

A G E N D A



RESERVES STEERING COMMITTEE

DATE: Friday, March 14, 2008

TIME: 9:00 a.m. to noon

PLACE: Council Chamber, Metro Regional Center, 600 NE Grand Avenue, Portland, OR

AGENDA ITEM	PRESENTER	ACTION	TIME
1. Welcome and Introductions	Debra Nudelman		10 min.
2. Public Comment			
3. Adoption of Draft Operating Principles for Reserves Steering Committee	Debra Nudelman	Information/ Action	20 min.
4. Discussion of LCDC Administrative Rule and Factors for Reserves Analysis	Kathryn Harrington Dick Benner	Introduction/ Discussion	20 min.
5. Discussion of Coordinated Public Involvement Plan	Martha Schrader Ken Ray	Introduction/ Discussion	20 min.
6. Break			10 min.
7. Discussion of Approach to Incorporating Population and Employment Forecasts	Jeff Cogen	Discussion	45 min.
8. Review of Potential Reserve Study Areas	Tom Brian Tim O'Brian	Introduction/ Discussion	45 min.
9. Review of Draft Work Program and Topic Schedule for Reserves Steering Committee Meetings	Deb Nudelman	Overview	10 min.

Next meeting:

Wednesday, April 9, 9:00 to 11:00 a.m.

Council Chamber, Metro Regional Center, 600 NE Grand Avenue, Portland

For agenda and schedule information, please call Ken Ray at 503-797-1508 or email

rayk@metro.dst.or.us

RESERVES STEERING COMMITTEE

DRAFT OPERATING PRINCIPLES

(AS OF ~~JANUARY 28~~MARCH 14, 2008)

For any collaborative process to operate smoothly, it is necessary for those involved to agree at the outset on the purpose for the process and on the procedures by which the group will govern its discussions and deliberations.

I. BACKGROUND AND PURPOSE OF THE RESERVES STEERING COMMITTEE

In 2007, the Oregon Legislature approved Senate Bill 1011. This bill, and subsequent rules adopted by the Land Conservation and Development Commission, enables Metro and the counties of the region to establish urban reserves and rural reserves to provide greater predictability for local governments, service providers, and landowners regarding where future growth may be accommodated and where it will not be accommodated. The process of studying and designating urban and rural reserves is also designed to provide greater flexibility in considering multiple factors for determining which areas are suitable for future urbanization and which areas should be set aside to enhance the agricultural and forest economy and protect natural areas.

The Reserves Steering Committee (“Steering Committee”) has been convened to oversee the study of urban and rural reserve areas and to make recommendations to the boards of commissioners of Clackamas, Multnomah and Washington counties and the Metro Council on the final designation of reserve areas. The Reserves Steering Committee will meet regularly in 2008 and 2009 to develop recommendations to the Metro Council and the county commissions on the designations of urban and rural reserves.

Urban and rural reserve designations will first be recommended through intergovernmental agreements between the Metro Council and the county commission in whose jurisdiction reserve areas are located. Following the endorsement of intergovernmental agreements in summer 2009, the Metro Council will designate urban reserves through amendments to the Regional Framework Plan, and the county commissions will designate rural reserves through amendments to their comprehensive land use plans. The amendments to both the Regional Framework Plan and the county comprehensive land use plans will be submitted to the Oregon Department of Land Conservation and Development for review and acknowledgement in late 2009.

II. RESERVES STEERING COMMITTEE STRUCTURE

The Steering Committee is co-led by one Metro Councilor and one commissioner each from Clackamas, Multnomah and Washington counties (the “Core 4”).

The Core 4 members are:

- Metro Councilor Kathryn Harrington
- Clackamas County Commissioner Martha Schrader
- Multnomah County Commissioner Jeff Cogen

- Washington County Chair Tom Brian

The Steering Committee also has seats for representatives from the two largest cities in each county, as well as one seat apiece representing the smaller cities of each county. One representative is designated to represent the neighboring cities outside Metro's urban growth boundary. In addition, the Steering Committee includes representatives of business, the agricultural community, the environmental conservation community, social and economic equity organizations, and state agencies.

The Steering Committee members will:

- Work together to develop the recommendation for designation of reserve areas;
- Agree on the desired level of specificity of agreement components;
- Strive to concur in all Steering Committee recommendations;
- Ensure adequate integration of the governance, funding, policy and analytical considerations to reach sound recommendations; and
- Concur in recommendations about the Steering Committee process, including overseeing the implementation of these operating principles.

In order for an agreement of this scope to be acceptable to and implementable by all authorities, those involved in this process agree to work together to produce an agreement that integrates the mandates, concerns, and ideas of all those significantly affected by the outcome.

Subgroups may be formed at the direction of the Steering Committee, which will designate subgroup members as needed for the anticipated tasks and outcomes. At the direction of the Steering Committee, subgroup members may develop draft products and make recommendations to the Steering Committee. Subgroups will not make decisions on behalf of the Steering Committee.

Governance, Funding, Policy and Technical Analysis will be provided by Metro and designated county staff, consultants or other designated entities. To the extent a Steering Committee member is relying on the expertise of their own technical staff, such technical staff ~~must~~ should be made available for discussion with other members of the Steering Committee if requested or needed. These technical advisers will not make decisions on behalf of the Steering Committee.

III. PARTICIPATION

Interests Represented. Steering Committee parties, identified on the signature page for these Operating Principles, represent the Core 4, cities, non-governmental stakeholders, and state agencies.

Attendance at Meetings. Each member must make a good faith effort to attend each Steering Committee meeting. If a Steering Committee member cannot attend, he or she may designate a regular alternate to attend. It is the responsibility of the member and alternate to stay fully briefed on all Steering Committee meeting discussions and deliberations. It is the responsibility of the member to inform the alternate concerning the deliberations. All alternates are also bound by these Operating Principles.

Constituent Interests. Steering Committee members are expected to consult with and represent the concerns and interests of the organizations and constituents they were appointed to represent. They are responsible for ensuring that all significant issues and concerns of their organizations and constituents are fully and clearly articulated during Steering Committee meetings. Members are also responsible to solicit support from their constituents and/or agencies they were appointed to represent for the eventual recommendations or agreements of the Steering Committee. ~~for ensuring that any eventual recommendations or agreements are acceptable to their constituents and/or the agencies they were appointed to represent.~~

IV. MEETINGS

Agendas. Proposed meeting agendas will be drafted by the facilitator in consultation with Core 4 members and Steering Committee project team staff. The facilitator and project team will post draft agendas to the Steering Committee website for review at least one week in advance of Steering Committee meetings. The website is maintained by Metro and can be found at www.metro-region.org/reserves. Agendas will be approved or revised at the beginning of each meeting.

Meeting Summaries. The facilitator will prepare Steering Committee meeting summaries. They will be provided electronically in draft form to the Steering Committee website for review and comment within one week of the Steering Committee meeting. Meeting summaries will be approved by the Steering Committee at the following meeting. Final meeting summaries will also be posted on the project website.

Action Items. Action item lists will be prepared by the facilitator to assist the Steering Committee in documenting its progress and activities. The facilitator will ensure that items included on the lists are tracked and that Steering Committee members are informed of their progress.

Caucuses/Breaks. Meetings may be suspended at any time at the request of any member to allow consultation among group members. Requests should be respectful of all members' time. If the use of caucuses becomes disruptive, the Steering Committee will revisit the process. The facilitator may be used to assist parties during the caucus if requested.

Distribution of Information. In the event a Steering Committee member would like to present additional information to the Steering Committee, members will provide that information to Core 4 staff. Information will be posted on the website, and when time and schedule allow, information relevant to a particular meeting will be included on the agenda and presented to the Steering Committee. Staff will provide the Steering Committee with an updated work program and meeting topic schedule to help committee members and others in determining when particular items will be needed by the committee.

