



THE BUREAU OF
**PLANNING &
SUSTAINABILITY**

To: Community Involvement Committee

From: Ariel Kane, Morgan Tracy

Date: March 25, 2025

Subject: Housing Bonus Alignment Project Draft Engagement Plan

To Community Involvement Committee,

On April 8, the Housing Bonus Alignment Project team will present the project and engagement plan to discuss and identify opportunities that enhance the engagement plan and process. Ahead of the meeting, here are some initial responses to some of CIC's interests related to the project;

Do you have an Engagement and Outreach Plan?

The team has drafted a plan which we will present at this meeting and have included in this memo.

What does the project team expect outreach and engagement to result in? What does the project team expect discussions with the CIC to result in?

The expectations are that outreach and engagement efforts will support project deliverables, honor the past and existing community input received to date, and result in an adopted legislative amendment that meets community needs and expectations.

What data will be used to identify and track engagement success?

As with the HNA and HPS, staff will provide a written summary of the engagement process, input and refinements it led to, MapApp testimony will remain public throughout the life of the project and beyond. Staff will also engage to encourage testimony to Council and PC.

How are the project team and community organizations working together? What does this relationship look like?

The HPS, the guiding plan for this and several other projects, was massively informed by community organizations and advocates, and we continue to engage with those same organizations who are able to lend expertise on both lived experiences and technical tuning. We also have engaged a consultant to advise and test feasibility of prototypes and code concepts.

Staff Questions to CIC

While this is a technical project, informed by the HPS engagement, we will need to go through the legislative process, given what you know about the goal of the project, what considerations should staff be making on messaging? Any general concerns about the engagement plan as-is, keeping in mind the technical and legislative requirements of this project?



Housing Bonus Alignment Project

Engagement Plan

Project Objectives

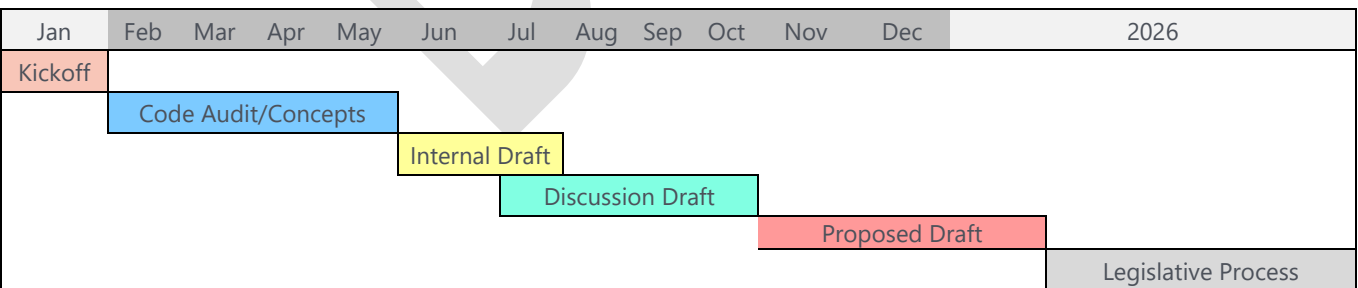
The purpose of this project is to prepare a hearings-ready set of zoning code amendments to facilitate housing production, affordability, and choice.

This project is primarily focused on adding or enhancing bonuses to increase the supply of specific types of units identified through engagement during the [Housing Needs Analysis](#) and [Housing Production Strategy](#). These include **multiple bedroom units** for larger households and households with children; units with **greater accessibility** for older adults and people with disabilities; and **deeper levels of affordability** for low and very low-income households. However, the systems for these bonuses vary between multi-dwelling and mixed-use base zones, and the 15 residentially focused plan districts together with several overlay zones and their respective bonus structures. This is partly the result of the evolution of approaches employed as various projects were adopted over time. The result is an inconsistent and unfocused housing bonus system across the city.

