METRO

Agenda

MEETING: METRO COUNCIL GREATEST PLACE WORK SESSION
DATE: January 16, 2008
DAY: Wednesday
TIME: 2:00 PM
PLACE: Metro Council Chamber

CALL TO ORDER AND ROLL CALL

Objectives:
- Council direction on "Making the Greatest Place" Engagement Strategy Outline
- Preview of budget proposal to fund "Building 2040 Today: An Update of the Region's Growth Concept"
- Provide status report/Council input on Regional Infrastructure Initiative
- Provide status report/Council input on urban/rural reserves

2:00 PM **I.** **"Making the Greatest Place" Engagement Strategy Outline**
- Overview – Building on 2007 Accomplishments in 2008
- Discussion
- Question: Does the strategy provide sufficient details on outcomes, audiences, messages, and phasing to guide specific events and engagement activities?

2:30 PM **II.** **Preview "Building 2040 Today: An Update of the Region's Growth** Concept" – Lisa Miles, Janice Larson, Stephanie Swanson
- Overview
- Discussion/Next Steps
Attachment: Building 2040 Today: An Update of the Region's Growth Concept

3:00 PM **III.** **Regional Infrastructure Initiative – Robin McArthur/Malu Wilkinson**

- Context/Status
- Upcoming Milestones
- Connections to other "Making the Greatest Place" tracks
Attachment: Malu Wilkinson memo on Infrastructure Analysis Update

3:30 PM **IV.** **Urban and Rural Reserves**
- Program Updates – Councilor Harrington
   a. Revised Reserves Milestone Chart
   b. Revised Guiding Principles
   c. Reserves Steering Committee

- Council Input to Councilor Harrington for Reserves Steering Committee Discussion on Study Area Identification – Tim O'Brien
    a. Considerations for selecting study area boundaries
    b. What data layers should be considered?
- Principles of Public Involvement and Engagement Strategy – Ken Ray

Attachments: Revised Reserves Milestone Chart, Proposed Data Layers to ID Reserve Study Areas, Reserves Data Layer Matrix (urban, natural features, agricultural)

ADJOURN

Building 2040 Today:
An Update of the Region's Growth Concept

Draft

Background
More than a decade has passed since the creation of the 2040 growth concept. Recent research confirms that residents today still strongly support the values and goals upon which 2040 was founded – but times have changed. The pace of growth has accelerated – over 200,000 new residents have entered the region since 2040 was adopted – technology has changed, social awareness of global environmental issues has risen dramatically, and the means to implement the 2040 vision continue to evolve.

Metro's current policy and implementation efforts face a number of communications challenges:

- **What is the 2040 Growth Concept?** Many citizens, particularly new entrants and young people, are unfamiliar with the regional goals outlined in the 2040 growth concept.
- **What does the 2040 Growth Concept look like?** Citizens have difficulty visualizing the implications of the 2040 growth concept on future development in their communities, and particularly visualizing what *good* design looks like on a community scale.
- **What does the 2040 Growth Concept have to do with global warming?** Citizens are increasingly aware of urgent global environmental issues but do not see the connection between regional planning and development efforts and these larger concerns.

Despite these challenges, a confluence of agency-wide and regional events have created an opportunity to tell the 2040 story and implement it in innovative new ways:

- **Regional coalition –** Metro has successfully engaged local elected officials and policy makers, through outreach efforts and regional roundtables, resulting in collective advocacy for the successful 2007 legislative agenda.
- **Energized elected officials –** Community leaders throughout the region have embraced the vision of 2040 and been inspired through the Get Centered! events, and local redevelopment "success stories." Elected officials now need resources and support to tell that story to their community members.
- **Strategic plan –** The Metro planning department's new strategic plan calls for a focus on place making and development activities to spur implementation of the 2040 growth concept.
- **Web and communication improvements –** Metro has recently launched a redesigned web site and is poised to create a positive brand and identity for Metro that resonates with citizens throughout the region.

Proposed Campaign
The time is right for a campaign that renews the region's commitment to the 2040 plan, reframes regional goals within a broader global context, and builds support for catalyst placemaking projects that will help make the 2040 vision a reality. To galvanize support for implementation of the 2040 vision, citizens, neighborhood groups, business leaders, and government officials throughout the region need a fresh understanding of regional goals and priorities, and a clear sense of how their actions can shape a better future for our region and our planet.

This campaign will:

- Support local officials and "change agents" by enabling citizens to understand choices and impacts, imagine the future and embrace the potential for positive transformation of their communities
- Link local efforts and actions to urgent global issues and concerns
- Present key policy and development initiatives in an integrated, approachable and highly visual framework
- Provide technical training and resources to local staff and policy makers to facilitate local implementation efforts
- Infuse resources, energy and focus into key projects throughout the region that will be a catalyst for development in centers and corridors

The Building 2040 campaign has three distinct elements – **communication, tools and resources,** and **placemaking**, each with targeted audiences and strategies. The two-year campaign will be targeted and phased to coincide with and support the other tracks of the planning "road map", with an estimated completion date at the end of 2009.

Element	Audience	Activity	Content
Communication	Targeted audiences will include elected officials, neighborhood groups, the development community, chambers of commerce, landmark commissions and other community organizations.	Assist community leaders to build broad understanding and public support for implementing the 2040 vision. Help create fertile ground in the community for later stages of place making and development.	Fresh, visually engaging communication package will tell the 2040 story in an accessible, compelling way. Formats to include print, presentations, video, pod casts and web interface.
Tools and resources	Local elected officials, government staff, planning commissions and the development community	The "2040 Academy" will bring practical tools and resources for community development out into local communities.	Workshops and resources will include community investment toolkits and cover topics such as real estate economics, finance mechanisms, parking strategies, street design, etc.
Placemaking	Regional public and private sector leaders	The campaign will jumpstart, amplify and leverage catalyst projects to help local communities achieve their vision and advance regional 2040 goals.	A series of strategy workshops led by a team of experts will assist five selected catalyst projects implement on-the-ground results, which will be shared as examples to other communities.