Facilitator. Steering Committee meetings will be facilitated by Debra Nudelman of Kearns & West, Inc. The facilitator will be funded by Core 4 entities but will remain independent and not take positions on the issues. The facilitator will work to ensure that the process runs smoothly. The facilitator's role usually includes developing draft agendas, distributing meeting materials,

facilitating meetings, working to resolve any impasse that may arise, preparing meeting summaries, action items and other tasks as requested.

The facilitator will work directly with all Steering Committee members to ensure their ability to represent the concerns and interests of their organizations and constituents. The facilitator will serve at the will of the group and may be replaced by another facilitator upon consensus of the Core 4.

V. COMMITMENTS

The Steering Committee includes only four voting members (Metro and the three counties—the Core 4) and all votes of the Core 4 must be unanimous before recommendations are carried back to their governing bodies, which retain authority for approval of the intergovernmental agreement. All other Steering Committee members serve in non-voting advisory positions and bring a responsibility to represent their entity or constituent group.

Core 4 Intent and Commitment. Steering Committee members recognize that under SB 1011, the ultimate decision-making on the designation of urban and rural reserves rests with the Metro Council and the boards of county commissioners. The Core 4 members, who are the representatives of those elected bodies on the Steering Committee, are committed to developing final urban and rural reserves recommendations in a collaborative forum in order to achieve concurrence and support from potential objectors and partners. However, all Steering Committee members understand that, if full group concurrence is not possible, the Core 4 will make the final decision with regard to the establishment of study areas and recommendations for reserve designations.

Steering Committee Intent and Commitment. It is understood that Steering Committee members are representing interests of their organization, agency, and/or constituents. Steering Committee members agree to regularly brief the decision-makers within their respective organizations to ensure support and buy-in for recommendations developed through the Steering Committee process, as well as the greatest likelihood of successfully implementing final recommendations and designations. All Steering Committee members agree to:

- Strive to look beyond individual interests toward the interests of the group to create a collaborative process focused on meeting regional and local needs;
- Attend meetings and follow through on promises and commitments;
- Bring concerns from their interest group or organization up for discussion at the earliest point in the process;
- Share all relevant information that will assist the group in achieving its goals;
- Participate in a free, open, and mutually respectful exchange of ideas, views, and information prior to achieving consensus;
- Resolve issues being addressed by the Steering Committee within the Steering Committee structure;
- Articulate interests and concerns to the best of their ability in an effort to find common ground among the parties;

- Communicate the expectation to subgroups and those providing scientific and technical input that these Operating Principles are also applicable to them;
- Characterize individual, caucus, or subgroup viewpoints as fully and accurately as possible;
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- Support the eventual product if they have concurred in it.

VI. PROCESS REMINDERS/GROUND RULES

- Seek to learn and understand each other's perspective.
- Encourage respectful, candid and constructive discussions.
- Provide balance of speaking time.
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VII. SAFEGUARDS

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Public Comment. The facilitator will provide periodic public comment opportunities for non-Steering Committee members during meetings. Comments from the public will be limited in time to allow sufficient opportunity to conduct the other portions of the Steering Committee agenda. Citizens are encouraged to participate in the Urban and Rural Reserves Coordinated Public Involvement Plan process and to submit written comments to project team staff for circulation to the full Steering Committee.

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VIII. SCHEDULE

The Steering Committee as a whole will meet approximately once a month between January 1, 2008 and July 31, 2009. With few exceptions, each regularly scheduled meeting will be held on the second Wednesday of each month. The Reserves Milestone Chart includes a proposed timeline of events and decisions points and may be found at www.metro-region.org/reserves. It is anticipated that the Steering Committee's work will be completed during the summer of 2009.

By their signature, the undersigned agree to abide by the preceding Reserves Steering Committee Operating Principles:

Interest Represented	Member	Signature

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Urban and Rural Reserves: Designation Fundamentals from New LCDC Rules

I. THE RESERVES

Overall Test for LCDC Approval of Reserves (Urban and Rural): The entire “package” of urban and rural reserves must be balanced to best achieve livable communities, the viability and vitality of the agricultural and forest industries, and protection of the important natural landscape features that define the region. 0005(2).

Amount of Land (Urban Reserves): If Metro designates Urban Reserves in 2009, it must designate enough land (within UGB and URs, combined) to accommodate population and employment for at least 40 years (2049) and no more than 50 years (2059). 0040(3).

Amount of Land (Urban Reserves): Metro must specify the number of years, between 40 and 50 years, for which the Urban Reserves are intended to provide a supply of land. 0040(2).

Designation Factors: Selection of Urban and Rural Reserves must be based upon consideration of the factors set forth in the rules. Each relevant factor must be applied to the areas being considered for reserves. 0050(1); 0060(2); 0060(3); 0080(4)(c).

Foundation Agricultural Land: If Metro selects Foundation Land (as mapped by the Oregon Department of Agriculture) for Urban Reserves, it must explain why, by reference to the factors, it chooses Foundation Land rather than other land considered. 0040(11).

No Urban Reserves without Rural Reserves: There can be no urban reserves designated in a county unless rural reserves are also designated in the county. 0020(3).

II. THE DESIGNATION PROCESS

Coordination among Metro, Clackamas, Multnomah and Washington Counties (“the partners”):

- Metro and the counties must enter into agreements on Reserves before they adopt Urban Reserves (Metro) or Rural Reserves (counties). 0040(1).
- Each step along in the process of evaluation of potential Urban and Rural Reserves and adoption of Reserves must be coordinated among partners and done concurrently. 0030(1).

Coordination with Cities, Counties, Service Districts, Schools and State Agencies: Metro and the counties must coordinate their designation of Urban and Rural Reserves with cities, special districts, school districts and state agencies. 0040(8); 0040(9).

Citizen Involvement: Metro and the counties must follow a coordinated citizen involvement process, reviewed by the State Citizen Involvement Advisory Committee (CIAC). 0030(2).

Adopt Policies: Metro must adopt Regional Framework Plan policies to implement the Reserves. 0040(6).

Adopt Policies: Counties must adopt Comprehensive Plan policies to implement the Reserves. 0040(7).

Joint Findings and Reasons: Metro and the counties must adopt a single, joint set of findings and reasons to explain the selection of Urban and Rural Reserves, and to explain the basis for the amount of land designated as Urban Reserve. 0040(10).

LCDC Review: Metro and the counties must submit the Urban and Rural Reserves simultaneously to LCDC, which will review the Reserves “in the manner of periodic review.” 0080(2).

III. AFTER THE DESIGNATIONS

Land Uses Allowed: Counties may not amend land use regulations for lands designated as Urban or Rural Reserves to allow uses that were not allowed, or smaller lots or parcels than were allowed, at the time of designation. 0070(2); 0070(3).

Urban Reserves Concept Plans: Counties, cities and Metro may adopt conceptual plans for lands designated as Urban Reserves after designation. Metro must ensure that Urban Reserve areas are ultimately planned to be developed in a manner consistent with the factors in 0050. 0070(4); 0070(5).

Urban Reserve Service Agreements: The partners may, but are not required to, enter into urban service agreements to support urbanization in the Urban Reserves after addition to the UGB. 0070(4).

LAND CONSERVATION AND DEVELOPMENT DEPARTMENT

DIVISION 27

URBAN AND RURAL RESERVES IN THE PORTLAND METROPOLITAN AREA

660-027-0005

Purpose and Objective

(1) This division is intended to implement the provisions of Oregon Laws 2007, chapter 723 regarding the designation of urban reserves and rural reserves in the Portland metropolitan area. This division provides an alternative to the urban reserve designation process described in OAR chapter 660, division 21. This division establishes procedures for the designation of urban and rural reserves in the metropolitan area by agreement between and among local governments in the area and by amendments to the applicable regional framework plan and comprehensive plans. This division also prescribes criteria and factors that a county and Metro must apply when choosing lands for designation as urban or rural reserves.