Project Scope

This project will audit Portland's mixed use and multi-dwelling zoning codes that apply outside of the Central City to identify opportunities to facilitate housing production, improve affordability and incentivize a range of housing types that address Portland's housing needs. These zones account for 60% of Portland's residential growth capacity. These zones are concentrated in Portland's centers and corridors, which are the areas emphasized in the 2035 Comprehensive Plan for receiving the greatest investments in infrastructure and services. This project will strive to ensure that as these places grow, evolve and change, that housing is available for a diversity of households at different income levels by leveraging incentives to achieve increased unit production.

Timeline



Engagement Plan and Activities

City staff will be responsible for conducting all components of engagement. The Project Team will prepare multiple outlets for in-person and online engagement activities to share and gather feedback from local government partners, development professionals, residents and the broader Portland community. Staff will utilize the Equity Toolkit to evaluate equitable engagement frameworks and determine appropriate audiences and mediums. Staff aim to develop awareness of draft code concepts, engage around improvements and what new ideas the city needs to consider implementing to have the greatest impact on housing opportunity, choice and support a housing abundant environment.

While targeted outreach will also be conducted with specific groups, the public will have opportunities to provide ideas and feedback at every stage of the project. Public engagement is split into three phases, each with a different engagement goal:

- **Phase 1 (January – July 2025):** Introduce the project and seek feedback; used to ground-truth the analysis of the project team as well as guide additional considerations for targeted housing needs being addressed through revisions (***collaborate/involve; targeted/internal outreach***).
- **Phase 2 (July 2025 – March 2026):** Share draft amendments with advocates and interested parties to get feedback on the preferred approach(es) and make modifications; used to inform prioritization and make revisions (***involve/consult; broad, targeted and decision maker outreach***).

Adoption and Post-Adoption (March – October 2026): Make modifications as needed, share, and adopt amendments. After, communicate results with advocates and interested parties, especially those interested in, and City staff responsible for, implementation (***inform; broad, targeted, internal and decision maker outreach***).



Engagement Timeline

Engagement Phase	Pre Project Engagement: HNA/HPS	Collaborate; Involve							Involve; Consult							Inform			
	2023-2025	2025														2026			
		Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Spring 2026		
Project Phases:	Develop Action Plan	Start	Code Audit/Concepts				Internal Draft		Discussion Draft			Proposed Draft				Legislative Process			
Proposed Activity	Broad	Citywide open house, city wide survey, draft map apps, blogs, emails		CIC							Map app, blog posts, web updates, e-news, emails							Communicate Results	
	Targeted	Biweekly cross bureau meetings, BIPOC Focus groups and community meetings, Community and advisory groups, Advocate & developer interviews	monthly interbureau coordination meetings																
			Expert and advocate interviews							Advisory body engagement Community organization engagement							Invite to comment/testify		
										Invite to testify and provide comment in legislative processes									
	Decision Makers	Work sessions and legislative hearings												Planning Commission work sessions				Legislative Hearings	



Broad Community Outreach

The following will be developed throughout the project and feedback will be integrated into the project deliverables:

- Host online open house (as needed)
- Email updates to project contacts and advocates and interested parties throughout the project
- A public website for each draft period
- An interactive MapApp for each draft period
- Blog for each draft period
- Web updates for PC and CC comment period
- Monthly E-news updates
- Monthly PPD Plans Examiner (Newsletter)

Targeted Outreach

Staff will discuss the project with city advisory boards, groups, and committees, staff will also discuss the project with the following city partners and community members at various phases throughout the project. Staff will:

- Draft agendas and notices
- Prepare presentation materials for public engagement
- Obtain space for meetings as needed
- Facilitate and present prepared materials
- Summarize meetings and public engagement
- Receive and integrate feedback

City Advisory Committees and Groups

Staff will conduct internal outreach with several advisory bodies such as Development Review Advisory Council (DRAC), Historic Landmarks Commission and Design Commission. Advisory bodies engage non-city staff experts who provide meaningful feedback on various topics.

Community Involvement Committee (CIC)

- **Meeting 1: April 2025.** Attend the CIC to present project basics and receive feedback on how to communicate results and successfully gather input.

Development Review Advisory Council

- **Meeting 1: TBD 2025.** Attend, present concepts and receive feedback.