Communication: Climate Change, Lifestyle Choice, and the 2040 Story

Metro will harness the power of imagery and video to help citizens understand how public investment and infill development combine to make great places locally, while producing global benefits. The campaign will provide updated information to citizens throughout the region, and will help to educate young people and new entrants about the 2040 vision. A fresh, visually engaging communications package will tell the 2040 story in an accessible and visually compelling way, highlighting local success stories and featuring voices of community leaders across the region that are working to implement the 2040 vision. Metro will pursue partnerships with a range of local organizations in order to implement this campaign and establish broad-based-support. A strategic alliance with other organizations will help sponsor and shape this effort.

A social marketing campaign that uses mass marketing techniques is not feasible given current allocated resources. Instead, this campaign will offer a right-sized effort to support the transformative policies under development while invigorating key catalytic projects in communities throughout the region. The target audience for campaign communications will be public and private sector decision makers and opinion leaders, including elected officials and staff, advocacy groups, planning commissions, neighborhood organizations, and the development community. Earned media will be a primary method by which to disseminate the campaign themes and messages more broadly.

Campaign Themes and Tactics

The campaign pivots on implementing the 2040 Growth Concept as a personal value and a public commitment. Prior to launching the campaign, staff will work with marketing consultants and with Council to develop and refine the campaign tone and identity, and package activities and messages in a way that will best resonate with target audiences. The proposed primary themes include:

- Climate Change and Energy -- Local transportation and land use choices have urgent global consequences as well as local air quality impacts.
- Lifestyle Choice and Quality of Life -- Implementation of the 2040 plan will expand the array of lifestyle, transportation and housing choices for citizens of the region, and will accommodate expected growth while retaining and enhancing the quality of life of the region.
- Community Action -- You can help shape a positive future for your community as we work together to build the 2040 vision.

Campaign communications will help people visualize the implementation of green, affordable and livable communities, protecting the region's environment and economy while creating a great metropolitan region for generations to come. The campaign will utilize a wide range of available formats:

Print: A new booklet will replace the outdated "Nature of 2040" and describe current policy work. Simple brochures will enable the campaign to effectively leverage existing outreach efforts (RTO, business recycling, natural gardening, public meetings, etc.) of both Metro and its partners, reaching wider audiences with our message.

Presentation: A presentation for use by councilors and staff would help to tell the 2040 story and explain key policy initiatives to a range of audiences.

Video: A general video would tell the 2040 story and discuss the environmental and economic benefits of sound regional development. Ongoing video vignettes and interviews with community leaders and other 2040 implementers will continually update the story with highlights of local placemaking activities.

Podcast: Monthly podcasts will feature current aspects of policy and implementation work and will allow an opportunity to showcase community leader perspectives.

Web: The updated communications in many formats will bring fresh content and imagery to the new website and the web interface will allow us to continually feature new video vignettes, information and points of view.

Tools and Resources: 2040 Academy

The purpose of the 2040 Academy would be to help local elected officials, planning commissions, design review boards and staff better understand how aspects of policy and real estate economics affect development in their community, and familiarize them with the range of federal, state, regional and local tools that can help implement their development aspirations.

The 2040 Academy will be developed to share critical technical information and tools with local partners in a customized, locally responsive format. The Financial Incentives Toolkit and the Design and Development Code Toolkit currently under way will be a valuable component of this effort. Metro will develop additional content to supplement the toolkits as necessary. Content for the 2040 Academy may include topics such as:

- Real estate economics: the up-front costs and long term benefits of mixed use development
- Urban living infrastructure: anchoring downtown redevelopment with the right mix of uses, attractions, and public amenities
- Financial tools and incentives: the public sector's role as a catalyst to mixed-use development in downtowns and main streets
- Innovative design and development codes: policy, planning and design guidelines necessary for successful implementation
- Public-private partnerships: case studies of innovative redevelopment partnerships
- Parking strategies: what to build, how much to build, alternatives, and why parking costs so much
- Transportation management associations
- Street design best practices
- Green building and nature friendly development
- Affordable housing strategies

Metro will hold initial sessions of the 2040 Academy during the summer and fall of 2008. These sessions will be digitally recorded so that the 2040 academy content will ultimately be available to other individuals and groups to access this important resource. Metro will involve other partners in this effort, such as ULI, APA, PSU, CRE as well as technical consultants.

Placemaking

Metro will engage regional leaders in testing and applying key ideas of the campaign through specific catalyst projects and placemaking efforts. The campaign will help to jumpstart, amplify, and leverage these catalyst projects to help local communities implement on-the ground results in their centers and corridors.

Building 2040 Development Initiatives

Metro will convene a distinguished team of design, development and finance experts to advise local communities on catalyst projects that could help them to reach their long-term vision while advancing the region's 2040 goals. Five project sites/study areas will be identified for Building 2040 Development Initiatives in 2008-09 based on selection criteria consistent with regional and campaign goals. Sites located in centers and corridors would be eligible. The technical assistance will (likely) consist of a series of focused strategy workshops, but ongoing funding and support will also enable the communities to follow up with the technical experts as they work further to implement projects.