(2) Urban reserves designated under this division are intended to facilitate long-term planning for urbanization in the Portland metropolitan area and to provide greater certainty to the agricultural and forest industries, to other industries and commerce, to private landowners and to public and private service providers, about the locations of future expansion of the Metro Urban Growth Boundary. Rural reserves under this division are intended to provide long-term protection for large blocks of agricultural land and forest land, and for important natural landscape features that limit urban development or define natural boundaries of urbanization. The objective of this division is a balance in the designation of urban and rural reserves that, in its entirety, best achieves livable communities, the viability and vitality of the agricultural and forest industries and protection of the important natural landscape features that define the region for its residents.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137 to ORS 195.145.

Hist.:

660-027-0010

Definitions

The definitions contained in ORS chapters 195 and 197 and the Statewide Planning Goals (OAR chapter 660, division 15) apply to this division, unless the context requires otherwise. In addition, the following definitions apply:

(1) "Foundation Agricultural Lands" means those lands mapped as Foundation Agricultural Lands in the January 2007 Oregon Department of Agriculture report to Metro entitled *"Identification and Assessment of the Long-Term Commercial Viability of Metro Region Agricultural Lands."*

- (2) “Important Agricultural Lands” means those lands mapped as Important Agricultural Lands in the January 2007 Oregon Department of Agriculture report to Metro entitled “*Identification and Assessment of the Long-Term Commercial Viability of Metro Region Agricultural Lands.*”
- (3) “Intergovernmental agreement” means an agreement between Metro and a county pursuant to applicable requirements for such agreements in ORS 190.003 to 190.130, 195.025 or 197.652 to 197.658, and in accordance with the requirements in this division regarding the designation of urban and rural reserves and the performance of related land use planning and other activities pursuant to such designation.
- (4) “Livable communities” means communities with development patterns, public services and infrastructure that make them safe, healthy, affordable, sustainable and attractive places to live and work.
- (5) “Metro” means a metropolitan service district organized under ORS chapter 268.
- (6) “Important natural landscape features” means landscape features that limit urban development or help define appropriate natural boundaries of urbanization, and that thereby provide for the long-term protection and enhancement of the region's natural resources, public health and safety, and unique sense of place. These features include, but are not limited to, plant, fish and wildlife habitat; corridors important for ecological, scenic and recreational connectivity; steep slopes, floodplains and other natural hazard lands; areas critical to the region's air and water quality; historic and cultural areas; and other landscape features that define and distinguish the region.
- (7) “Public facilities and services” means sanitary sewer, water, transportation, storm water management facilities and public parks.
- (8) “Regional framework plan” means the plan adopted by Metro pursuant to ORS 197.015(17).
- (9) “Rural reserve” means lands outside the Metro UGB, and outside any other UGB in a county with which Metro has an agreement pursuant to this division, reserved to provide long-term protection for agriculture, forestry or important natural landscape features.
- (10) “UGB” means an acknowledged urban growth boundary established under Goal 14 and as defined in ORS 195.060(2).
- (11) “Urban reserve” means lands outside an urban growth boundary designated to provide for future expansion of the UGB over a long-term period and to facilitate planning for the cost-effective provision of public facilities and services when the lands are included within the urban growth boundary.
- (12) “Walkable” describes a community in which land uses are mixed, built compactly, and designed to provide residents, employees and others safe and convenient pedestrian access to schools, offices, businesses, parks and recreation facilities, libraries and other places that provide goods and services used on a regular basis.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137; ORS 195.145.

Hist.:

660-027-0020

Authority to Designate Urban and Rural Reserves

(1) As an alternative to the authority to designate urban reserve areas granted by OAR chapter 660, division 21, Metro may designate urban reserves through intergovernmental agreements with counties and by amendment of the regional framework plan to implement such agreements in accordance with the requirements of this division.

(2) A county may designate rural reserves through intergovernmental agreement with Metro and by amendment of its comprehensive plan to implement such agreement in accordance with the requirements of this division.

(3) A county and Metro may not enter into an intergovernmental agreement under this division to designate urban reserves in the county unless the county and Metro simultaneously enter into an agreement to designate rural reserves in the county.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137 to ORS 195.145.

Hist.:

660-027-0030

Urban and Rural Reserve Intergovernmental Agreements

(1) An intergovernmental agreement between Metro and a county to establish urban reserves and rural reserves under this division shall provide for a coordinated and concurrent process for Metro to adopt regional framework plan provisions, and for the county to adopt comprehensive plan and zoning provisions, to implement the agreement. The agreement shall provide for Metro and the county to concurrently designate urban reserves and rural reserves, as specified in OAR 660-027-0040.

(2) In the development of an intergovernmental agreement described in this division, Metro and a county shall follow a coordinated citizen involvement process that provides for broad public notice and opportunities for public comment regarding lands proposed for designation as urban and rural reserves under the agreement. Metro and the county shall provide the State Citizen Involvement Advisory Committee an opportunity to review and comment on the proposed citizen involvement process.

(3) An intergovernmental agreement made under this division shall be deemed a preliminary decision that is a prerequisite to the designation of reserves by amendments to Metro's regional

framework plan and amendments to a county's comprehensive plan pursuant to OAR 660-027-0040. Any intergovernmental agreement made under this division shall be submitted to the Commission with amendments to the regional framework plan and county comprehensive plans as provided in OAR 660-027-0080(2) through (4).

Stat. Auth.: ORS 195.41; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137 to 195.145.

Hist.:

660-027-0040

Designation of Urban and Rural Reserves

- (1) Metro may not designate urban reserves under this division in a county until Metro and applicable counties have entered into an intergovernmental agreement that identifies the lands to be designated by Metro as urban reserves. A county may not designate rural reserves under this division until the county and Metro have entered into an agreement that identifies the lands to be designated by the county as rural reserves.
- (2) Urban reserves designated under this division shall be planned to accommodate estimated urban population and employment growth in the Metro area for at least 20 years, and not more than 30 years, beyond the 20-year period for which Metro has demonstrated a buildable land supply inside the UGB in the most recent inventory, determination and analysis performed under ORS 197.296. Metro shall specify the particular number of years for which the urban reserves are intended to provide a supply of land, based on the estimated land supply necessary for urban population and employment growth in the Metro area for that number of years. The 20 to 30-year supply of land specified in this rule shall consist of the combined total supply provided by all lands designated for urban reserves in all counties that have executed an intergovernmental agreement with Metro in accordance with OAR 660-027-0030.
- (3) If Metro designates urban reserves under this division prior to December 31, 2009, it shall plan the reserves to accommodate population and employment growth for at least 20 years, and not more than 30 years, beyond 2029. Metro shall specify the particular number of years for which the urban reserves are intended to provide a supply of land.
- (4) Neither Metro nor a local government may amend a UGB to include land designated as rural reserves during the period described in section (2) or (3) of this rule, whichever is applicable.
- (5) Metro shall not re-designate rural reserves as urban reserves, and a county shall not re-designate land in rural reserves to another use, during the period described in section (2) or (3) of this rule, whichever is applicable.
- (6) If Metro designates urban reserves under this division it shall adopt policies to implement the reserves and must show the reserves on its regional framework plan map. A county in which urban reserves are designated shall adopt policies to implement the reserves and must show the reserves on its comprehensive plan and zone maps.

(7) If a county designates rural reserves under this division it shall adopt policies to implement the reserves and must show the reserves on its comprehensive plan and zone maps. Metro shall adopt policies to implement the rural reserves and show the reserves on its regional framework plan maps.

(8) When evaluating and designating land for urban reserves, Metro and a county shall apply the factors of OAR 660-027-0050 and shall coordinate with cities, special districts and school districts that might be expected to provide urban services to these reserves when they are added to the UGB, and with state agencies.