Design Commission

- **Meeting 1: TBD 2025.** Attend, present concepts and receive feedback.



Historic Landmarks Commission

- **Meeting 1: TBD 2025.** Attend, present concepts and receive feedback.

Bureau of Planning and Sustainability (BPS) Staff

- **All Planners Meeting: TBD 2025.** We will provide an overview of the project and project schedule, discuss desired project outcomes, and ask for feedback about the public engagement process.

Community Organizations

Staff plan to continue strategic conversations, started in the HNA/HPS process, with organizations and community advocates such as disability/older adult advocates, land use and housing advocacy organizations, and additional stakeholders as needed. Staff will attend group meetings, to introduce the project and collect feedback on the project. This may include the following interested parties:

- North Portland Land Use Group
- NW district
- Southwest Land Use & Transportation Forum
- SEUPLIFT
- East Portland Action Plan Housing Committee
- CNN LUTOP
- NENC
- Housing Oregon
- Portland Homebuilders' Association
- Oregon Smart Growth
- Portland: Neighbors Welcome
- Sightline
- Fair Housing Council of Oregon
- Housing Land Advocates
- Housing Alliance
- Welcome Home Coalition
- Network for Oregon Affordable Housing
- National Low Income Housing Coalition – Oregon Chapter

Aging and Disability

Extensive outreach was done in the work BPS did for the Age- and Disability-Inclusive Neighborhoods (ADIN) working group and in the development of the [Age- And Disability-Inclusive Neighborhoods \(ADIN\) Plan](#) – staff will rely heavily on the extensive engagement and documentation done in this process. The ADIN coordinator has worked with the project team to summarize the following efforts:

- Housing recommendations (from [March 2023 draft report](#))
- Age-Friendly Portland Qualitative Research (with older adults, caregivers, and services providers): [World Health Organization's Age-Friendly Cities Project in Portland, Oregon: Summary of Findings](#)
- Age-Friendly Portland research: *The World Health Organization Age-Friendly Cities Project in Portland, Oregon, USA* ([Full report](#))

Additionally, staff will conduct outreach to developers, architects and advocacy organizations who build or advocate for accessibility and disability and age friendly housing. This may include staff or representatives of the following:

- Community Vision
- Disability Rights Oregon
- Oregon Council On Developmental Disabilities
- Northwest Pilot Project
- Liveable Homes



Development Professionals

Staff will conduct interviews with developers and architects of mid-scale residential, mixed-use development, and affordable housing. Interviews will focus on gaining insight into the current bonus structure, regulatory impediments and opportunities that may exist to unlock more housing development, as well as other potential bonuses to incentivize specific housing types (such as deeper affordability, family-sized units, senior and accessible housing). The interviews will focus on identifying what is working, what is not, and barriers to constructing higher density/taller buildings and needed housing types. The initial interviews will occur in task 2 but additional interviews may take place in tasks 3 through 5. Project staff will:

- Identify and invite up to 15 interviewees
- Develop interview questions
- Coordinate meeting logistics and conduct interviews
- Summarize interviews

These interviews may include staff or representatives of the following:

- | | | |
|------------------------|----------------------------------|------------------------------|
| • Portland Houseworks. | • Project PDX | • LiveAble Homes |
| • Edlen | • Ethos | • Urban Development Partners |
| • Bora | • Security Properties | • Adre |
| • Community Vision | • Holst | • Owen Gabbert LLC |
| • Related NW | • Community Development Partners | • Killian Pacific |
| • Urban League | | |

Questions for Development Outreach

DEVELOPMENT COST ASSUMPTIONS

- What is the general cost of constructing units in a stick-frame walkup (Type V) versus a midrise podium (Type III)?
- What does parking look like in your developments? Structured, tuck-under, surface? What is market demand (spaces per unit)? What are the costs?
- What are you looking for a return-on-cost? What is the current market cap rate?
- What are your operating costs assumptions?



