensions.



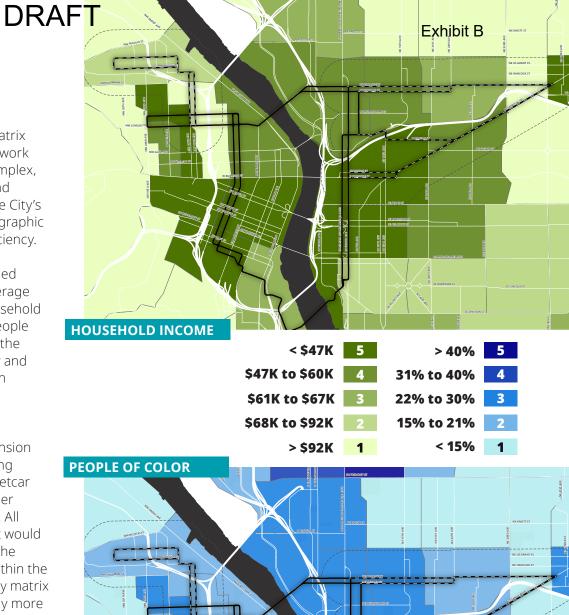
AREA EQUITY INDICATORS

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.

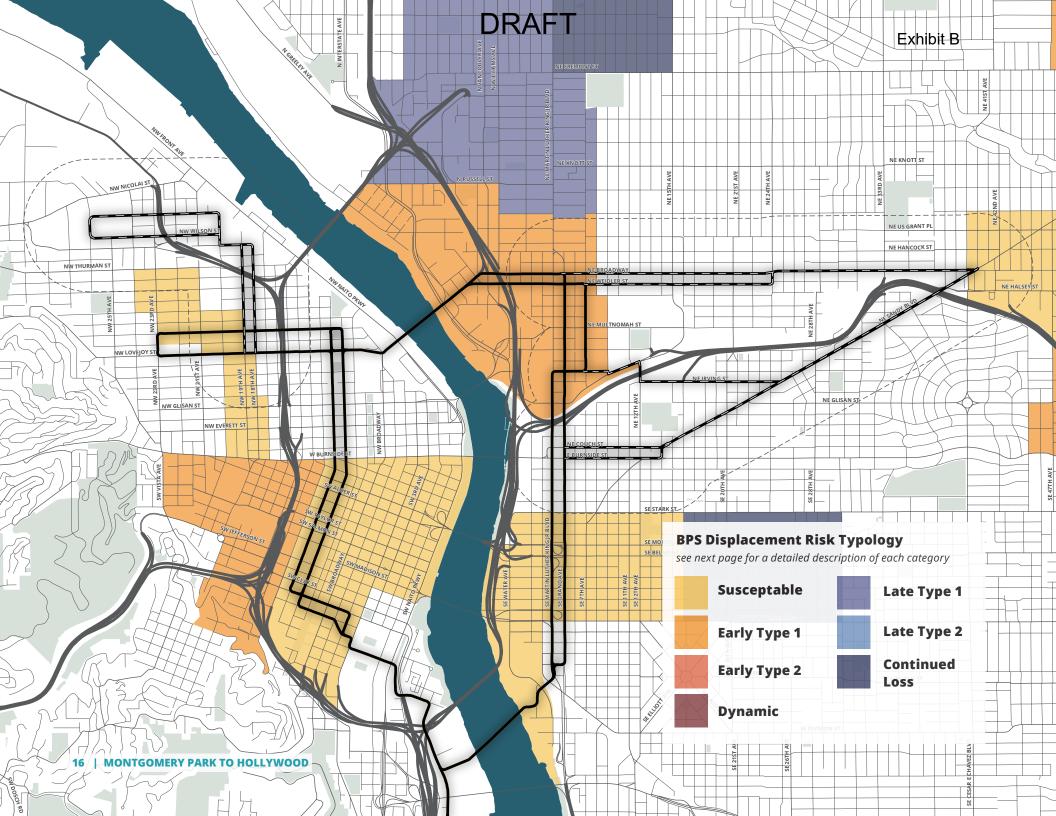
Using these three demographic variables, PBOT designed a simplified Equity Matrix that identifies areas with higher than the citywide average concentration of people of color and people below the median household income. This strategy centers race and has intersectionality with people with disabilities. Limited English Proficiency (LEP) in 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







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 oncehigh 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

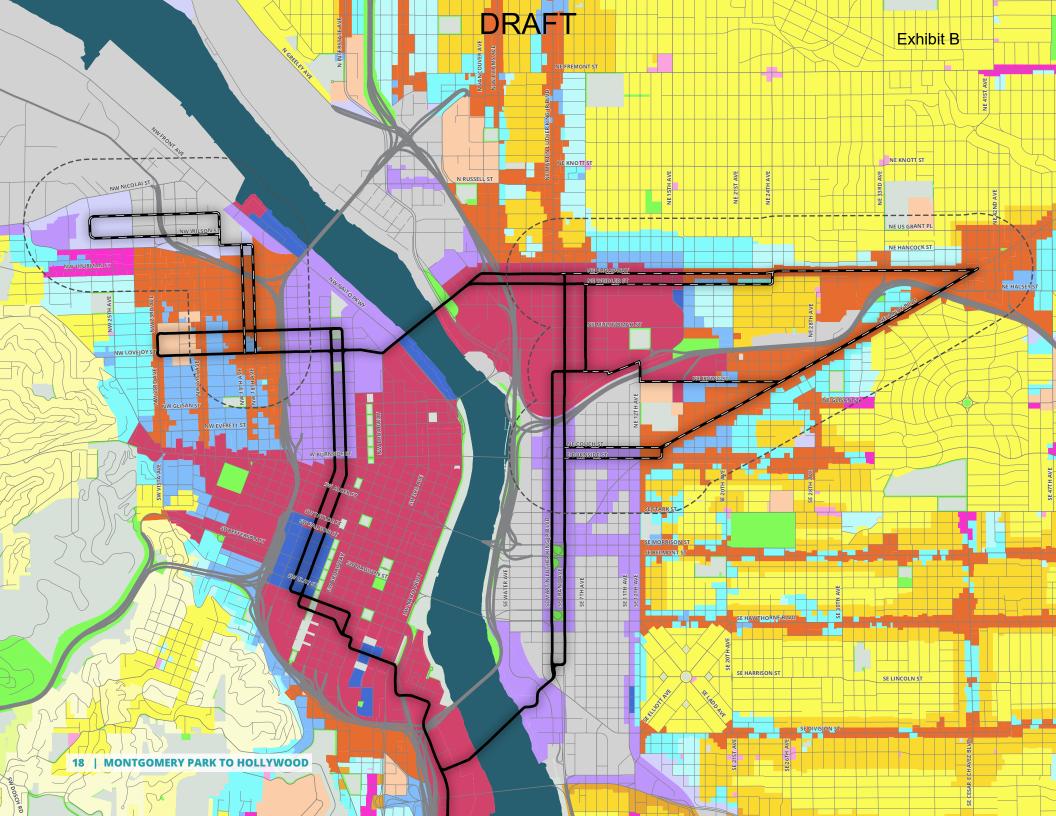
ABOUT THIS DATA SOURCE

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.

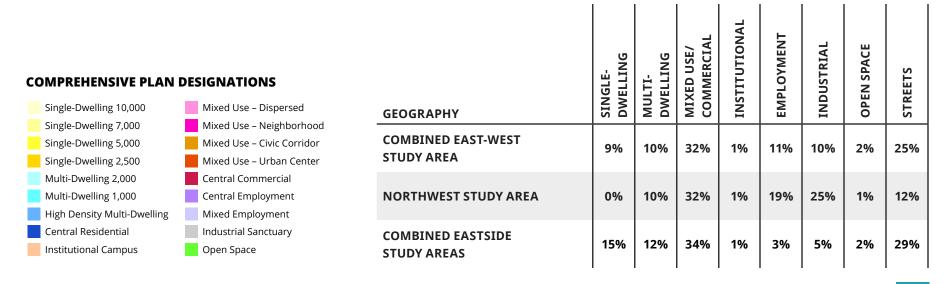


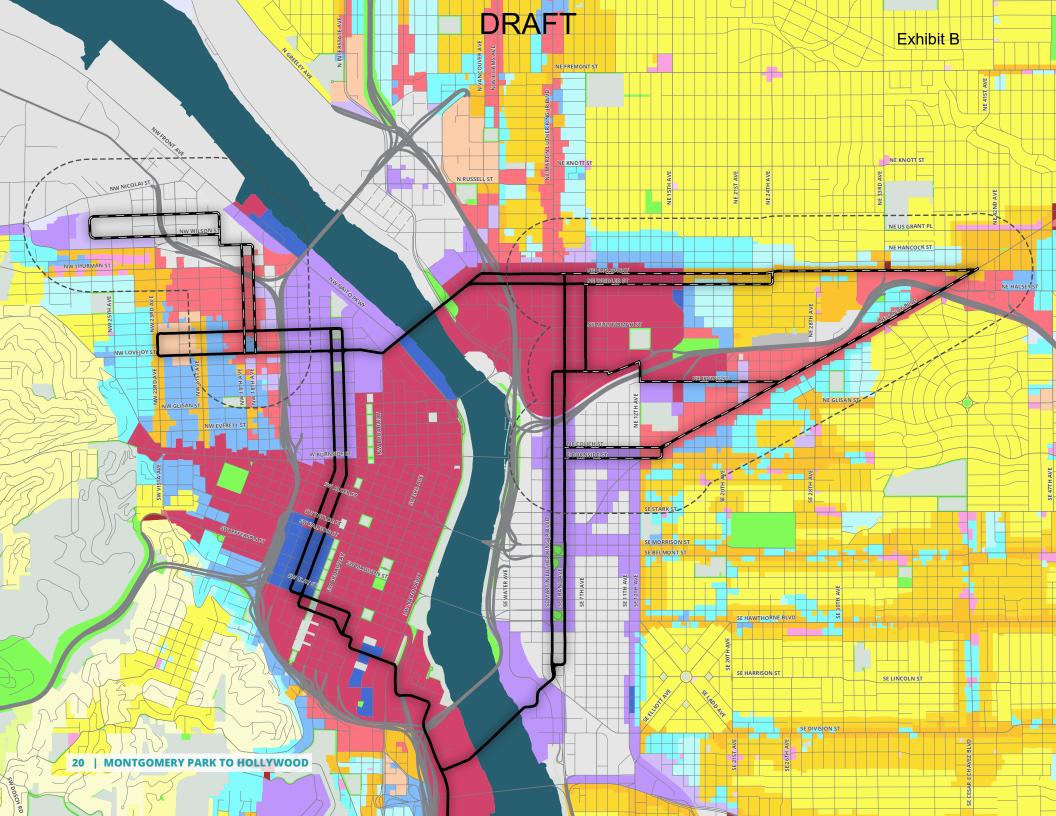
Land Use & Development

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 encompasees 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).





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

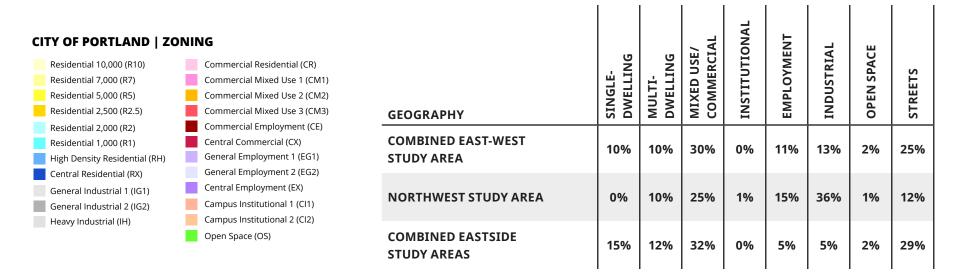
different types of allowed uses (residential, commercial, industrial, etc.). These are augmented by "overlay zones" and "plan districts" which supplement base zones. See westside and eastside descriptions for details.

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.



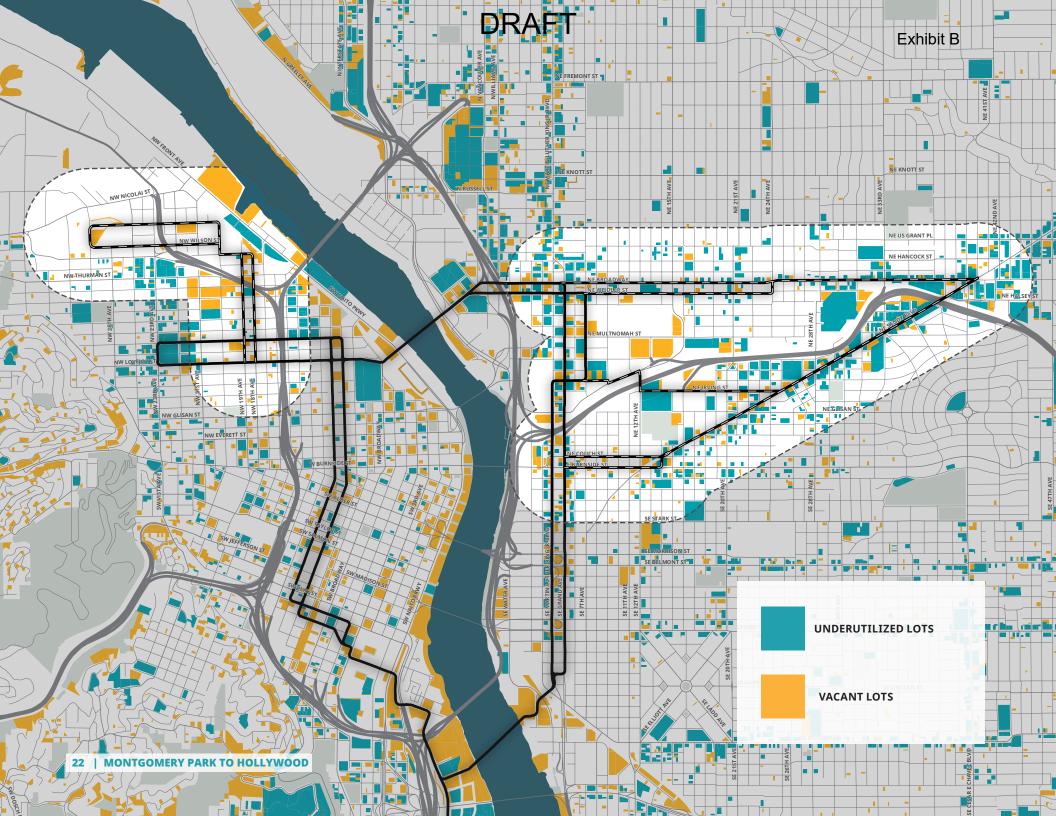


Exhibit B

DRAFT

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.

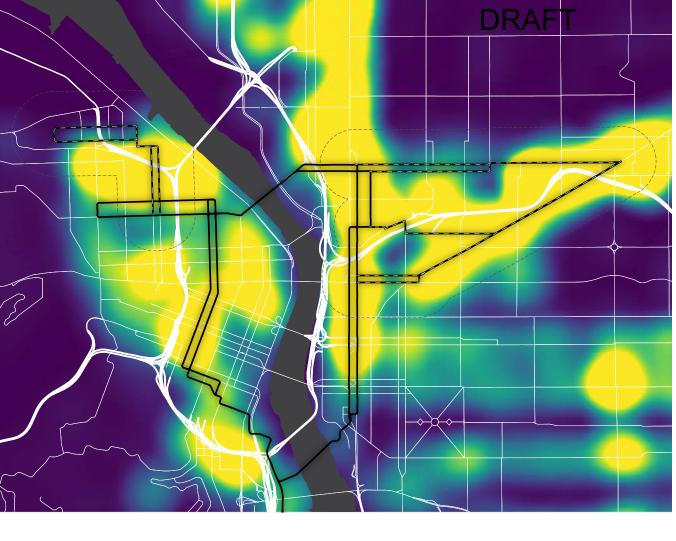
Buildable Lands Inventory

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	JOBS CAPACITY	ACRES	PARCEL COUNT
NORTHWEST STUDY AREA	6,249	4,157	99	219
EASTSIDE STUDY AREA	25,205	39,977	276	946



HOUSING CAPACITY

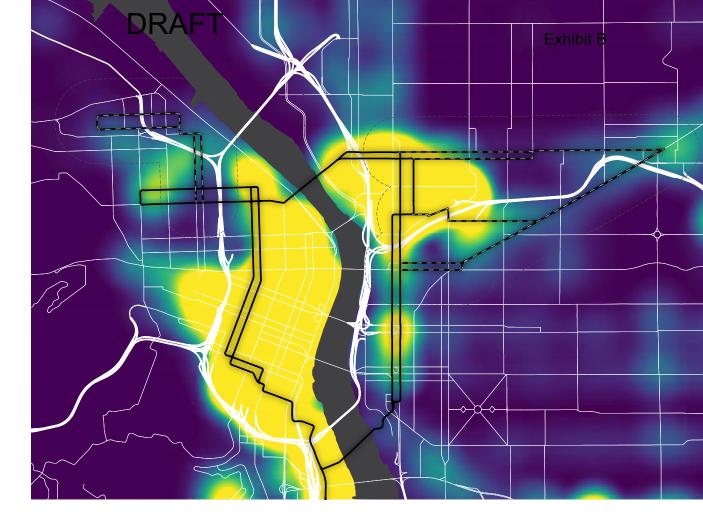
Based on the vacant and under-utilized parcels that were identified in the BLI capacity model, we can estimate the net new number of jobs and housing units that could be accommodated under current zoning. Areas with a high capacity for new housing units include the MLK corridor, Sandy Boulevard, Broadway 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.



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





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

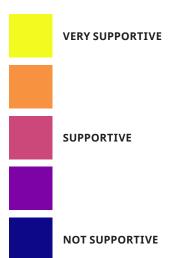
The Eastside alignments all contain generally transit supportive future densities, particularly on Broadway close to the Lloyd Center, along the MLK corridor, and along Sandy. The NE Broadway alignment contains the highest supportive densities at almost 18 units per acre in aggregate.

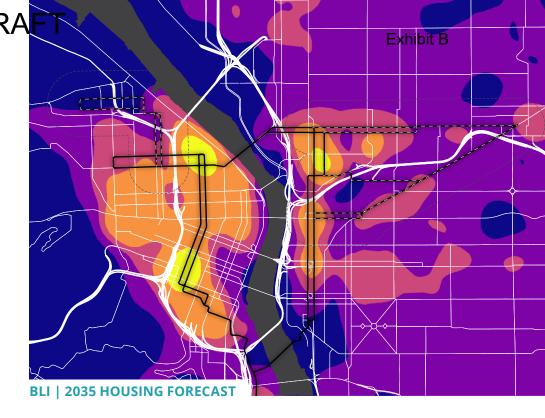
In addition to adequate housing density that supports good public transit, we also consider the density of jobs, which starts at around 40 jobs per acre. The BLI allocation models helps us predict where these densities may occur in 2035.

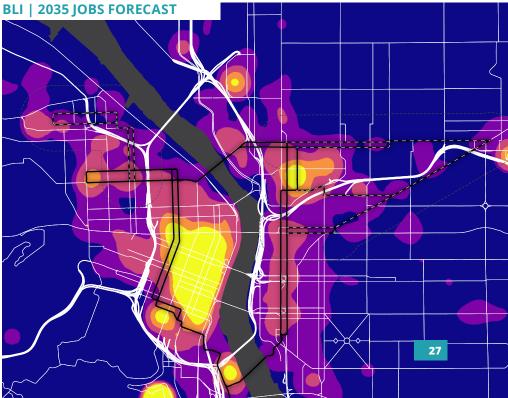
With the exception of the NE Irving Alignment, the study areas do not contain generally supportive future densities of employment. However, the alignments all link specific areas with very supportive concentrations of employment, including Montgomery Park, the Lloyd, Hollywood and parts of Providence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







Transportation: Guiding Policy & Existing Investments

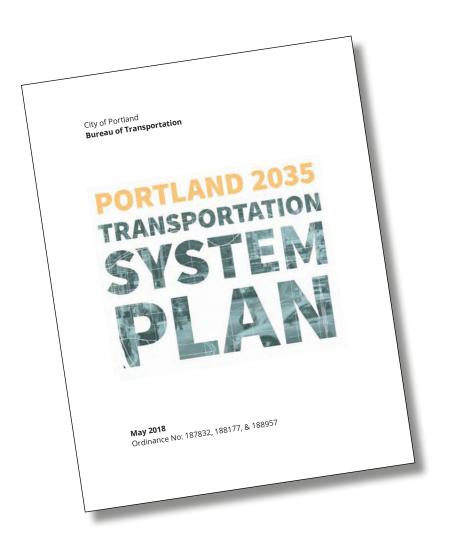
The Transportation System Plan (TSP), a component of the City's Comprehensive Plan, guides the City's transportation policy and investment strategy for the next 20 years. The TSP guides policy and investment through street classifications, area plans, master street plans, and modal plans.

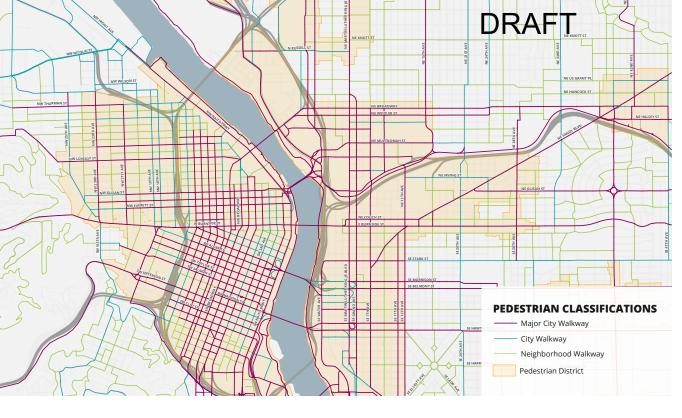
As Portland and the region grow, however, there is a continuing challenge to maintain the natural environment, economic prosperity, and overall quality of life. If in 2035, the percentage of people who drive alone to work remains the same as it is now (nearly 60 percent), traffic, carbon emissions, and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

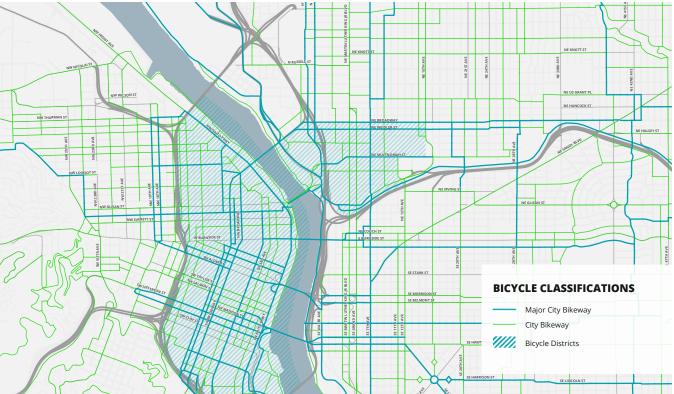
To accommodate this growth, our transportation system must provide Portlanders safer and more convenient ways to walk, bike, and take transit for more trips. The 2035 Transportation System Plan guides investments to maintain and improve the livability of Portland by:

- 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.







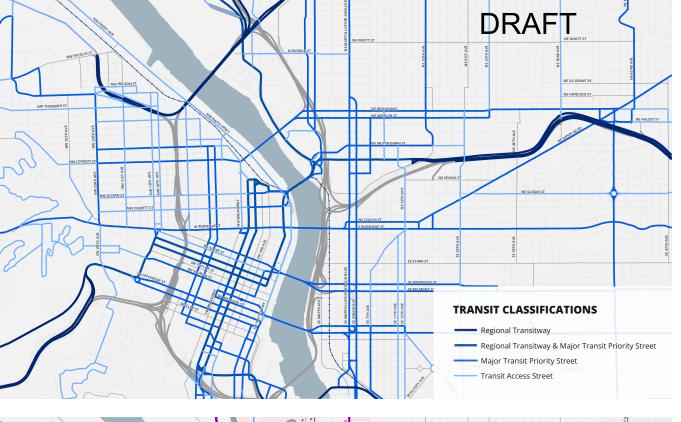
WALKING CLASSIFICATIONS

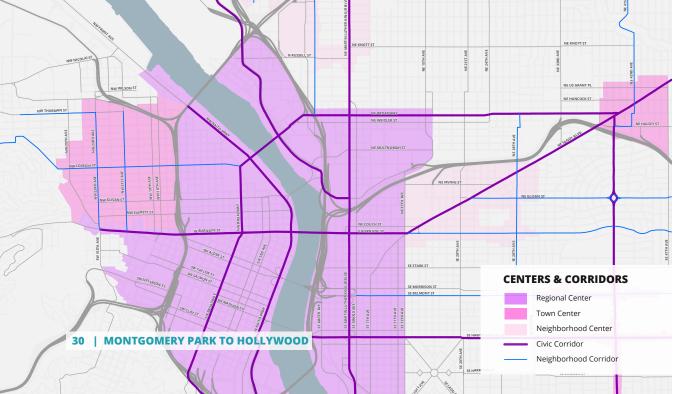
Pedestrian classification reflects the level of demand for pedestrian movement on that street. Higher classifications reflect a prioritization of pedestrian connections to key transit and land use destinations. The density of elevated walking classifications reflect places with high levels of pedestrian 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 CLASSIFCATIONS

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.





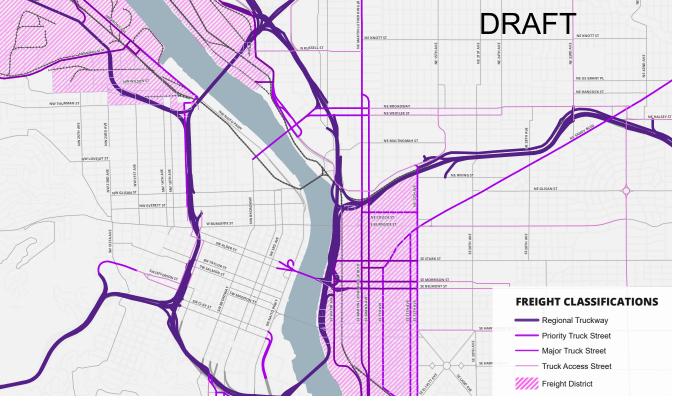
TRANSIT CLASSIFCATIONS

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

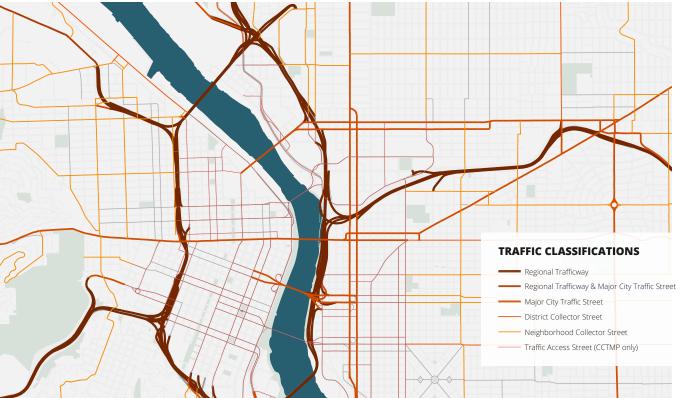
The study areas include the Central City and Town Centers in Northwest and in the Hollywood District. There are also several Civic and Neighborhood Corridors in the study area, notably Sandy Boulevard, Broadway, Burnside Street, Lovejoy Street, Thurman Street, and others.

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. Densifying centers and corridors make good use of existing infrastructure and encourages efficiency in new investments.