(9) When evaluating and designating land for rural reserves, Metro and a county shall apply the factors of OAR 660-027-0060 and shall coordinate with cities, special districts and school districts in the county, and with state agencies.

(10) Metro and any county that enters into an agreement with Metro under this division shall apply the factors in OAR 660-027-0050 and OAR 660-027-0060 concurrently and in coordination with one another. Metro and those counties that lie partially within Metro with which Metro enters into an agreement shall adopt a single, joint set of findings of fact, statements of reasons and conclusions explaining why areas were chosen as urban or rural reserves, how these designations achieve the objective stated in OAR 660-027-0005(2), and the factual and policy basis for the estimated land supply determined under section (2) of this rule.

(11) Because the January 2007 Oregon Department of Agriculture report entitled “*Identification and Assessment of the Long-Term Commercial viability of Metro Region Agricultural Lands*” indicates that Foundation Agricultural Land is the most important land for the viability and vitality of the agricultural industry, if Metro designates such land as urban reserves, the findings and statement of reasons shall explain, by reference to the factors in OAR 660-027-0050 and 660-027-0060(2), why Metro chose the Foundation Agricultural Land for designation as urban reserves rather than other land considered under this division.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137 to 195.145.

Hist.:

660-027-0050

Factors for Designation of Lands as Urban Reserves

Urban Reserve Factors: When identifying and selecting lands for designation as urban reserves under this division, Metro shall base its decision on consideration of whether land proposed for designation as urban reserves, alone or in conjunction with land inside the UGB:

(1) Can be developed at urban densities in a way that makes efficient use of existing and future public and private infrastructure investments;

- (2) Includes sufficient development capacity to support a healthy economy;
- (3) 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;
- (4) Can be designed to be walkable and served with a well-connected system of streets, bikeways, recreation trails and public transit by appropriate service providers;
- (5) Can be designed to preserve and enhance natural ecological systems;
- (6) Includes sufficient land suitable for a range of needed housing types;
- (7) Can be developed in a way that preserves important natural landscape features included in urban reserves; and
- (8) Can be designed to avoid or minimize adverse effects on farm and forest practices, and adverse effects on important natural landscape features, on nearby land including land designated as rural reserves.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137 to ORS 195.145.

Hist.:

660-027-0060

Factors for Designation of Lands as Rural Reserves

- (1) When identifying and selecting lands for designation as rural reserves under this division, a county shall indicate which land was considered and designated in order to provide long-term protection to the agriculture and forest industries and which land was considered and designated to provide long-term protection of important natural landscape features, or both. Based on this choice, the county shall apply the appropriate factors in either section (2) or (3) of this rule, or both.
- (2) Rural Reserve Factors: When identifying and selecting lands 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 consideration of whether the lands proposed for designation:
 - (a) Are situated in an area that is otherwise potentially subject to urbanization during the applicable period described in OAR 660-027-0040(2) or (3) as indicated by proximity to a UGB or proximity to properties with fair market values that significantly exceed agricultural values for farmland, 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 forest land;

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

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

(A) for farm land, the existence of a large block of agricultural or other resource land with a concentration or cluster of farm operations, or, for forest land, 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.

(3) Rural Reserve Factors: When identifying and selecting lands for designation as rural reserves intended to protect important natural landscape features, a county must consider those areas identified in Metro's February 2007 "*Natural Landscape Features Inventory*" and other pertinent information, and shall base its decision on consideration of whether the lands proposed for designation:

(a) Are situated in an area that is otherwise potentially subject to urbanization during the applicable period described OAR 660-027-0040(2) or (3);

(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, such as rivers, cliffs and floodplains, to reduce conflicts between urban uses and rural uses, or conflicts between urban uses and natural resource uses;

(g) Provide for separation between cities; and

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

(4) Notwithstanding requirements for applying factors in OAR 660-027-0040(9) and section (2) of this rule, a county may deem that Foundation Agricultural Lands or Important Agricultural Lands within three miles of a UGB qualify for designation as rural reserves under section (2) without further explanation under OAR 660-027-0040(10).

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 195.137 to ORS 195.145.

Hist.:

660-027-0070

Planning of Urban and Rural Reserves

(1) Urban reserves are the highest priority for inclusion in the urban growth boundary when Metro expands the UGB, as specified in Goal 14, OAR chapter 660, division 24, and in ORS 197.298.

(2) In order to maintain opportunities for orderly and efficient development of urban uses and provision of urban services when urban reserves are added to the UGB, counties shall not amend land use regulations for urban reserves designated under this division to allow uses that were not allowed, or smaller lots or parcels than were allowed, at the time of designation as urban reserves until the reserves are added to the UGB.

(3) Counties that designate rural reserves under this division shall not amend their land use regulations to allow uses that were not allowed, or smaller lots or parcels than were allowed, at the time of designation as rural reserves unless and until the reserves are re-designated, consistent with this division, as land other than rural reserves.

(4) Counties, cities and Metro may adopt conceptual plans for the eventual urbanization of urban reserves designated under this division, including plans for eventual provision of public facilities and services for these lands, and may enter into urban service agreements among cities, counties and special districts serving or projected to serve the designated urban reserve area.

(5) Metro shall ensure that lands designated as urban reserves, considered alone or in conjunction with lands already inside the UGB, are ultimately planned to be developed in a manner that is consistent with the factors in OAR 660-027-0050.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15)

Stats. Implemented: ORS 195.137 to 195.145.

Hist.:

660-027-0080

Local Adoption and Commission Review of Urban and Rural Reserves

(1) Metro and county adoption or amendment of plans, policies and other implementing measures to designate urban and rural reserves shall be in accordance with the applicable procedures and requirements of ORS 197.610 to 197.650.

(2) After designation of urban and rural reserves, Metro and applicable counties shall jointly and concurrently submit their adopted or amended plans, policies and land use regulations

implementing the designations to the Commission for review and action in the manner provided for periodic review under ORS 197.628 to 197.650.

(3) Metro and applicable counties shall:

(a) Transmit the intergovernmental agreements and the submittal described in section (2) in one or more suitable binders showing on the outside a title indicating the nature of the submittal and identifying the submitting jurisdictions.

(b) Prepare and include an index of the contents of the submittal. Each document comprising the submittal shall be separately indexed, and

(c) Consecutively number pages of the submittal at the bottom of the page, commencing with the first page of the submittal.

(4) The joint and concurrent submittal to the Commission shall include findings of fact and conclusions of law that demonstrate that the adopted or amended plans, policies and other implementing measures to designate urban and rural reserves comply with this division, the applicable statewide planning goals, and other applicable administrative rules. The Commission shall review the submittal for:

(a) Compliance with the applicable statewide planning goals. Under ORS 197.747 “compliance with the goals” means the submittal on the whole conforms with the purposes of the goals and any failure to meet individual goal requirements is technical or minor in nature. To determine compliance with the Goal 2 requirement for an adequate factual base, the Commission shall consider whether the submittal is supported by substantial evidence. Under ORS 183.482(8)(c), substantial evidence exists to support a finding of fact when the record, viewed as a whole, would permit a reasonable person to make that finding;

(b) Compliance with applicable administrative rules, including but not limited to the objective provided in OAR 660-027-0005(2) and the urban and rural reserve designation standards provided in OAR 660-027-0040; and

(c) Consideration of the factors in OAR 660-027-0050 or 660-027-0060, whichever are applicable.

Stat. Auth.: ORS 195.141; ORS 197.040.

Other Auth.: Statewide planning goals (OAR chapter 660, division 15).

Stats. Implemented: ORS 183.482(8)(c); 195.145; ORS 197.626; ORS 197.747.