PRODUCTION OF SPECIFIC UNIT TYPES

- **Costs and challenges associated for specific unit types:**
 - Accessible (esp. above federal minimum), opportunity cost (what tradeoffs are considered, e.g. building amenities, open space), true costs associated
 - Increased mix of unit types (e.g. studio, 1-, 2- and 3+ bedroom). [we assume that larger units are cheaper to construct per s.f., but the opportunity cost is fewer available units. Are there other cost considerations?]
 - Deeper affordability – (e.g. income restricted up to 60% MFI). Beyond the calculus in terms of lower rent or sales prices, what are other cost drivers? [e.g. compliance or application costs, other requirements beyond zoning code]
- **Accessible units –**
 - Are there challenges associated with providing Accessible types (e.g. building for universal design, very narrow tolerances in code, etc.)
 - Does your org. include accessibility features beyond the minimum federal requirements? Are there barriers to providing accessible units?
 - what are key features that you include for accessibility?
 - Is ANSI the gold standard? Is it too much/too little?
- **Multiple bedroom units** for larger households and households with children.
 - One of the needs identified is more housing for multi-generational families. Does your org. provide units that meet these needs? What are the barriers? Would bonuses be an effective way to encourage multiple bedrooms?
 - what sorts of features are unique for these types of developments/units?

BONUSES AND INCENTIVES

- Do you know about the existing zoning bonuses? How do you find information about the available bonuses? (e.g. call a planner, hire a consultant, read the code, read the city website, talk to other developers)
- What types of incentives have been, or do you think would be, the most beneficial to your organization?
- Would incentives be effective in delivering more accessible units? What about requirements for accessibility beyond federal standards?
 - Would FAR/Height bonuses be an effective way to encourage these?
 - Financial ? Other code (e.g. public works, building code, etc.)? Other (e.g. permit prioritization/ fast-tracking)



- Do you think higher allowed densities would make housing units more affordable? Is there a point of diminishing returns?
- Is it better to have more bonuses available that inevitably would compete against each other, or fewer bonuses that you would be able to “stack”.

DECISION MAKING AND DEVELOPMENT

- Are there development code or process barriers that you think should be addressed to make multi-dwelling housing easier to build in Portland?
 - have you seen benefit from recent changes already?
- What prompts you to make investment decisions – when developing
 - What swings you from an apt to MH when you have a site that allows either?
 - What role does commercial space have in these decisions?
- How do you decide how many units to propose in a project? Is zoning (e.g. height, FAR and building coverage) where you start and estimate what the market in that area will bear, or do you work from the land value and work back to the zoning? What are other considerations you include in your analysis? (e.g. need for parking, condition of infrastructure).
 - What density range would you target if there were no zoning limits (except height)?
- Looking to the future: in a better market, what could make these types more feasible
 - Construction technology (e.g. CLT, other promising changes?)
 - Is there an incentive that would make adaptive reuse more feasible (not just commercial, but small scale residential to more residential)?
 - Which bonuses could encourage tree preservation and/or if tree preservation as an attractive public benefit for developers to take advantage of in order to qualify for bonuses.



Inter-bureau Coordination Team

The City has recruited and established an Inter-bureau Coordination Team made up of members of bureau partners to review and provide feedback on the analysis and guide code development. The ICT will be composed of staff involved in real estate development and partners with existing industry knowledge and experience around housing development, particularly code and design impediments, including from Portland Housing Bureau, Prosper Portland, and Portland Permitting and Development. Additional topic experts from Bureau of Planning and Sustainability and other impacted bureaus will be invited to participate and/or support the work of the team. The ICT will provide feedback, insight, and ideas throughout the project. Meetings will be hybrid and occur throughout the project. Meeting up to 12 times.