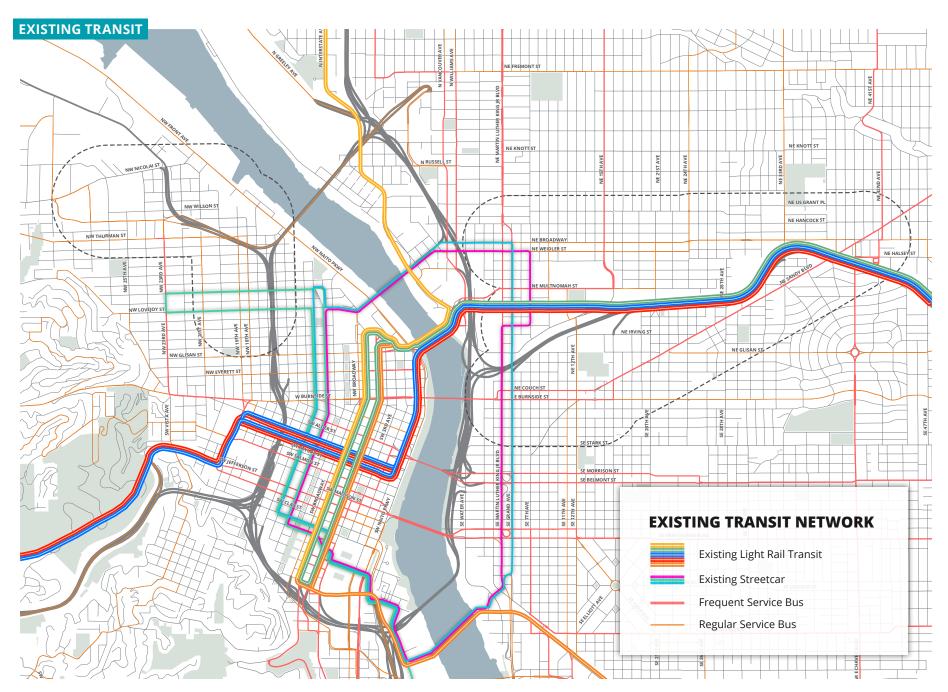
FREIGHT CLASSIFICATIONS

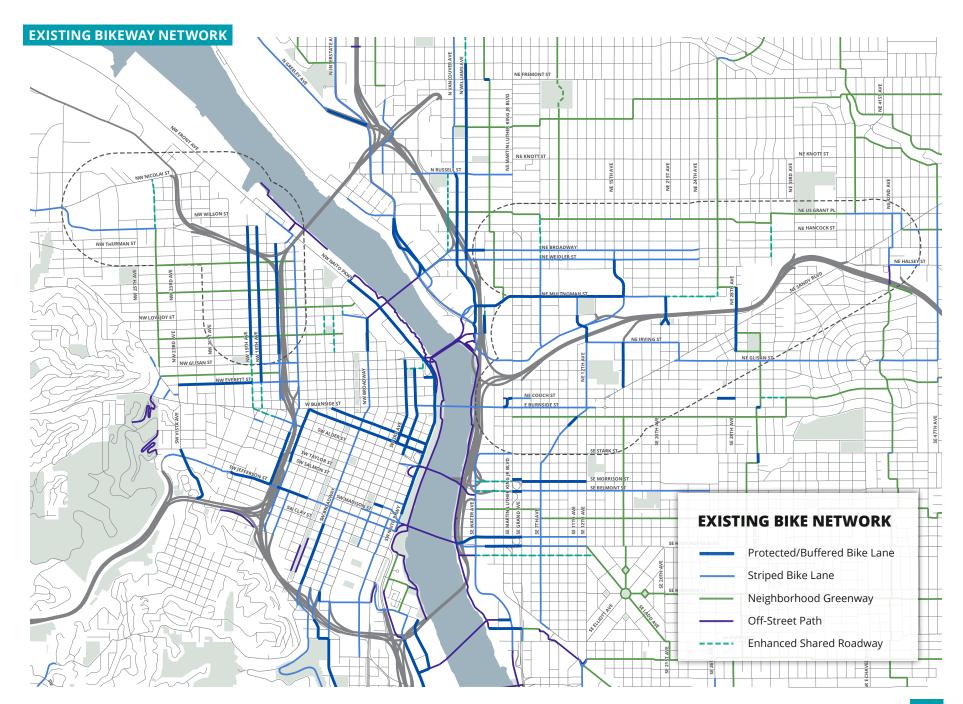
Streets with freight classifications designate a system of truck streets, railroad lines, and intermodal freight facilities that support local, national, and international distribution of goods. Freight districts are intended to provide safe and convenient truck mobility and access in industrial and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

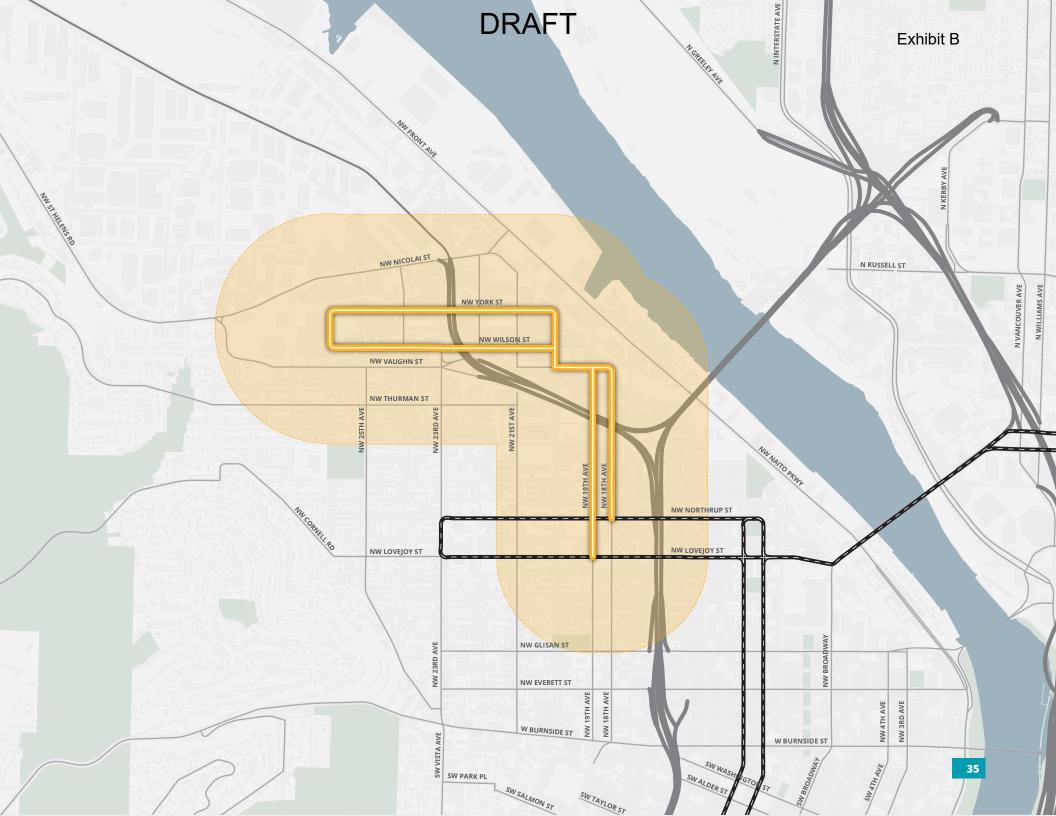
The Westside study area, also referred to as Northwest, consists of a quarter-mile buffer around a potential streetcar alternative route that connects the second-largest office building in Portland, Montgomery Park, to the existing Portland Streetcar network. The alignment diverges from the existing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

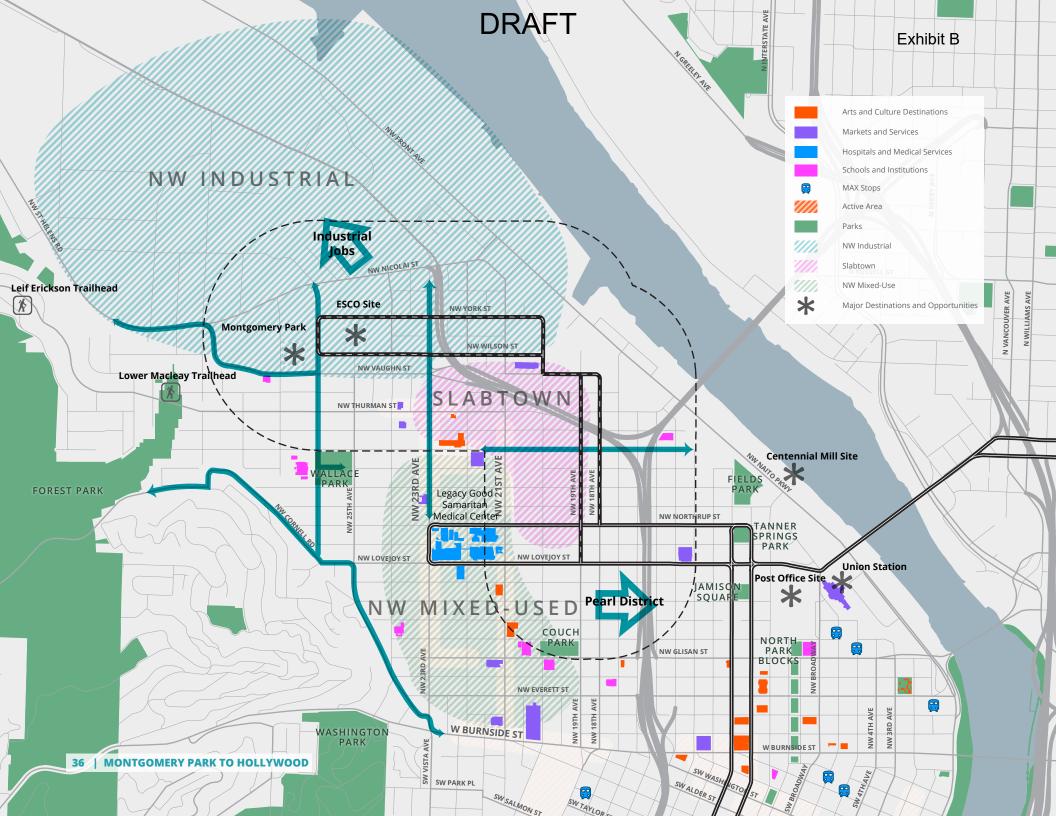
The study area is primarily within the Northwest District and adjacent industrial areas to the north are within the NW Industrial Business Association boundary.

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.



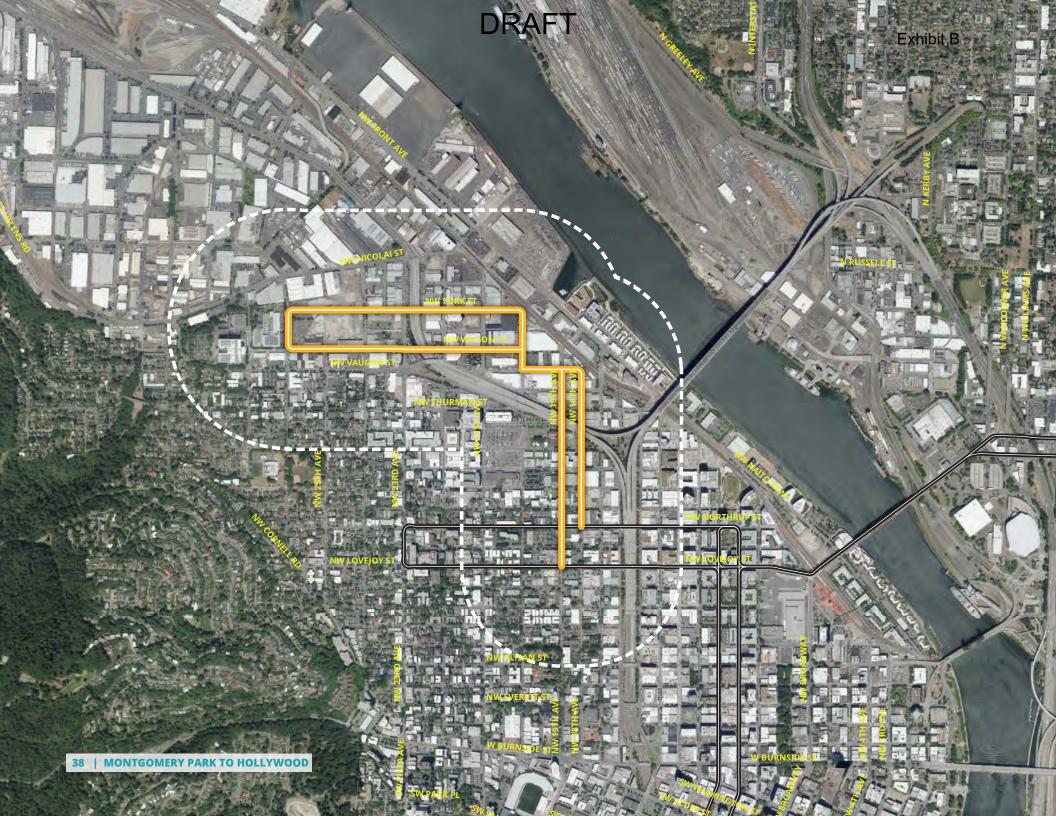
Large parking lots have long supplied Montgomery Park employees with free parking, but redevelopment may introduce other uses.



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.

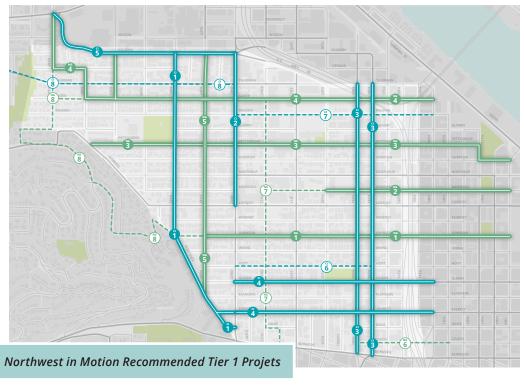
A major character-defining feature of the Northwest study area is the Highway 30/I-405 alignment and the approaches to the Fremont Bridge—major pieces of infrastructure that pose a connectivity barrier in some areas, while towering over others. The area lacks significant public open space, although Forest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



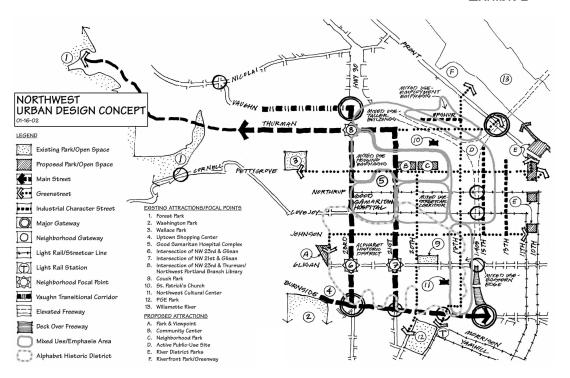
Exhibit B

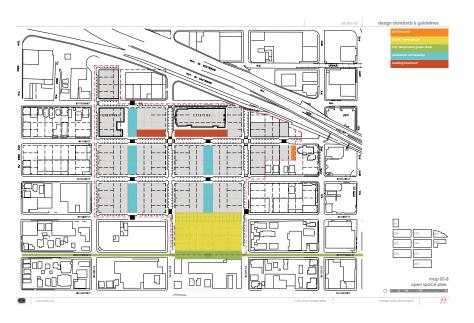
NORTHWEST DISTRICT PLAN

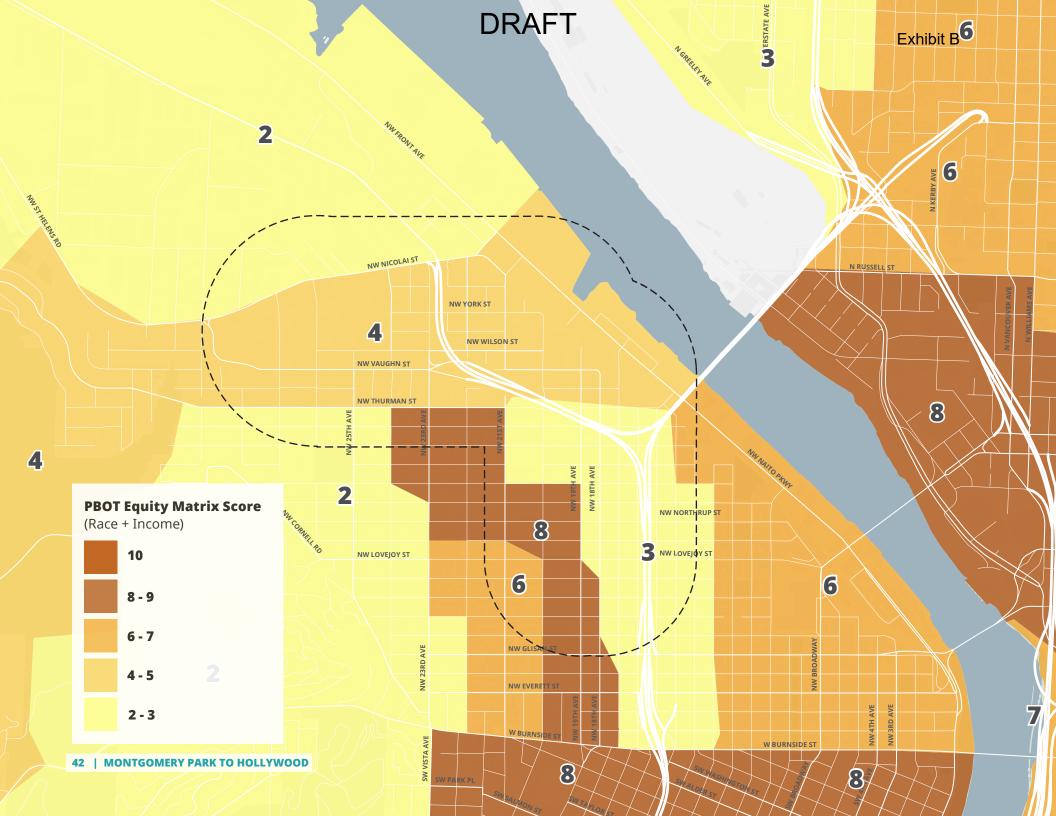
The Northwest District Plan was adopted in 2001 and sets a more specific framework of desired land uses and development for this densely developed neighborhood. The plan is implemented by the Northwest Plan District (33.562) which specifies additional land use allowances and development standards for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

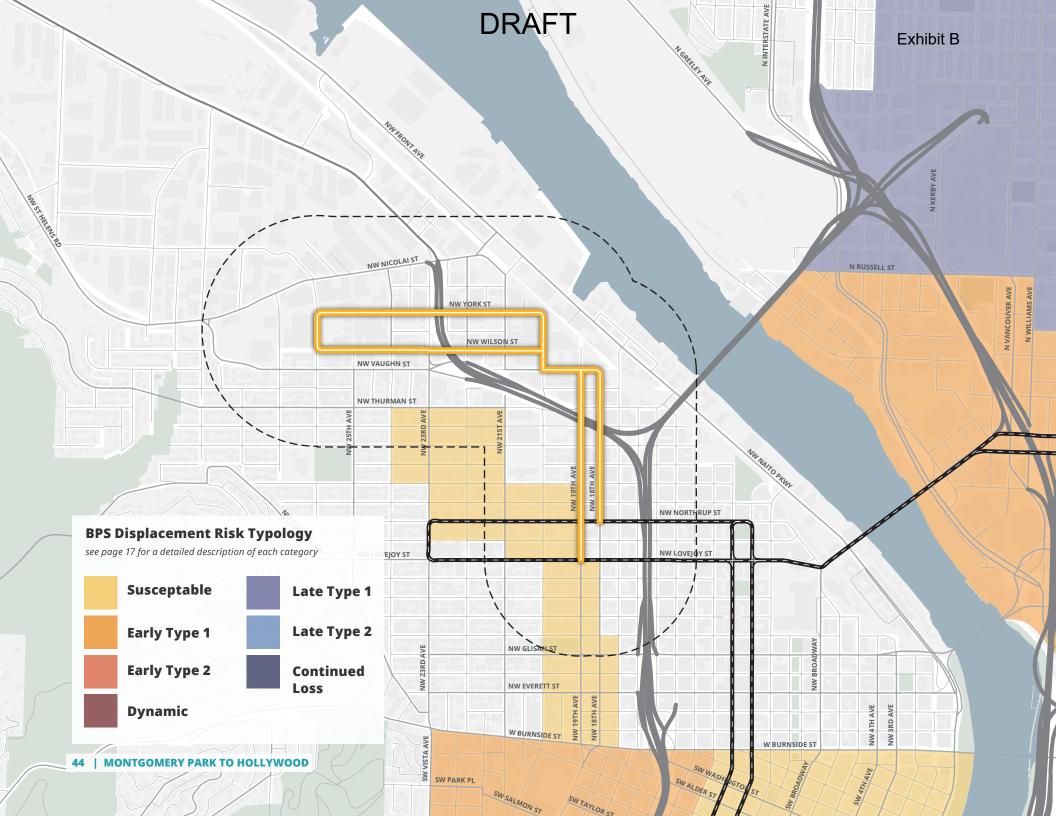
In the tract north of NW Thurman, the income and racial equity scores are each a 2, which indicates that the area has lower concentrations of low-income and people of color than the citywide average. About 1% of the households have limited English proficiency, but no common non-English language has been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

City of Portland	Northwest Study Area	Population Characteristics
630,331	6,735	Total Population
\$37,382	\$64,295	Per Capita Income
135,543	1,108	Total Families
10%	4%	Share of Families in Poverty
29%	20%	People of Color
City of Portland	Northwest Study Area	Race/Ethnicity
7%	2%	Black
2%	2%	Native American
10%	10%	Asian
1%	0%	Pacific Islander
3%	1%	Another Race
10%	8%	Hispanic
71%	80%	Non-Hispanic White
City of Portland	Northwest Study Area	Age Characteristics
36.8	35.2	Median Age
18%	8%	Share under 18
70%	80%	Share 18 to 64
12%	11%	Share over 64



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





241 TO 320



161 TO 240



81 TO 160



80 OR LESS



JOBS LOCATION

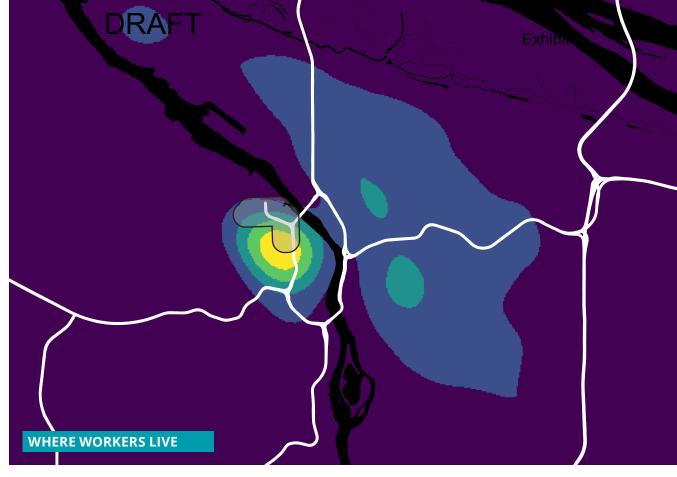
This map shows the density of workplace locations of people that live in the Northwest study area. The highest concentration of workplaces for Northwest residents is in Downtown Portland, on both the east and west sides of I-405. Smaller concentrations work in the inner eastside in the Central Eastside 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.

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.



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

|--|

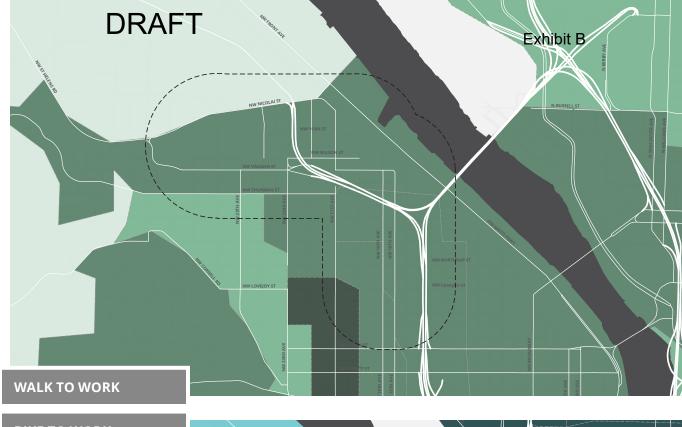
PEOPLE BIKING

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

< 5% 5 -1	0% 10 -15%	15-20%	>20%
-----------	------------	--------	------

48 | MONTGOMERY PARK TO HOLLYWOOD





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

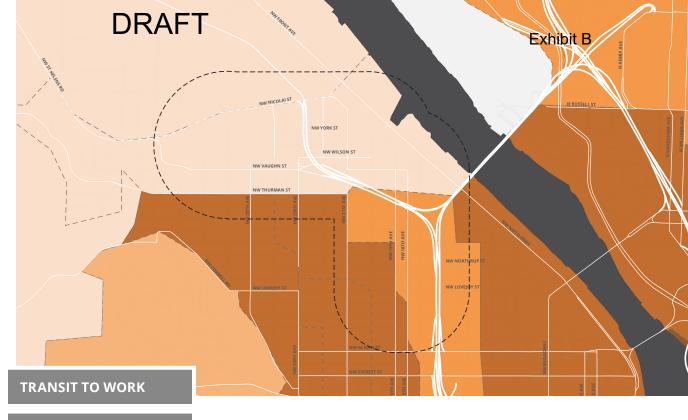
< 5% 5 -10% 10 -15% 15-	25% >25%
-------------------------	----------

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

0% 30-40%	40-50%	40-50%	> 60%
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Land Use: Comprehensive Plan

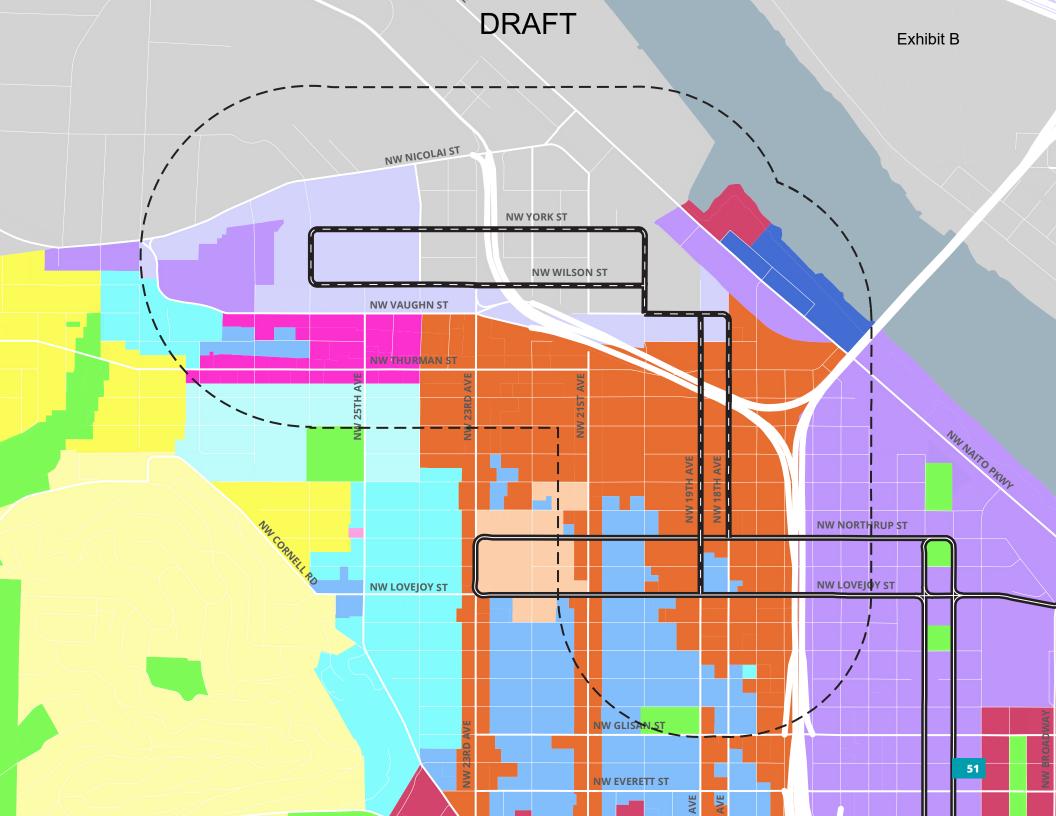
COMPEHENSIVE PLAN DESIGNATIONS

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



Land Use: Zoning

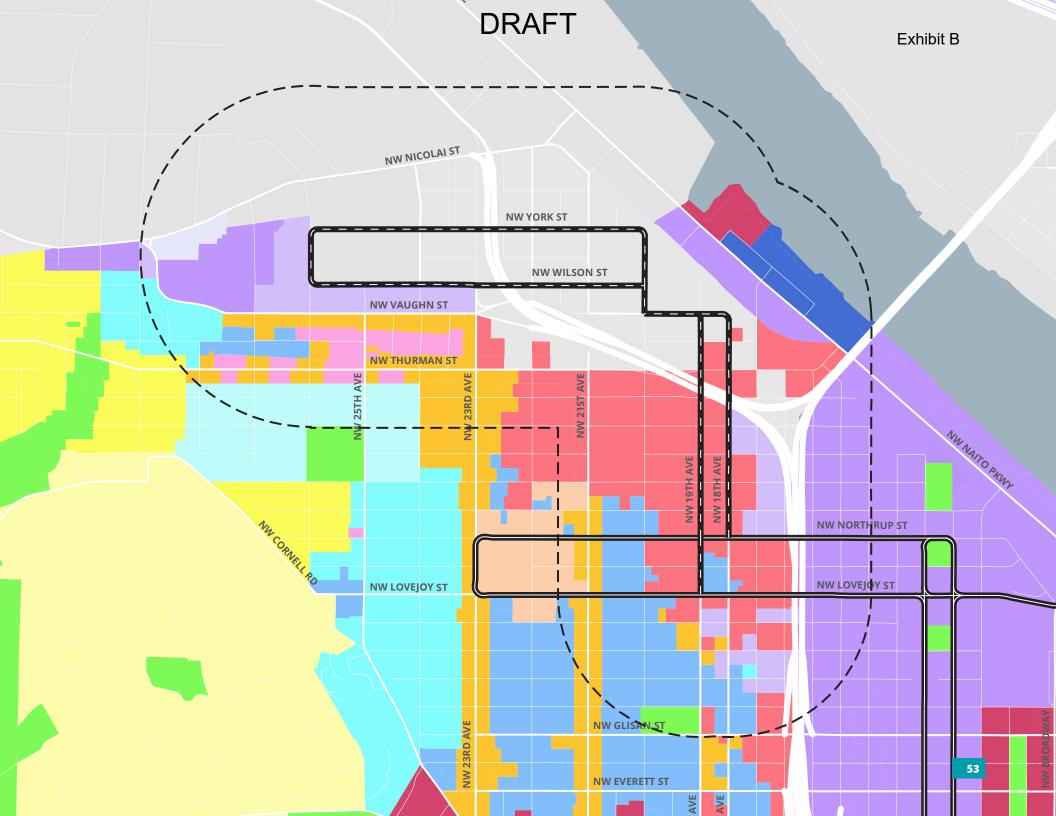
ZONING

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



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%





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.

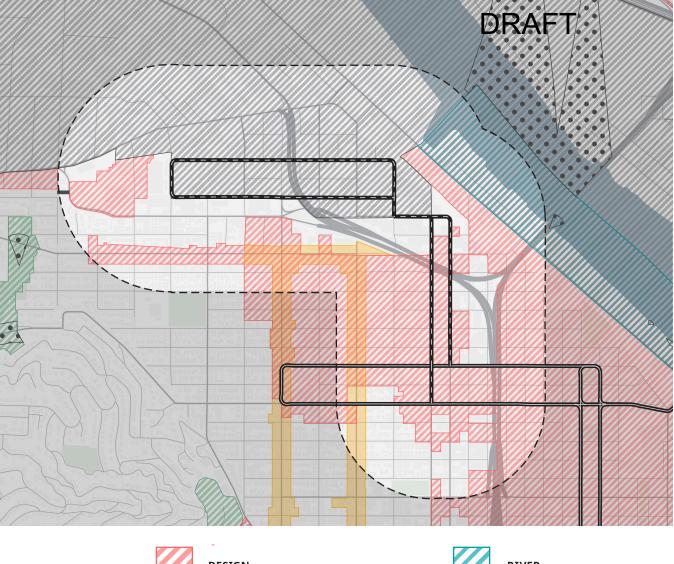
The **Design overlay zone ("d"),** implemented by 33.420, is applied in areas where new development is subject to a greater degree of design control due to special character of an area, or the scale of anticipated development.

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.