Mayors' Institute for City Design

Metro will be collaborating with the University of Oregon and Portland State University to host a session of the Mayors' Institute for Community Design (MICD). This national program, a partnership of the National Endowment for the Arts, the U.S. Conference of Mayors, and the American Architectural Foundation, has awarded a $50,000 grant to implement the MICD session during the spring of 2008. Four local mayors will be invited to participate in this intensive three-day program, along with four mayors from other cities throughout the Northwest. During the program the mayors will share specific community design and development challenges facing their communities, and an interdisciplinary panel of eight nationally recognized design and development professionals will respond with their advice and expertise. Each of the panelists will also make a presentation to the group on a relevant topic of interest. The overall theme of the MICD session will be targeted to complement and build upon the themes of the Building 2040 campaign.

Building 2040 Campaign Schedule and Events – 2008

Campaign Teaser (Feb): The campaign will be introduced to the public through a teaser in conjunction with the Integrating Habitats design competition.

Campaign Launch (April): The campaign will be officially launched at an expanded Regional Roundtable type event. This event will also serve as a Planning Commissions Summit and chance to highlight the Design/Code Toolkit, so local staff and planning commissioners would be encouraged to participate. Metro will highlight the involvement of other campaign partners, and keynote speakers will address campaign themes. Metro will issue a call to action to local communities to define their vision and focus work on specific catalyst projects in preparation for a "Building 2040/Making the Greatest Place Summit" to be held in late fall 2008 or early 2009.

Mayors Institute for Community Design (May): Four mayors from the metro region will be selected along with four other mayors from the northwest to participate in the MICD program, hosted jointly by Metro, the University of Oregon, and Portland State University. This two to three day event will combine presentations and discussions by the mayors and a panel of national experts, along with local tours, receptions and exhibits.

Local Campaign Events (Spring-Summer): Metro will join with campaign partners and local stakeholders, community groups and governments to help deliver the messages of the campaign in a practical and locally appropriate context. Events would be timed and themed to add value to local catalyst projects and the Building 2040 Development Initiatives. Local partners will play the key role in organizing and hosting these sessions. Metro's role in these local events will be to provide modest funding and appropriate content accessible to the target audience. Metro will seek to hold at least one outreach event in each Metro district during the spring and summer of 2008.

Building 2040 Development Initiatives (Summer-Fall):
Metro will offer technical support and assistance to 5 communities through the Building 2040 Development Initiatives and will provide staff support to other jurisdictions to help clarify and refine their centers/corridor strategies in advance of the fall summit. The Building 2040 Development Initiatives will bring together local leaders, staff, developers and technical experts for strategy workshops as appropriate to the particular project.

Building 2040 Academy (Summer-Fall): Initial sessions of the 2040 Academy will be held in summer or fall. The topics and timing of the sessions will be coordinated to complement training activities of other partners, such as the APA Planning Commissioner Training series.

Building 2040/Making the Greatest Place Summit (November or January 2009): This roundtable event will be an opportunity to share the outcomes of the Building 2040 Development Initiatives and assess progress and results at the local level. The event will feature a trade-show or science-fair element that will enable all local jurisdictions to "show and tell" about the vision they have developed for their center(s) and corridors, as well as results and steps taken so far. During this event we will also discuss more broadly each community's plans and capacity expectations and how public investment priorities and strategies can help to realize their ambitions. In this way, the spring and fall roundtable events will also tie directly to the "Road Map" investing track goals, prioritizing investments and recalibrating capacity expectations in preparation for the next Urban Growth Report.

Estimated Campaign Budget

FY 07-08

Expenses

Marketing and communications consultant	60,000
Printing	20,000
Campaign launch event	20,000
Campaign launch speakers	7,500
Mayors Institute for City Design	50,000
2040 Academy technical consultants	25,000
2040 Academy materials	25,000
Local campaign events	11,500
Building 2040 Development Initiative consultants	60,000
Staff (Public Affairs Program Assistant II -- Events Coordinator)	21,000
TOTAL FY07-08 Campaign Expenses	**$300,000**

Revenue

Making the Greatest Place contingency allocation FY07-08	150,000
Get Centered! existing budget	75,000
Long Range Planning existing budget	25,000
Mayors Institute for City Design grant	50,000
TOTAL FY07-08 Campaign Revenue	**$300,000**

FY 08-09

Expenses

Ongoing communications design and printing	20,000
Building 2040 Development Initiative consultants	175,000
Building 2040/Making the Greatest Place summit	25,000
Local events	9,500
2040 Academy technical consultants	15,000
2040 Academy event costs	5,000
Staff (Public Affairs Program Assistant II -- Events Coordinator)	50,500
TOTAL FY08-09 Campaign Expenses	**$300,000**

Revenue

Making the Greatest Place contingency allocation FY08-10	300,000
TOTAL FY08-09 Campaign Revenue	**$300,000**

METRO

To:	Council President Bragdon and Councilors
From:	Malu Wilkinson, Principal Regional Planner
Date:	December 14, 2007
Re:	Infrastructure Analysis Update

I wanted to give you a brief update on the Regional Infrastructure Analysis since the last chance we had to discuss it was at the September 19th New Look Work Session. At that time we described our approach to the analysis, and received direction from you on the types of infrastructure to be included in our work. You identified the following infrastructure types: roads, bridges, bike and pedestrian connections; sewer; water; stormwater; energy; transit; urban parks and greenspaces; parking facilities; schools; and civic buildings and facilities (including fire & police stations, libraries). Since then we have held our first workshop for service providers, distributed a questionnaire and data request, explored options for determining comparative infrastructure costs, and met twice with the Infrastructure Advisory Committee.