Hist.:

MEMORANDUM

March 6, 2008

To: Members of the Reserves Steering Committee

From: Ken Ray, senior public affairs coordinator, Metro

Re: Review of coordinated public involvement plan

At your March 14 meeting you will have an opportunity to discuss and give comment on a coordinated public involvement plan for urban and rural reserves that has been developed as a joint effort by the staffs of Clackamas, Multnomah and Washington counties and Metro. Attached to this memo is the most updated draft of that plan for your review in advance of this meeting.

This plan is intended to outline generally the types of public involvement activities that Metro and the counties will undertake throughout the urban and rural reserves process and how those activities will inform the study and analysis of reserve areas. It is organized around five phases of this project that correspond with the milestones identified on the Key Milestones chart that was distributed with the materials for your January 28 meeting. (This Key Milestones chart is also included as Attachment B to the coordinated public involvement plan.)

This plan has been discussed and vetted with the citizen involvement committees of Metro and the three counties, various county-level advisory committees, the Metro Council, Core 4 members and other entities. It was also reviewed by the Citizen Involvement Advisory Committee of the Oregon Land Conservation and Development Commission at its meeting in Salem on February 21, as required by administrative rule. The attached draft reflects the collective comments and feedback received from all of these entities.

On behalf of the staffs of Metro and of Clackamas, Multnomah and Washington counties who have collaborated on the development of this plan, I look forward to our discussion and receiving your feedback on March 14.

Coordinated Public Involvement Plan Urban and Rural Reserves March 2008

This public involvement plan is the product of a coordinated effort of the staffs of Metro and of Clackamas, Multnomah and Washington counties to incorporate citizen involvement into the study and designation of urban and rural reserves. Metro and the counties are implementing a reserves study and designation process that involves the clear communication of information and timely opportunities for meaningful involvement by local and state governments, interested organizations, and members of the public.

This plan is designed to illustrate the types of public involvement activities, messages and communications methods that will be utilized at different phases of this effort. It does not provide an exhaustive list of meetings and activities that will be scheduled, target audiences that will be engaged, or messages that will be employed. Staff from Metro and Clackamas, Multnomah and Washington counties will be working closely throughout this effort to coordinate public involvement activities and will keep the Reserves Steering Committee, the Metro Council, the boards of commissioners of the three counties, the respective Metro and county citizen involvement committees, and other policy advisory committees informed of and engaged with the implementation of various citizen involvement activities throughout the different phases of the urban and rural reserves effort.

This plan incorporates the requirements of Oregon law and administrative rules governing citizen involvement in land use planning decisions. This plan will undergo review by the Reserves Steering Committee. This draft reflects comments and feedback received from the Metro Council, Core 4 members, the respective citizen involvement committees of Metro and the three counties, and other county-level advisory committees. The Citizen Involvement Advisory Committee of the Oregon Land Conservation and Development Commission (LCDC) has also reviewed this plan, as required by administrative rule.

Background Information on Urban and Rural Reserves

The longstanding system for managing the metro region's urban growth boundary (UGB) has produced less than desirable, and often impractical, urban development patterns. This system has also failed to provide long-term protection for the region's most productive agricultural lands or for important natural landscape features, and it leaves out any consideration of the types of communities the region seeks to create when the UGB is expanded. This approach, which requires Metro to start from scratch every five years, has led to conflict, uncertainty, and frustration for local governments, farmers, businesses, and landowners.

In 2007 the Oregon Legislature approved Senate Bill 1011. This bill enables Metro and the counties of the region to establish urban reserves—areas outside the UGB that, based on a number of factors, may be better suited to accommodate population and job growth over 40 to 50 years—as well as rural reserves, which are areas outside the UGB needed to protect valuable farm and forestland for a similar period. The establishment of urban and rural reserves is

intended to provide greater predictability for local governments and landowners for where future growth may be accommodated and where it will not be accommodated. The process of studying and designating urban and rural reserves is also designed to provide greater flexibility in considering multiple factors for determining which areas are suitable for future urbanization and which areas should be set aside to enhance the agricultural economy and protect natural areas.

Urban and Rural Reserves Study and Designation Process

A Reserves Steering Committee has been convened to oversee the study of urban and rural reserve areas and to make recommendations to the boards of commissioners of Clackamas, Multnomah and Washington counties and the Metro Council on the final designation of reserve areas. The Reserves Steering Committee is co-led by one Metro Councilor and one commissioner from each of the three counties (the “Core 4”). All decisions by the Reserves Steering Committee with regard to the establishment of study areas and recommendations of reserve designations must be made by a unanimous vote of the Core 4. The Core 4 members are:

- Metro Councilor Kathryn Harrington
- Clackamas County Commissioner Martha Schrader
- Multnomah County Commissioner Jeff Cogen
- Washington County Chair Tom Brian

The Steering Committee also has seats for representatives from the two largest cities in each county, as well as one seat for each county representing the smaller cities of that county. One representative is designated to represent the neighboring cities outside Metro’s urban growth boundary. In addition, the Steering Committee includes representatives of the business community, the agricultural community, the natural resources community, social and economic equity organizations, and state agencies. A full list of Reserves Steering Committee members is included as “Attachment A” to this coordinated public involvement plan.

The Reserves Steering Committee is scheduled to meet monthly throughout 2008 and will continue to meet into 2009 when it will submit recommendations to the Metro Council and the county commissions on the designations of urban and rural reserves. Urban and rural reserve recommendations will be made through agreements between the Metro Council and the county commission in whose jurisdiction a reserve area is located. Following the signing of the intergovernmental agreements recommending reserve areas in summer 2009, the Metro Council will adopt the designation of urban reserves through amendments to the Regional Framework Plan, and the county commissions will adopt the designation of rural reserves through amendments to their comprehensive land use plans. The amendments to both the Regional Framework Plan and the county comprehensive land use plans will be submitted to the Oregon Department of Land Conservation and Development for review and acknowledgement in late 2009.

A chart illustrating the process and key milestones for designating urban and rural reserves is included as “Attachment B” to this coordinated public involvement plan. This public involvement plan is organized around four important phases of this work, culminating in

intergovernmental agreements between Metro and the counties in summer 2009. Public meetings and outreach efforts are part of every phase of this project.

Following the signing of the intergovernmental agreements, the Metro Council and county commissions will conduct public hearings and other public outreach required by Oregon law and administrative rules prior to the formal designation of the reserve areas in the Regional Framework Plan and county comprehensive land use plans.

Principles of Public Involvement

The following principles will apply to all public involvement activities:

1. As the designation of urban and rural reserves are linked, public outreach and citizen engagement events should be coordinated by Metro and the counties and should discuss both urban and rural reserves.
2. At major public open houses or other events designed for broad participation, both the affected county and Metro staff should coordinate and carry out the activity. It is the goal to involve elected officials from the Metro Council and the boards of county commissioners in as many activities as schedules will permit.
3. The effort of designating urban and rural reserves should be framed in aspirational terms: this is about shaping what this region will look like over the next 40 to 50 years. This will focus on protecting rural and natural areas that we treasure while determining which areas may be better suited to accommodate population and employment growth that will provide for a healthy economy.
4. Each public involvement activity related to the study of potential reserve areas should begin with a brief presentation of the need for a new approach to managing urban growth in this region, the advantages of designating urban and rural reserves, and information on the findings of the Shape of the Region Study and how those findings are applied to this work. These activities, at different phases of this work, will also feature study questions that will assist the Reserves Steering Committee in developing its recommendations.
5. Metro and the counties will seek to solicit public input through electronic means. Any public feedback solicited online or through other media should address the same study questions asked at public forums and other in-person meetings.
6. Public comments received by Metro and by the counties on matters related to urban and rural reserves will be recorded and responses published in a manner that supports the single, coordinated set of findings required by LCDC's Reserves Rule (OAR 660 Division 27).
7. Attendees at public meetings and forums who submit their names and contact information for the public record will be kept informed through written communications of the progress of the urban and rural reserve study and designation process.
8. Metro and each county may carry out their own processes for informing proposals on urban and rural reserves. Public involvement activities related to these processes are included in this coordinated public involvement plan. Input received through these processes will ultimately come to the Reserves Steering Committee to inform its recommendations on urban and rural reserve designations.