DESIGN



RIVER



PRIME INDUSTRIAL



ENVIRONMENTAL



CENTERS MAIN ST



SCENIC RESOURCES

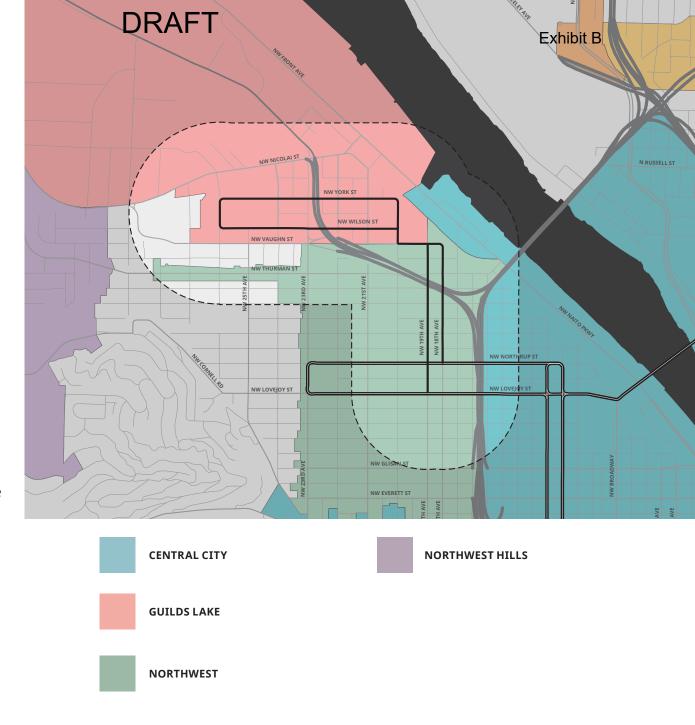
PLAN DISTRICTS

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.



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 alignment along NW 18th and NW 19th passes through a portion of a designated Neighborhood Center in NW Portland. North of NW Upshur, the alignment passes through an area designated by Metro as a regionally significant industrial area, and by the City of Portland as a Prime Industrial Area. The alignment is not located along a designated Civic or Neighborhood Corridor.

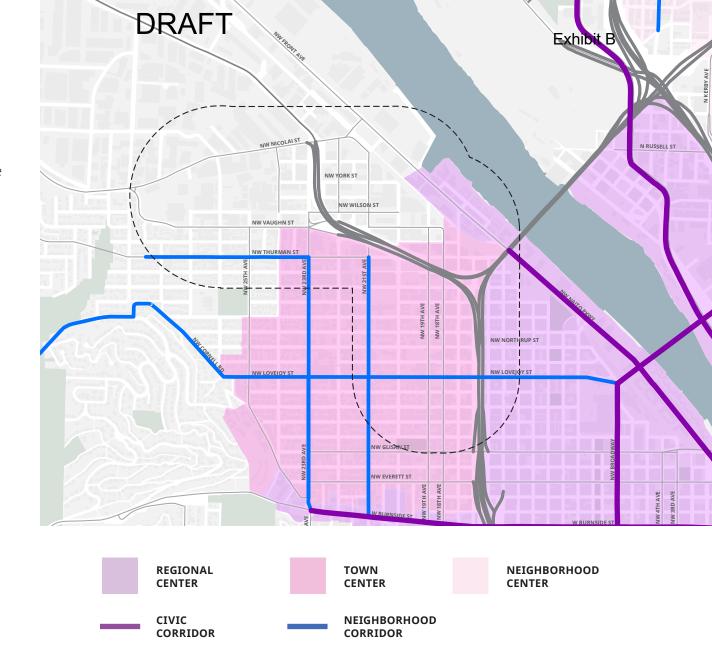
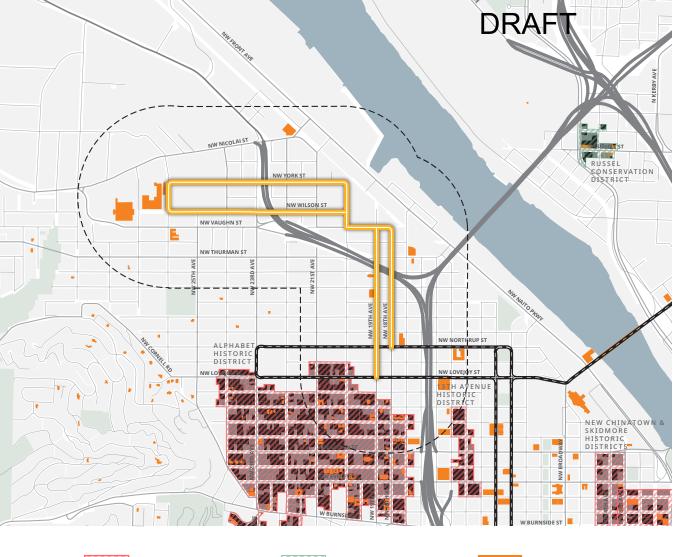


Exhibit B

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 Alphabet 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.



HISTORIC

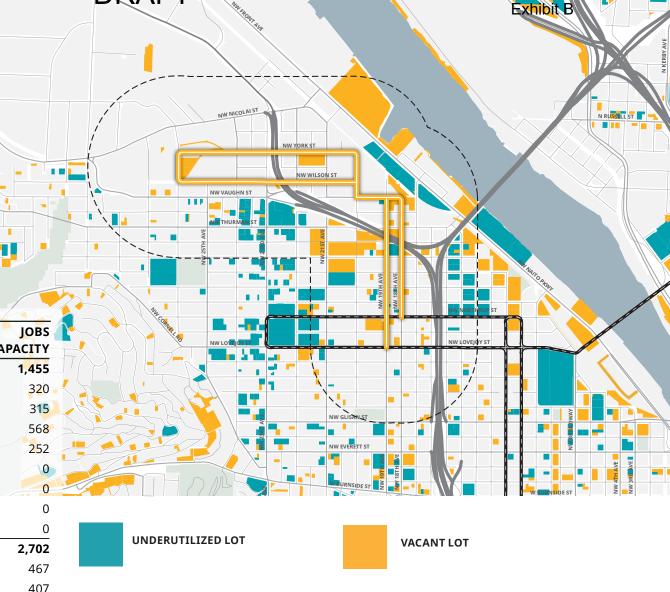
LANDMARKS



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		HOUSING	JOBS
	COUNT	ACRES	CAPACITY	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



DRAFT

Exhibit B

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.





<5'

Special Habitat Areas

40' to 50'

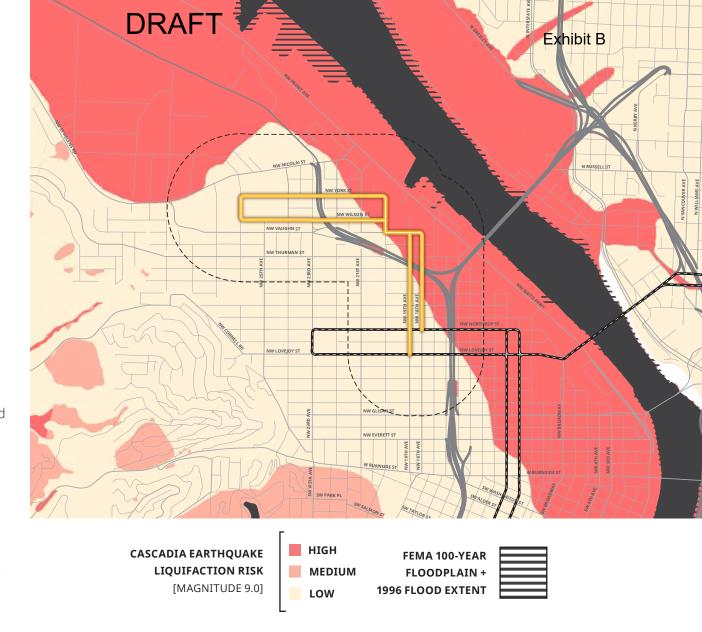
Natrual Resources Inventory Rank High Medium Low Forest Woodland Shurbland Herbaceous

>80'

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.

Much of Portland's Central City is at an elevated liquefaction risk. Within the Northwest study area the land nestled between the HWY 30 ramps and the Willamette River is at an elevated risk of liquefaction. This area contains the section of the alignment as it transitions from the NW 18th and 19th Ave couplet before turning west to reach Montgomery Park via NW York and Wilson St. Also notable is the liquefaction risk present north of NW Nicolai St as part of the Guild's Lake industrial sanctuary The Northwest study area shows minimal risk of flooding as only a small part of the waterfront area east of NW Naito Parkway lies within the FEMA 100-Year Floodplain.

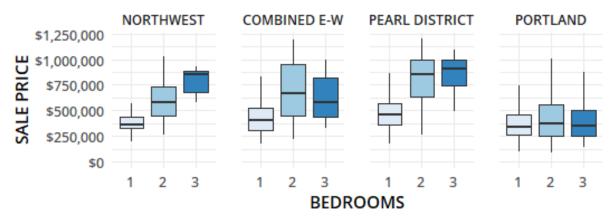


Housing & Development

FOR-SALE MARKET

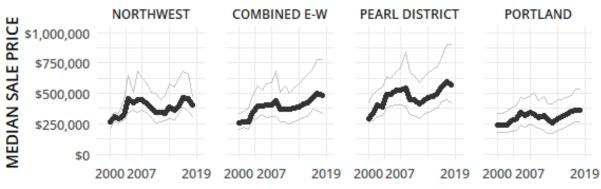
The for-sale housing market in Northwest is slim, with sales of 82 condos and 10 combined single-family and townhomes in 2018. This compares to 336 condo sales in the Pearl in 2018. The current sale price is about \$410,000 at the median but varies significantly by submarket and bedroom count. One-bedroom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



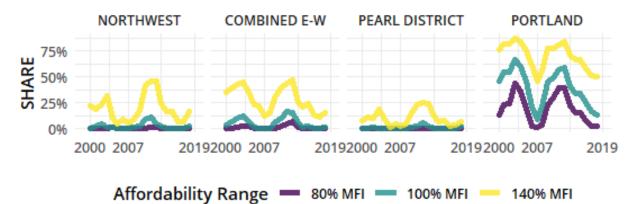
Source: Regional Multiple Listings Services (RMLS).

TREND IN MEDIAN CONDO SALE PRICE



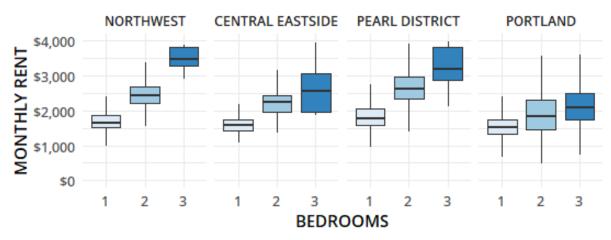
Source: Regional Multiple Listings Services (RMLS).

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.

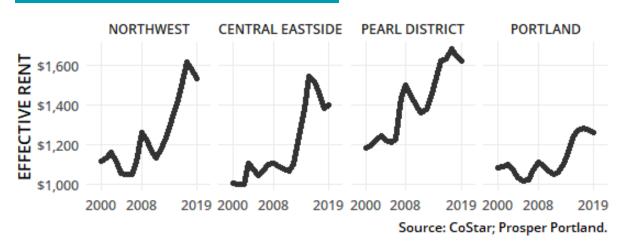
FOR-SALE AFFORDABILITY

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.

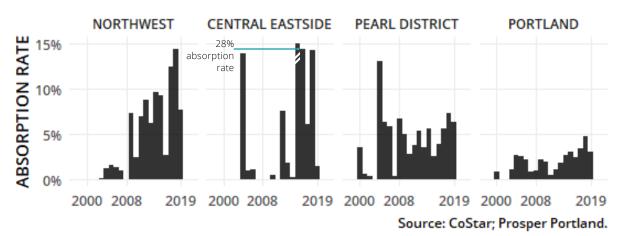
RENTAL MARKET

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



TREND IN MULTI-FAMILY ABSORPTION RATES



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





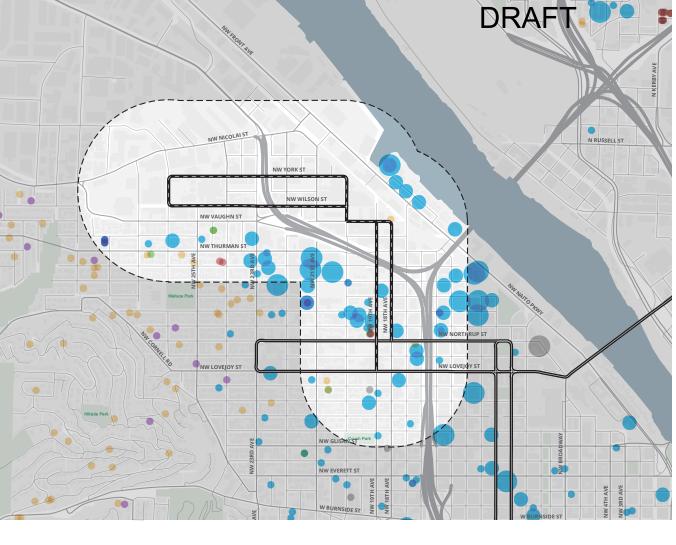
NW Raleigh looking toward NW 21st Ave (Slabtown). The area west of 19th added more than 1,800 new units since 2008.



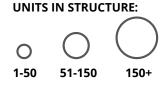
Exhibit B

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.







DRAFT Exhibit B

ABOUT THIS DATA SOURCE: RMLS

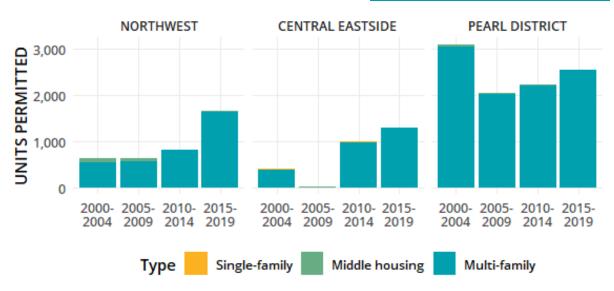
The **Regional Multiple Listings Service** (RMLS) is a proprietary database that realtors use to access and create current home listings and view past listings. The Portland Bureau of Planning and Sustainability maintains a subscription to the service and updates their database annually with recent sales. 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.



- 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.

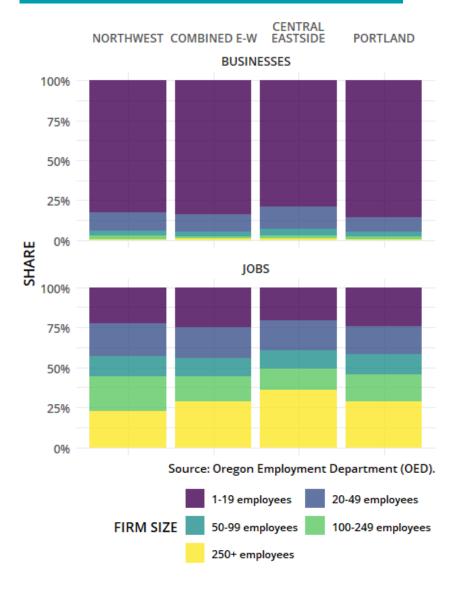
BUSINESS & EMPLOYMENT MIX

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.

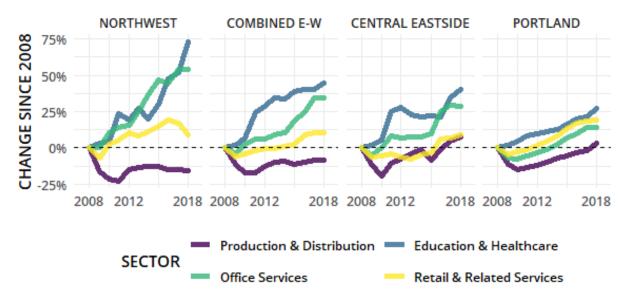
DUCINIECE AND ENADLOVIMENT	RAIN DV ERADI OVRAERIT CECTOD 2040
I BUSINESS AND EMPLOYMENT	MIX BY EMPLOYMENT SECTOR. 2018
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DOSINESS AND LIMIT LOT WILL	AL MILY DI L	VIF LOT IVIL	INI SECT	JIC, 2010
	NORTHWEST	COMBINED E-W	CENTRAL EASTSIDE	PORTLAND
BUSINESSES	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: OCEW

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:

- 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 <u>NAICS system</u>, 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.

DRAFT Exhibit B

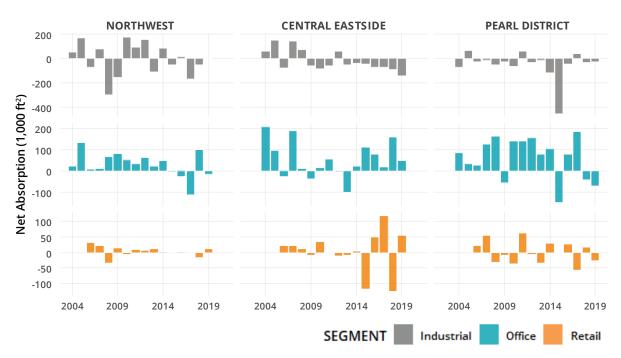
ABOUT THIS DATA SOURCE: COSTAR

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

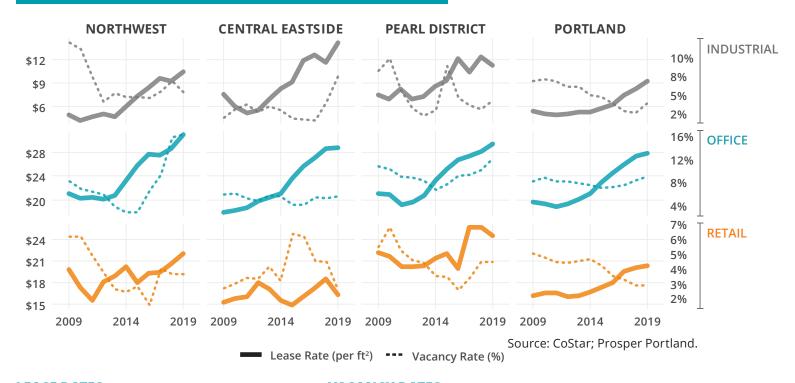


ABSORPTION

Source: CoStar; Prosper Portland.

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



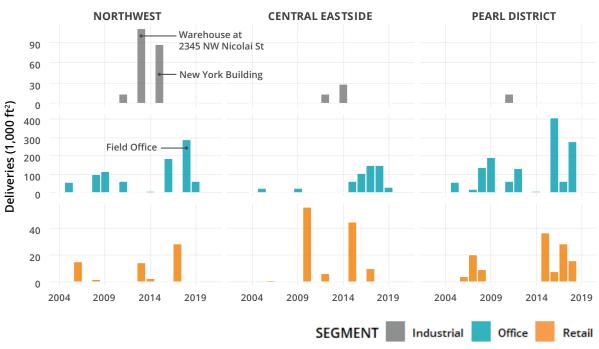
LEASE RATES

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 ft 2 of commercial space was delivered to the market in Northwest, 75% of which was office space (or about 614,000 ft 2). For comparison, the Central Eastside alignment area delivered 540,000 ft 2 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 ft 2 of office space, which has 80% vacancy. For industrial, the New York building came online with 87,000 ft 2 in 2015 and is now fully occupied.

Transportation

TSP CLASSIFICATIONS

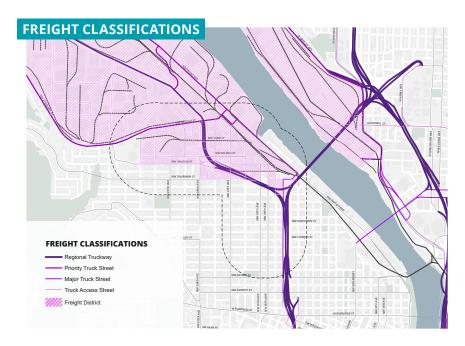
TSP classifications are a system of roadway categories determined in the Transportation System Plan. The TSP is a 20-year plan for transportation improvements in the City of Portland with the goal of providing transportation choices for residents, employees, visitors and firms doing business in Portland. 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.



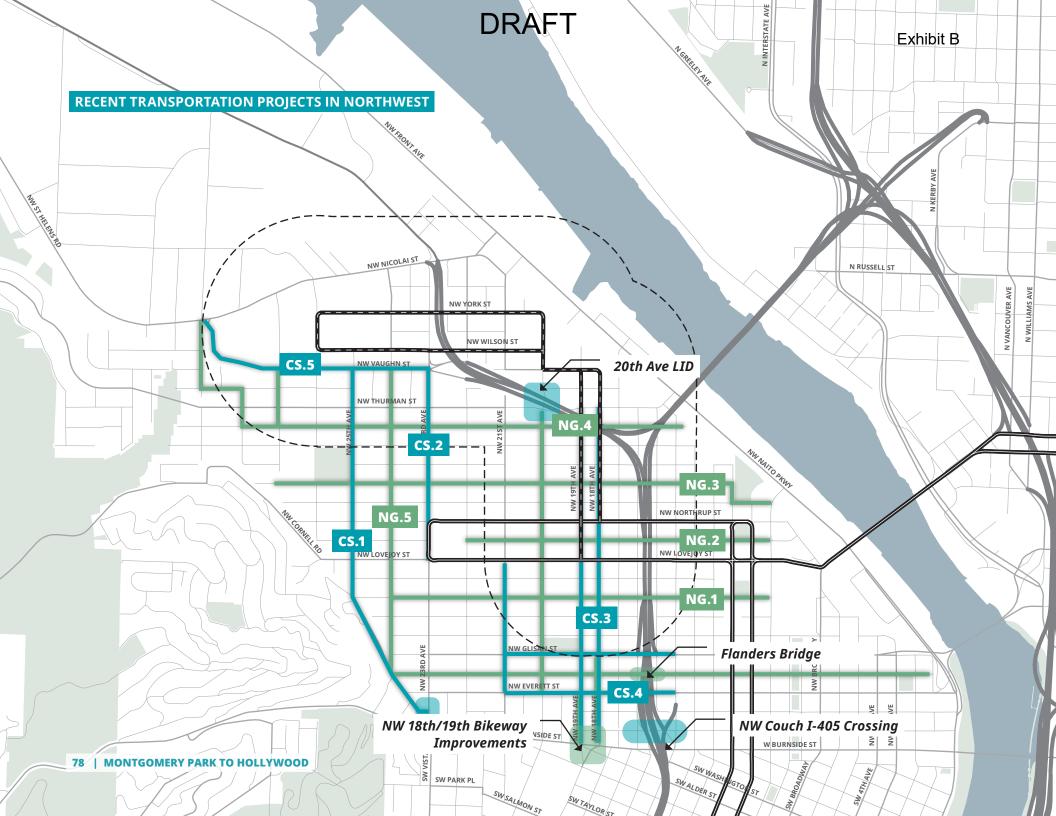












RECENT TRANSPORTATION PROJECTS IN NORTHWEST

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 Savier 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:

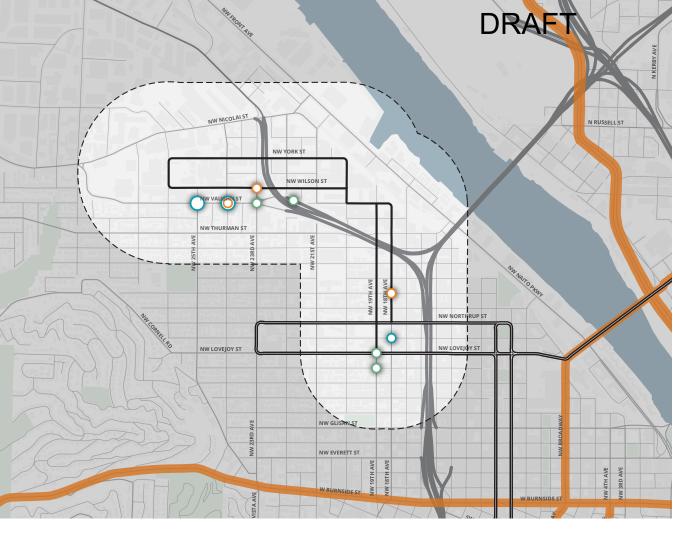
An extension of NW 20th Ave beneath the HWY 30 onramps to provide between connectivity between the Conway area and the industrial area to the north. Complementary to this project are signal and circulation improvements at the busy intersection of NW Vaughn and NW 23rd Ave.

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.



VISION ZERO

Vision Zero is Portland's commitment to ending traffic violence in our communities. Through the Vision Zero program, the City of Portland and partners are working to eliminate deaths and serious injuries on our streets. The Northwest study area does not contain any of the corridors that make up the high crash network, however there have been crashes in the area resulting in serious injuries.

NW Vaughn stands out for being the location of crashes that have resulted in serious injuries for pedestrians, bicyclists and vehicle operators. NW 18th and NW 19th also have vulnerable user crashes, potentially due to the commercial draws on the corridors attracting more foot traffic.



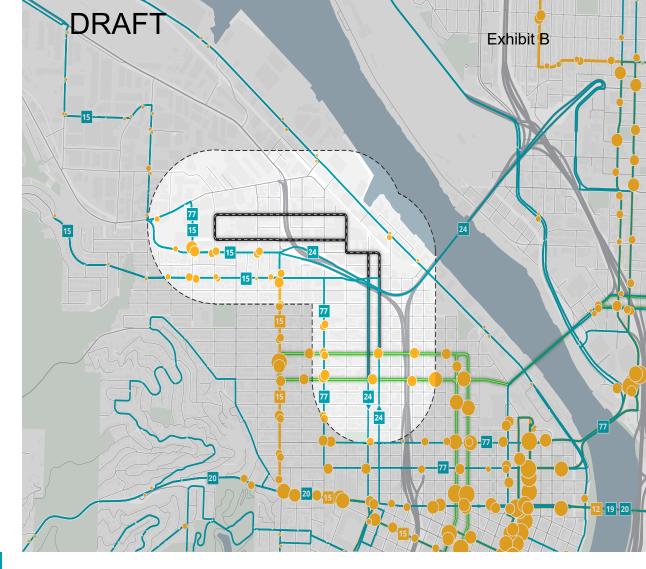
TRANSIT ACTIVITY

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.

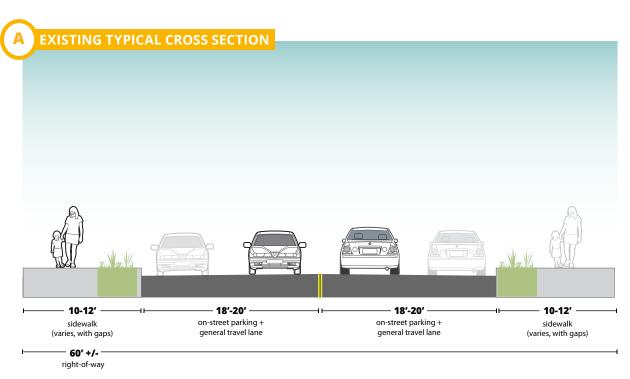


BUSIEST TRANSIT STOPS | WESTSIDE STUDY AREA

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

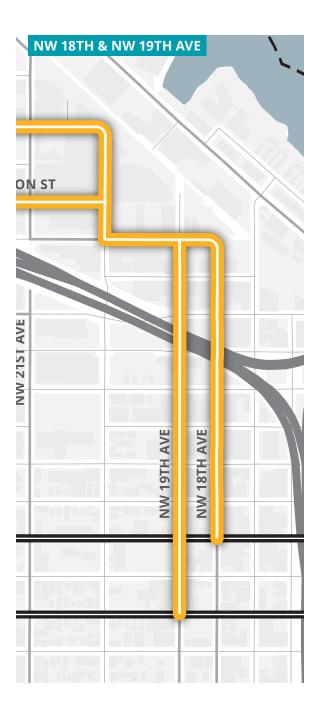
Roadway Cross Sections



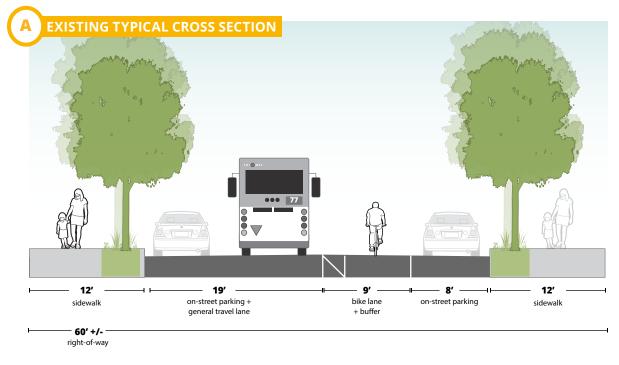


In Northwest, the proposed streetcar extension alternative would operate on NW York and NW Wilson Street. The streets in the area are not uniform, with many lacking typical sidewalks, formalized parking, and bike facilities. The alignment shown would rely on the City of Portland gaining easements and 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.



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.