Workshop #1
On October 19th we held the first of a series of three workshops with infrastructure service providers. The objectives of the workshop were to:
- Describe the link between public investments in infrastructure and implementation of the 2040 Growth Concept,
- Explain Metro's approach to quantitative and qualitative data collection to successfully document regional needs and gaps,
- Build awareness of infrastructure challenges across "types" and jurisdictions, and
- Provide an opportunity for providers of various infrastructure types to discuss challenges together.

We had a very successful turnout of around 60 people, widely distributed across the region. Some of the top challenges and opportunities we heard are described below.

Top challenges:	Top opportunities or solutions:
Replacement and upgrades of aging systems	Education/outreach to increase public awareness of the complexity of the infrastructure challenge
Coordination between different service providers	Build political leadership
Need to coordinate between public and private service providers of all infrastructure types	Pursue opportunities to coordinate to reduce redundancies, increase cost efficiencies
Lack of public recognition of issues and values related to infrastructure	Sustainability best practices
Not enough political leadership to take on the challenge of ensuring adequate infrastructure for growth	Demand management as a tool to provide services with more cost efficiency
Equity and the issue of who pays and when	Revise service standards
Uncertainty surrounding where future expansions will occur impacts the ability to plan for infrastructure	Revise SDCs to better reflect infrastructure needs and development impacts
Willingness and attitude of service providers to serve new areas	Pursue financial solutions such as increasing state revolving loan fund, expand construction excise tax, real estate development tax, etc.
We can't build, fund, or finance infrastructure the same way we did before	

Questionnaire/data analysis
In order to identify infrastructure needs to support achieving the 2040 regional goals, we developed a questionnaire and requested planning documents from all of the service providers in the region. Our consultants are currently reviewing the information we have received, their next step will be to identify gaps in the data and summarize it by infrastructure type and sub-region.

The Metro Council also identified schools as one of the key infrastructure types to be considered in the regional analysis. Schools are an important component of the great communities we aspire to support throughout the region. Information on the needs for other infrastructure systems is being collected by looking at local facilities plans, a questionnaire, and selected interviews. Representatives providing these infrastructure services have been involved with Metro on an ongoing basis on many matters of regional concern. However, the school districts are not as familiar with Metro and the region's 2040 vision. Information is needed on school district needs by early spring to fit into the regional infrastructure analysis. To this end, staff is working with the MPAC and MTAC school district representatives to plan a meeting in January 2008 with school district facility planners and finance directors to gather information for the regional infrastructure analysis as well as to engage with them about the urban/rural reserve planning and Metro's expected population growth.

Comparative infrastructure costs
What are the comparative infrastructure costs and benefits of investing in compact growth and infill development and less dense development at the edge of the urban area?

Answering the above question is an important aspect of this project, and is of particular interest in supporting development to achieve the 2040 vision, as well as to provide information on the relative infrastructure costs for urban and rural reserve planning and improving our approach to growth management based on urban performance. As part of the regional infrastructure and public investment analysis, we are looking to answer this question using three information sources:

- *National literature.* Our consultants, Cogan Owens Cogan, have begun developing a memorandum describing the pertinent national literature on the comparative infrastructure costs.
- *Metro's existing econometric and land use model (Metroscope).* Metro's economists have used Metroscope outputs and national data to estimate the total infrastructure costs associated with growth over the next 20+ years.
- *Local case studies.* So far, Todd Chase from FCS has collaborated with Metro to analyze the infrastructure costs in several newly urbanizing areas. He found that the costs varied from $20,000 to $217,000 per dwelling unit. These figures do not include the costs for regional facilities. The next phase of the local case studies will focus on centers/redevelopment areas, analyzing the infrastructure costs our local partners have already invested in a subset of locations to upgrade and enhance centers for redevelopment and increased use.

These three sources can be used to support each other and ensure that we end up with information that can be most useful to local and regional policymakers. We are working with the IAC to determine:
- Usefulness of the information to help inform policy
- Suggestions for information sources and case studies
- Recommendations on how to best convey the information

Infrastructure Advisory Committee
An important aspect of this project is the Infrastructure Advisory Committee, which was established to advise staff as we move through this project. The IAC is made up of a variety of public and private service providers, local jurisdictional partners, and private developers. The members are expected to serve as ambassadors to their colleagues to help explain this project and Metro's interest in infrastructure,

an issue we have not previously been involved in outside of transportation and regional parks. We have a very dedicated and interested group that has already proven invaluable as we consider how to convey and collect information to service providers. Members include:

- Alice Rouyer, City of Gresham
- Cheryl Twete, PDC
- Dean Funk, PGE
- Lawrence Odell, Washington County
- Lorna Stickel, Regional Water Providers Consortium, City of Portland Water Bureau, MTAC
- Marion Haynes, PBA
- Mike Wells, Wells Development
- Ric Stephens, Alpha Community Development, Westside Economic Alliance, ULI, MTAC
- Stephan Lashbrook, Lake Oswego, MTAC
- Ted Kyle, Clackamas County Water Environmental Services
- Wink Brooks, Hillsboro
- Becky Steckler, DLCD

Next steps
In the early spring we will hold the second infrastructure workshop at which we will share the results of our data collection and analysis, identifying the top infrastructure needs. We will begin discussing potential solutions, with the final product being complete in late spring and released at the third infrastructure workshop. I envision that to be a summary of the region's infrastructure needs and a menu of solutions for you and your elected counterparts to consider.

At the appropriate time we will be taking information to MTAC and MPAC for their advice and review. The information from the analysis will also be of interest to the Reserves Steering Committee. We envision a spring regional roundtable to be the ideal time to showcase the results of our work, to be held shortly after the third infrastructure workshop.