Phase One: Informing Recommendations of Reserve Study Areas

Winter and Spring 2008

Phase One will focus on providing an introduction to the urban and rural reserves process. This will include an explanation of the need for this approach, the process that will be undertaken to develop urban and rural reserves, and the outcomes that the region seeks to achieve. Public involvement events and activities during this phase will also discuss the analytical approach that will be applied in the identification of reserve study areas. These meetings will be the first of several rounds of meetings with community groups and it will be emphasized that staff and elected officials from the counties and Metro will return at different phases of the project to provide updates and seek public input that informs the study and analysis of proposed reserve areas.

Main messages will focus on:

- The need for a new approach to managing urban growth in this region
- The advantages of designating urban and rural reserves
- A brief overview of the factors that will be considered in evaluating potential urban and rural reserves
- How the process of studying and designating urban and rural reserves will work
- The ultimate outcomes the region seeks to achieve

Primary audiences and events will include:

- **Citizen organization meetings¹:** Staff from Metro and the counties will attend regularly scheduled citizen organization meetings in selected areas to provide introductory information on urban and rural reserves and to hear concerns, ideas and other feedback for informing the process of developing urban and rural reserve study areas.
- **Citizen involvement committees:** Staff and elected officials from Metro and the counties will meet with their respective citizen involvement committees to describe plans and goals for soliciting and incorporating citizen involvement into the study and designation of urban and rural reserves. Ideas for enhancing citizen involvement throughout this effort will also be sought.
- **County Coordination and Policy Advisory Committees:** The counties will staff and facilitate their respective advisory committees to develop recommendations specific to the county. In addition, Metro staff and elected officials will brief the Metro Policy Advisory Committee (MPAC) on the details of this citizen involvement plan and on the work of the Reserves Steering Committee.

Materials will include:

- A PowerPoint presentation that briefly explains, at a minimum:
 - Why urban and rural reserves are needed

¹ For purposes of this coordinated public involvement plan, the term “citizen organization” refers to citizen participation organizations (Washington County); community planning organizations, hamlets and villages (Clackamas County), and recognized neighborhood associations (in all three counties).

- The Shape of the Region study and how it informs the reserves study and designation process
- The timeline for studying and designating urban and rural reserves
- What the region hopes to achieve through this process
- A brochure that briefly describes the urban and rural reserves program and timeline
- A description of the county's public involvement process (if applicable)
- Summaries of the three components of the Shape of the Region Study
- A description of Reserves Steering Committee: who its members are and how it operates
- A timeline of events and decision points (Reserves Milestones Chart)
- Web sites maintained by Metro (www.metro-region.org/reserves) and the counties (specific Web addresses to be determined) that describe the need for urban and rural reserves and the process for studying and designating reserve areas

Maps that are utilized during this phase will illustrate the broader region outside of the Metro UGB that is being considered for study for potential reserve areas, both urban and rural. These maps will not identify areas as likely to be included in either rural or urban reserves. During this phase Metro and the counties will be gathering initial input from the public on issues and concerns regarding which areas should be studied for further analysis. There are no preconceptions as to which areas will be studied as potential urban reserves or rural reserves.

At the conclusion of Phase One, public comment will have informed the staff of Metro and the counties in the development of their preliminary recommendations to the Reserves Steering Committee on identifying reserve study areas for further analysis.

Phase Two: Developing Reserve Study Areas

Summer 2008

Phase Two will focus on the selection of reserve study areas for further analysis. As we continue to share information with the public on the importance of urban and rural reserves and describe the analytical approach being taken to evaluate potential reserve areas, we will outline proposed study areas on maps for review and comment by the public. In addition to the main messages provided in Phase One, this phase of the program will focus on addressing at least two primary questions:

1. Are these the areas that the Reserves Steering Committee should study and analyze further?
2. What additional information should be considered in defining these study areas?

Information received through various citizen involvement activities during this phase will inform the decisions of the Reserves Steering Committee to formally establish reserve study areas for further analysis.

Primary audiences and events will include:

- **Public open houses:** Metro and the counties will jointly sponsor and publicize public open houses during this period to describe the purpose of urban and rural reserves and

illustrate potential study areas. These open houses will solicit public input on the scope of the reserve study areas and related considerations. Consistent messages and questionnaires will be used at all open houses.

- **Citizen organization meetings:** Staff and/or elected officials from Metro and the counties will attend citizen organization meetings in selected areas to illustrate potential study areas and solicit feedback on the scope of the proposed study areas and the factors to consider in evaluating those study areas.
- **County coordinating committee meetings:** Staff and/or elected officials from the counties and Metro will meet with coordinating committees in each of the three counties to describe the recommended study areas and solicit feedback on the scope of the proposed study areas and the factors to consider in evaluating those study areas.
- **Other stakeholder meetings:** Staff from the counties and Metro will present information and collect input from a range of other stakeholder groups, including but not limited to county planning commissions, agricultural organizations, local business groups, other interest groups and affected public agencies.

Communication materials utilized during this phase will include:

- A PowerPoint presentation that briefly explains, at a minimum:
 - Why urban and rural reserves are needed
 - The Shape of the Region study and how it informs the reserves study and designation process
 - The timeline for studying and designating urban and rural reserves
 - What the region hopes to achieve through this process
 - The questions to be addressed at this phase of the project
- Brochure that briefly describes the urban and rural reserves program and timeline
- Maps of potential study areas
- Summaries of the three components of the Shape of the Region Study
- A description of the processes being utilized by the county and Metro for gathering input on potential urban and rural reserves
- A description of Reserves Steering Committee: who its members are and how it operates
- Timeline of events and decision points (Reserves Milestones Chart)
- Written articles for publication in neighborhood and CPO newsletters, promoting attendance at open houses and describing the effort to study and designate urban and rural reserves
- Web sites maintained by Metro (www.metro-region.org/reserves) and the counties (specific Web addresses to be determined) that describe the need for urban and rural reserves and the process for studying and designating reserve areas, publicize upcoming open houses and other public forums for citizen involvement, include maps of recommended study areas, and solicit feedback from the public on the primary questions being addressed in this phase of the project
- News releases and notices in local newspapers publicizing the open houses.

At the conclusion of Phase Two, the Reserves Steering Committee will endorse study areas for further analysis.

Phase Three: Analyzing Reserve Study Areas

Fall 2008 and Winter and Spring 2009

Phase Three, which follows the establishment of the reserve study areas by the Reserves Steering Committee in summer 2008, will be the longest and employ the most intensive analytical rigor leading to the development of preliminary recommendations for reserve designations. The analysis will apply the findings of the various elements of the Shape of the Region study and the factors to consider in the designation of urban and rural reserves as described in Oregon law and administrative rule. The analysis will also incorporate information related to transportation and infrastructure needs, population and employment trends, and other inputs.

Public involvement events and activities during this phase will focus on educating the public about the application of these data and factors to the reserve study areas and will solicit citizen feedback on how the Metro Council and the boards of county commissions should weigh various factors in the designation of urban and rural reserves. In addition to the main messages emphasized in the first two phases of this project, public involvement activities during this phase will seek input on the analysis provided by staff from Metro and the counties as well as the relative weight that should be given to different factors in the ultimate designation of urban and rural reserves.