EASTSIDE | ALIGNMENT DETAIL

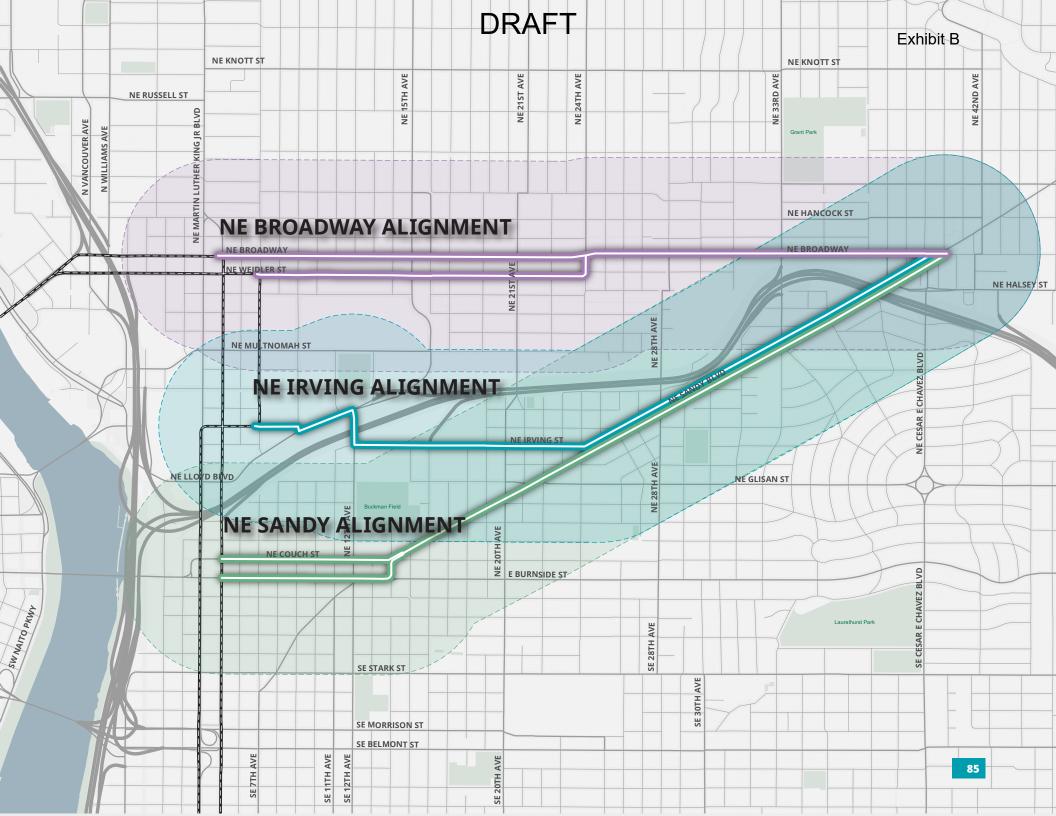
The Eastside study area, also referred to as the Northeast study area, consists of a quarter-mile buffer around alternative potential streetcar routes that connect the Hollywood District, a designated town center, to the existing Portland Streetcar network. Three different alignment options are being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

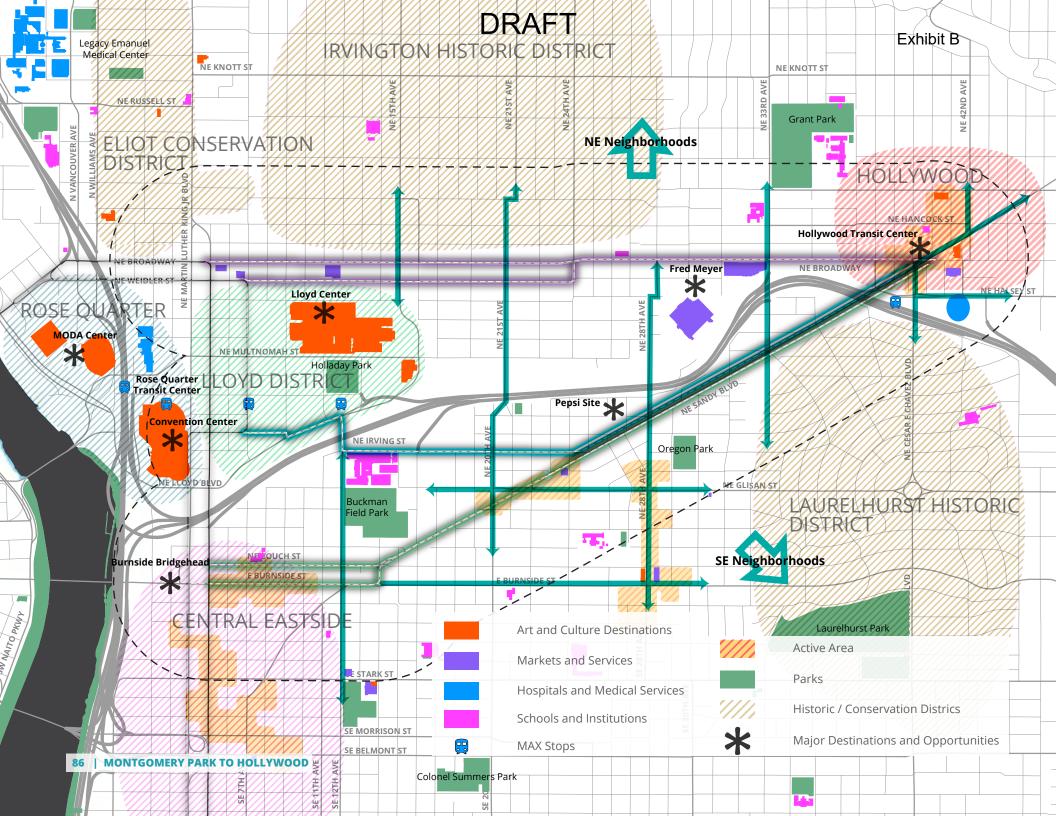
- **NE Broadway**, which connects to the existing streetcar system in the Lloyd District and continues along NE Broadway and a portion of NE Weidler to Hollywood.
- **NE Irving**, which connects to the existing streetcar system near the Oregon Convention Center, crosses Interstate 84, continues along 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 varity 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.









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.



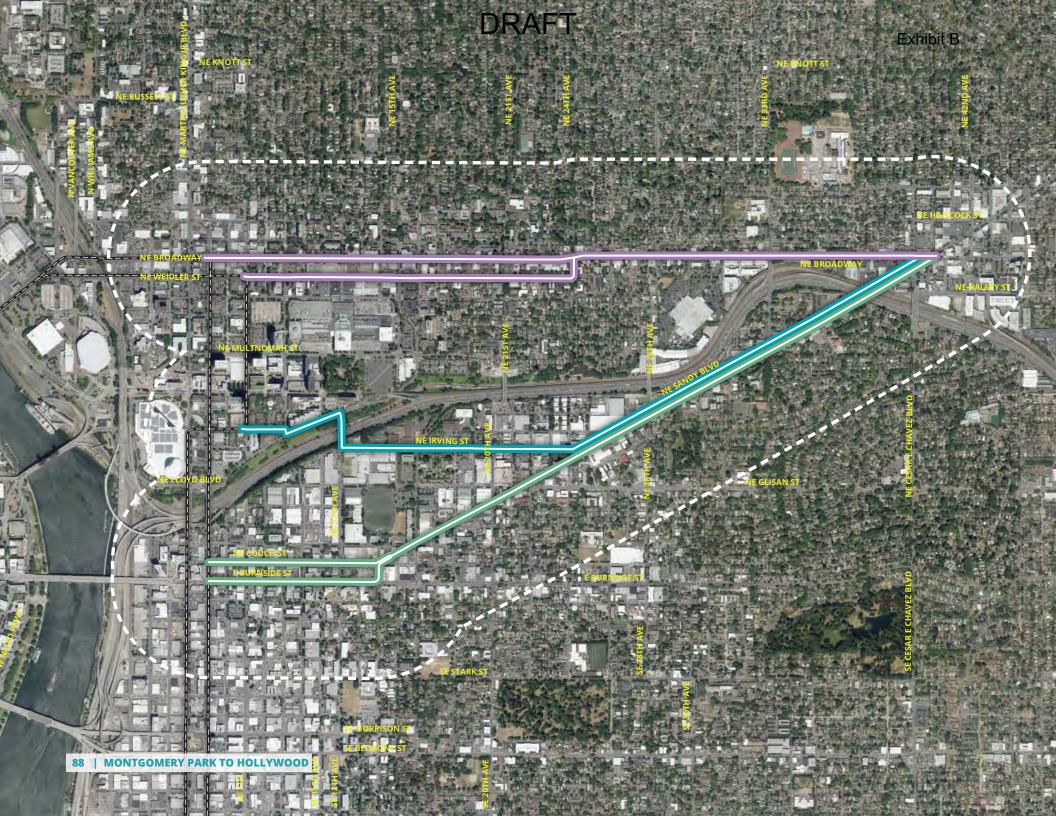
The Zipper is a popular destination off Sandy that provides indoor and outdoor spaces to gather and enjoy food from the adjoining restaurant cluster.



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.



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 multifamily 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

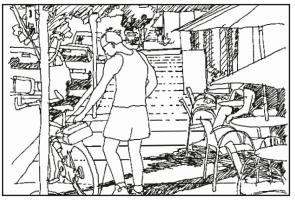
BROADWAY WEIDLER COORIDOR

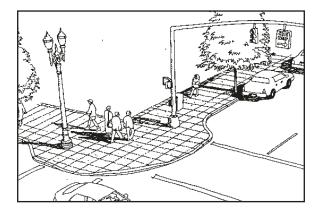
NE Broadway is a major city street in NE Portland which runs from inner NE Portland near the Moda Center, through the Lloyd District to the Hollywood District. Between roughly Interstate 5 and NE 24th Avenue, the street is a one-way couplet with NE Weidler. A former streetcar route, the street is adjoined 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.







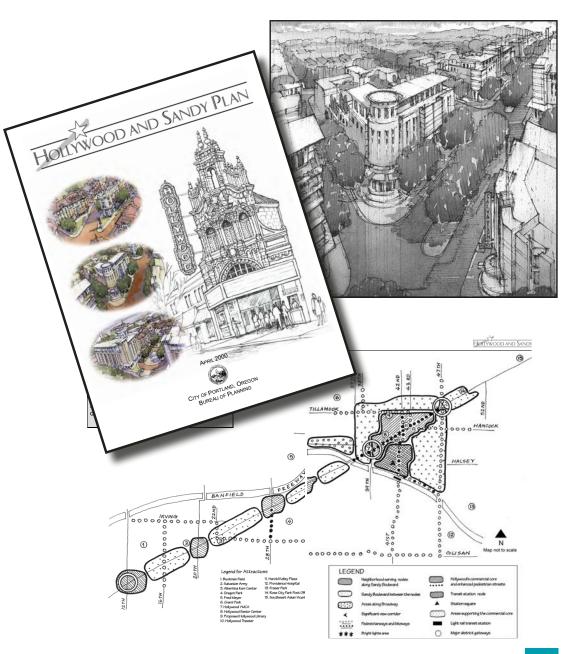
HOLLYWOOD & SANDY PLAN (2000)

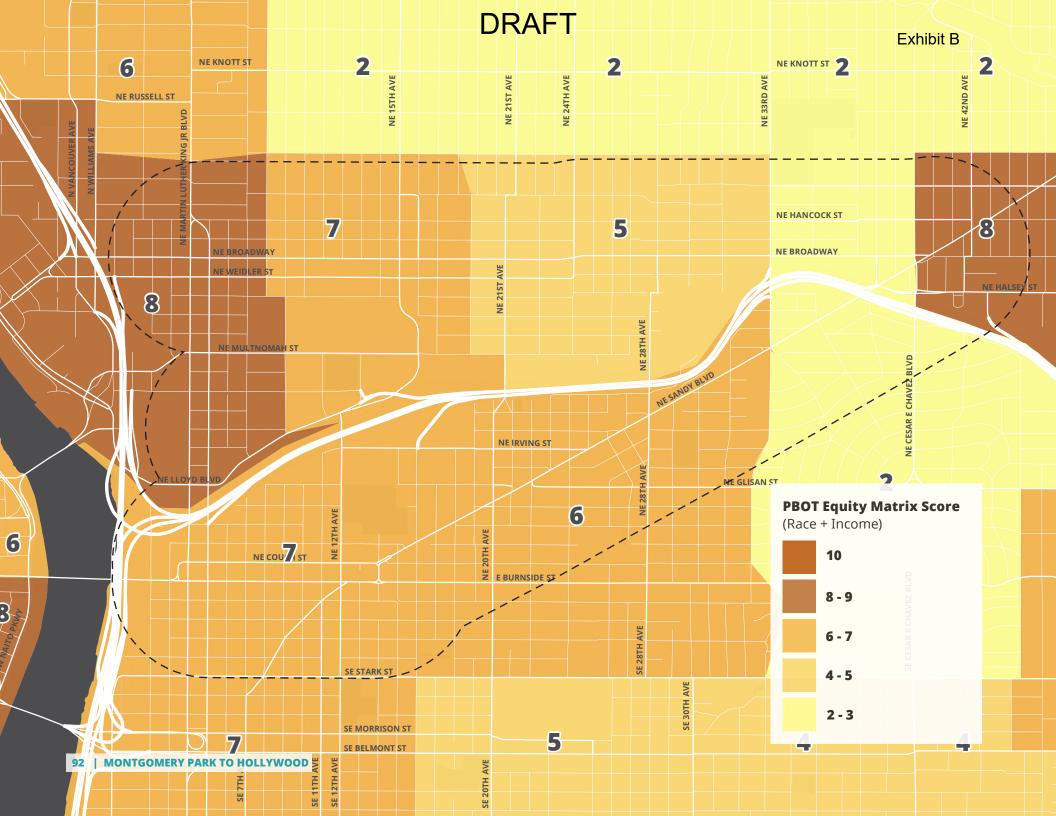
The Hollywood and Sandy Plan, adopted in 2000, is an area plan focused on the Hollywood town center and Sandy Boulevard main street areas. The Hollywood District has been a center of community activity on the eastside of Portland since the early 1920s. Named after the historic Hollywood Theatre, the 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.





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.

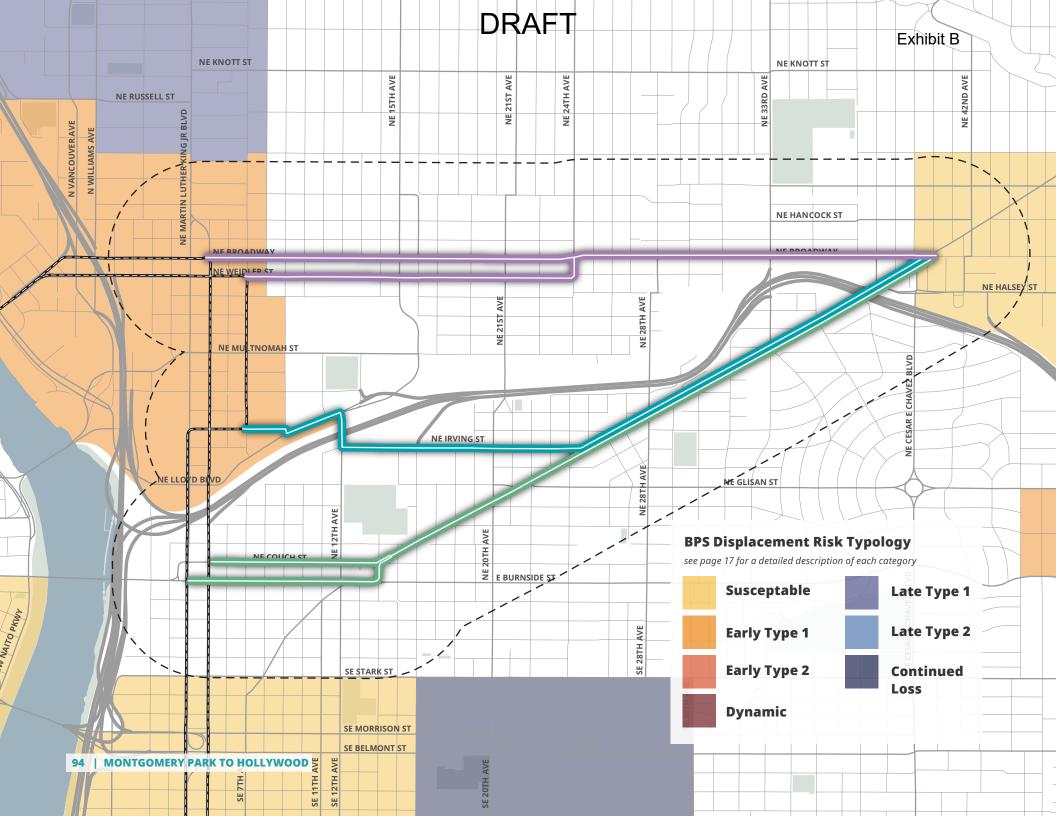
The census tract at the east end of the study area in the Hollywood district has a slightly lower composite equity score. The area has the same racial equity score of 3, but a slightly lower income equity score (4). This reflects slightly lower concentrations of low-income Portlanders, but still ranks 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 Eastide 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



241 TO 320



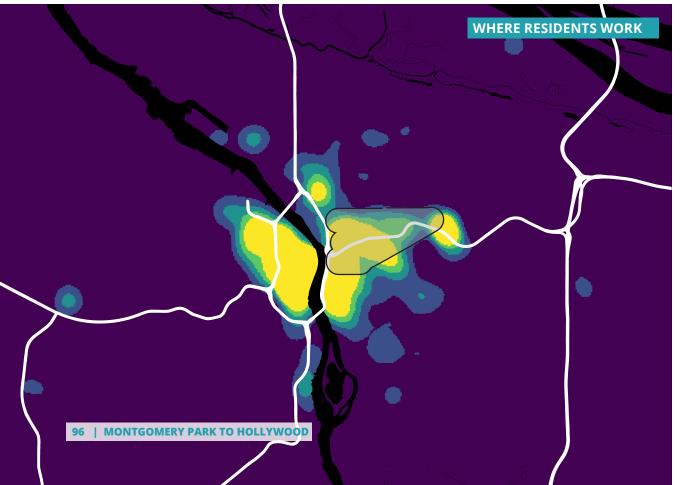
161 TO 240



81 TO 160



80 OR LESS



JOBS LOCATION

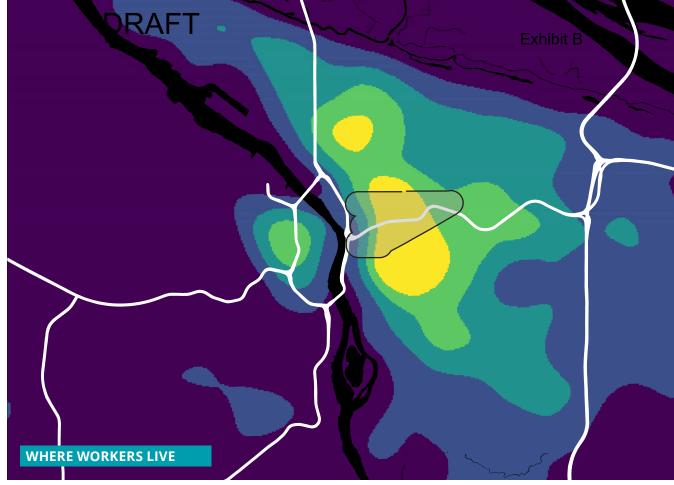
The map here shows the concentration of workplaces of people who live in the Eastside study area. Residents living in the study area work largely in the inner eastside of Portland, downtown in the Central City, and near Emanuel Hospital in the North Vancouver/ Williams corridor.

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.

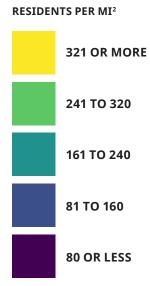
The LODES data contains a matrix showing showing the number of workers that commute between Census blocks. Users can input a study area to retrieve the characteristics about the people who work there as well as those who live in the study area. Users can track where residents go to work and where workers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



PEOPLE WALKING

The highest walk mode share is in the inner NE neighborhoods, where between 10 and 25% of people walk to work. This compares to the citywide share of 5.7%. The rest of the study area largely falls into a walk share of between 5 and 10%, with a smaller share north of Broadway between NE 33rd and NE 39th.

WALK TO WORK - MODE SHARE

< 5% 5 -10% 10-25% > 25%

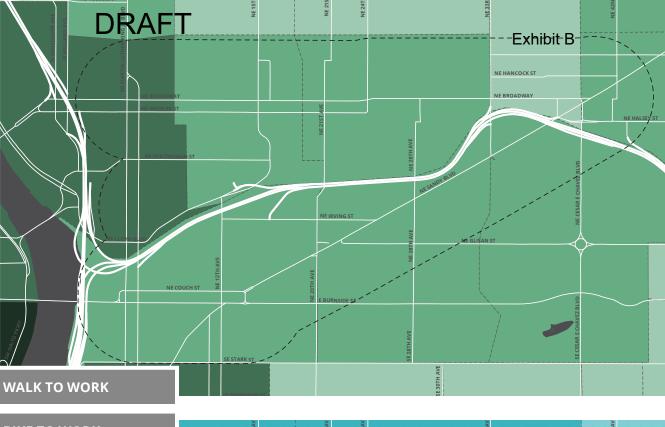
PEOPLE BIKING

More Portlanders bike to work from their homes in the NE study area than the Citywide average. Much of the study area has a share of 10 - 15%, with some areas falling in the 5 - 10% mode share. The citywide bicycling mode share is 7%.

BIKE TO WORK - MODE SHARE

<	5%	5 -10%	10 -15%	15-20%	>20%
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98 | MONTGOMERY PARK TO HOLLYWOOD





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

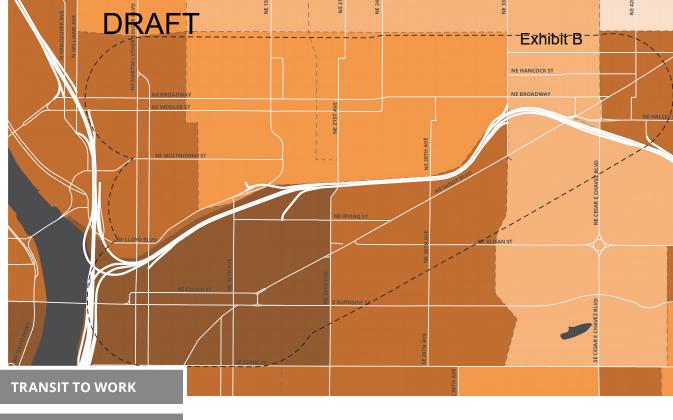
< 5%	5 -10%	10 -15%	15-25%	>25%

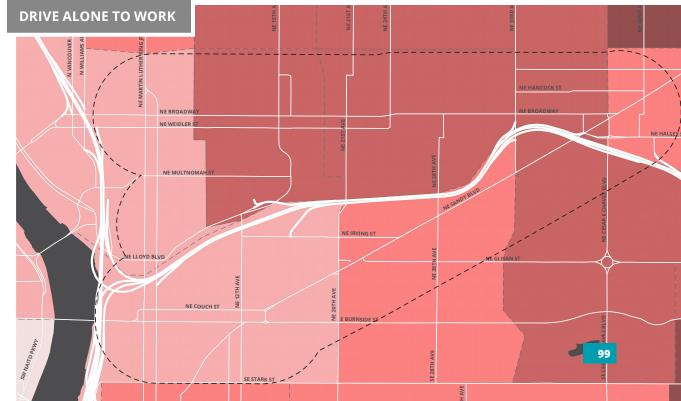
PEOPLE DRIVING ALONE

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

< 30% 30-40%	40-50%	40-50%	> 60%
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Land Use: Comprehensive Plan

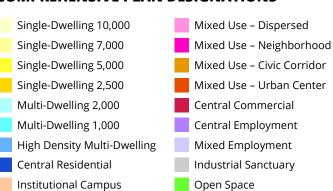
COMP PLAN DESIGNATIONS

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

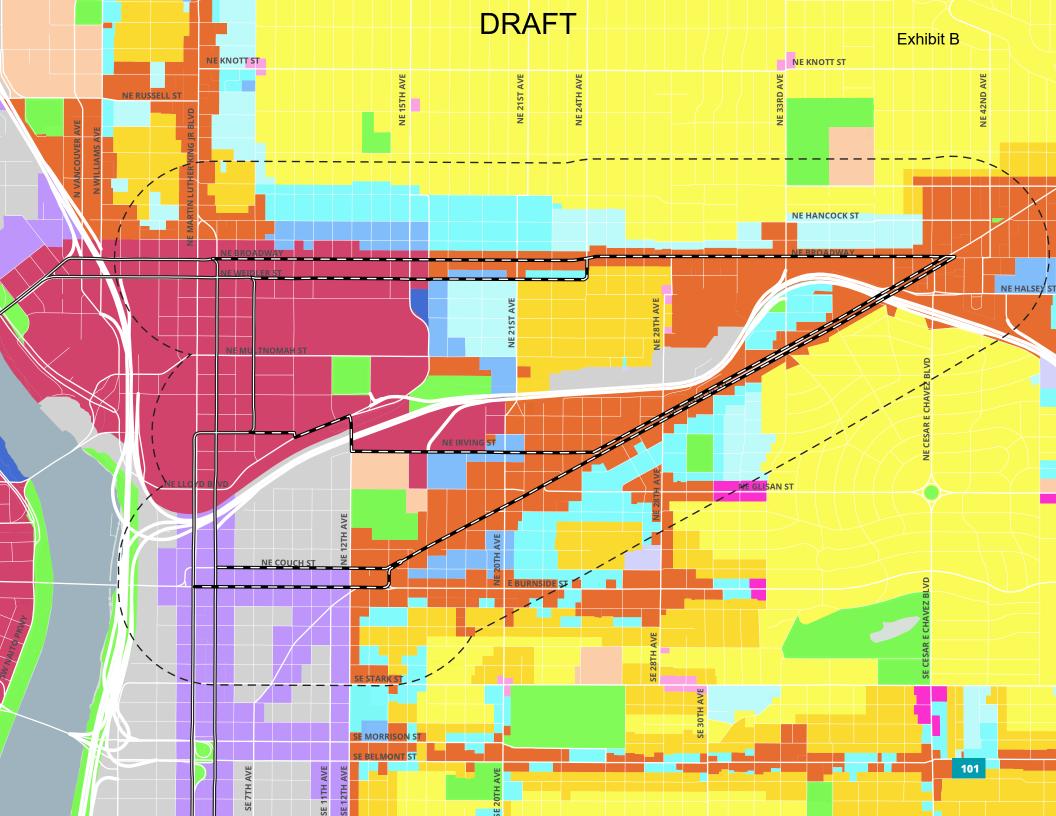
NE Broadway: This alignment passes through the Central City west of NE 16th where Central Commercial designations are applied. East of 16th, the Comprehensive Plan designation adjacent to the alignment is Mixed Use Urban Center. **NE Sandy**: The Comprehensive Plan designations adjacent to this alignment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

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



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%



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.

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.

RIGHT-OF-WAY

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 BROADWA	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%

28%

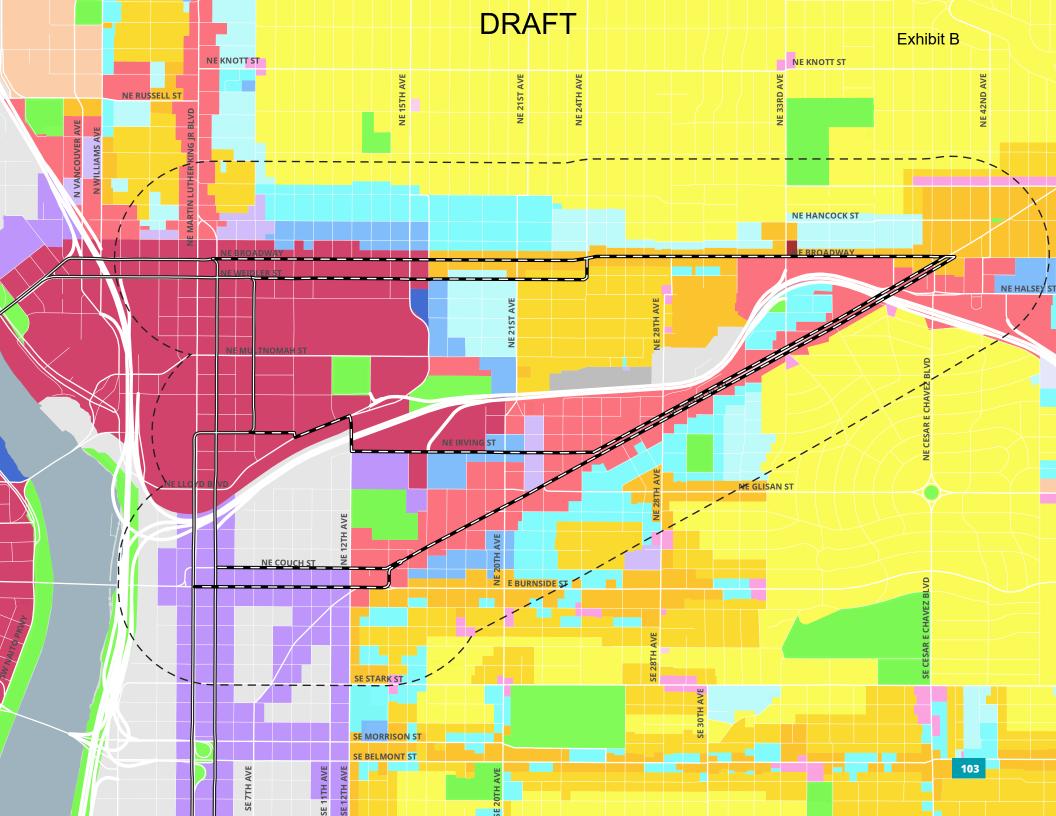
26%

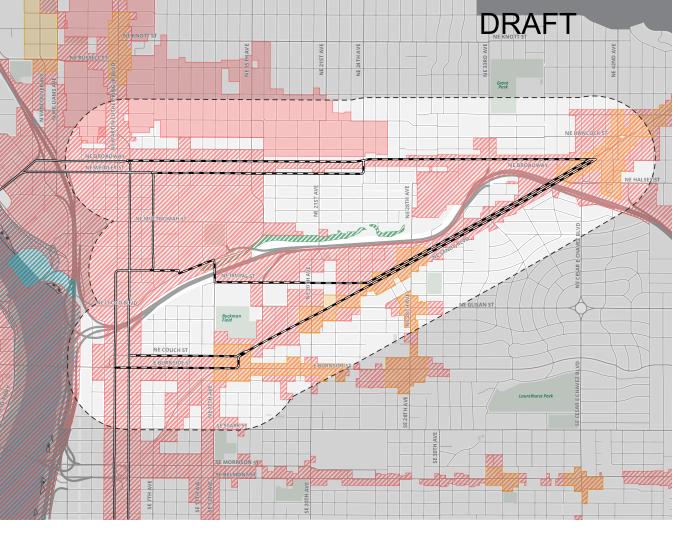
30%

15%

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)





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.



DESIGN



RIVER



ALT DESIGN DENSITY





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).

ENVIRONMENTAL 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.

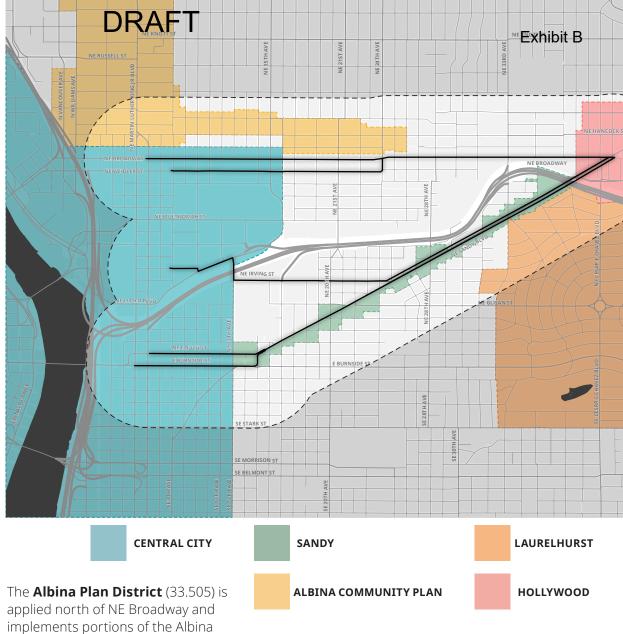
PLAN DISTRICTS

Plan Districts are zoning code 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. In the Eastside study area, the alignments intersect several different plan districts.

