

A G E N D A

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METRO

Agenda

MEETING: METRO COUNCIL ADVANCE
DATE: August 15, 2005
DAY: Monday
TIME: 3:00 PM
PLACE: 5485 SW Nyberg Lane, Tualatin

CALL TO ORDER AND ROLL CALL

- 1. NEW LOOK AT 2030**
- 2. MAYOR'S SYMPOSIUM PLANNING**

ADJOURN

Metro Council Advance on Region 2040 Review Process

Monday, August 15, 2005

3:00 to 5:00 p.m.

- I. Purpose of Meeting/Desired Outcomes – Robin McArthur

- II. Branding (30 minutes)
 - Michael Jordan - intro
 - Janice Larson

- III. Proposed Process/Timeline/Budget Issues (30 minutes)
 - Robin McArthur

- IV. 2030 Forecast and Allocation - inputs/outputs/policy levers (45 minutes)
 - Andy Cotugno/Dennis Yee
 - Discuss process for agreeing on an RTP or "interim forecast"

- V. Mayor's Forum - what do you want to get out of it? (15 minutes)
 - Michael Jordan/Robin McArthur

Broad Policy Questions We Need To Answer

DRAFT

1. How can we work together to focus development in centers, corridors, and employment/industrial areas?
2. How can we facilitate planning in areas recently brought into the Urban Growth Boundary (UGB)?
3. How can we improve the UGB process to reinforce the Region 2040 Growth Concept and to make it more predictable, timely and less controversial?
4. How should we engage communities throughout the Metro area and Willamette Valley to agree on a vision and implementation strategies for the future?

AGENDA

Naming the 2040 review
August 15, 2005

Outcomes

- Direction on the approach for developing a brand and communications plan for the 2040 review
- A list of potential names

Brief overview

How to come up with a name – best practice (Get Centered! Nature in Neighborhoods)

- Analyze situation – identify goals, target audience, objectives, and desired impression
- Brainstorm alternative names (project team, in-house marketing experts and/or consultants)
- Test options
- Revise, refine and launch

1. Situation analysis matrix

Review and revise audience list, audience interest list and desired outcomes; define the project/campaign goal and objectives.

Audience list

Review draft
Revise and cluster
Prioritize

Research notes

Hand out notes from August 5
Hand out preliminary word lists from Smart Growth frame article

2. Evaluation criteria

Establish evaluation criteria:

Does it trigger the right frame?

Does it speak to the audience interest?

Is it memorable, unique and descriptive?

Does it describe the process/project?

Is it easy to remember?

Is it short or can it be abbreviated to a meaningful nickname?

Will it create the desired impression in the target audience? Does it speak to the audience's interest from their point of view?

Does it have strong promotional capacity and allow for message and graphic design extension?

3. Brainstorm exercise

Warm-up

- Use sticky note process to generate a list of attributes and qualities that describe the 2040 review
(*Word categories: future, geography, values, desired outcomes, etc.*)

Names

- Use sticky note process to generate list of potential names
- Cluster and refine
- Use criteria to evaluate and narrow the list to 3-five choices

Next steps

Option A

Set up meeting with Council and key project staff to fully develop the audience matrix.

Draft a creative brief defining the current situation, position statement and communication objectives

Hire consultant or assign in-house staff to develop name options, key messages and communications strategies

Test name options against evaluation criteria and with informal or scientific survey and/or focus groups

Option B

Generate additional options with follow-up brainstorm exercises with project and marketing staff

Conduct an informal test of the top choices with people who represent key target groups and make a recommendation