Primary audiences and events will include:

- **Public open houses:** Metro and the counties will jointly sponsor and publicize public open houses during this period to illustrate the study areas and describe the factors and findings being applied in the analyses of these study areas. These open houses, which will include the involvement of elected officials from the counties and Metro, will solicit public input on the application of the factors and additional issues and concerns to consider. Consistent messages and questionnaires will be used at all open houses.
- **County planning commissions²:** Staff from Metro and the counties will present information to county planning commissions describing the approach to designating urban and rural reserves, highlighting the reserves study areas, explaining the factors and analytical methodology being applied to the reserve study areas, and the effects that designating urban and rural reserves will have on growth management decisions at the local and regional level. Staff will seek input from planning commissions on the application of the factors.
- **Citizen organization meetings:** Staff from Metro and the counties will attend citizen organization meetings in selected areas to illustrate potential study areas and solicit feedback on the scope of the proposed study areas and the factors to consider in evaluating those study areas.
- **County coordinating committee meetings:** Staff and/or elected officials from the counties and Metro will meet with coordinating committees of the three counties to describe the recommended study areas and solicit feedback on the scope of the study areas and the factors to consider in evaluating those study areas.

² As the counties will designate rural reserves through amendments to their comprehensive land use plans in 2009, and as staff resources are limited, the focus here is on county planning commissions. However, Metro and county staff will provide information to city planning staffs for their use to inform city decision makers and citizen organizations.

- **Other stakeholder meetings:** Staff from the counties and Metro will present information and collect input from a range of other stakeholder groups, including those listed for Phase Two and others that are identified during the analytical work.

Materials will include:

- A PowerPoint presentation that briefly explains, at a minimum:
 - Why urban and rural reserves are needed
 - The process of establishing study areas up to this point
 - How public input received up to this point has informed the establishment of the study areas
 - The Shape of the Region study and how it informs the reserves study and designation process
 - What comes next in the process of studying urban and rural reserves
 - What the region hopes to achieve through this process
 - The questions to be addressed at this phase of the project
- Brochure that briefly describes the urban and rural reserves program and timeline
- Maps of study areas
- Summaries of the three components of the Shape of the Region Study
- A description of the processes being utilized by the county and Metro for gathering input on potential urban and rural reserves
- Technical information developed to address the factors for selection of study areas
- Timeline of events and decision points (Reserves Milestones Chart)
- Written articles for publication in neighborhood and CPO newsletters, promoting attendance at open houses and describing the effort to study and designate urban and rural reserves
- Web sites maintained by Metro (www.metro-region.org/reserves) and the counties (specific Web addresses to be determined) that describe the need for urban and rural reserves and the process for studying and designating reserve areas, publicize upcoming open houses and other public forums for citizen involvement, include maps of study areas, and solicit feedback from the public on the primary questions being addressed in this phase of the project
- News releases and notices in local newspapers publicizing the open houses.

At the conclusion of Phase Three, the Core 4 members of the Reserves Steering Committee will, by unanimous vote, formally recommend the designations of specific urban and rural reserves to the Metro Council and boards of county commissioners for their adoption through intergovernmental agreements.

Phase Four: Recommending Reserve Designations Spring and Summer 2009

Phase Four will seek public input on the preliminary urban and rural reserve designations recommended by the Reserves Steering Committee for adoption by the Metro Council and the boards of commissioners of Clackamas, Multnomah and Washington counties. Staff and elected officials from Metro and the three counties will continue to meet with the audiences and

organizations that have been engaged in the study and designation of the urban and rural reserves with the aim of illustrating how citizen input has contributed to the formation of the recommended reserve designations and seeking additional public comment to inform the decisions of the Metro Council and county commissions to designate reserve areas through intergovernmental agreements.

The questions to be addressed during this phase will focus on whether the Metro Council and the boards of county commissioners should adopt the recommendations of the Reserves Steering Committee and, if amendments to the proposed reserve designations are desired, how those proposed reserve designations should be amended and why.

Primary audiences and events will include:

- **Public open houses:** Metro and the counties will jointly sponsor and publicize public open houses (at least two per county) during this period to illustrate the recommended reserve designations. These open houses, which will include the involvement of elected officials from the counties and Metro, will solicit public input on factors for the Metro Council and the county commissions to consider when determining urban and rural reserve designations.
- **Public hearings:** In addition to public open houses, public hearings will be held by the Metro Council and the boards of county commissioners to receive public comment on the recommendations for reserve designations made by the Reserves Steering Committee and to provide feedback on the draft intergovernmental agreements to be negotiated between the Metro Council and the boards of county commissioners.
- **County planning commissions:** Staff from Metro and the counties will present information to county planning commissions describing the recommended reserve designations and the factors and other considerations that contributed to those recommendations. Staff will also discuss the steps following the adoption of intergovernmental agreements designating the reserve areas, including the amendments to comprehensive plans and the Regional Framework Plan, and the roles and responsibilities of planning commissions relating to the zoning and planning of reserve areas.
- **Citizen organization meetings:** Staff from Metro and the counties will attend selected citizen organization meetings to illustrate the recommended reserve designations and solicit public feedback to present to the Metro Council and the county commissions prior to adoption of the intergovernmental agreements. The focus of this outreach effort will be on those citizen organizations serving areas in or nearest to the recommended areas for reserve designations.
- **County coordinating committee meetings:** Staff and/or elected officials from the counties and Metro will meet with coordinating committees from each of the three counties to describe the recommended reserve designations and solicit public feedback to present to the Metro Council and the county commissions prior to adoption of the intergovernmental agreements.

Materials will include:

- A PowerPoint presentation that briefly explains, at a minimum:
 - Why urban and rural reserves are needed
 - The process of establishing recommended reserve designations up to this point

- What was learned in applying the technical analyses and public input to the study areas, and how they inform the recommended reserve designations
- The next steps to be undertaken by the Metro Council and the county commissions
- What the region hopes to achieve through this process
- The questions to be addressed at this phase of the project
- Maps of recommended reserve designations
- A description of the processes being utilized by the county and Metro for gathering input on potential urban and rural reserves
- Technical information developed to address the factors for selection of study areas
- Written articles for publication in neighborhood and CPO newsletters, promoting attendance at open houses and describing the effort to study and designate urban and rural reserves
- Web sites maintained by Metro (www.metro-region.org/reserves) and the counties (specific Web addresses to be determined) that describe the need for urban and rural reserves and the process for studying and designating reserve areas, publicize upcoming open houses and other public forums for citizen involvement, include maps of study areas, and solicit feedback from the public on the primary questions being addressed in this phase of the project
- News releases and notices in local newspapers publicizing the open houses and public hearings.

At the conclusion of Phase Four, after receiving public comment through a variety of activities and events, the Metro Council and the boards of county commissioners will adopt intergovernmental agreements recommending the designations of urban and rural reserves. The formal designations of the reserve areas will take place in Phase Five, when the Metro Council will amend the Regional Framework Plan to designate urban reserves and the counties will amend their comprehensive plans to designate rural reserves. The amendments to these plans will be subject to review and acknowledgement by LCDC.

Phase Five: Formal Designations of Urban and Rural Reserves

Summer and Fall 2009

Phase Five will deal with the amendment of the Regional Framework Plan to designate urban reserves and the amendments to the comprehensive land use plans of Clackamas, Multnomah and Washington counties to designate rural reserves. Specific public involvement activities related to these amendments will be planned in 2009 prior to the adoption of the intergovernmental agreements described in Phase Four of this coordinated public involvement plan. These activities will be conducted in accordance with requirements for public involvement established in Oregon law, Goal 1 of Oregon's Statewide Planning Goals and Objectives, and other applicable administrative rules.