The Planning Department strategic plan endorsed by Council in August 2007 recommended that the Chief Operating Officer take a key role in developing and implementing a public investment strategy. Staff has worked with Mike Jordan in developing the technical work program consistent with Council direction. As findings, trends, and issues emerge from the study, staff will return to Council to chart out elements of the strategy.

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work in progress

Key Milestones for Designating Urban and Rural Reserves

2008
Identifying and analyzing options for urban and rural reserves study areas

2009
Final analysis and decisions on urban and rural reserves
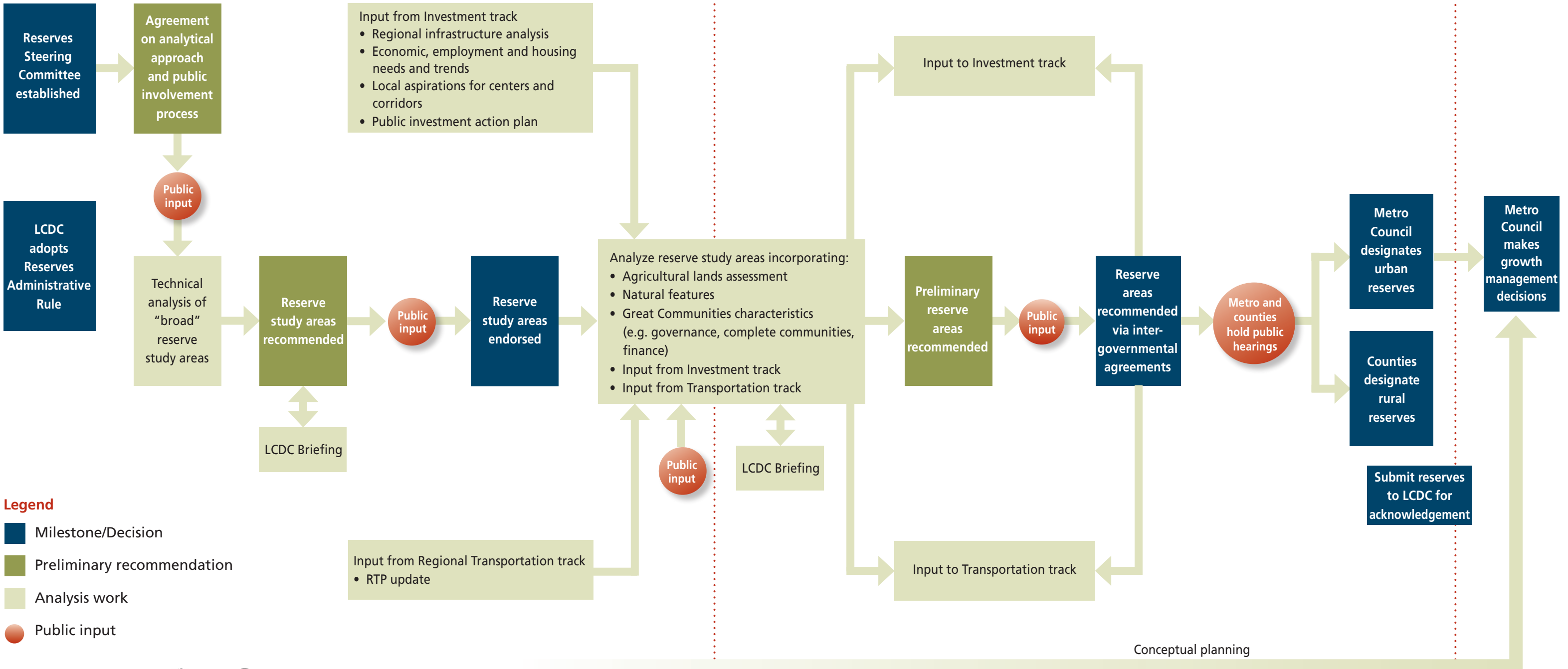
2010
Future decisons

WINTER	SPRING	SUMMER	FALL	WINTER	SPRING	SUMMER	FALL

Reserves Steering Committee established

Agreement on analytical approach and public involvement process

Input from Investment track
- Regional infrastructure analysis
- Economic, employment and housing needs and trends
- Local aspirations for centers and corridors
- Public investment action plan

Input to Investment track

Public input

LCDC adopts Reserves Administrative Rule

Technical analysis of "broad" reserve study areas

Reserve study areas recommended

Public input

Reserve study areas endorsed

Analyze reserve study areas incorporating:
- Agricultural lands assessment
- Natural features
- Great Communities characteristics (e.g. governance, complete communities, finance)
- Input from Investment track
- Input from Transportation track

Preliminary reserve areas recommended

Public input

Reserve areas recommended via inter-governmental agreements

Metro and counties hold public hearings

Metro Council designates urban reserves

Counties designate rural reserves

Metro Council makes growth management decisions

LCDC Briefing

Public input

LCDC Briefing

Submit reserves to LCDC for acknowledgement

Input from Regional Transportation track
- RTP update

Input to Transportation track

Conceptual planning

Legend

- ■ Milestone/Decision
- ■ Preliminary recommendation
- ■ Analysis work
- ● Public input

CLACKAMAS COUNTY

MULTNOMAH COUNTY

WASHINGTON COUNTY OREGON

METRO

07389jg Draft 1, 12/20/07

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January 9, 2008

PROPOSED DATA LAYERS FOR ID OF RESERVE STUDY AREAS

From Shape of the Region work program

I. Identification of Reserve Study Area (Proposed)

A. <u>Framing the "Broad" Reserve Study Area</u> – the following issues frame the extent of the "Broad" Reserve Study Area

- Study "enough" land so we can designate as much as 50 years' worth of urban reserves and rural reserves, and have options for that amount of designation (start with 5 miles and adjust accordingly).