REGION 2040 REVIEW – SITUATION ANALYSIS MATRIX

091505c-04
8/6/05 FIRST DRAFT JL

Audiences	Interest in 2040 review	Desired outcome of branding	Messages	Best communication tools, means or messenger	Notes
<p>Residents of the region</p> <p>Families and children Employees Home owners Individual property owners Renters Youths (20 to 30 year olds) Seniors Suburban residents Urban residents Metro employees</p> <p>Communities of interest</p> <p>Environmental groups Education community Scientific community Health community Oregonians in Action faith-based communities Underserved communities</p>	<p>What is 2040? What is Metro? Life style choices Land value Housing costs Protecting farmers and the food we eat Safe neighborhoods Transportation choices Jobs</p> <p>Clean water Access to nature Health Real costs Cultural legacy Regional heritage Economic gain Flexibility, no hassle Ability to use land how they see fit</p>	<p>The regional plan is seen as responsive Broad ownership of the region's future A continuously renewable planning process Metro is the process owner Metro is the place for regional solutions There is a new crop of champions for regional planning Positive association of Metro to their values Call Metro first Self-empowerment with help from Metro (community stewardship)</p> <p>Working with Metro gets you what you want Metro is a government of, by and for the people Metro is you</p>	<p>What are we leaving for our children? Your property investments are more secure Act locally, think regionally</p>		
<p>Government agencies and elected officials</p> <p>Cities and counties Special districts State of Oregon United States</p>	<p>Want to represent the will of their citizens Focus within their boundary Want to keep their coffers full Simplicity at the permit counter Required to meet state and federal land use laws Local control Control over neighbors Fairness and equity Respect and credit for unique characteristics and efforts</p>	<p>Think outside of their boundaries Act based on awareness that land use, transportation and conservation issues are bigger than one jurisdiction Inspire local innovation and are willing to take risks See Metro as a helper, facilitator</p>	<p>Metro is here to help Cooperation is better than competition Metro can help you manage your neighbors We can save you money We can support your identity and unique position</p>		
<p>Development interests</p> <p>Large parcel property owners Non-residential developers Residential developers Architects Landscape architects Builders and contractors</p>	<p>Livability Economic gain Control of assets Flexibility, no hassle Freedom of marketplace Concerns about limitations on business choices</p>	<p>Become public advocates for planning Agendas are in the open Interest in taking ownership Sign up for action Form coalition and lead campaign Take responsibility for willingly developing in agreed upon way</p>	<p>This is economically a good thing There are economic advantages and opportunities Metro is here to help The region needs your leadership The region needs you and your money</p>		

The New Look at 2040

Foundations of Framing/Reframing

- Frames are mental structures that shape the way we talk about what's important, who's included, and what we want. As a result, they shape the goals we seek.
- We know frames through language. All words are defined relative to conceptual frames.
- Because language activates frames, new language is required for new frames.
- Thinking differently requires speaking differently.

Filling in the picture ... goals for reframing the Region 2040

1. Redefine the terms of the discussion.
2. Define the purpose of change.
3. Get the new definitions used by others – first by allies, then by detractors.

Framing is not Branding...

- Branding is not a slogan, not a message, not a logo.
- A brand is a promise that a marketer/supplier delivers upon consistently over time.
- Brands are both a commitment and a community. Brands that stick give a customer the opportunity to say "the brand is a reflection of me and my values".
- Brands are about tapping into what the customer wants, what motivates a loyalty to a product in spite of the cost.

The New Look at 2040 Framing Examples

Old Frames

Planning process, moving the UGB

Growth is bad and something that must be held at bay

Oh no, people are moving here

Land use law, LUBA, LCDC, lawyers, formulas are the way

About protecting farmland, forests

Density, upzoning, infill

New Frames

Creating communities, increasing land Values

Growth is always good, inevitable

This region is the envy of the world, the Paris of the new world – how do we leverage that?

Nature vs. business is over, no longer valid

About protecting farmers, farming the food we eat, the nature that defines our quality of life

Choices in lifestyles, life choices, anywhere in the region is a good place to live

Metroscope - Land Use Forecasting Model and Policy Analysis Tool

Policy Issues		2030 Forecast Technical Input	2030 Forecast Policy Input	Possible Interim Policy Changes	Long-term Policy	Future Economic Development Policy
Policy Issues and Model Outputs						
input	2030 \Regional Forecast (pop-HIA & emp-SIC)	2002 UGR Forecast				Need for a Council-approved economic advisory panel
input	Gross-to-net: streets, parks and churches (buildable lands)	2002 UGR				
output	Density - determined by MS based on real estate supply & demand factors such as available capacity and kind of demand					
output	Capture Rate - Jobs		Land supply policies impact capture and refill rates which are economically intertwined with regional growth.		Land supply policies impact capture and refill rates which are economically intertwined with regional growth.	
output	Capture Rate - Housing					
output	Center's Capture Rate (not a UGR target)					
output	Refill Rate - Jobs					
output	Refill Rate - Housing					
output	Vacancy Rate	~ 4% rate assumed for housing				not a policy variable; need to explain that periods of high job vacancy rates are temporary dips that vanish when economy rebounds -also source for Metro policy to achieve high job refill rates
coordination	Clark county forecast - coordination	assume alternative 6 UGA adds		Coordination allocation of Regional Forecast with Clark county.	Coordination allocation of Regional Forecast with Clark county.	
coordination	Neighboring city forecast (growth to approximate past trends)	assume 20 year land supply in future years	Assume status quo growth trends		Coordination of Regional Forecast with nearby cities.	
Land Supply / Capacity Assumptions						