The **Central City Plan District** (33.510) is applied generally in the area west of 12th Avenue, and NE 16th Avenue and north of I-84. The plan district encourages a high-density urban area with a broad mix of commercial, residential, industrial and institutional uses, and foster transit-supportive development, pedestrian and bicycle-friendly streets, a vibrant public realm and a healthy urban river. All three alignments intersect this area.

The **Hollywood Plan District** (33.536) is applied in the designated Hollywood Town Center area. The plan district provides for an urban level of mixed-use development including commercial, office, housing, and recreation.

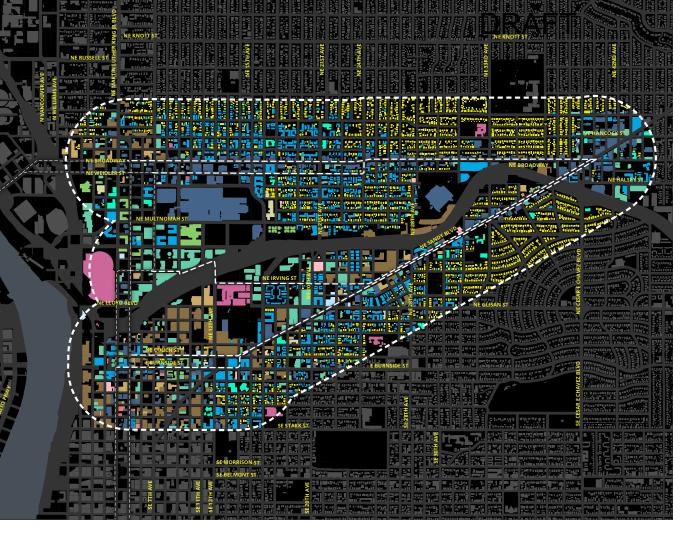
The **Sandy Boulevard Plan District** (33.575) is applied generally to properties adjoining NE Sandy Boulevard. The plan district implements the Sandy Boulevard elements of the Hollywood and Sandy Plan through special height transitions and unique setback treatments. The NE Sandy and NE Irving alignments intersect this area.



The **Albina Plan District** (33.505) is applied north of NE Broadway and implements portions of the Albina Community Plan. Plan provisions intend that new higher-density commercial and industrial developments do not overwhelm nearby residential areas through encouraging urban development on NE MLK Jr Blvd.

The **Laurelhurst-Eastmoreland Plan District** (33.540) maintains the established

character of the Laurelhurst and Eastmoreland areas, characterized by homes with larger than normal building setbacks from the street.





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, multidwelling residential and office uses. The area also includes Benson High School.

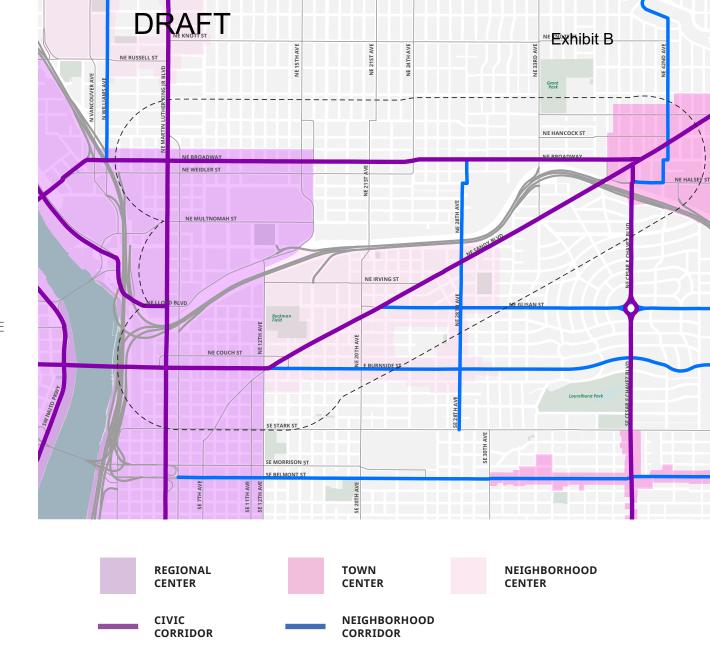
The NE Broadway alignment corridor is also flanked primarily by commercial/retail uses; the surrounding area is a mix of commercial and residential uses. On the west end through NE 16th, land uses in the Central City are an intense mix of commercial (including Lloyd Center), offices, and high density 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 multidwelling residential uses.

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.

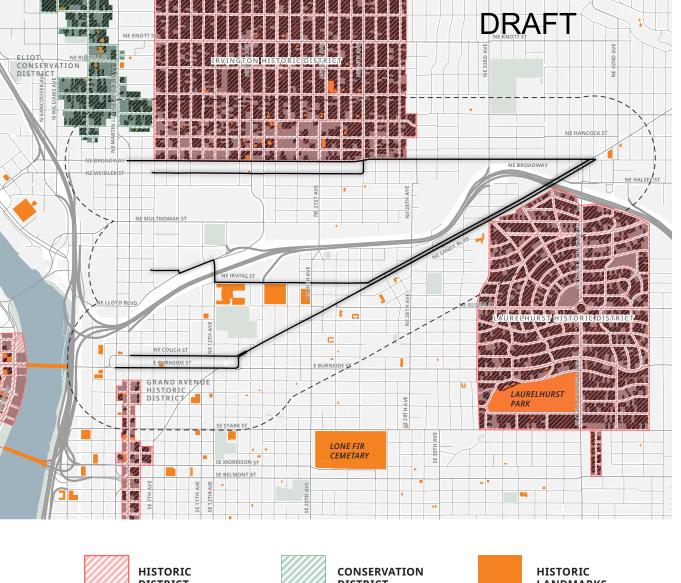
The three alignments feature different designations. The alignments all terminate in Hollywood, which is Town Center. The Broadway and Irving alignments both pass through a portion of the Central City, the region's largest center. NE Broadway and NE Sandy are both designated Civic Corridors. NE Irving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



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 Revivalstyle 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.





UNDERUTILIZED LOTS

In 2015, there were 946 lots in the eastside study areas identified as vacant or underutilized, totaling about 280 acres. About 72% of the area in these lots were vacant. On these parcels approximately 25,200 additional housing units and 40,000 additional jobs could be accommodated under current zoning. The largest opportunities for redevelopment are in sites 0.5 to 3 acres, which could accommodate up to 10,000 additional housing units. For vacant sites, medium-sized lots 3 to 5 acres in size have the highest capacity for jobs (about 9,100 jobs).

	PARCEL		HOUSING	JOBS
	COUNT	ACRES	CAPACITY	CAPACITY
UNDERUTILIZED	614	197	18,091	18,067
< 0.5 ACRES	224	35	3,716	2 ,956
0.5 TO 1 ACRE	191	49	4,560	7,146
1 TO 3 ACRES	168	54	5,393	4,320
3 TO 5 ACRES	19	27	2,324	3,034
6 TO 10 ACRES	11	17	587	612
10 TO 20 ACRES	1	15	1,509	0
20 TO 50 ACRES	0	0	0	0
> 50 ACRES	0	0	0	0
VACANT	332	78	7,115	21,910
< 0.5 ACRES	136	16	1,726	1,728
.5 TO 1 ACRE	103	19	2,126	5,636
1 TO 3 ACRES	67	20	1,570	5,211
3 TO 5 ACRES	13	16	1,184	9,107
6 TO 10 ACRES	6	3	180	63
10 TO 20 ACRES	7	3	329	165
20 TO 50 ACRES	0	0	0	0
> 50 ACRES	0	0	0	0
TOTAL	946	276	25,205	39,977

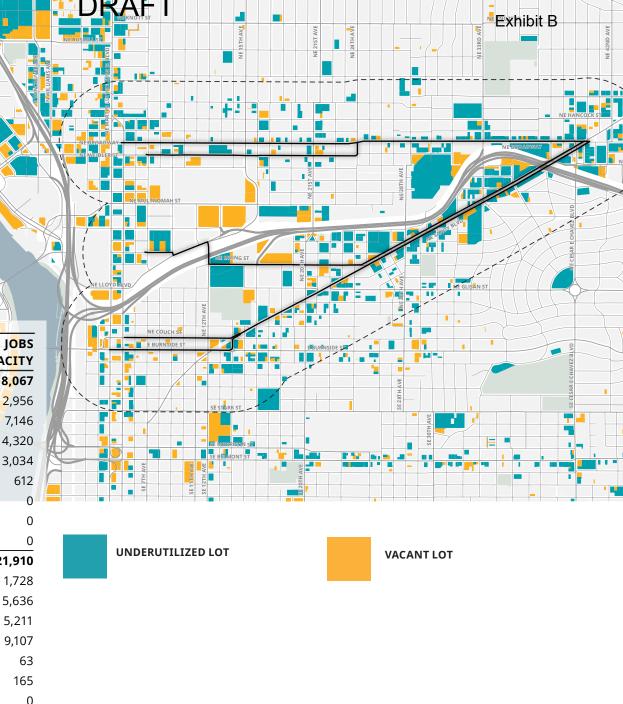


Exhibit B

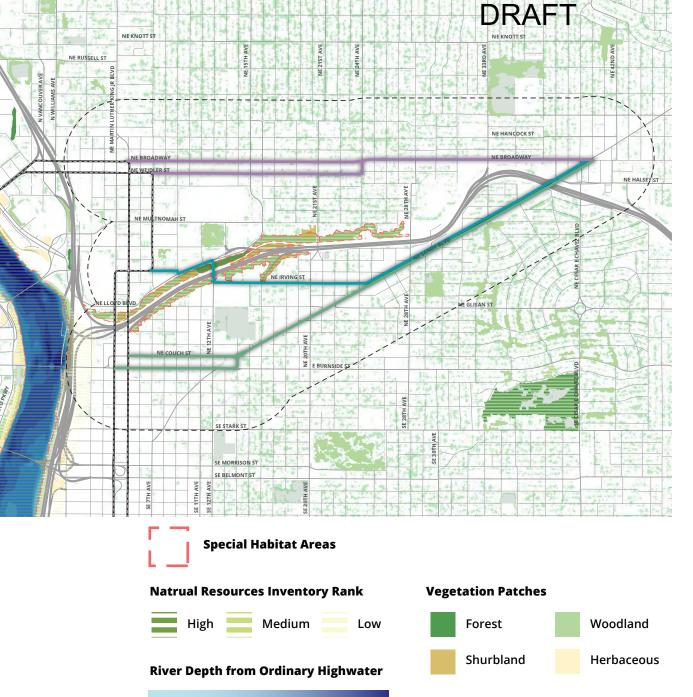
NATURAL RESOURCES

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.



>80'

40' to 50'

<5'

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 liquefactoin on the built environment can be devasting 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.

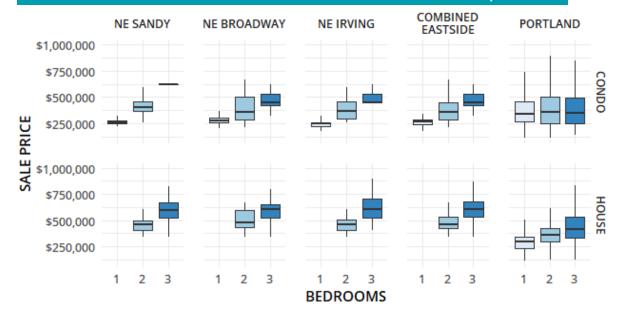


Housing

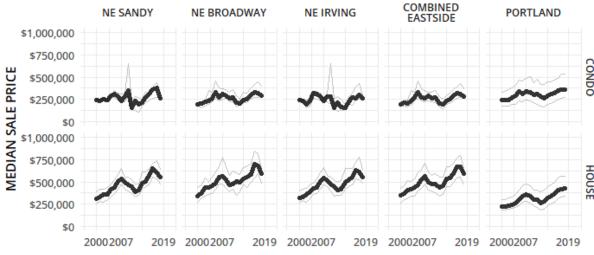
FOR-SALE MARKET

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.

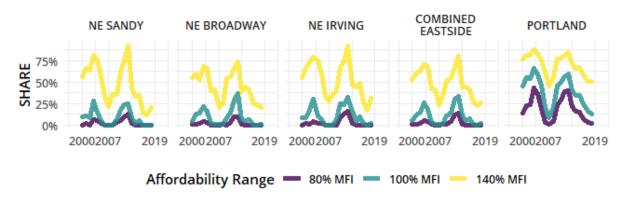
DISTRIBUTION OF HOME SALES BY BEDROOM COUNT AND HOME TYPE, 2017-18



TREND IN MEDIAN SALE PRICE BY HOME TYPE

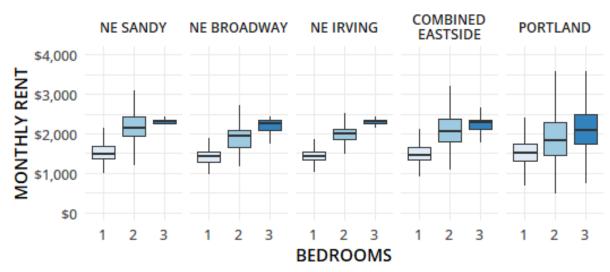


TREND IN SHARE OF HOME SALES BY AFFORDABILITY THRESHOLD



Source: Regional Multiple Listings Services (RMLS).

DISTRIBUTION OF MONTHLY RENTS BY BEDROOM COUNT, 2019



Source: Craigslist.

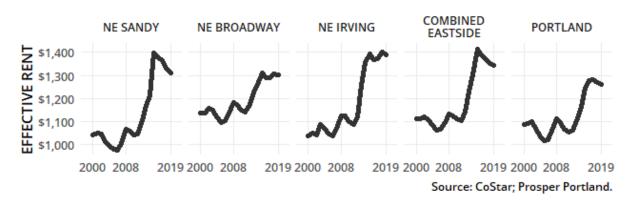
FOR-SALE AFFORDABILITY

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.

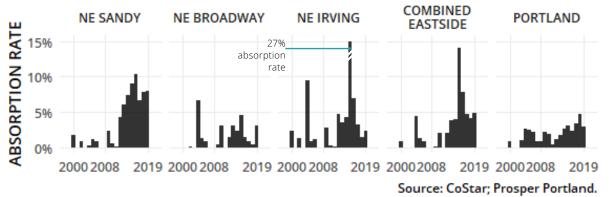
RENTAL MARKET

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 onebedroom 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. Threebedroom 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

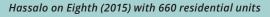


TREND IN MULTI-FAMILY ABSORPTION RATES



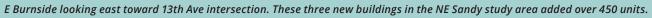
MULTI-FAMILY ABSORPTION

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.

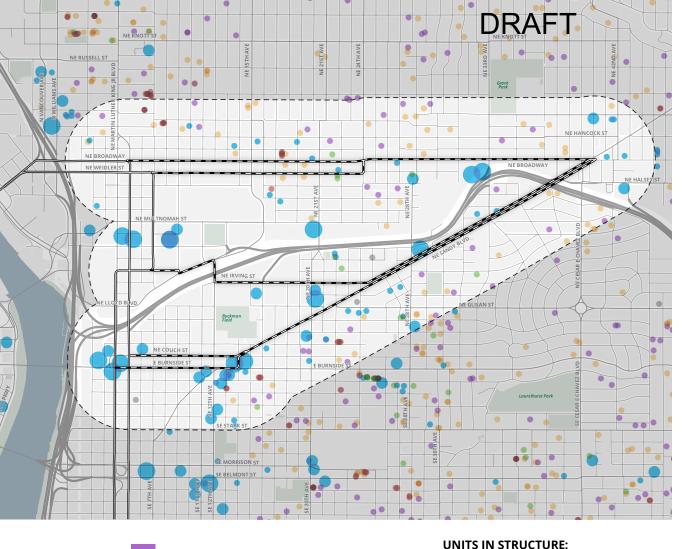












ACCESSORY DWELLING UNIT APARTMENTS/CONDOS 1-50 51-150 **DUPLEX SINGLE-FAMILY** TOWNHOUSE/ROWHOUSE OTHER STRUCTURE

150+

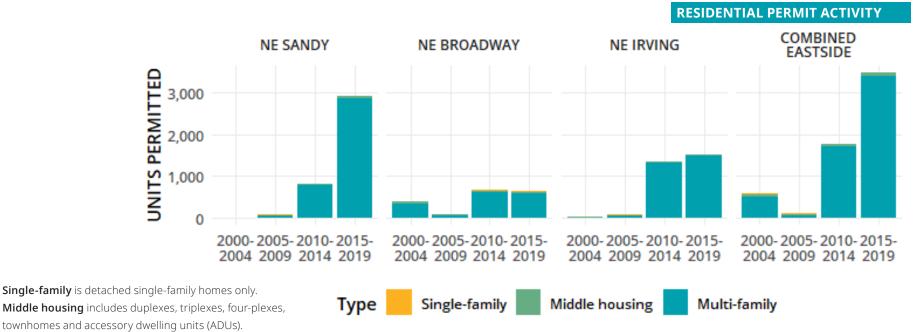
PERMIT ACTIVITY | 2000-2019

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).

ABOUT THIS DATA SOURCE: BDS PERMIT DATA

Multi-family are buildings with 5 or more units.

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.

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.



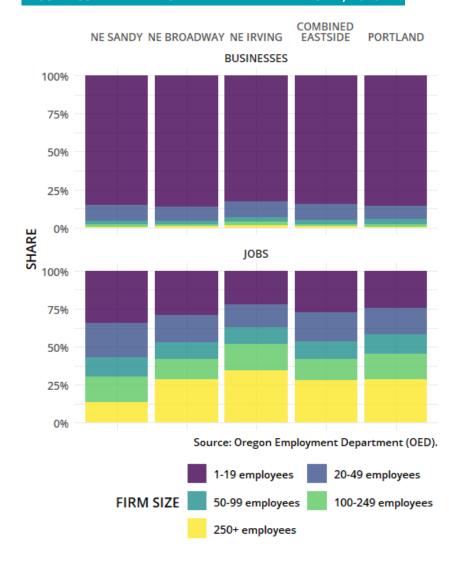
- Utilities companies such as Bonneville
 Power Administration and PacifiCorp have their headquarters in the Lloyd Center.
- The Lloyd Center has many other headquarters or regional offices, including Kaiser Permanente, Liberty Mutual, and KinderCare Education.
- The Lloyd Center Mall has dozens of retail 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%	
JOBS	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%	

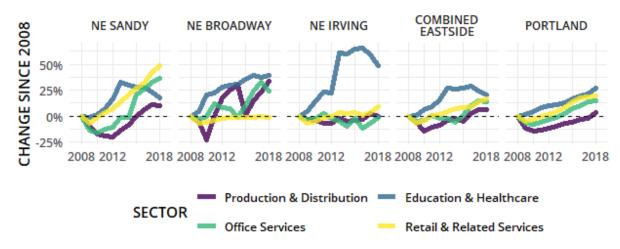
BUSINESS AND EMPLOYMENT MIX BY FIRM SIZE, 2018



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%.

CHANGE IN EMPLOYMENT RELATIVE TO 2008 BY EMPLOYMENT SECTOR



Source: Oregon Employment Department (OED).

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:

- 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 <u>NAICS system</u>, 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 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	\$27.5 0
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.

Exhibit B

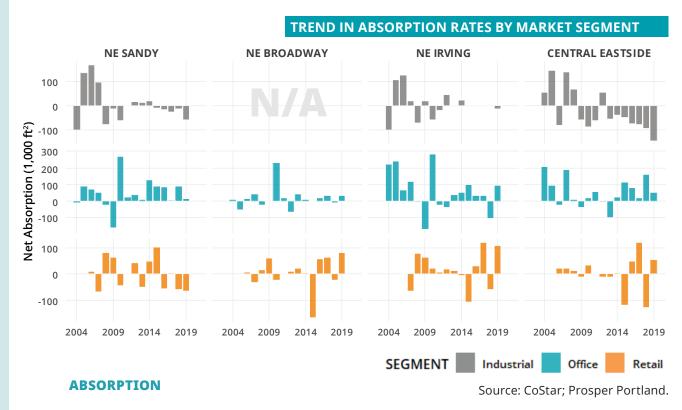
DRAFT

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.

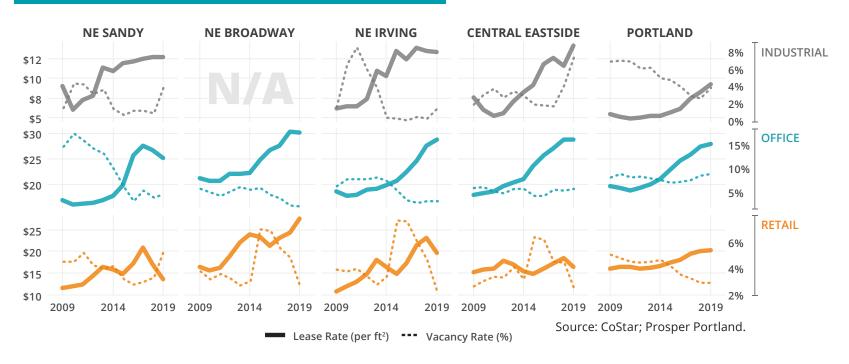
For more information, visit https://www.costar.com/products/costar-market-analytics.



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

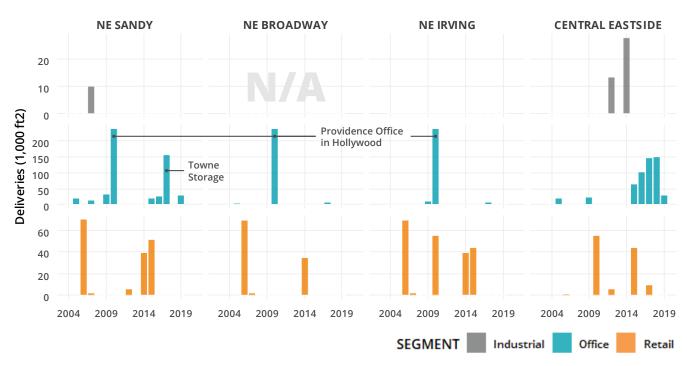
for space in these locations. Retail lease rates are considerably higher, particularly along NE Broadway which have reached almost \$29 per ft², compared to the citywide average of \$21 per ft².

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.

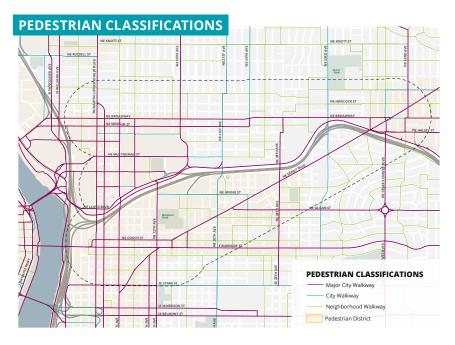
DELIVERIES

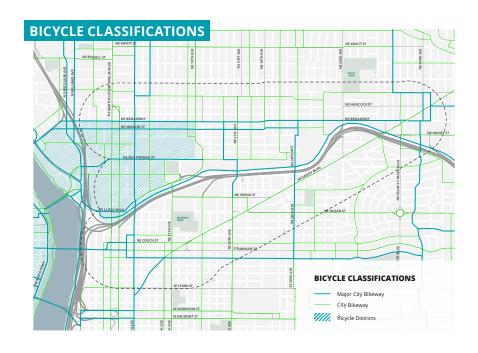
Since 2014, about 365,000 $\rm ft^2$ of commercial space was delivered to the market in the combined study areas, 63% of which was office space (or about 230,000 $\rm ft^2$). For comparison, the existing Pearl District streetcar alignment area delivered 752,000 $\rm ft^2$ of office in the same time period. The largest addition was the Towne Storage building in 2017 in the NE Sandy study area, which brought on 100,000 $\rm ft^2$ of office space and is now fully leased.

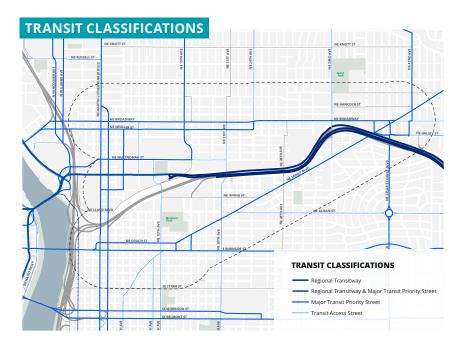
Transportation Classifications

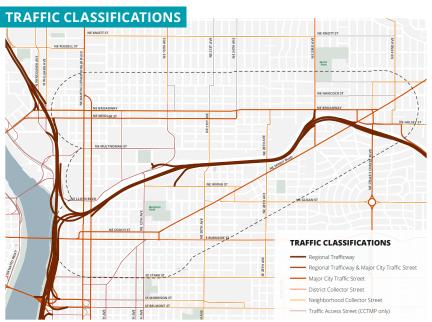
The Portland Transportation System Plan classifies each street according to its role in the traffic, transit, bicycle, pedestrian, and freight system. The higher the classification, the more important the role the street plays for each travel mode.

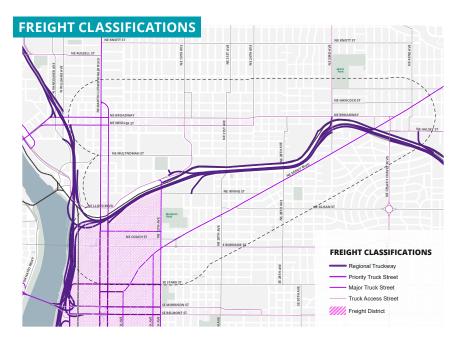
Street	Traffic	Transit	Bicycle	Pedestrian	Freight
NE Broadway/ NE Weidler	Major City Traffic	Major Transit Priority	Major City Bike- way	City Walkway	Truck Access
NE Oregon Street	Local Street	Local Street	Local Street	City Walkway	Local Street
NE Lloyd Boulevard	Local Street	Local Street	City Bikeway	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

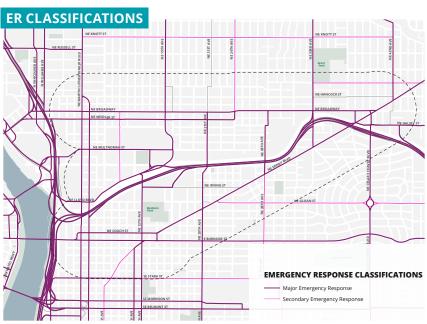


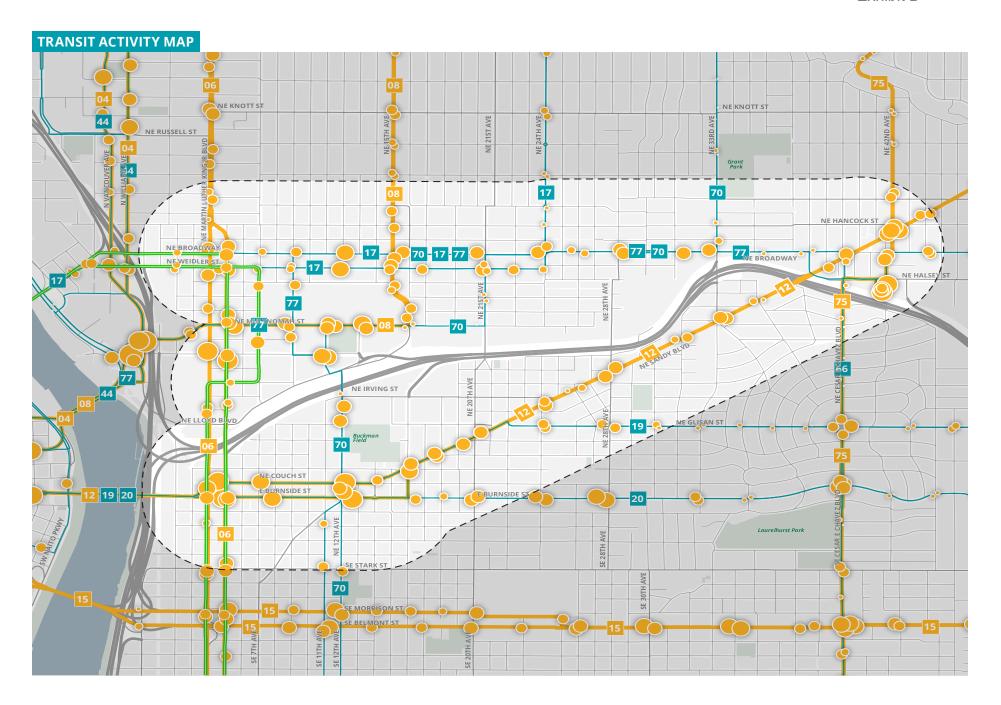












EXISTING BUS ACTIVITY

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

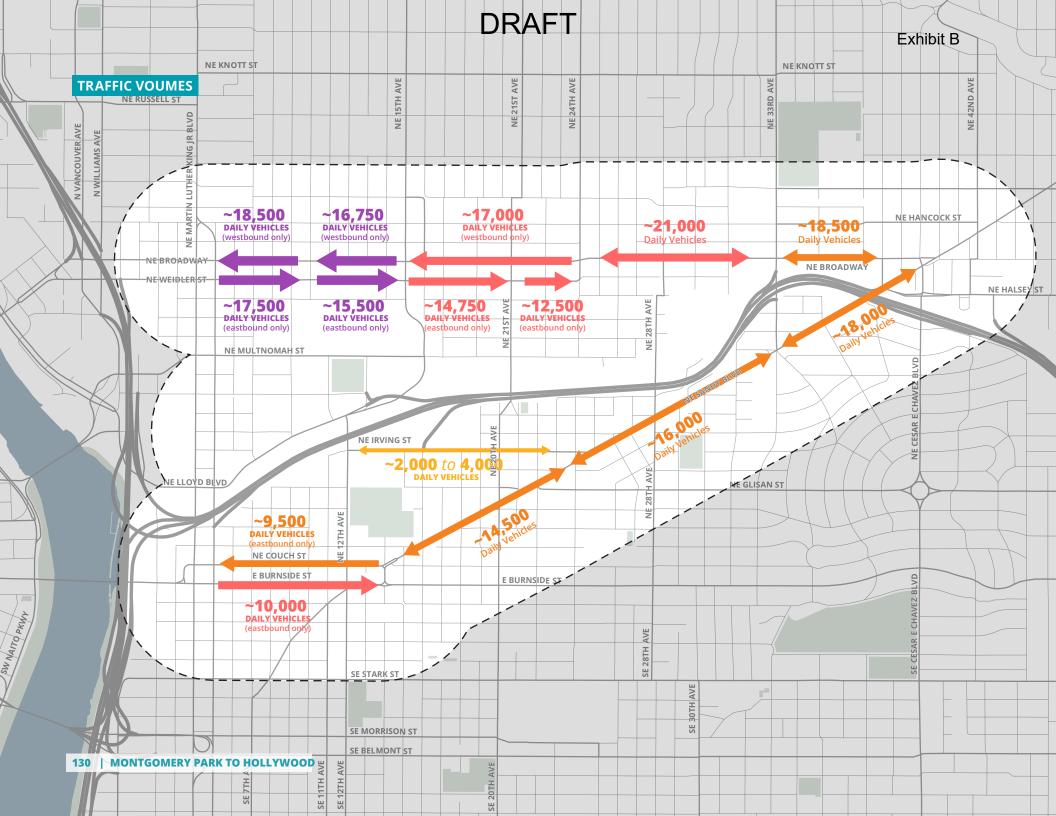
Line 12 runs along NE Sandy Blvd, connecting Tigard Transit Center and Parkrose/Sumner Transit Center. Lines 19 and 20 also provide east-west connections. Line 19 serves E Burnside, NE Couch, and NE Glisan, connecting Mt Scott/112th, Portland City Center, and Gateway Transit Center. Line 20 runs along 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 lightrail MAX, also operates from the City Center to the Lloyc 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	
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