- Don't study more than we can afford to analyze to the level of analysis we expect.

- Study those areas along highways that historically have supported/resulted in development. (Resulting map may have fingers)

- Don't bother looking at land which we either cannot designate as urban reserve (State/National forest land, Columbia Gorge, e.g.) or will not for logistical reasons (Yamhill Co.)

- Study land between our UGB and the UGBs of all neighbor cities whose own UGB expansions could threaten the integrity of agriculture or forest reserves (but not cities in Columbia, Yamhill or Marion Counties; save designation of rural reserves in these counties for another day).

- Study more or study less land with the integrity or coherence of a reserve designation in mind (if the five-mile line (or other such line) passes through the middle of a "large block" of agricultural land, include the rest of the block out to some boundary - creek, road, e.g.).

B. <u>Result</u> – the adoption of a **"broad"** reserve study area that will be analyzed for the identification of urban and rural reserve study areas.

II Analysis Process of "Broad" Reserve Study Area

The entire "broad" reserve study area will be evaluated to identify both urban and rural reserve study areas based on suitability factors from the Great Communities/Agricultural Analysis/Natural Features work completed as part of the Shape of the Region work program. The entire "broad" reserve study area will be separately evaluated for urban reserve suitability and rural reserve suitability. The results of the two analyses will be integrated with the expectation that some areas will be solely identified as an urban reserve study area, some areas solely identified as a rural reserve study area and some areas identified as suitable for both an urban and rural reserve study area or a conflicted area.

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January 9, 2008

A) <u>Urban Reserve Evaluation</u> – The Great Communities work identified the following eight characteristics that should be considered when evaluating land for urbanization purposes: Community Design, Complete Communities, Ecological Systems, Optimize Major Public Investments, Governance, Finance, Economy and Education and Workforce Development. The level of analysis associated with each of the characteristics will vary at different scales and over different time periods. Some characteristics are more relevant in making decisions about urban reserves while others are more relevant when considering UGB decisions (attached graphic).

The LCDC Rulemaking Work Group has incorporated a number of these characteristics into the proposed rule, stated as follows:
   a) Can be developed at urban densities in a way that makes efficient use of existing and future public and private infrastructure investments;
   b) Includes sufficient development capacity to support a healthy economy;
   c) Can be efficiently and cost-effectively served with public schools and other urban-level public facilities and services by appropriate and financially capable service providers;
   d) Can be designed to be walkable and served with a well-connected system of streets, bikeways, and recreation trails by appropriate service providers;
   e) Can be designed to preserve and enhance natural ecological systems;
   f) Includes sufficient land suitable for a range of needed housing types;
   g) Can be developed in a way that preserves important natural landscape features included in urban reserves; and
   h) Can be designed to avoid or mitigate adverse effects on farm and forest practices and natural landscape features on nearby resource land, including land designated as rural reserves.

The key to applying these factors is defining them in terms of land data that can be mapped and determining what level of analysis is needed at what time in the process. It is clear that some of the LCDC factors, such as determining an appropriate and financially capable service provider, are not suitable for this early level of analysis.

Identifying the individual urban reserve study areas from the "broad" reserve study area requires a 60,000 foot level of analysis that focuses on identifying the best land that will provide the opportunity for an area to be designed and served as outlined in the urban reserve rulemaking factors. In order to accomplish this high-level of analysis the following data sets will be evaluated: watersheds, topography, rivers, streams and floodplain, highways, major roads, existing and proposed light rail alignment, existing and proposed trails, local government natural resource inventories, agricultural analysis map and tax lots.

<u>Data Layers</u>
Watersheds – related to efficiently providing urban services, designed to preserve and enhance natural ecological systems

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Topography (e.g. 25% slopes) – related to urban density, community design, and efficiently providing urban services

*Rivers/streams and floodplain*s *and local government natural resource inventories* – related to preserving and enhancing natural ecological systems, avoiding and mitigating adverse effects on farm and forest practices

Highways/major roads/existing and proposed light rail and trails – related to a well connected system of streets, bikeways and trails and optimizing public investments

Tax lots – related to urban density, community design and efficiently providing urban services

Agricultural analysis map – related to avoiding and mitigating adverse effects on farm and forest practices

These data sets will be overlaid at a broad scale utilizing a stepwise methodology to identify the lands that meet some, most or all of the identified factors and those areas that don't meet any factors.

Result: A map of proposed urban reserve study areas (not tax lot specific)

B) <u>Rural Reserve Evaluation</u> – The Agricultural Analysis work resulted in a three category map that classified the land outside the Metro UGB as either Foundation, Important or Conflicted agricultural land. In terms of this study, Foundation agricultural lands provide the core support to the agricultural base of the region and are vital to its long-term viability. Important agricultural lands are suited to agricultural production and contribute to or have the capacity to contribute to the commercial agricultural economy. Conflicted agricultural lands have concerns regarding long-term viability due to questions of integrity and ability to operate.

The Natural Landscape Features work resulted in a map that identified twenty-six landscape features that influence the sense of place for the greater region. The inventory and assessment was based on two key questions:

- What natural features are essential to the health and welfare of the region?
- What landscape features define the sense of place for the region?