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input	RLIS Vacant Land Inventory (2000)	2000 data			update 2004 or later buildable lands data	
input	Update Local Zone Class definitions - regulatory density assumption	2001 zoning (SRZ)		Update regional capacity with recent zoning updates.	Policy lever that directs local jurisdictions to further upzone local zones to achieve higher densities in 2040 design types	
policy input lever	Future Up-zone of existing parts in the UGB (e.g., corridors and Portland's central eastside industrial sanctuary)	No upzoning assumed (see: Urban Renewal)	Upzoned designated urban renewal areas		Recent studies suggest that more capacity could be squeezed into corridors. Recognize that some parts of the Region could benefit from upzoning/re-zoning in order to reinforce 2040 objectives.	
input	Title 3: water quality protection measures		Title 3 map	Assumes "modeled" Title 3 for new urban areas		
input	Goal 5 assumption in old UGB - technically how do we characterize the capacity takedown?		No Goal 5 deduction		Decision rule needed to discount future capacity lost to Goal 5 protection	
input	Goal 5 assumption in new urban areas - technically how do we characterize the capacity takedown?		No Goal 5 deduction		Policy interpretation to discount buildable land supply	
input	New "Get Centered" capacity - Council policy implementation could generate additional capacity than currently zoned		No upzoning	Increase urban renewal subsidy in Central City; refine elsewhere	Additional housing capacity could be generated from efforts to boost development of Centers	Ec. Dev. Initiatives & subsidies to promote more aggressive centers growth
policy input lever	New prospective public investment/subsidy measure (e.g., urban renewal)	25% cost of construction subsidy per PDC	All existing + planned Urban Renewal Areas + 2040 centers	Add Portland Harbor	Prospective areas for future urban renewal areas need to be vetted politically to gain acceptance.	Local jurisdictions to implement new urban renewal places
policy input lever	Up-zone new LRT station communities (e.g., I-205) Up-zone near commuter rail stations		No upzoning assumed	Local jurisdictions already asking DRAFT allocation to reflect changes to TAZ where LRT station could be assigned	Opportunity to program in higher capacity in future forecast periods.	
input	Master Planning (e.g., Damascus & Springwater Corridor, presently assuming a sketch plan)	Assume a sketch plan		Utilize approved Master Plans when completed	When Master Plans are complete, can include details in Metroscope or Policy direction to prospectively upzone in future years	

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policy input levers	UGB additions (uses exception lands first) - State land hierarchy definitions (current laws being interpreted & implemented in Metroscope UGB adds)		Use current state land hierarchy		related to sub-regional rule; requires legislative fix	Ec. Dev. Initiatives could speed-up transition of new urban areas into urban style development densities
	Timing of UGB addition readiness for development (Infrastructure readiness)		Lag assumed to simulate delay in infrastructure prepared-ness	infrastructure readiness; MS: lag time = 8 to 13 year delay from enactment of UGB addition fine tune to better correlate to expected lag times	Policies/financing could be more explicit in timing of development	
	Sub-regional analysis (not presently included in Metroscope assumptions)		No input or assumption		requires legislative fix to current legal language	
	Urban Reserves (not presently included in Metroscope assumptions)		No input or assumption		Urban Reserve Planning (see Master Planning)	
	Hard Edge (not presently included in Metroscope assumptions)		No input or assumption		political debate needed to sort out future urban reserves, infrastructure needs, neighbor city policy, and upzoning	
policy input lever	Zoning for UGB adds (rough area planning is currently assumed to achieve 2040 density goals)		Assume 2040 density as applicable		Master Plans or set of standardized technical assumptions to compute potential capacity	
policy input lever	Rural Zoning (assumes current rural zoning; does not take into account M37 development)		No policy assumption			
coordination	Clark county UGA additions	Use Clark county UGA alternative 6				
	Clark county Capacity	2000 vacant land and zoning				
	Clark county new urban area zoning	Use sketch plan				
	Clark county urban renewal initiatives	Use existing assumption	No new UR			
	Clark county zoning for new areas	Use sketch plan				Open dialog between Metro and Clark county commission - include RTC, Bi-state commission and city of Vancouver