Members

- Ariel Kane (BPS)
- Morgan Tracy (BPS)
- Jessi Conner (PHB)
- Dory Hellyer (PHB)
- Kathryn Hartinger (PP)
- Brian Moore (PP)
- Joel Devalcourt (PP)
- Gina Messa (PPD, P&Z)
- Ben Nielsen (PPD, DZ&HR)
- Matthew Berkhow (PBOT)
- Brian Landoe (PPR)
- Sam Brookham (BPS)
- Shannon Buono (BPS)
- Cassie Bellew (BPS)
- Blessie Saoit (BPS)
- Tom Armstrong (BPS)
- Shem (DECA Consultant PM)

Meetings

The ICT meetings are expected to be as follows, though meetings may be consolidated where appropriate:

MTG #	MONTH, YEAR	PROJECT STAGE	TENTATIVE TOPIC
1	Dec, 2024	Task 1	Intros, Intro to project, need, scope and timeline, preliminary reactions and considerations
2	Feb 24, 2025	Task 2, Code Audit	Preview base case, and peer city review
3	Mar, 2025		Draft bonus code concepts
4	Apr, 2025		Interview findings, Draft Bonus Prototypes Discussion
5	May, 2025		Central City and Inner East Guests
6	June, 2025	Task 3, Internal	Revised feasibility findings - Graphic models
7	Jul, 2025	Draft	In-house draft
8	Aug, 2025	Task 4, Discussion Draft	Review ICT Feedback
9	Sep, 2025		Discussion Draft Report and Code Amendments
10	Oct, 2025		Summary of community feedback?
11	Nov, 2025	Task 5,	Proposed draft
TBD	Dec, 25-2026	Proposed Draft	Presentation materials to explain final draft updates to the hearings body



Decision Makers

The Project Team will present at Planning Commission and City Council meetings several times during the legislative adoption process, corresponding to the timing of specific draft deliverables. The purpose of these meetings will be to provide decision makers with information from the project and ask for feedback on key questions about assumptions and policy issues.

Staff will present the project proposals to the Planning Commission and City Council, including the Proposed and Recommended draft of the proposed code amendments and project report. The public will be afforded the opportunity to testify to these hearing bodies, which can result in changes to the proposal that will be incorporated into the final amendments. The preparation and occurrence of these briefings and hearings will occur in task 5 and through implementation. In addition to presenting materials to Council and Planning Commission, staff will;

- Create mailing list and send required legislative notice
- Send notice to interested parties (including HNA/HPS engagement participants)
- Send notice to PC testifiers
- Updated map app for testimony submittals
- Conduct training for city staff
- Publish information for public/applicants

Planning Commission

- Meeting 1. TBD, 2025/26. PC Public Hearing.
- Meeting 2. TBD, 2025/26. Planning Commission Work Session.
- Meeting 3. TBD, 2026. Planning Commission Continued Hearing and Work Session.
- Meeting 4. TBD, 2026. Planning Commission Recommendation as-needed.

City Council

Based on previous council processes, we would expect:

- Meeting 1. TBD 2026. Mayor's Briefing. This meeting will present preliminary findings.
- Meeting 2. TBD 2026. Joint Bureau Council Office Briefing.
- Meeting 3. TBD, 2026. City Council Hearing.
- Meeting 4. TBD 2026. City Council Work Session. Present and make revisions based on review.
- Meeting 5. TBD 2026. Final City Council Hearing. Respond to any final questions and adoption.



Equity Assessment

Core Engagement Principles

At BPS, it is our responsibility to seek out the voices and interests of underserved and underrepresented communities who may be impacted by a decision and use an equity framework to:

- Identify disproportionate adverse effects this work may have on a community, particularly low-income populations and communities of color.
- Identify ways in which the communities' needs inform planning, investment, implementation and enforcement processes

We know that we must intentionally allocate resources to overcome the cumulative impacts of institutional racism on historically underserved and under-represented people. Investing resources into quality engagement can prevent costly course corrections in the long run. Because community engagement with communities of color and low-income populations is highly relational, one of the best investments that can be made is ample staff time to develop relationships with underserved and underrepresented community members. Navigating across cultures and addressing previous negative experiences with government requires both cultural competency skills and time. It is also important to note this work does not begin and end with a project timeline but is viewed as an ongoing investment that is connected across projects over time.

Analysis

The following section reviews the BPS Equity Toolkit in relation to the implementation of this project. When scoping projects and potential communities to engage in the work, BPS staff are encouraged to center impacted communities and continually ask the following questions;

What (if any) historical or current disparities related to this policy or plan is your team aware of?