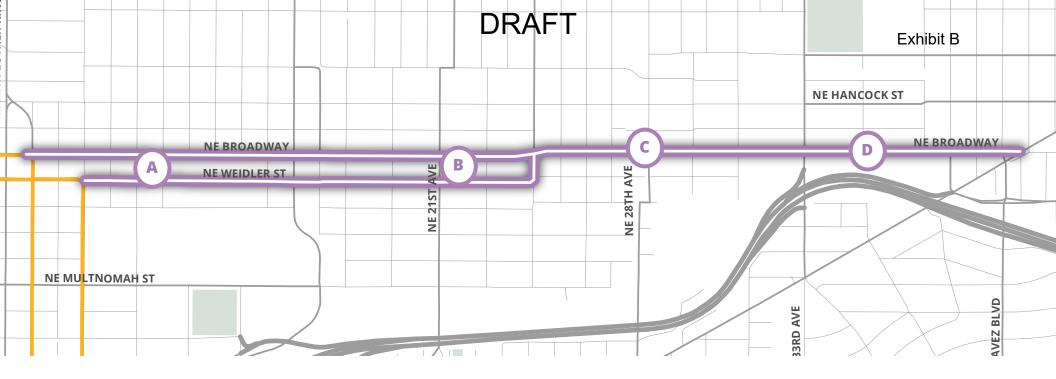
TRAFFIC VOLUMES DICISUSSION

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

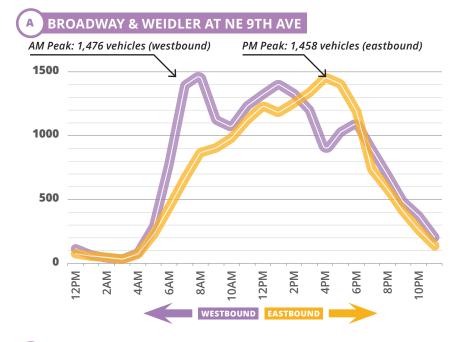
	BROADWAY & WEIDLER	IRVING & SANDY	SANDY & BURNSIDE
Segment with the lowest volume of daily vehicles	NE Weidler, NE 21st to NE 24th: ~12,500 daily vehicles	NE Irving, NE 12th to NE 23rd: ~2,000 to 4,000 daily vehicles	NE Couch, NE Grand to NE Sandy: ~9,500 daily vehicles
Segment with the highest volume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

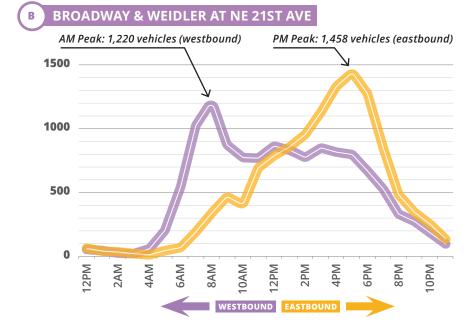


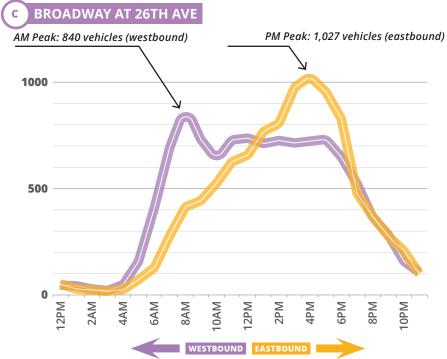
TRAFFIC VOLUMES DICISUSSION

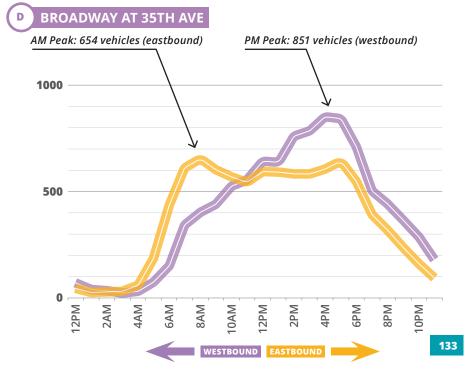
The figures to the right show traffic volumes per hour at four intersections along the corridor. The figures demonstrate strong direction flow with peak west-bound traffic in the AM on Broadway everywhere except Broadway and 35th. This may be due to neighborhood traffic traveling west bound to the access 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.

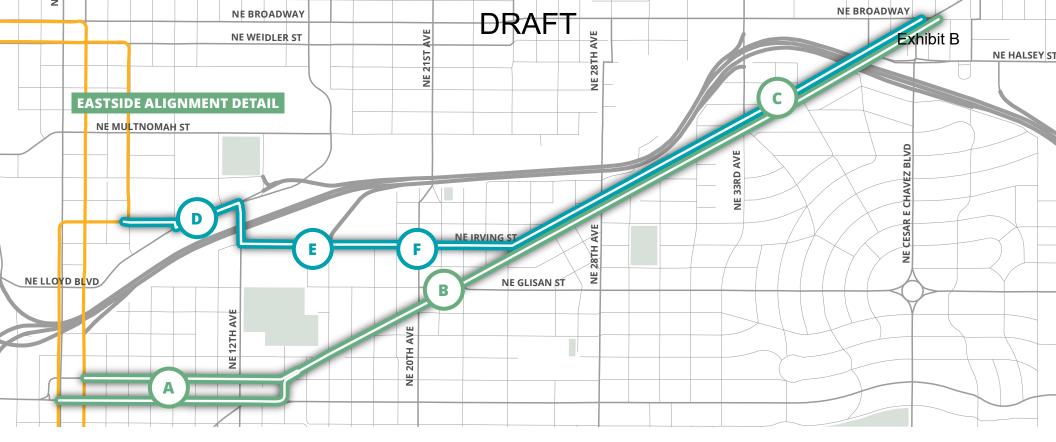
NE Broadway and NE Weidler at NE 9th has the highest traffic volumes throughout the day—almost 1,500 vehicles at 8am, about 1,400 at 1pm, and over 1,000 at 6pm. Broadway at NE 26th and NE 35th have lower traffic volumes—under 1,000 throughout the day—compared to Broadway and Weidler at NE 9th and NE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







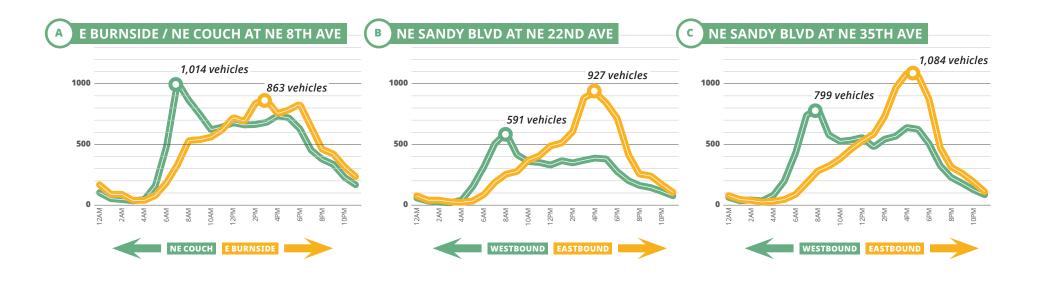


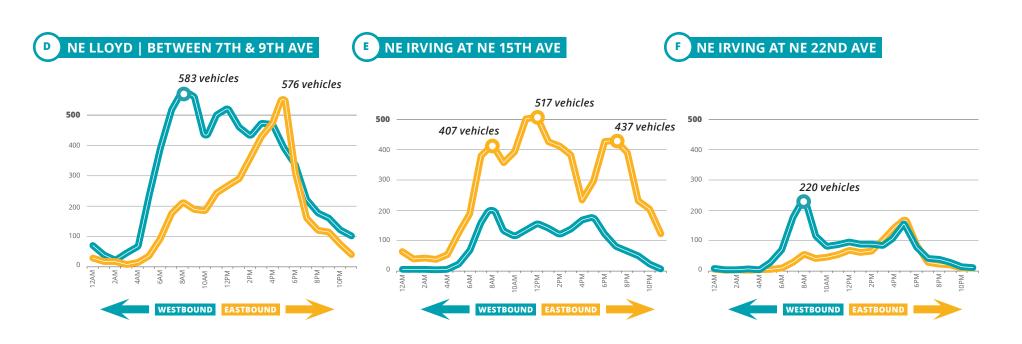


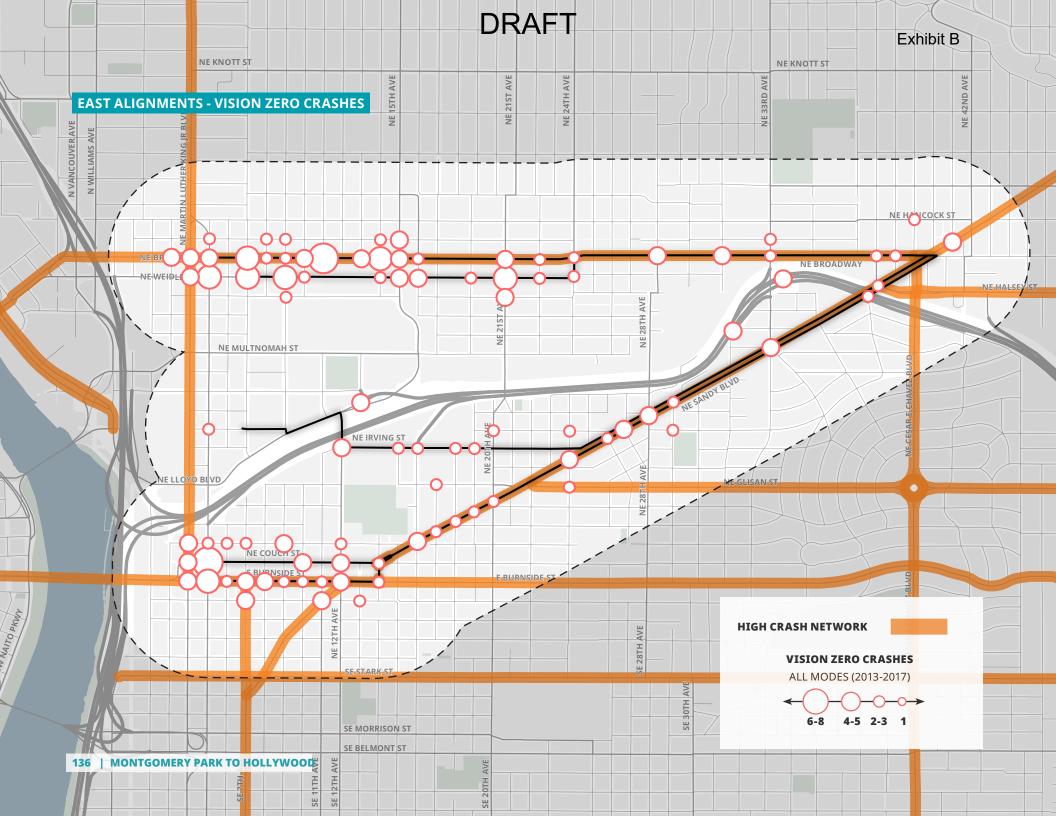
TRAFFIC VOLUMES DICISUSSION

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.







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

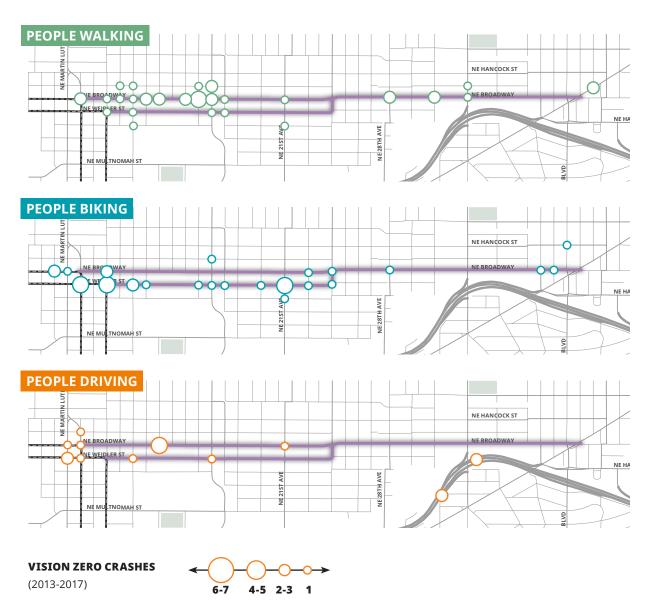
Location	Person killed while.	Date
E Burnside & E 17th Ave	Driving	May 2019
E Burnside & E 22nd Ave	Walking	Feb 2012
NE Sandy & NE 20th Ave	Walking	August 2018
BE Sandy & NE 23rd Ave	Driving	October 2018

HIGH CRASH NETWORK | EAST ALIGNMETNS

	High Crash Network Ranking (Out of 20)			
Corridor	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

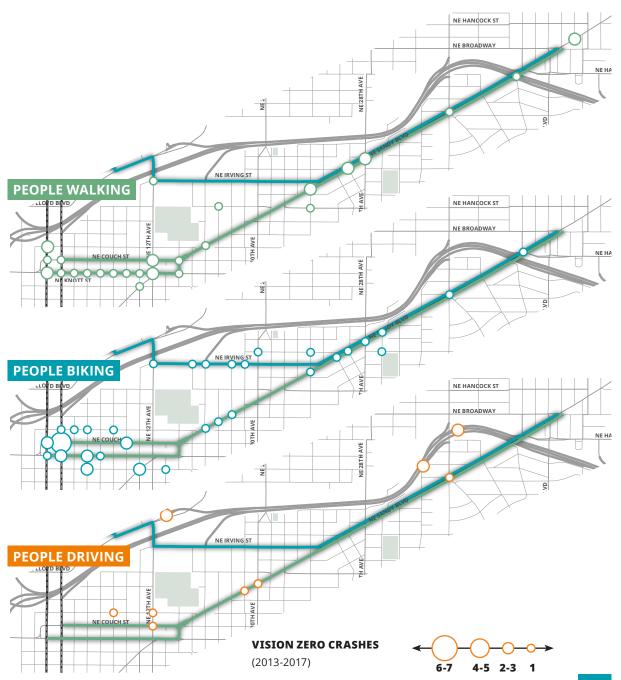
Most crashes along the NE Broadway and Weidler alignment involve people walking and people biking. NE Weidler has a higher number of crashes that involve people biking compared to NE Broadway which has a higher number of crashes that involve people walking. The highest number of crashes involving people 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.



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.

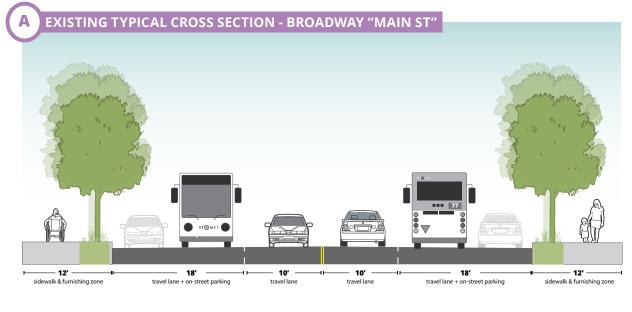
Both Burnside (including both E and W) and NE Sandy are identified as a high crash corridor for people walking, biking, and driving. Burnside is the third most dangerous street for people biking and people walking, and the fifth most dangerous street for people driving. NE Sandy is identified as the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





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.

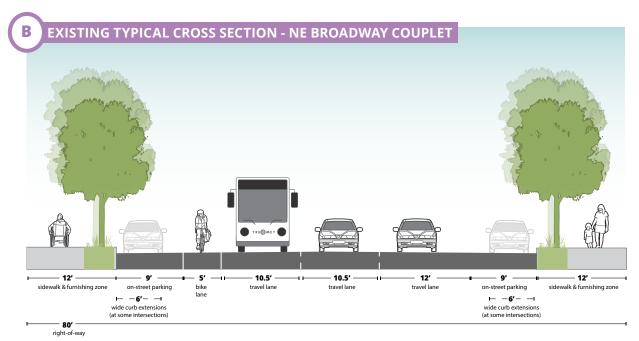


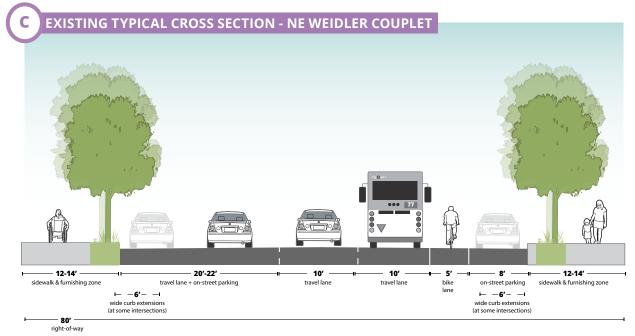
BROADWAY/WEIDLER COUPLET CROSS SECTION

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.



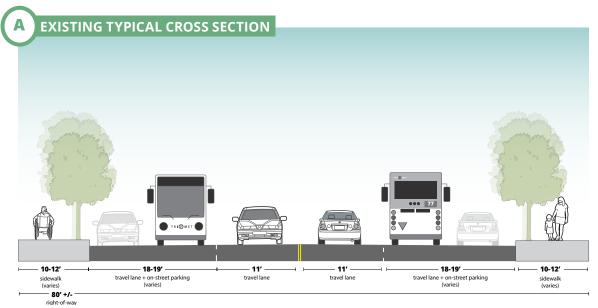




SANDY BLVD CROSS SECTION

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.

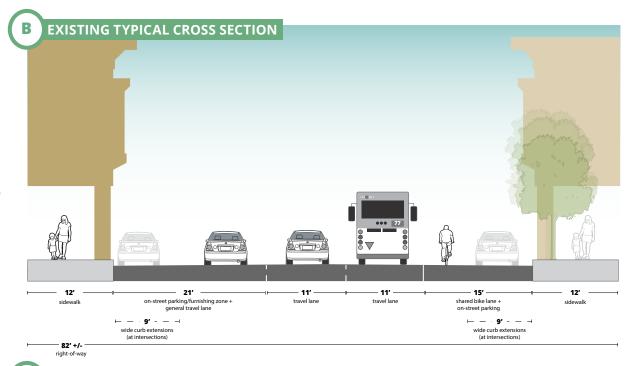


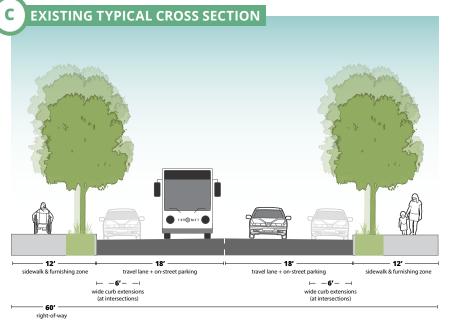
BURNSIDE / COUCH COUPLET CROSS SECTION

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 onstreet parking on both sides of the street.

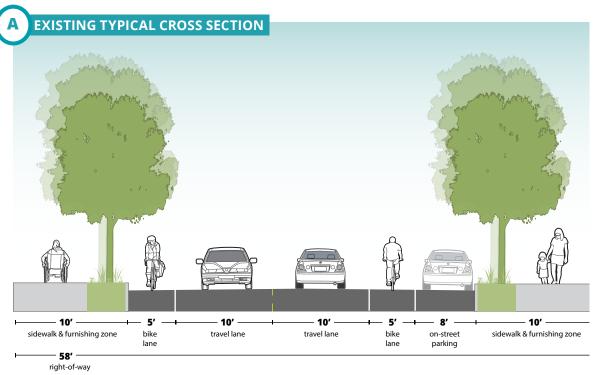






NE IRVING ST CROSS SECTION

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.



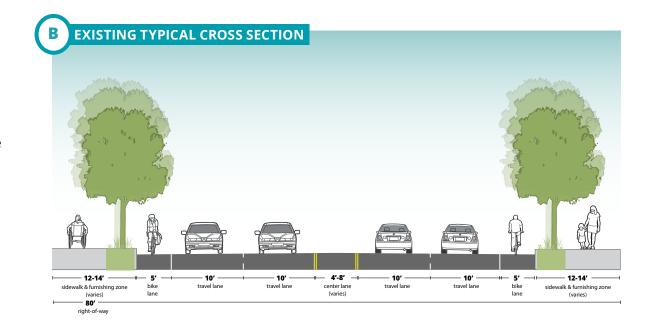
NE LLOYD BLVD CROSS SECTION

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.

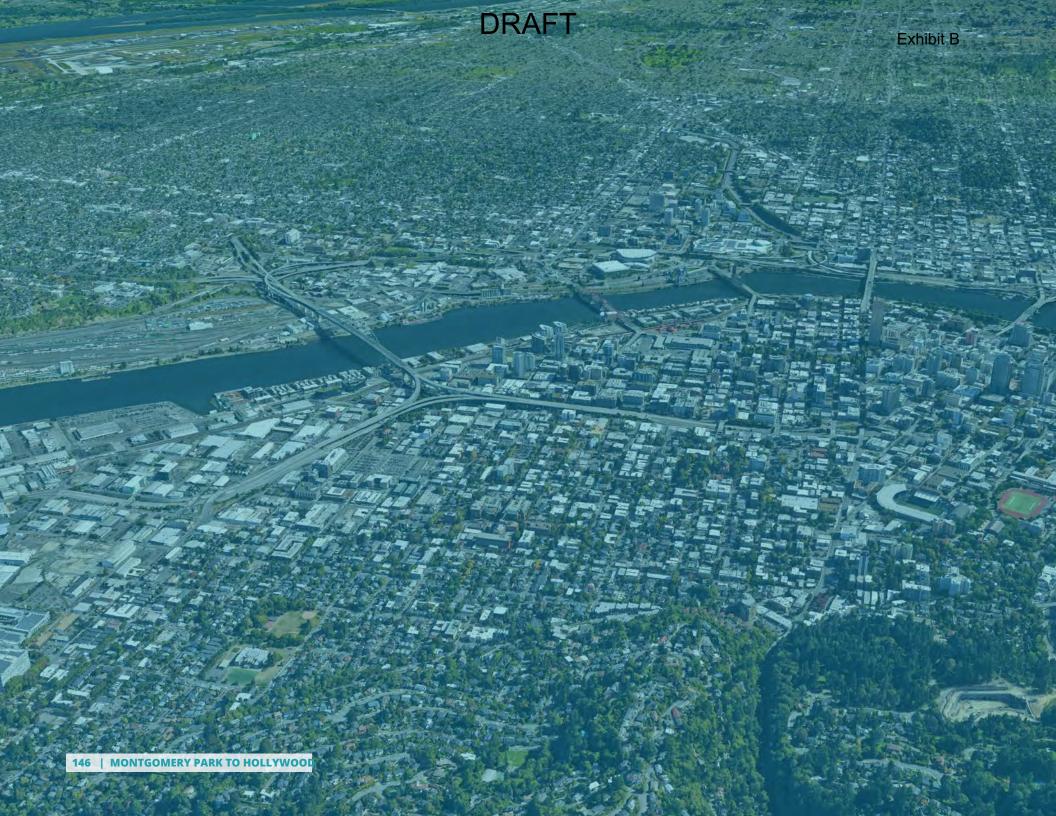
CENTRAL CITY IN MOTION:

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



Montgomery Park to Hollywood

Transit and Land Use Development Strategy

Equitable Development Report





DRAFT January 2023



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Donnie Oliveira, Director Eric Engstrom, Deputy Director Patricia Diefenderfer, Chief Planner

BPS MP2H Project Staff

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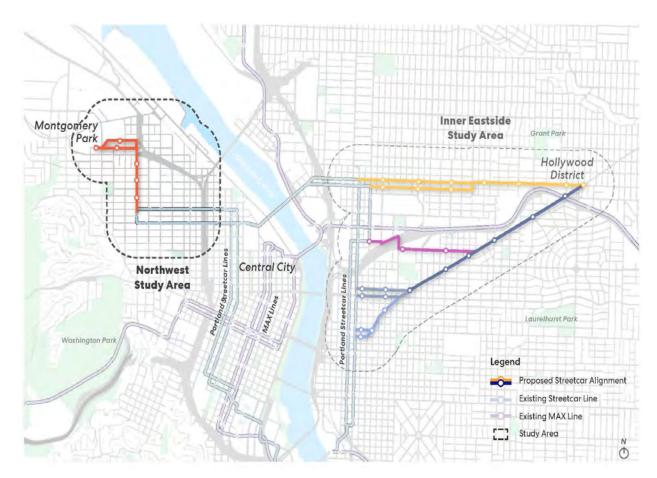
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Appendix

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

1. Introduction and Purpose

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



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

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

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

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

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

2. Summary of Previous Equitable Development Assessments

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

The report identified the following issues/impacts to explore:

Land Value

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

Housing

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

Jobs and Businesses

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Ongoing CBO Engagement

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

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

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

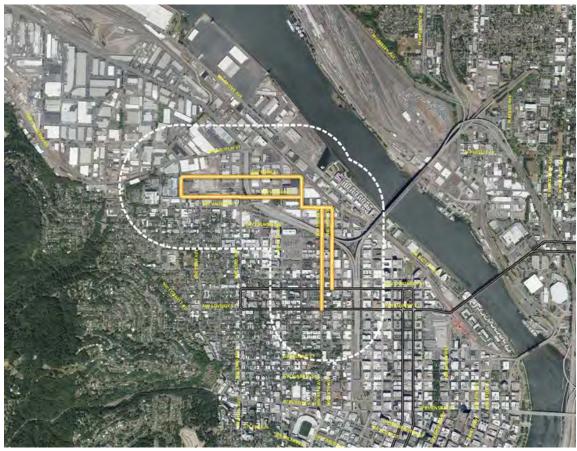
Northeast Study Area. No land use actions are proposed for the northeast study area, and no actions to reduce harm or address burdens are currently proposed. As future planning proceeds, the following issues identified through existing conditions analysis and community outreach should be considered.

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



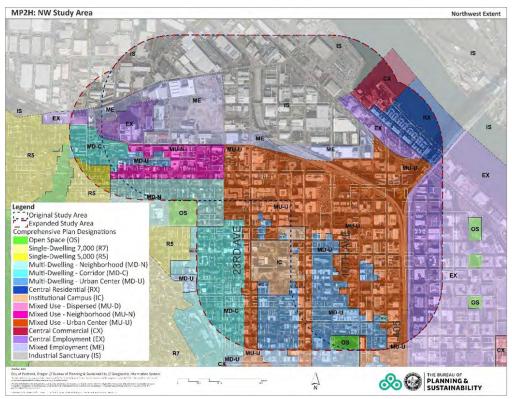
Northeast/Eastside Study Area and Alignment Alternatives

Northwest Study Area. The Northwest study area was initially focused on the area within $\frac{1}{4}$ mile of a proposed streetcar/transit alignment following NW 18^{th} /NW 19^{th} Avenues north of NW of Northup Street and following NW Wilson/NW York streets west to approximately NW 26^{th} /NW 27^{th} Avenue near the eastern entrance of the Montgomery Park office building. See the Northwest Study Area and Initial Alignment graphic shown below.

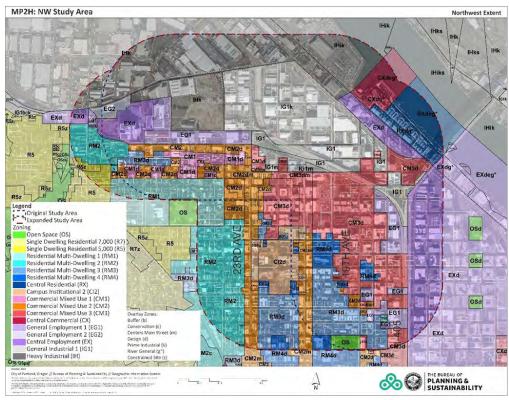


Northwest Study Area and Initial Alignment

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



Comprehensive Plan Map - NW Study Area

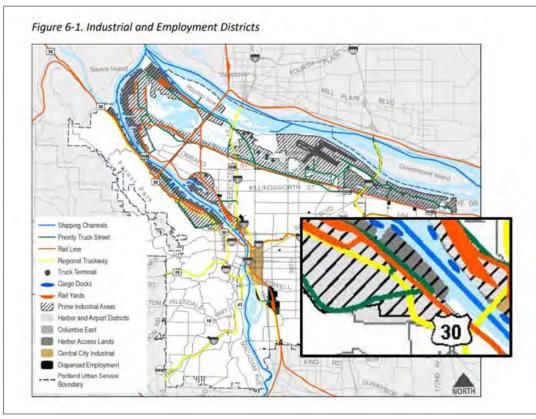


Zoning Map - NW Study Area

Industrial Land and Jobs

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

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



Comprehensive Plan Figure 6.1

Development Scenarios, New Alignment, and Reduced Area of Change

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

Initial Economic Modeling

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

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

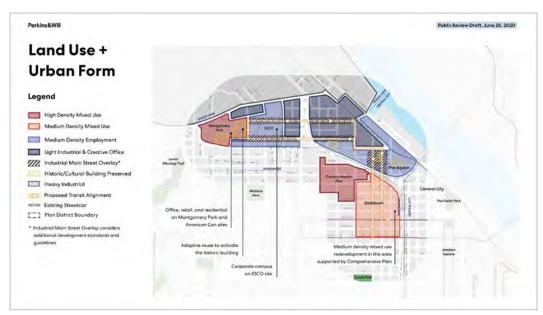
ECONorthwest Preliminary Scenario Modeling Results

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

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

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

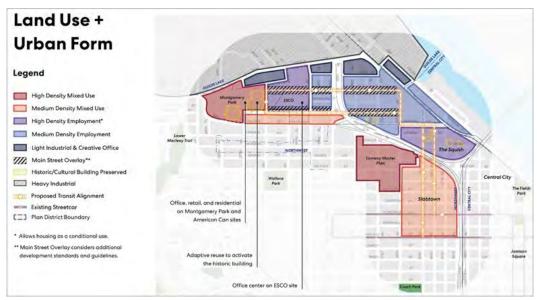
and industrial workers. The scenario was also not seen as being fully supportive of fixed rail transit investments in terms of ridership, or capacity to support financial contributions to a local improvement district.