Metroscope - Land Use Forecasting Model and Policy Analysis Tool

Policy Issues		2030 Forecast Technical Input	2030 Forecast Policy Input	Possible Interim Policy Changes	Long-term Policy	Future Economic Development Policy
coordination	Neighboring city capacity estimates (also: green corridor and rural reserve policies)	assume 20 year land supply in future years	Assumes status quo policies		Open dialog with neighbor cities.	Identify & promote economic policies consistent with 2040
Infrastructure Assumptions						
policy input lever	Regional Transportation Plan (RTP) projects in future years	Financially Constrained RTP		Financially Constrained RTP	Travel times are affected by land use choices and in turn travel times impact location choice for households. Road projects affect travel times and options. Consider land use affects of major new highway, bridge and road improvements	
policy input lever	Sewer and Water & other infrastructure facilities		Lag assumed to simulate delay in infrastructure preparedness	infrastructure readiness; MS: lag time = 8 to 13 year delay from enactment of UGB addition fine tune to better correlate to expected lag times		Economic incentives to initiate faster urban style development to pay for new infrastructure. New tax incentives.
policy input lever	Local Ec. Dev. Policies-influences development readiness		Urban renewal & subsidies			State, local, or regional econ policy
input	Neighborhood Quality Index (unchanged in future years)	2000 estimates				

Metroscope Notes:

Metroscope incorporates economic theory and real estate economics to predict future land uses. Future housing demand is derived from the housing choices that individual types of households make depending upon their household size, income and demographic characteristics of members of the household. As examples, wealthier households can afford more housing. Households with kids are more likely to demand single family residences. Poor households will tend to select to live in apartments. Older households and single person households are more likely to select housing units that are smaller. Where different types of homes get built depends on the supply of land (refill or vacant), its zoning, and the cost of construction for different places in the region. Some parts of the region have a scarcity of land for single family construction, whereas the same location may have significant amounts of land suitable for multifamily construction.

As the price of home ownership rises (or rents) more home construction will be developed as profit margins grow with rising real estate prices. Some places like downtown Portland have a lot of housing demand, but the cost of construction is expensive so very few households can afford to live there and builders don't want to build because the market is thin and the cost of construction is high relative to actual market demand. In other instances, demand may be high for a select location, but there is very little capacity for more construction and refill is not an option because the price point for redevelopment is too low and demand is not for multifamily. (Redevelopment that replaces an old house with a new house does not add to existing capacity.) Zoning determines what type of housing can be located in areas around the region and the legal maximum density permitted.

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DRAFT

To: MTAC/TPAC
From: Andy Cotugno
Subject: 2030 HH and EMP allocation subcommittee
Date: August 9, 2005

At the joint meeting on Wednesday July 27, 2005, MTAC/TPAC reviewed the preliminary 2030 household and employment allocations for the Metro regional area and agreed to appoint a subcommittee to review the allocations further and suggest alterations that would make the allocations acceptable for interim use on a number of planning projects. A subcommittee met on Tuesday August 9 and identified several alterations for consideration. With additional concurrence from MTAC, and willingness to work with Metro to refine the assumptions, Metro is prepared to rerun the Metroscope and Travel Demand models to produce a new allocation over the next two months. At the same time, Metro will continue to develop the work program that will facilitate a longer-term examination of policies that affect household and employment allocations and work with the region to recommend alterations to these policies.

Proposed Alteration:

1. **Use regional zoning (or Comprehensive Plan for Portland) for 2004:**
Many of the areas where staff expected to see higher growth don't show higher growth. This is partly due to the use of the 2001 zoning data instead of current zoning. The 2001 data was "current" when the work began and has not been updated in the model. A new 2004 regional zoning data is now available.
2. **Review and/or reassign "urban renewal" surrogate factors to centers and station areas:**
The Metroscope model assumes a continuation of existing policies that support urban renewal and other targeted public intervention strategies to support development in centers and station areas. Metro staff, working with local jurisdiction staff, has estimated the location, scale or size of these public investments. These assumptions can be revised to better reflect existing policies for investment in the Central City, station communities along I-204 or other locations.
3. **Update Design Designations in New Urban areas to match the designations now proposed in Concept Plans for Springwater, Damascus, and others.**
The design designations can be updated to reflect the latest adopted policies.

4. Delay or shorten the timing of development readiness in New Urban Areas to better reflect existing policy.

The Metroscope model currently assumes an 8 year lag between the time when land is assumed to be brought into the UGB and when it is assumed to be ready for development with infrastructure in place. Over the next 5, 10 and 15 year periods, the model assigns development, reflecting the alternative development choices available. The sooner the land is ready for development, in general, the more it attracts a share of the 2030 allocations. The current assumption does not reflect the public intervention in existing policy that will make some areas available sooner (ie Springwater or Shute Road) and the lack of public intervention in existing policy that may make some areas available for development later (outside of Sherwood or Oregon City). Adjustments to this “lag” factor can be made with further clarification of existing policy.

In addition, the subcommittee discussed Neighbor Cities and Neighbor Counties and the need to be more explicit in defining how much growth the allocations assume for these areas and how the resulting growth compares to other, state, forecasts.