Similar to the urban reserve question, the LCDC Rulemaking Work Group has incorporated these two studies into the proposed rule, based on what the function of the rural reserve is being established for. When identifying and selecting land for designation as rural reserves intended to provide long-term protection to the **agricultural industry or forest industry, or both**, a county shall base its decision on whether the lands:

a) Are situated in an area that is otherwise potentially subject to urbanization during the reserve period, as indicated by proximity to a UGB **or** proximity to properties with fair market values that significantly exceed agricultural values, for farm land, or forestry values, for forest land;

b) Are capable of sustaining long-term agricultural operations, for agricultural land, or are capable of sustaining long-term forestry operations, for forestland;

c) Have suitable soils where needed to sustain long-term agricultural or forestry operations, and have available water where needed to sustain long-term agricultural operations;

d) Are suitable to sustain long-term agricultural or forestry operations, taking into account:

(A) For farmland, the existence of a large block of agricultural or other resource land with a concentration or cluster of farm operations, or, for forestland, the existence of a large block of forested land with a concentration or cluster of managed woodlots;

(B) The adjacent land use pattern, including its location in relation to adjacent non-farm uses or non-forest uses, and the existence of buffers between agricultural or forest operations and non-farm or non-forest uses;

(C) The agricultural or forest land use pattern, including parcelization, tenure and ownership patterns; and

(D) The sufficiency of agricultural or forestry infrastructure in the area, whichever is applicable.

When identifying and selecting land for designation as rural reserves intended to protect important **natural landscape features**, a county shall base its decision on whether the lands:

a) Are situated in an area that is otherwise potentially subject to urbanization during the identified reserve period;

b) Are subject to natural disasters or hazards, such as floodplains, steep slopes and areas subject to landslides;

c) Are important fish, plant or wildlife habitat;

d) Are necessary to protect water quality or water quantity, such as streams, wetlands and riparian areas;

e) Provide a sense of place for the region, such as buttes, bluffs, islands and extensive wetlands;

f) Can serve as a boundary or buffer to reduce conflicts between urban uses and rural uses and natural resources, such as rivers, cliffs and floodplains;

g) Provide for separation between cities; and

h) Provide easy access to recreational opportunities in rural areas, such as rural trails and parks.

Determining the individual rural reserve study areas from the broad reserve study area again requires a high level of analysis that focuses on identifying the best land that will provide long-tem protection for large blocks of agricultural land and forest land and for natural landscape features that limit urban development or define natural

boundaries of urbanization. The two maps that resulted from the **Agricultural Analysis and the Natural Landscape Features Analysis** will be integrated to provide a starting point for this analysis. The three agricultural land categories will be noted on the integrated map.

Data Layers
Additional data sets related to the factors identified by the LCDC Rulemaking Work Group may be used including:

- *Forestland and woodlot location and ownership data*
- *Soil classification and water availability*
- *Property value data to validate the threat of urbanization*
- *Infrastructure specific to the agriculture and forestry industries*
- *Rural freight movement to maintain or promote viable clusters*
- *Distance from UGB*
- *Floodplains*
- *Landslide data and topography*

The additional data sets will be applied to integrated agricultural and natural features map to identify those areas that meet some, most or all of the factors and those areas that don't meet any of the factors.

Result: A map of proposed rural reserve study areas (not tax lot specific)

III Integration of the Two Map Products

The two maps developed through the "broad" study area analysis work will be overlaid to identify study areas as rural, urban, and conflicted (good for both). The next phase of analysis will be tailored to the specific reserve type to refine the study areas based on a deeper level of analysis. There will be some land from the broad study area that will not be identified for additional analysis.

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DRAFT – 01/09/08	Proposed Data Layers				
Rural Reserve Factors*	**Rural Reserve Study Areas - May 2008**	**Preliminary Rural Reserves - Dec. 2008**	**Rural Reserve Approval 2009**	**Incentives and Tools - 2009/2010**	**Growth Management Decision 2010**
Natural Landscape Features					
Are situated in an area that is otherwise potentially subject to urbanization during the identified reserve period	-Distance from UGB - ?? miles				
Are subject to natural disasters or hazards, such as floodplains, steep slopes and areas subject to landslides	-Topography (e.g. >50%) -Floodplains -Landslide data				
Are important fish, plant or wildlife habitat	-Natural Landscape Features map and supporting data	-Existing fish/plant/wildlife surveys			
Are necessary to protect water quality or water quantity, such as streams, wetlands and riparian areas	-Natural Landscape Features map	-Drinking water source data			
Provide a sense of place for the region, such as buttes, bluffs, islands and extensive wetlands	-Natural Landscape Features map	-Local government inventories and visions -State/national inventories			
Can serve as a boundary or buffer to reduce conflicts between urban uses and rural uses and natural resources, such as rivers, cliffs and floodplains	-Natural Landscape Features map -Topography -Rivers/streams/floodplains				
Provide for separation between cities	-Not addressed at this time		-Mapping exercise		
Provide easy access to recreational opportunities in rural areas, such as rural trails and parks	-Not addressed at this time	-National/state/local parks and trails			