Scenario 1

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

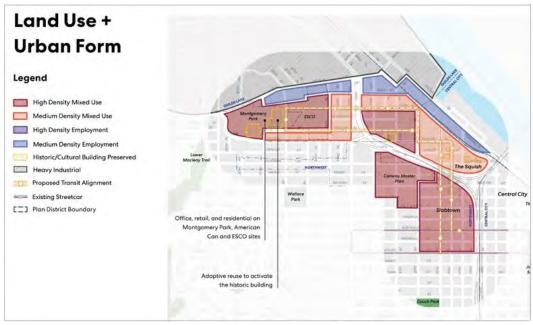
This scenario was seen as being supportive of fixed rail transit investment, but a lack of housing in the district suggested a scenario with high peak-hour travel demand, and significant daytime activity, but less activity in evenings. The onset of the COVID-19 pandemic further clouded the outlook for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



Scenario 2

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

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

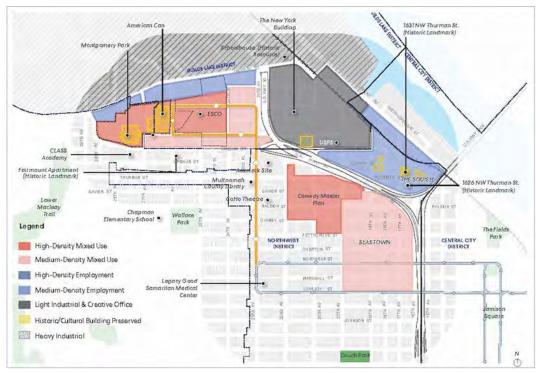


Scenario 3

Alternate Scenario and Alignment Rethinking.

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

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



Scenario 4

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

Housing and Middle-wage Jobs Opportunity.

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

ECONorthwest Hybrid Scenario Modeling Results

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

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

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

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

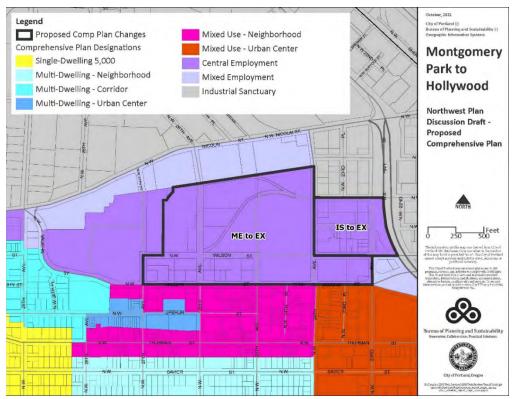
The MP2H NW Plan Discussion Draft was published on December 21, 2021. The draft plan generally proposes a preferred scenario development approach that builds on Scenario 4, Hybrid, described previously. The proposal calls for land use changes to accommodate a high-intensity mix of land uses in the area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

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

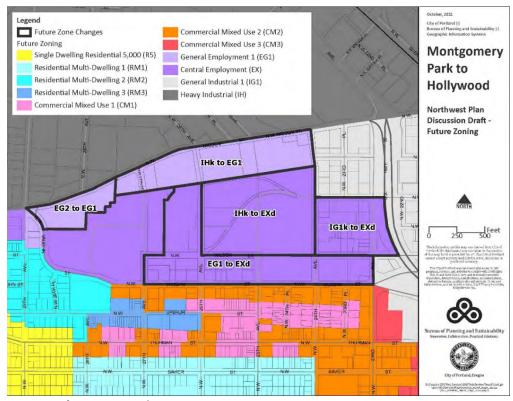
Land Use Changes and Value Creation

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

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



Proposed Comprehensive Plan Map



Proposed Future Zoning Map

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

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

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



Subareas west of Highway 30

Subarea Estimates – Baseline Scenario to Hybrid

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

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

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

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

Costs Associated with Land Use Transition

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

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

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

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

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

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

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

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

Potential Public Benefits

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

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

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

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

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

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

6. Displacement Risks: Housing and Jobs

NW Study Area Demographics

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

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

NW Population & Income

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

NW Race & Ethnicity

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

NW Age

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

NW Education

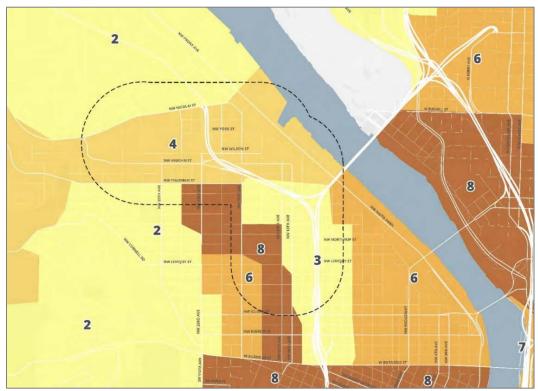
Education	NW Area	Portland
Less than HS	2%	8%
HS diploma	6%	16%
Some college	18%	28%

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

NW Households & Tenure

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

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



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

NW Portland Affordable Housing

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

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

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

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

NW 2 & 3 Star Rated Buildings

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

NW Study Area Employment and Businesses

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

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

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

NW Businesses

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

NW Jobs

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

Jobs and Housing Displacement Risks

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

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

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

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

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

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

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

7. Housing Need Analysis

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

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

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

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

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

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

Existing & Future Households Earning 0-100% AMI

Income Level	20	20	2035		
	NW	Portland	NW	Portland	
	Households	Households	Households	Households	
0-65% AMI	2,794	65,526	3,476 - 3,850	81,522 - 90,312*	
0-65% AMI & Severely					
Cost-Burdened	891** (32%)	30,570 (47%)	1,112 - 1,232†	38,315 - 42,447†	
65-100% AMI	1,229	23,572	1,529 - 1,663	29,327 - 31,986††	
65-100% AMI &					
Severely Cost-Burdened	14‡ (1%)	787 (3%)	15-17†	880 - 960†	
Total 0-100% AMI	4,023	89,098	5,005 - 5,513	110,879 - 122,298	

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

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

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

^{**}Margin of Error: 298.5

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

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

[‡]Margin of Error: 26.5

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

Inclusionary Housing in Montgomery Park Study Area

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

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

8. Citywide Housing Supply Context

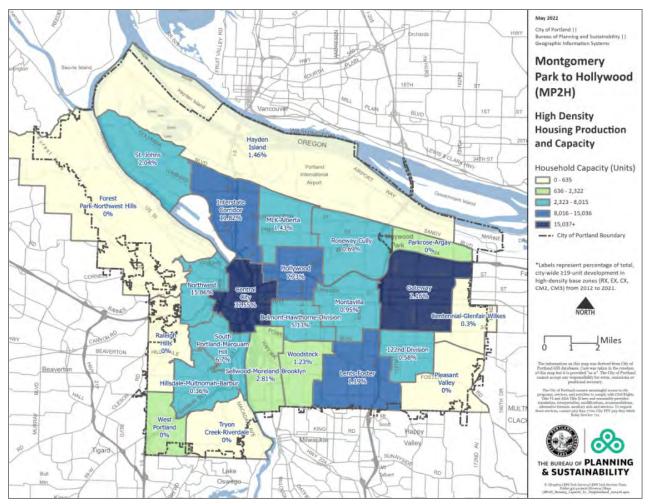
Housing Production in the Past 10 Years

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

Comparing Production to Capacity

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

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



High Density Housing Production and Capacity

Comparison of Large Opportunity Sites

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

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

	Large Op	portunity	Site Ho	using	Potential*
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Site	Unit Capacity	Potential Affordable Housing	% of Citywide Housing Need by 2035	% of Citywide Housing Built in Past 10 Years in	% of Citywide Hi- Density Housing Built in Past 10 Years
		Units‡		Same Area‡‡	in Same Area‡‡
MP2H-NW	3,000 – 5,000	300-500	2.9-3.7%	10.8%	15.2%
Lloyd District**	5,000	500	3.7-4.8%		
Broadway					
Corridor†	2,620	720	1.9-2.5%	23.5%	35.9%
OMSI	1,200	240	0.8-1.1%		
RiverPlace++	915 – 1,015	91	<1%		
Total	12,735 - 14,835	1,851	11-12%	NA	NA
Area w/in ¼ mile of	20 000 Unito	2 000	22.20%	26.50/	27.20/
Streetcar	≈ 30,000 Units	≈ 3,000	22-29%	26.5%	37.2%

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

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

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

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

^{**}https://www.portland.gov/sites/default/files/2020-01/complete-adopted-plan lores 0.pdf

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

^{††}https://www.portlandoregon.gov/bds/article/796394

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

^{‡‡} Analysis area boundaries as shown on map above.

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

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

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

9. Conclusions

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

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

Key Takeaways:

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

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

Exhibit	E
January 202	23

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Montgomery Park to Hollywood Transit and Land Use Development Strategy

Equitable Development Report

Appendix

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

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

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

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

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

Grant Background/Purpose

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

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

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

Project Staff

Joy Pearson, Volunteer Manager Denise Lafond, Director of Operations

Methodology

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

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

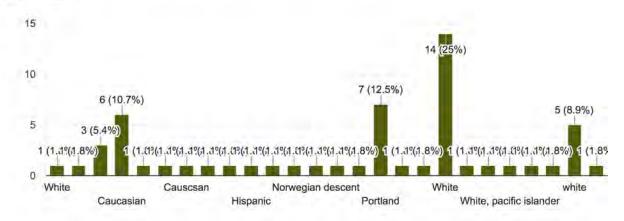
The Virtual Community Forums yielded the most information from the participants, with conversations that brought up information not included in the surveys we provided—the scope of the potential project's impact on the houseless community, for instance.

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

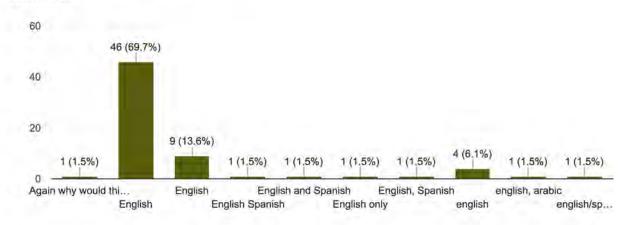
Demographic information

The majority of respondents to our email survey were white, between the ages of 20–45. A table showing the demographics of these respondents and languages spoken is shown below.

What is your ethnicity? Feel free to leave blank if you prefer not to answer. 56 responses

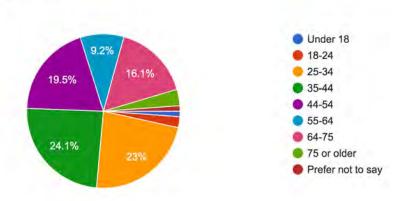


What languages are spoken in your home? 66 responses



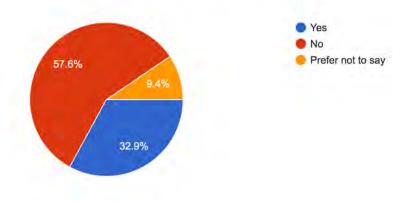
What is your age range

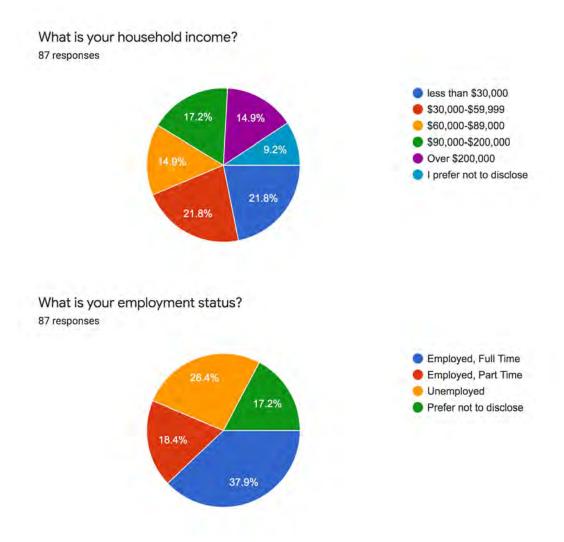
87 responses



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

85 responses





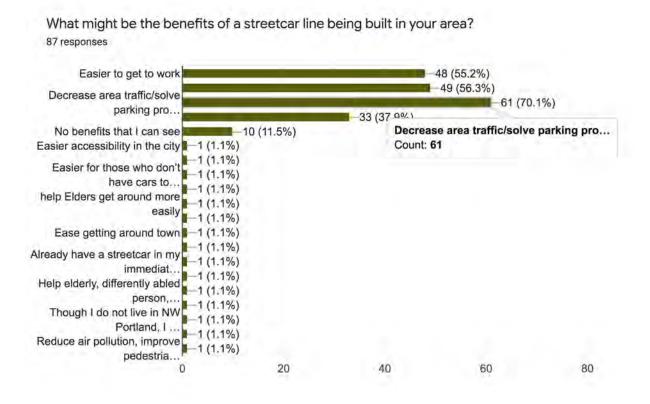
Our Virtual Community Forums offered more diversity, with exactly half of the participants coming from the BIPOC community, and a more comprehensive age range. The turn out for these events was more modest than we had anticipated, with our largest group being six participants. Twenty people in total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

Findings

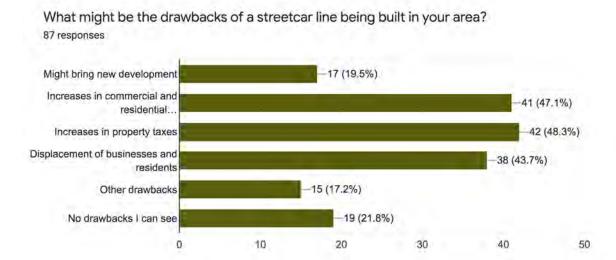
The following is a summary of findings from Friendly House outreach efforts to date. The tables represent responses from the email survey. This survey was given to the Virtual Forum participants, as well as those who inquired but were unable to attend the forums. These questions do not represent the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

Survey Questions and Results

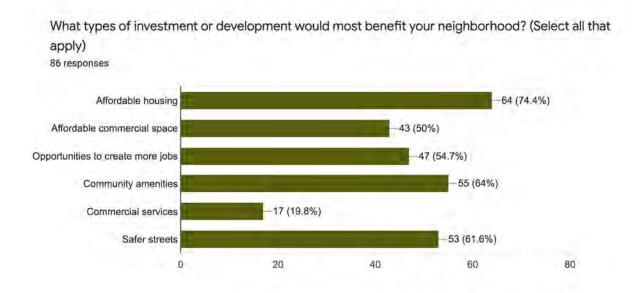
What might be the benefits of a streetcar line being built in your area?



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



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



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

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

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

"Affordability is my main concern. I see rents that near \$4000 a month for a very modest home.

There needs to be better rent control."

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

"Something done about the incredible rise in homelessness!"

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

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

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

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

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

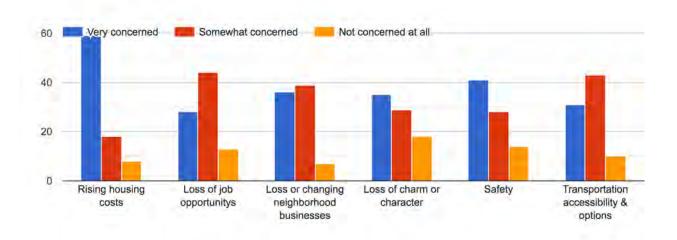
In addition to affordable housing, access to parking, specifically in light of possible changes to the area, was referenced multiple times.

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

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

What are your greatest concerns for NW Portland?

What are your greatest concerns for NW Portland?



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

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

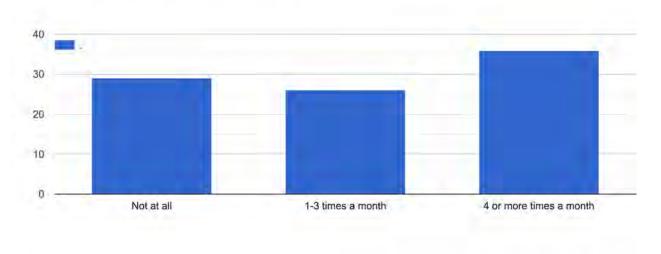
"Great concern about garage/car/residence break-ins, and increasing homeless camp issues (drugs, garbage, safety)."

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

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

How many times a month do you use public transportation?

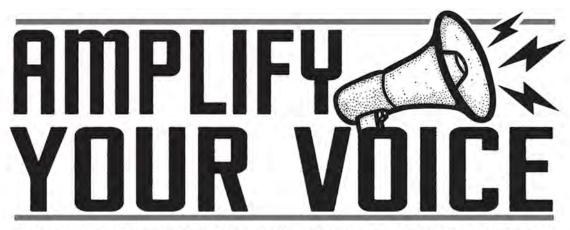
How many times a month do you use public transportation?



Conclusion

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

Appendix



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

THE EXPANSION WILL IMPACT OUR NEIGHBORHOOD WE WANT TO HEAR YOUR VOICE! FRIENDLY HOUSE IS INVINTING YOU TO PARTICIPATE IN A QUICK SURVEY (10 MINUTES MAX).

YOUR PARTICIPATION WILL MAKE SURE YOUR HOPES AND CONCERNS ARE HEARD!

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

INTERESTED?
EMAIL JPEARSON@FRIENDLYHOUSEINC.ORG OR TEXT 503-482-2113



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

Here is a link to the survey questions and responses in spreadsheet format.

Wording used for Friendly House Flyer, email and physical copy

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

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

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

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

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

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

NW Portland Streetcar Expansion

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

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

* Required

Email address *

Your email

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

() Yes

 \bigcap No

Maybe

	DIVIII	LAITIDIL D
What is your zip code? *		
Your answer		

What might be the benefits of a streetcar line being built in your area?
Easier to get to work Bring more customers to local business Decrease area traffic/solve parking problems Might bring new development No benefits that I can see Other:
What types of investment or development would most benefit your neighborhood? (Select all that apply)
·
neighborhood? (Select all that apply)
neighborhood? (Select all that apply) Affordable housing
neighborhood? (Select all that apply) Affordable housing Affordable commercial space
neighborhood? (Select all that apply) Affordable housing Affordable commercial space Opportunities to create more jobs

!

What might be the drawbacks of a streetcar line being built in your area?					
Might bring new development					
Increases in commercial and residential rents					
Increases in property taxes					
Displacement of businesses and residents					
Other drawbacks					
No drawbacks I can	see				
What are your greatest concerns for NW Portland?					
	Very concerned	Somewhat concerned	Not concerned at all		
Rising housing costs					
Loss of job opportunitys					
Loss or changing neighborhood businesses					
Loss of charm or character					
Safety					
Transportation accessibility & options					

!

How many times a month do you use public transportation?		
	•	
Not at all		
1-3 times a month		
4 or more times a month		
Please express any additional ideas you have for NW Portland? What would you like to see? What are you afraid of seeing?		
Your answer		
What is your ethnicity? Feel free to leav	re blank if you prefer not to answer.	
Your answer		
What languages are spoken in your hon	ne?	
Your answer		

!

Are you a person living with a disability?
O Yes
O No
Prefer not to say
What is your age range
Under 18
18-24
25-34
35-44
O 44-54
55-64
64-75
75 or older
O Prefer not to say
Do you identify as a member of the LGBTQ+ community?
O Yes

Prefer not to say

IVO

What is your household income?	
O less than \$30,000	
\$30,000-\$59,999	
\$60,000-\$89,000	
\$90,000-\$200,000	
Over \$200,000	
I prefer not to disclose	

What is your employment status?

Employed, Full Time

Employed, Part Time

Unemployed

Prefer not to disclose

What form of transportation do you use?

Your answer

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

Page 1 of 1

Submit

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Google Forms

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

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DRAFT

Exhibit B





Findings from the Northwest Streetcar Extension Surveys

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

December 2020

Introduction

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

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

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

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

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

Project Staff

Craig Hamilton; Northwest industrial Business Association Greg Madden; Northwest industrial Business Association

Ellen Wax; Working Waterfront Coalition Molly Taylor; Columbia Corridor Association Marissa King; Columbia Corridor Association Corky Collier; Columbia Corridor Association

Purpose & Background

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

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

Approach

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

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

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

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

Four surveys

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

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

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

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

General Findings

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

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

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

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

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

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

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

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

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

<u>Demographics of the Employee respondents</u>

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

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

Ethnicity data is from US Census Bureau, 2019 estimates.

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

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

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

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

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

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

Conclusion

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

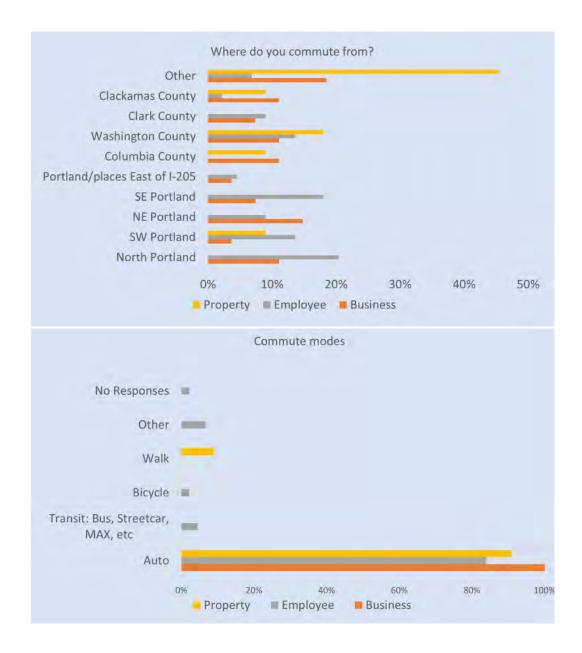
A common claim is that redevelopment will result in more high wage jobs. While this is accurate, it's also true that the percentage of BIPOC employees in those jobs is dramatically lower, not to mention the negative impact on people without four-year college degrees. In addition, BPS data shows there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

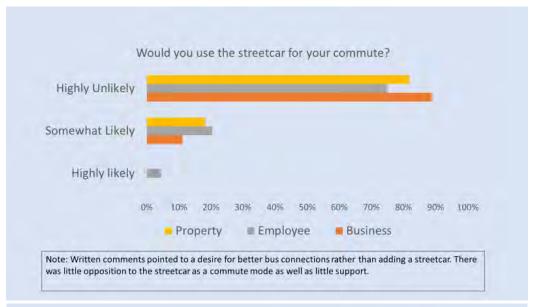
While it's possible that some industrial activity will remain in the area, experience in other parts of the city such as Central Eastside show the obvious: industrial activity cannot be sustained on land that is zoned for higher value, such as office and residential. First, there is pressure to earn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

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

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

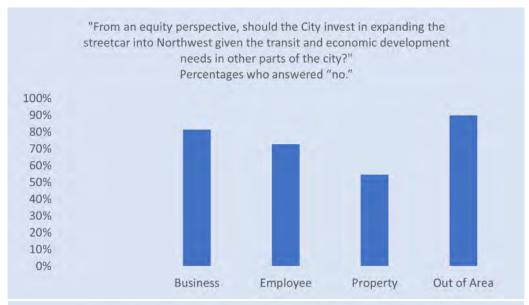
Survey Highlights





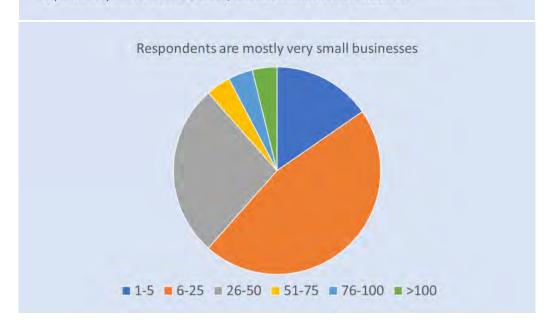






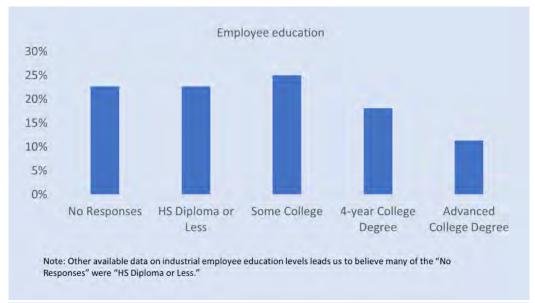


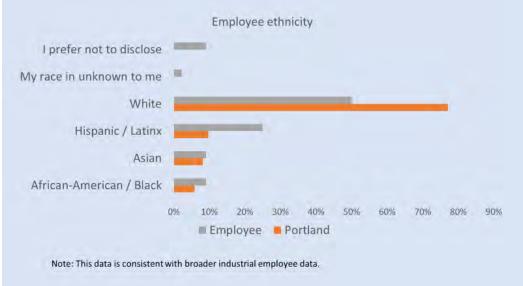
Note: The City of Portland's 20 year industrial land forecast shows virtually no excess land. The number is likely to be worse because that forecast was based on 60% brownfield redevelopment, which is not being achieved. While 20% of respondents may think North Portland is viable, less than 5% would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

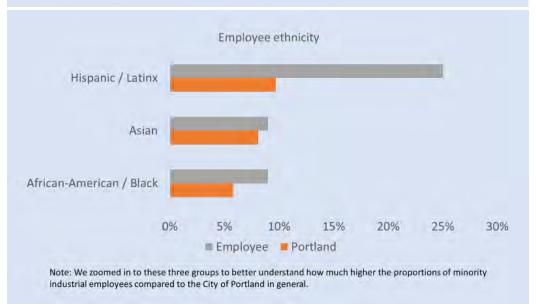


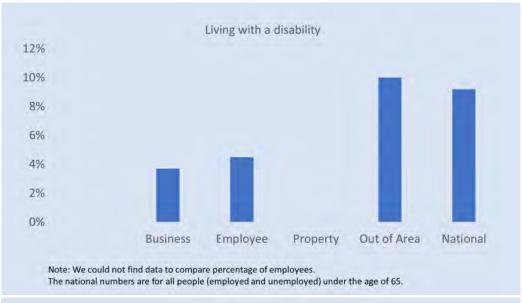
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Exhibit B













NIBA/CCA MP2H Survey

Open-Ended Responses to Survey Questions

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

No, not ever

Out of Project Area Comment:

No responses

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

Employee Comment:

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

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

Business Owner Comment:

No responses

Property Owner Comment:

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

Out of Project Area Comment:

No responses

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

Employee Comment:

• We would move operations, potentially to out of state

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

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

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

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

No responses

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

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

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

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

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

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

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

Employee Comment:

No responses

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

• Increasing land values does not promote industrial development.

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

No responses

Out of Project Area Comment:

No responses

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

Employee Comment:

No responses

Business Owner Comment:

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

Property Owner Comment:

No responses

Out of Project Area Comment:

No responses

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

Employee Comment:

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

Business Owner Comment:

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

Property Owner Comment:

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

Out of Project Area Comment:

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

Q12: Where might your business move?

Employee Comment:

No responses

Business Owner Comment:

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

Property Owner Comment:

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

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

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

Out of Project Area Comment:

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

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

Employee Comment:

No responses

Business Owner Comment:

No responses

Property Owner Comment:

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

Out of Project Area Comment:

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

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

Employee Comment:

No responses

Business Owner Comment:

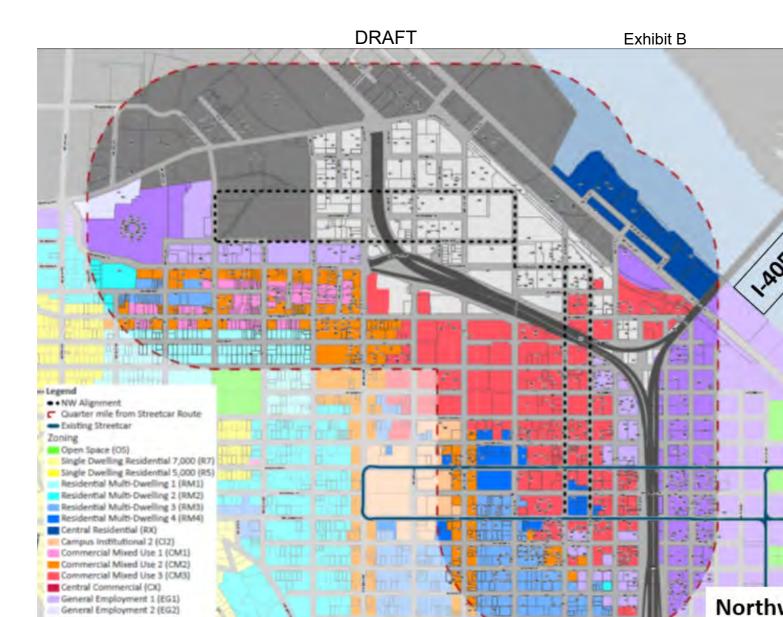
No responses

Property Owner Comment:

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

Out of Project Area Comment:

No responses



Constant Contact Survey Results

Survey Name: Portaind Streetcar NW Industrial Impact Survey for Employees

Response Status: Partial & Completed

Filter: None

10/14/2020 11:05 AM PDT

Central Employment (EX)

General Industrial 1 (IG1)
Heavy Industrial (IH)

Indust

Thank you for participating in the Portland Streetcar Impact Survey!