QUESTIONS	DISPARITIES	NOTES
Have select racial/ethnic groups been inequitably impacted or denied access by this work, or similar/related types of initiatives in the past?	More Research Required	Black, Indigenous, Japanese, and Chinese residents and other racialized communities have historically been impacted by housing policies that determine where, what kind and tenure of housing developed in the City
Is income (or the ability to afford/pay) a determining factor in the ability to benefit from the outcomes of this initiative?	Yes	The model of housing development and access is not one of a public good in the US, therefore some income or access to support is often required to access housing, which this project is focused on facilitating the development of as an outcome



QUESTIONS	DISPARITIES	NOTES
Is personal wealth (e.g. Property or business ownership) a determining factor in the ability to benefit from this initiative?	Yes	Given the current economy and state regulations, multi-dwelling rental housing is most likely to be impacted, therefore renters, or those without ownership stake in their housing are most likely to be impacted by the outcome AND developers who have financial stake in the development of the properties with these bonuses stand to benefit the most.
Does the structure of this initiative employ a regressive cost/payment structure?	no	
Has the design of this initiative been analyzed for cultural relevancy or versatility?	More Research Required	
Have educated, middle- and upper-class persons historically benefited or had 'ownership' of the topic?	yes	Typically, we engage developers, or other fellow technocrats in the implementation of this work
Is participation reliant upon an individual's ability to comfortably interact with mainstream educated, middle- and upper-class persons, and/or BPS employees and/or their designated consultants?	no	In drafting yes, to benefit from the outcome, no
Are there other factors that may impact access?	More Research Required	

What possible disparities are known?

Access to dense, suitable housing in high opportunity areas has historically and systemically been withheld from select racial/ethnic/socioeconomic groups. Relatedly, similar/same groups have historically been relegated to rental multi-dwelling housing that competes with ownership opportunity often found in Portland's lower density areas

What possible disparities need further research and exploration?

If access to quality, affordable, family-sized and accessible housing will increase for protected classes through the changes made

How do you plan to find out the information that is needed to understand whether or not a disparity currently or historically exists?

Coordination and discussion with advocates



What is the landscape? Are there additional impacted communities-to consider based on their expertise or knowledge?

GROUP	BENEFIT?	HARM?	NEEDS?
Developers/Property Owners	Maximize value of property	Must consider tradeoffs in incentives	clear structures and articulation of bonus changes
City Review Staff	Simplification of review	changes/complication in review	clear structures and articulation of bonus changes
PHB, Home Forward, JOHS, Mult Co	Maximize value of property, increased ability to provide needed housing	Must consider tradeoffs in incentives	clear structures and articulation of bonus changes
Businesses	More dense housing choice available to workers near employment centers		

Roles

	INFORM	CONSULT	COLLABORATE	SHARED DECISION MAKING POWER	PROVIDE ADDITIONAL COMMENTS ON STAKEHOLDER GROUPS: How much do the major stakeholders care about this issue, project or program? What degree of involvement do the major stakeholders appear to desire or expect? What is the anticipated level of conflict, controversy or concern on this or related issues?
General Public	✓				Educate stakeholders about the rationale for the policy or plan; how it fits with BPS goals and policies; issues being considered, areas of choice or where input is needed. Invite for testimony
Racial/Ethnic Groups		✓			Urban League / NAYA - should/could include in non profit developer interviews, black-led service and housing provider. Invite for testimony and interview
Community and Faith Based Organizations and Neighborhood Groups		✓			Affordable housing developers (Portland housing oregon, HLA), accessibility advocates/experts, NW Pilot, Urban League, etc. Invite for testimony and interview
Private For-Profit Business Sector		✓			Developers, Oregon Smart Growth. Invite for testimony and interview
Local Elected Officials and Advisory Bodies		✓			Service area staff, DRAC, Historic Landmark Commission, Design Commission
Other BPS Divisions, Work Units, or Employee Teams			✓		Interbureau working group
Other City or County Departments or Agencies			✓		Interbureau working group
Other Public Agencies	✓				Mult Co, DLCD
Other		✓			