* As defined by LCDC rulemaking

DRAFT – 01/09/08	Proposed Data Layers				
Rural Reserve Factors*	**Rural Reserve Study Areas - May 2008**	**Preliminary Rural Reserves - Dec. 2008**	**Rural Reserve Approval 2009**	**Incentives and Tools 2009/2010**	**Growth Management Decision 2010**
Agriculture/Forest or both					
Are situated in an area that is otherwise potentially subject to urbanization during the reserve period, as indicated by proximity to a UGB or proximity to properties with fair market values that significantly exceed agricultural values, for farm land, or forestry values, for forest land	-Distance from UGB - ?? miles -Property value data				
Are capable of sustaining long-term agricultural operations, for agricultural land, or are capable of sustaining long-term forestry operations, for forestland	-Agricultural analysis map & data -ODF data on forest operations				
Have suitable soils where needed to sustain long-term agricultural or forestry operations, and have available water where needed to sustain long-term agricultural operations	-Agricultural analysis map & data -Soils map -Irrigation districts -DWR data				
Are suitable to sustain long-term agricultural or forestry operations, taking into account:					
For farmland, the existence of a large block of agricultural or other resource land with a concentration or cluster of farm operations, or, for forestland, the existence of a large block of forested land with a concentration or cluster of managed woodlots	-Not addressed at this time	-Agricultural analysis map & data -County zoning -Woodlot location and ownership data -Tax lots -Aerial photos			
The adjacent land use pattern, including its location in relation to adjacent non-farm uses or non-forest uses, and the existence of buffers between agricultural or forest operations and non-farm or non-forest uses	-Not addressed at this time	-Tax lots -Aerial photos -Natural Landscape Features map -Rivers/streams/floodplains			
The agricultural or forest land use pattern, including parcelization, tenure and ownership patterns	-Not addressed at this time	-Tax lots -Ownership records			
The sufficiency of agricultural or forestry infrastructure in the area, whichever is applicable	-Not addressed at this time	-Rural freight routes -Farm/forest specific infrastructure			

* As defined by LCDC rulemaking

DRAFT – 01/09/08	Proposed Data Layers				
	Urban Reserve Study Areas May 2008	Preliminary Urban Reserves Dec. 2008	Urban Reserve Approval 2009	Analysis/refinement of UR 2009/2010	Growth Management Decision 2010
Urban Reserves Factors*					
Developed at urban densities in a way that makes efficient use of existing and future public and private infrastructure investments	-Topography (e.g. 25% slope-buildable land) -Rivers/streams/floodplains -Highways/major roads/existing and proposed light rail and trails -Tax lots -Watersheds/drainage basins	-Conceptual development plan -RTP analysis -related projects -Infrastructure inventory -Preliminary goal 5 inventory -Local vision/aspirations	-Preliminary development plan -Market feasibility analysis -Infrastructure analysis -Goal 5 inventory -Supports local vision/aspirations -Existing major transportation corridors	-Development plan -Sketch level plans -Infrastructure plan -Natural resource protection plan -Proposed major transportation components	
Includes sufficient development capacity to support a healthy economy	-Not Addressed at this time	-Regional employment needs/trends -Local employment needs -Sector/niche economies	-Strengths of local economy -Transportation connections -UGR employment	-Economic development plan -Market viability	
Can be efficiently and cost-effectively served with public schools and other urban-level public facilities and services by appropriate and financially capable service providers	-Watersheds -Topography (e.g. 25% slope-buildable land) -Tax lots	-Conceptual development plan -Infrastructure inventory -Infrastructure study -School district plan/needs -Higher education needs -Service provider boundaries	-Preliminary development plan -ID of governance structure and service providers -Preliminary fiscal impact analysis -Preliminary phasing plan	-Development plan -Annexation plan -Financing plan -IGAs in place	
Can be designed to be walkable and served with a well-connected system of streets, bikeways, and recreation trails by appropriate service providers	-Topography (e.g. 25% slope-buildable land) -Highways/major roads/existing and proposed light rail and trails	-Conceptual development plan -RTP/TSP analysis- corridors/trails -Adjacent land use pattern -Adjacent street connections -Natural resource corridors & adjacent features	-Preliminary development plan -Preliminary traffic impact analysis -Major transportation corridors	-Development plan -Transportation plan -Proposed major transportation components	
Can be designed to preserve and enhance natural ecological systems	-Watersheds -Rivers/streams/floodplains -Topography -Existing local government natural resource inventories	-Conceptual development plan -Preliminary goal 5 inventory -Slope analysis	-Preliminary development plan -Goal 5 inventory	-Development plan -Natural resource protection plan -Proposed major transportation components	
Includes sufficient land suitable for a range of needed housing types	-Topography (e.g. 25% slope-buildable land -Existing local government natural resource inventories	-Conceptual development plan -Housing needs analysis -Infrastructure inventory	-Preliminary development plan -Housing assessment for range of types and affordability Preliminary buildable lands inv.	-Proposed major transportation components -Buildable lands inventory -Infrastructure capacities	
Can be developed in a way that preserves important natural landscape features included in urban reserves	-Not Addressed at this time	-Natural landscape features inventory -Preliminary goal 5 inventory -Existing local government natural resource inventories	-Preliminary design plan with edges and buffers	-Natural resource protection plan -Design plan	
Can be designed to avoid or mitigate adverse effects on farm and forest practices and natural landscape features on nearby resource land, including land designated as rural reserves	-Rivers/streams/floodplains -Agricultural analysis maps	-Analysis of impacts on ruralreserve study areas -Analysis of impacts on resourcelands -Aerials	-Preliminary design plan with edges and buffers	-Development plan -Design plan with edges and buffers -Proposed major transportation components	

*As defined by LCDC rulemaking

GREAT COMMUNITIES

SCHEMATIC FOR APPLYING
GREAT COMMUNITIES CRITERIA FOR URBANIZATION

GENERAL

Community Design

Governance

Finance

Economy

Complete Communities

Education/Workforce Development

Ecological Systems

Maximize Public Investments

Preliminary
Examination
(includes
ag, natural resources)

Urban
Reserves
Establishment

Development Vision/
Preliminary Planning
• Agreements
• Strategies

UGB
Annexation

SPECIFIC

**Great Communities
Implementation**

• Comprehensive planning
• Zoning
• Permitting
• Building