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

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

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

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

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

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

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

Would you use the	Northwest exten	sion of the Portland Streetcar to commute to work?	
Answer	0%	Number of 100% Response(s)	Response Ratio
Highly likely		2	4.5 %
Somewhat Likely		9	20.4 %
Highly Unlikely		33	75.0 %
No Response(s)		0	0.0 %
		Totals 44	100%

Would you use the	streetcar to go to lund	ch, get to meetings, etc.?		
Answer	0%	100%	Number of Response(s)	Response Ratio
Highly Likely			2	4.5 %
Somewhat Likely			7	15.9 %
Highly Unlikely			34	77.2 %
No Response(s)			1	2.2 %
		Totals	44	100%

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

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

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

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

Part of the goal of streetcar expansion is to connect

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

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

Industrial

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

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

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

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

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

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

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

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

Why is your location in	NW Portland the	most effective location for your firm?		
Answer	0%	100%	Number of Response(s)	Response Ratio
Close to customers or suppliers			13	33.3 %
Transportation connections and freight access			20	51.2 %
Long-term location or sunk costs			19	48.7 %
Other			1	2.5 %
		Totals	39	100%

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

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

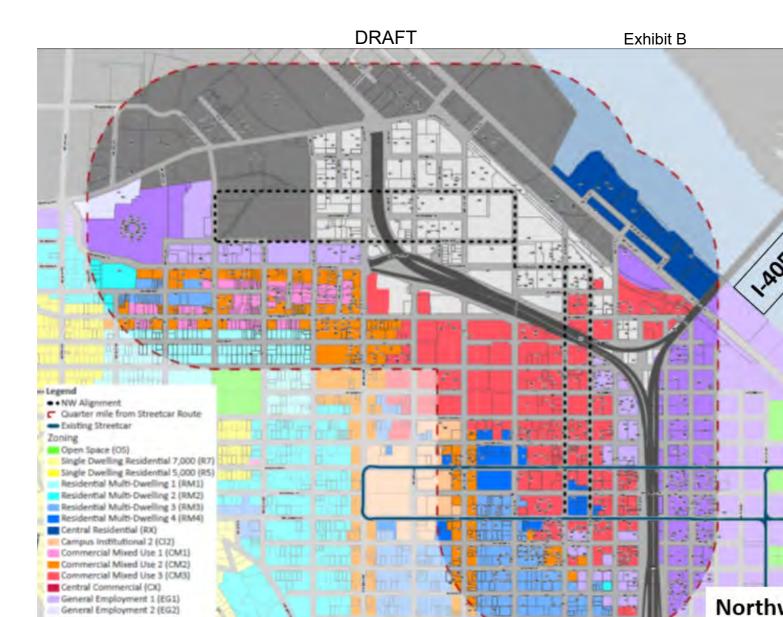
What is your education	level?			
Answer	0%	100%	Number of Response(s)	Response Ratio
HS Diploma or Less			10	22.7 %
Some College			11	25.0 %
4-year College Degree			8	18.1 %
Advanced College Degree			5	11.3 %
No Response(s)			10	22.7 %
		Totals	44	100%

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

*Are you a person living with a disability?

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

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



Constant Contact Survey Results

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

Response Status: Partial & Completed

Filter: None

10/14/2020 11:07 AM PDT

Central Employment (EX)

General Industrial 1 (IG1)
Heavy Industrial (IH)

Indust

Thank you for participating in the Portland Streetcar Impact Survey!

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Introduction

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

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

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

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

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

How do you typically	get to work or the N	IW Portland industrial area?		
Answer	0%	100	Number of Response(s)	Response Ratio
Auto			27	100.0 %
Transit: Bus, Streetcar, MAX, etc			0	0.0 %
Bicycle			0	0.0 %
Walk			0	0.0 %
Other			0	0.0 %
No Response(s)			0	0.0 %
		Tota	ls 27	100%

Would you use the I	Northwest extensio	on of the Portland Streetcar to commute to	o work?	
Answer	0%	100%	Number of Response(s)	Response Ratio
Highly likely			0	0.0 %
Somewhat Likely			3	11.1 %
Highly Unlikely			24	88.8 %
No Response(s)			0	0.0 %
		Totals	27	100%

Would you use

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

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

If zoning in the area were changed to support

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

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

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

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

Part of the goal of streetcar expansion is to connect

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

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

Industrial lands

serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an

adequate supply of industrial lands and expand access for minority and marginalized community members to those jobs?

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

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

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

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

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

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

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

Why is your current location in

NW Portland the most effective location for your firm?

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

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

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

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

*About how many people are employed at your facility?

26 Response(s)

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

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

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

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

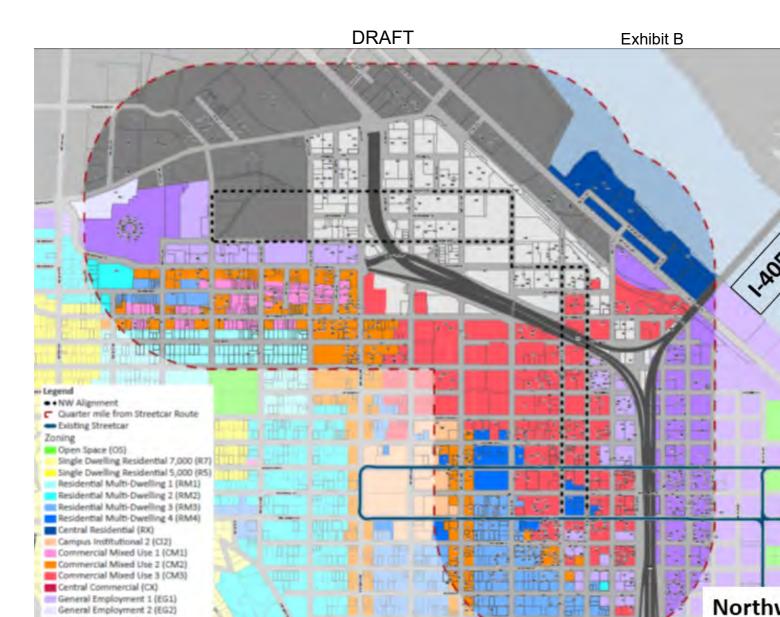
Answer	0%	oyees are minority or disadvantaged?	Number of Response(s)	Response Ratio
0-10%			9	33.3 %
10-20%			13	48.1 %
20-30%			0	0.0 %
30-40%			1	3.7 %
40-50%			3	11.1 %
More than 50%			1	3.7 %
No Response(s)			0	0.0 %
		Totals	27	100%

Answer	0%	vees have a 4-year college degree?	Number of Response(s)	Response Ratio
0-10%			9	33.3 %
10-20%			6	22.2 %
20-30%			2	7.4 %
30-40%			3	11.1 %
40-50%			1	3.7 %
More than 50%			6	22.2 %
No Response(s)			0	0.0 %
		Totals	27	100%

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

*Are you a person l	living with a disa	ability?		
Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	3.7 %
No			21	77.7 %
I prefer not to disclose			5	18.5 %
No Response(s)			0	0.0 %
		Totals	27	100%

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



Constant Contact Survey Results

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

Response Status: Partial & Completed

Filter: None

10/14/2020 11:10 AM PDT

Central Employment (EX)

General Industrial 1 (IG1)
Heavy Industrial (IH)

Indust

Thank you for participating in the Portland Streetcar Impact Survey!

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

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

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

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

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

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

How do you typically ge	t to the NW Portland indust	rial area?		
Answer	0%	100%	Number of Response(s)	Response Ratio
Auto			10	90.9 %
Transit: Bus, streetcar, MAX, etc			0	0.0 %
Bike			0	0.0 %
Walk			1	9.0 %
Other			0	0.0 %
No Response(s)			0	0.0 %
		Totals	11	100%

Would you use the	Northwest extens	sion of the Portland Streetcar to commute to	your property?	
Answer	0%	100%	Number of Response(s)	Response Ratio
Highly likely			0	0.0 %
Somewhat Likely			2	18.1 %
Highly Unlikely			9	81.8 %
No Response(s)			0	0.0 %
		Totals	11	100%

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

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

If zoning in the area were changed to support

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

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

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

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

Part of the goal of streetcar expansion is to connect

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

tenants and employees?

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

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

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

Industrial lands

serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an

adequate supply of industrial lands and expand access for minority and

marginalized community members to those jobs?

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

DRAFT

Exhibit B

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

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

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

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

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

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

What, if any, concerns do you have about economic and/or other pressures that might force industrial firms and

tenants out of the NW Industrial area? Select any/all that apply.

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

In the long

term, what do you think is the best use of land in the study area between NW

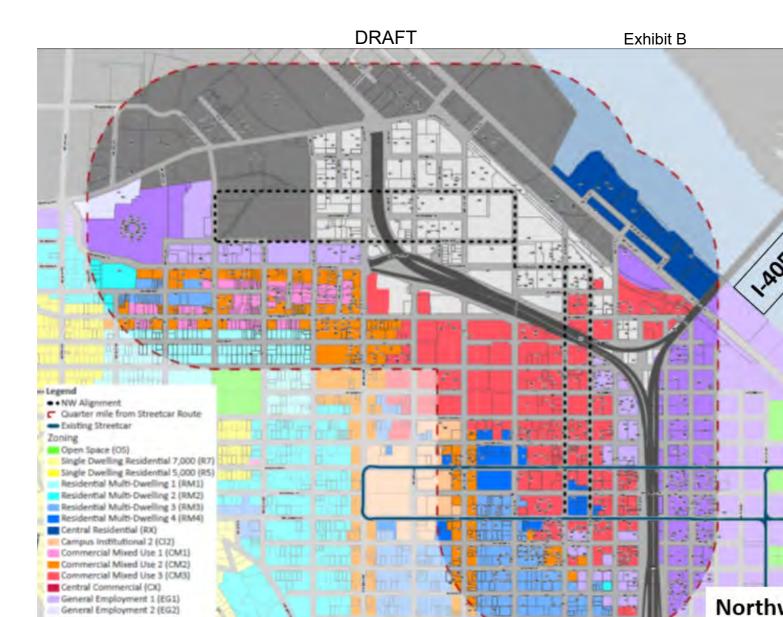
Vaughn and NW Nicolai?

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

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

*Are you a person I	iving with a disability?			
Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			0	0.0 %
No			10	90.9 %
I prefer not to disclose			1	9.0 %
No Response(s)			0	0.0 %
		Totals	11	100%

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



Constant Contact Survey Results

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

Response Status: Partial & Completed

Filter: None

10/14/2020 11:11 AM PDT

Central Employment (EX)

General Industrial 1 (IG1)
Heavy Industrial (IH)

Indust

Thank you for participating in the Portland Streetcar Impact Survey!

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

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

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

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

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

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

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

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

If zoning in the area were changed to support

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

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

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

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

Part of the goal of streetcar expansion is to connect

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

tenants and employees?

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

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

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

Industrial lands

serve as the leading source of middle-wage jobs that do not require a 4-year college degree. Do you think expanding the streetcar into the Northwest study area would help maintain an

adequate supply of industrial lands and expand access for minority and

marginalized community members to those jobs?

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

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

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

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

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

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

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

What, if any, concerns do you have about economic and/or other pressures that might force industrial firms and

tenants out of the NW Industrial area? Select any/all that apply.

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

In the long

term, what do you think is the best use of land in the study area between NW

Vaughn and NW Nicolai?

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

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

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

*Are you a person l	ving with a disability?			
Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			1	10.0 %
No			9	90.0 %
I prefer not to disclose			0	0.0 %
No Response(s)			0	0.0 %
		Totals	10	100%

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

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

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

Background:

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

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

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

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



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

Purpose

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

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

Lead Project Staff:

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

Approach

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



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

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

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

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

Survey Responses

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



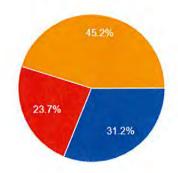
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Hollywood Senior Center & Urban League of Portland MP2H Transportation Survey Findings September 2020

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

93 responses



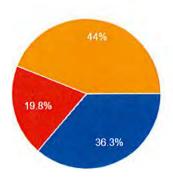


Alignment A: Sandy Boulevard
 Alignment B: Irving Street to Sandy
Boulevard
 Alignment C: Branchurgut/Moidler

Alignment C: Broadway/Weidler

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

91 responses



Alignment A: Sandy Boulevard

 Alignment B: Irving Street to Sandy Boulevard

Alignment C: Broadway/Weidler

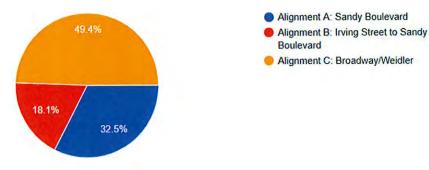
Urban League of Portland



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

Which alignment best matches your preferred vision for future development of this area? 83 responses



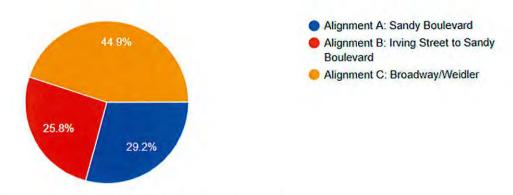


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Hollywood Senior Center & Urban League of Portland MP2H Transportation Survey Findings September 2020

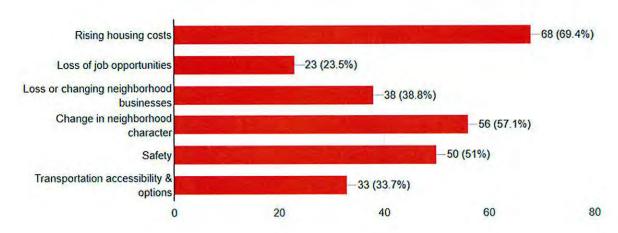
On which alignment would a streetcar investment most improve access to affordable housing, middle- wage jobs, nature and recreation?

89 responses



What are your greatest concerns for NEPortland/ Hollywood?

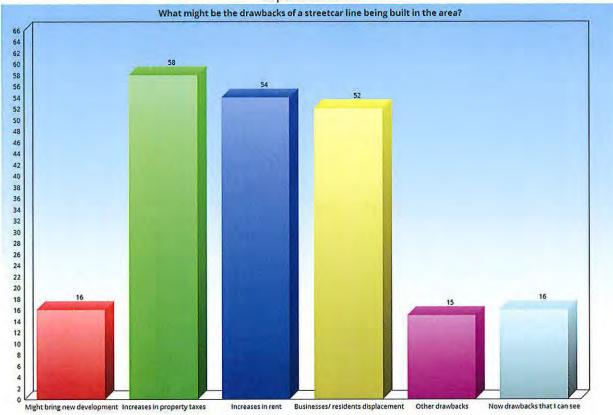
98 responses





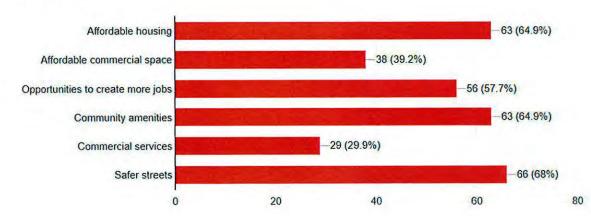
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What types of investment or development would most benefit your neighborhood?(Select all that apply.)

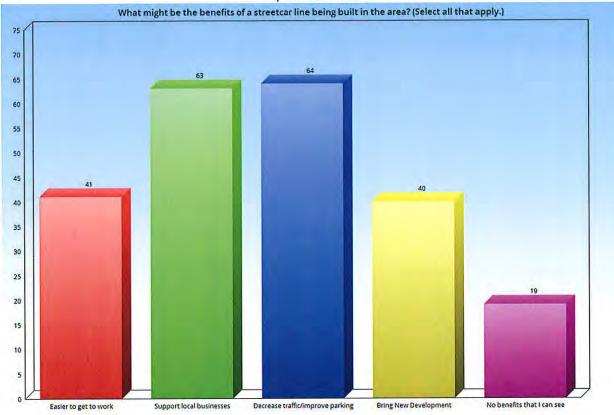
97 responses





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

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

Community Space & Public Benefit

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





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

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

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

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

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

Housing

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

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

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

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

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



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

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

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

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

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

Safety

A few survey participants expressed safety concerns.

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

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

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

Racial Justice& Displacement

Urban League of Portland



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

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

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

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

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

Transportation

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

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

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

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

Urban League



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

"Turn around on all alignments will be problematic."

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

"Please don't put more traffic on Sandy Blvd. and make one-way traffic on crowded side streets. Especially74th going down to the school and 73rd and 72nd also. I like street cars. Street car lines frequently take away many on street parking to the detriment of local businesses. Many disabled people have to drive and keep easily accessible parking spots."

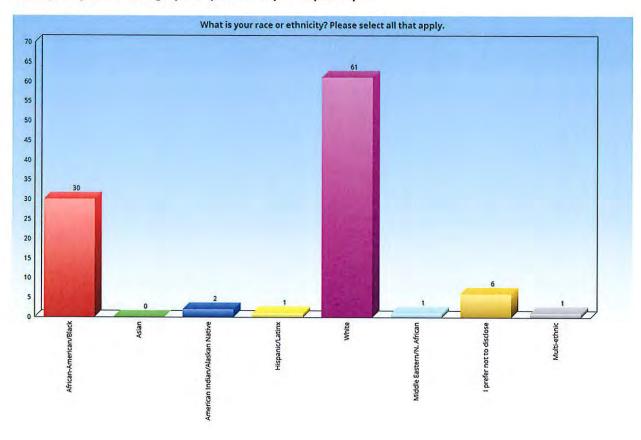
The entire Broadway quarter and north east is under developed as a two commercial District or Main Street. Businesses cannot survive with high runs and lack of ability to attract pedestrian traffic, due to the high speed commuter orientation of the street. Broadway would be too perfect opportunity for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

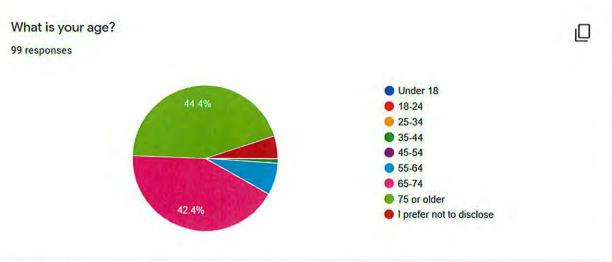


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Survey Response Demographics (102 surveys completed)



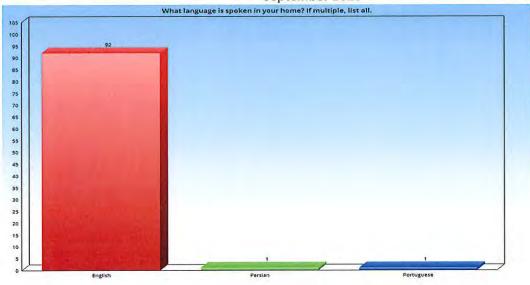






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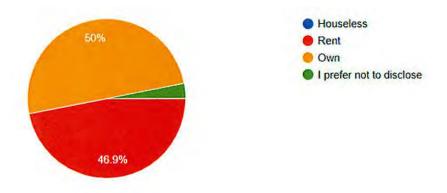


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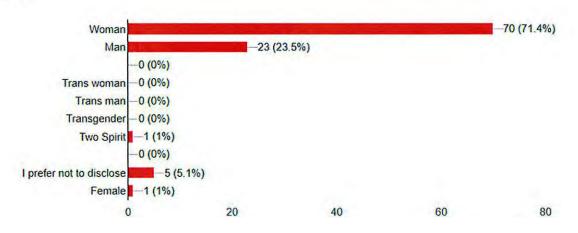
Which best describes your current housing?

98 responses



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

98 responses





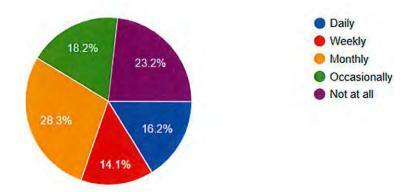


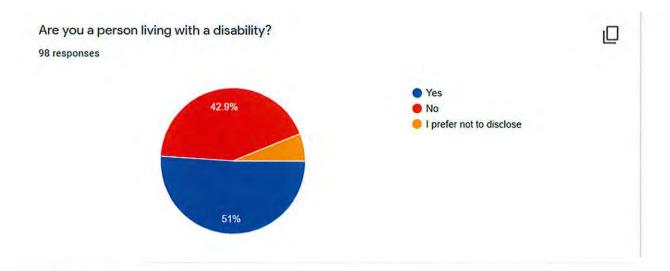
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How frequently do you use public transportation?

99 responses

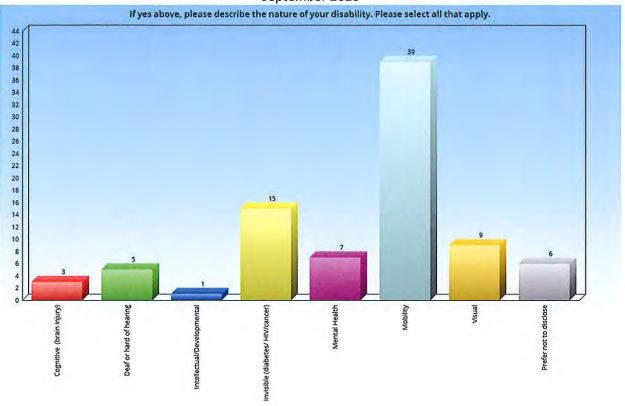






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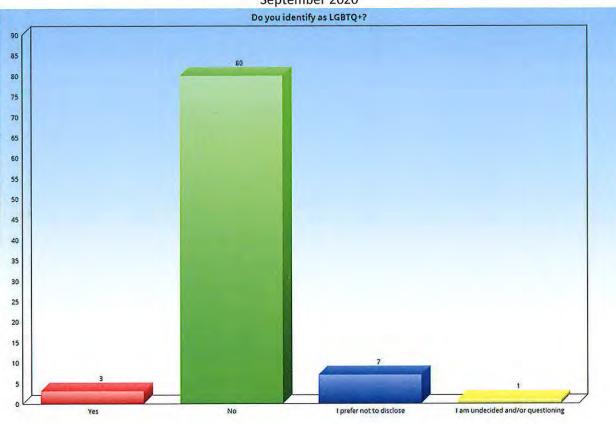


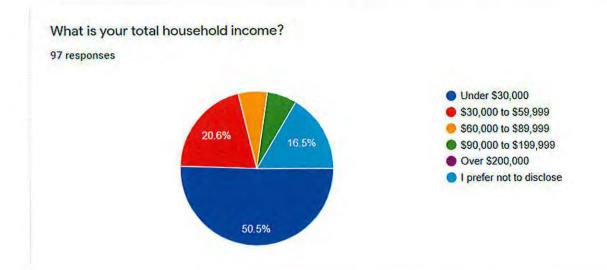




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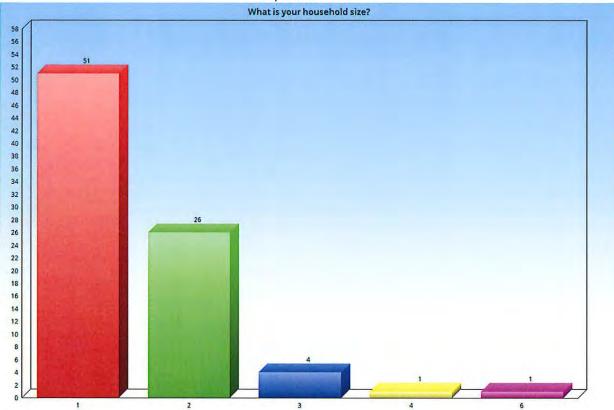






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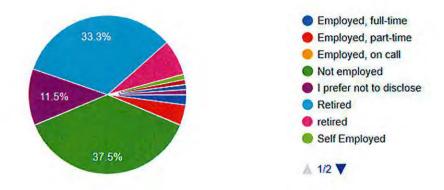


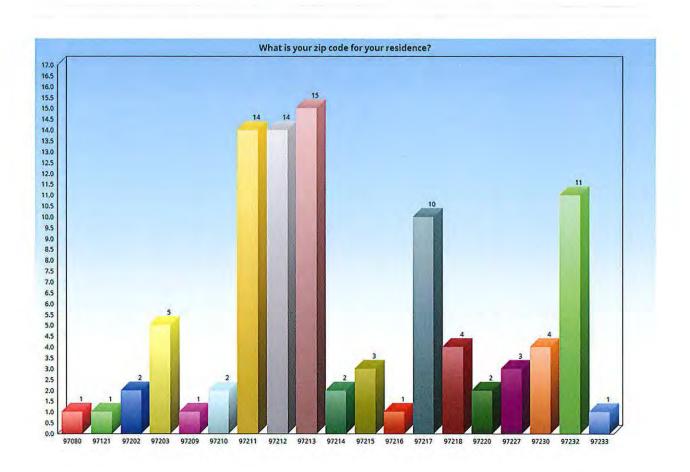
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What is your employment status?

96 responses

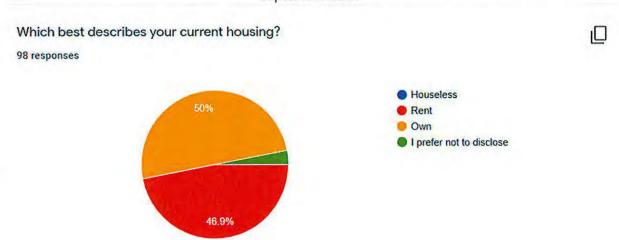


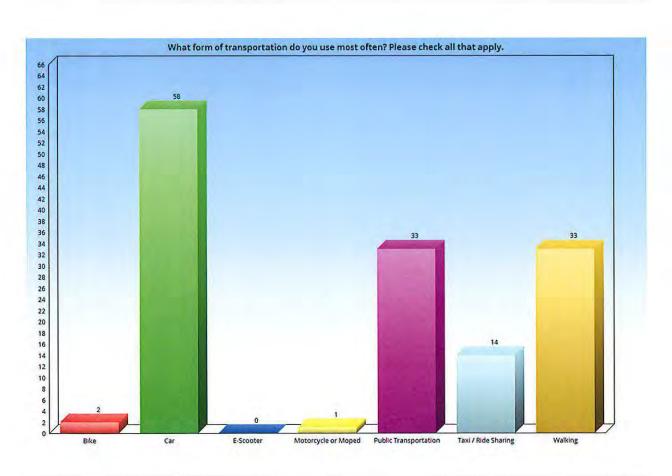




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Hollywood Senior Center & Urban League of Portland MP2H Transportation Survey Findings September 2020

Final Thoughts

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

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

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



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

Complete Comments from Hollywood Senior Center MP2H Transportation Survey

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

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





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

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

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

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

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

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

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

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

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





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

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

Grocery store

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

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

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

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





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





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businesses. I would like to see additional variety of retail stores such as Walgreens. How about a KFC or Burger King or Popeyes. I don't not wish for businesses that exist now leave the area. I would like to see more thrift stores in the area.

Turn around on all Alignments will be problematic

I would like to see less demolitions of houses and fewer apartments and more trees and greenspaces. More restaurants and local shops would also enhance the area. Currently cute small bungalows that could become housing for many are being replaced by boring, ugly apartments with little or no parking, few trees, very little green spaces and not commensurate with surrounding neighborhoods. The east side is losing it's character and becoming just a sea of apartment buildings. A big concern is dedicated red bus lane to be included on Sandy as planned by the mayor. If this bus lane will be required on Sandy, there just isn't enough room on Sandy for a streetcar. Why wasn't information about this bus lane included with the information of the street car before making decisions. Unfortunately, plans to cut car lanes increase traffic congestion. For example on Glisan. The elimination of car lanes often causes cars to be backed up for 10 blocks. Ten blocks of cars idling does not do much for the environment and increases stress and hinders safety.

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

I am interested in seeing low income development housing

Dense housing with little parking

Please don't put more traffic on Sandy Blvd. and make one way traffic on crowded side streets. Especially 74th going down to the school and 73rd and 72nd also . I like street cars, too one out to Oaks Park when I was 26 and I am 97 and still like them.

Street car lines frequently take away many on street parking to the detriment of local businesses. Many disabled people have to drive an keep easily accessible parking spots.

Green spaces - benches at bus stops and parks. Multi generational activities such as Shakespeare in the Park, picnic area, water foundations and clean restrooms, more libraries, community centers, multigenerational housing. Rebuilding centers - Fix it Fairs, outdoor dining and eliminate fast food restaurants help small business and local, ethnic business.

NE Portland swimming pool and rec center with meeting rooms. Need sidewalks along all the streets, school musical groups playing and entertaining in the park. Movies in the park, free popcorn, neighborhood parade bikes.

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





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

Would like to see more commercial development such as small shops, restaurants, specialty food stores, etc.

I am concerned about the street car causing displacement of people like what happened in the Albina district with uprooting of African American names. I am also worried about the safety the safety of pedestrians, the streetcar could also affect access to local businesses by blocking entrance to stores and decreasing parking spaces.

Not a good idea

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

Because of the black lives matter does not seem like a good time right now since our city has been destroyed. Sandy Blvd is a mess anyway.

Drivers would be white and probably not race friendly. In addition to the majority of the passengers being white due to the project.

TRANSPORTATION SURVEY

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

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



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

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

We want to hear from you!

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

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

SLIDESHOW if you can, before completing the survey: https://www.portland.gov/bps/mp2h/mp2h-northeast-portland-urban-design-concept-virtual-open-house

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

HSC or 1820 NE 40th Avenue

PPX, OR 97212

ULP, Attn. Arleta 10 N. Russell St. PDX, OR 97227

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

THE CITY WANTS YOUR INPUT!

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



This alignment includes the following attributes:

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

... Survey continued on page 2

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Alignment B: Irving Street to Sandy Boulevard

This alignment includes the following attributes:

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

Alignment C: Broadway/ Weidler

This alignment includes the following attributes:

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

SURVEY QUESTIONS:

Which Alignment Do You Think Works Best?

- 1. On which alignment do you think a streetcar line can best support economic prosperity through job creation, small business or micro enterprise opportunity, or serve existing jobs?
 - ☐ Alignment A: Sandy Boulevard
 - ☐ Alignment B: Irving Street to Sandy Boulevard
 - ☐ Alignment C: Broadway/Weidler
- 2. On which alignment would a streetcar investment most improve access to affordable housing, middlewage jobs, nature and recreation?
 - □ Alignment A: Sandy Boulevard
 - □ Alignment B: Irving Street to Sandy Boulevard
 - ☐ Alignment C: Broadway/Weidler

3.	Which alignment do you think has the most opportunity to advance equitable outcomes through different development types/land uses, or a potential community benefits agreement? Alignment A: Sandy Boulevard Alignment B: Irving Street to Sandy Boulevard Alignment C: Broadway/Weidler
4.	Which alignment best matches your preferred vision for future development of this area? Alignment A: Sandy Boulevard Alignment B: Irving Street to Sandy Boulevard Alignment C: Broadway/Weidler None of the Above. Your Idea:
	□ None of the Above. Your Idea:
0	eneral Questions:

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