Attachment A**Reserves Steering Committee Members**

as of March 6, 2008

Core 4

Metro Council	Kathryn Harrington
Clackamas County	Martha Schrader
Multnomah County	Jeff Cogen
Washington County	Tom Brian

<u>Cities</u>	<u>Member</u>	<u>Alternate</u>
Portland	Gil Kelley	Bob Clay
Beaverton	Rob Drake	
Gresham	Shane Bemis	
Hillsboro	Tom Hughes	Aron Carleson
Lake Oswego	Judie Hammerstad	Donna Jordan
Oregon City	Alice Norris	Doug Neeley
Other cities – Clackamas County	Charlotte Lehan, Wilsonville mayor	Norm King, West Linn mayor
Other cities – Multnomah County	David Fuller, Wood Village mayor	Julie Odell, Wood Village
Other cities – Washington County	Chris Barhyte, Tualatin city councilor	Richard Kidd, Forest Grove mayor
Neighbor cities	Bob Austin, Estacada mayor	Kathy Figley, Woodburn mayor

<u>Non-governmental stakeholders</u>	<u>Member</u>	<u>Alternate</u>
Business	Greg Manning	
Construction/Real Estate	Greg Specht	Bob LeFeber
Urban Development	Craig Brown	Drake Butsch
Agriculture	Jeff Stone	Shawn Cleave
Natural Resources	Mike Houck	Jim Labbe
Land Use	Mary Kyle McCurdy	
Social/Economic Equity	Sue Marshall	Ron Carley

<u>State Agencies – serving in coordination roles</u>	<u>Member</u>	<u>Alternate</u>
Department of Land Conservation and Development	Richard Whitman	Bob Rindy
Department of Transportation	Lainie Smith	
Department of Forestry	David Morman	Doug Decker
Economic and Community Development Department	Karen Goddin	
Water Resources Department	Bill Ferber	
Department of State Lands	Peter Ryan	Kevin Moynahan
Department of Environmental Quality	Keith Johnson	
Department of Agriculture	Katy Coba	Jim Johnson
Department of Fish and Wildlife	Jeff Boechler	Susan Barnes

DRAFT

Key Milestones for Designating Urban and Rural Reserves

*work in progress***2008***Identifying and analyzing options for urban and rural reserves study areas***2009***Final analysis and decisions on urban and rural reserves***2010***Future decisions*

WINTER

SPRING

SUMMER

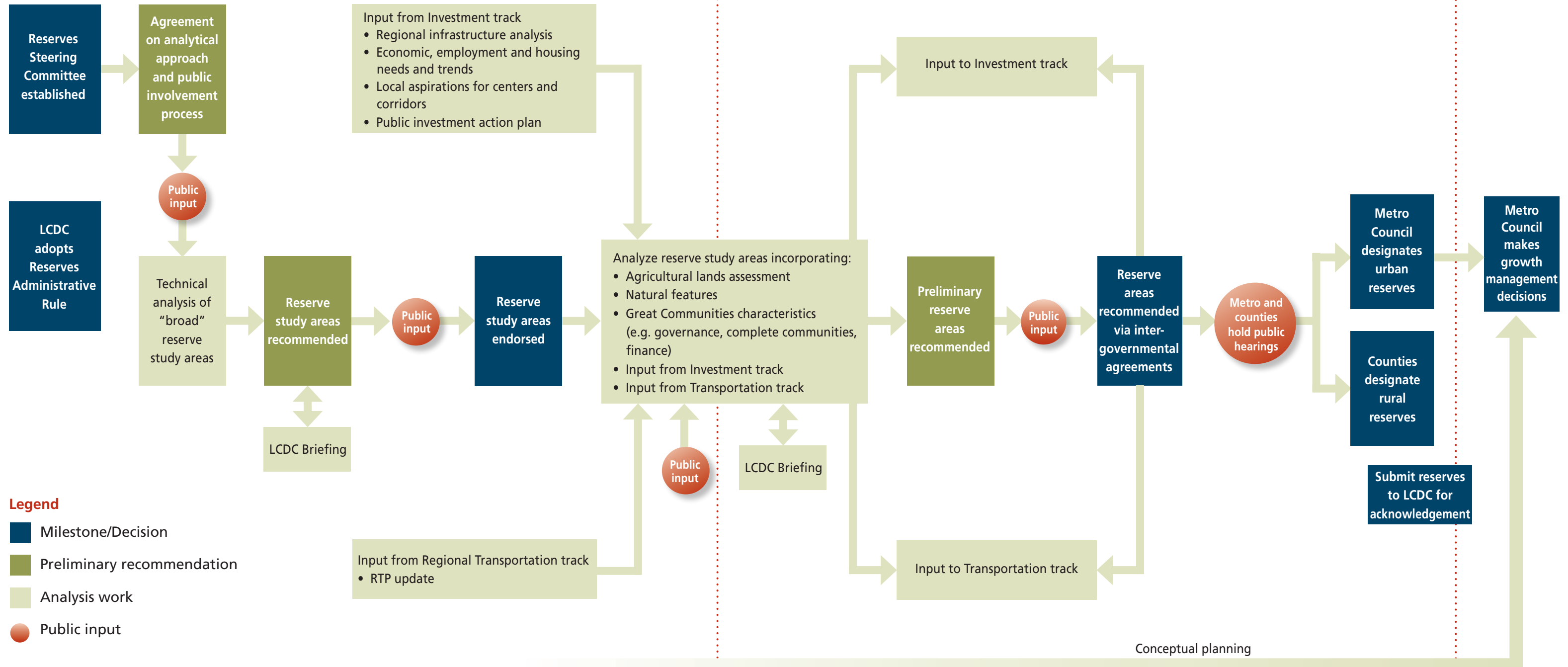
FALL

WINTER

SPRING

SUMMER

FALL



Framing Growth Forecasts in the Context of Urban Reserves

February 27, 2008

Framework: This document recommends a way to integrate growth forecasts and allocations of that growth around the region at the appropriate points in the urban reserves decision-making process.

1. The reserves process is intended to define the future shape of the Portland metropolitan region including where and how growth will occur.
2. Designation of urban reserves at the end of 2009 will require growth forecasts and allocations to make adequate findings.
3. Growth forecasts and allocations will need to reflect long-term economic and demographic trends to ensure that future businesses, jobs and people are accommodated.
4. Allocations regarding where and how growth will occur cannot be made until the following questions are answered:
 - **Regional choices:** What is the region's ability and willingness to provide the necessary public facilities and services, governance, and finance to support the creation of "Great Communities" which are sustainable and complete?
 - **Local choices:** What is the ability and willingness of local jurisdictions and service providers to achieve local aspirations in existing centers, corridors and employment areas (e.g., upzoning, targeted investments, transportation improvements)?
 - **New land supply:** What is the potential capacity and suitability of the reserve areas to accommodate future jobs and people in a way that creates "Great Communities"?
5. Each decision point along the reserves decision-making continuum will require a greater level of refinement in the growth forecasts and ultimately will lead to allocation of the forecasted population and employment incorporating regional and local agreements on the trends and policy choices described above.
6. Metro will prepare growth forecasts that will be peer-reviewed by an expert review panel. The growth forecast expert review panel should include academic experts, state and local economic experts and local business experts.

Recommendations:

1. **Spring 2008:** To guide development of reserve study areas, Metro will release an initial 40 to 50-year population and employment range forecast after review by expert panel that will include an assessment of variables which affect the accuracy of the forecast.
2. **Spring 2008 – Fall 2009:** The region, the three counties and local governments will proceed through a planning process that will utilize and achieve successively greater levels of refinement regarding population and employment forecasts and allocation of the forecasted growth to various locations in the region.
3. **Spring 2009:**
 - Metro will release 20-year forecast after review by expert panel to guide development of Urban Growth Report (UGR).
 - Metro will release *final* 40 to 50-year range forecast to guide designation of urban reserves.

4. Summer 2009: Metro will circulate draft Urban Growth Report (UGR) that reflects growth assumptions and local aspirations.
5. Fall 2009: Metro Council adopts UGR
6. Fall/Winter 2009: Metro Council adopts urban reserves with 40 to 50-year population and employment forecast and growth allocation.
7. Winter 2010: Metro Council makes urban growth boundary decision.

Reserves Steering Committee Members Contact List

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Materials following this page were distributed at the meeting.

DRAFT

Key Milestones for Designating Urban and Rural Reserves

work in progress

2008

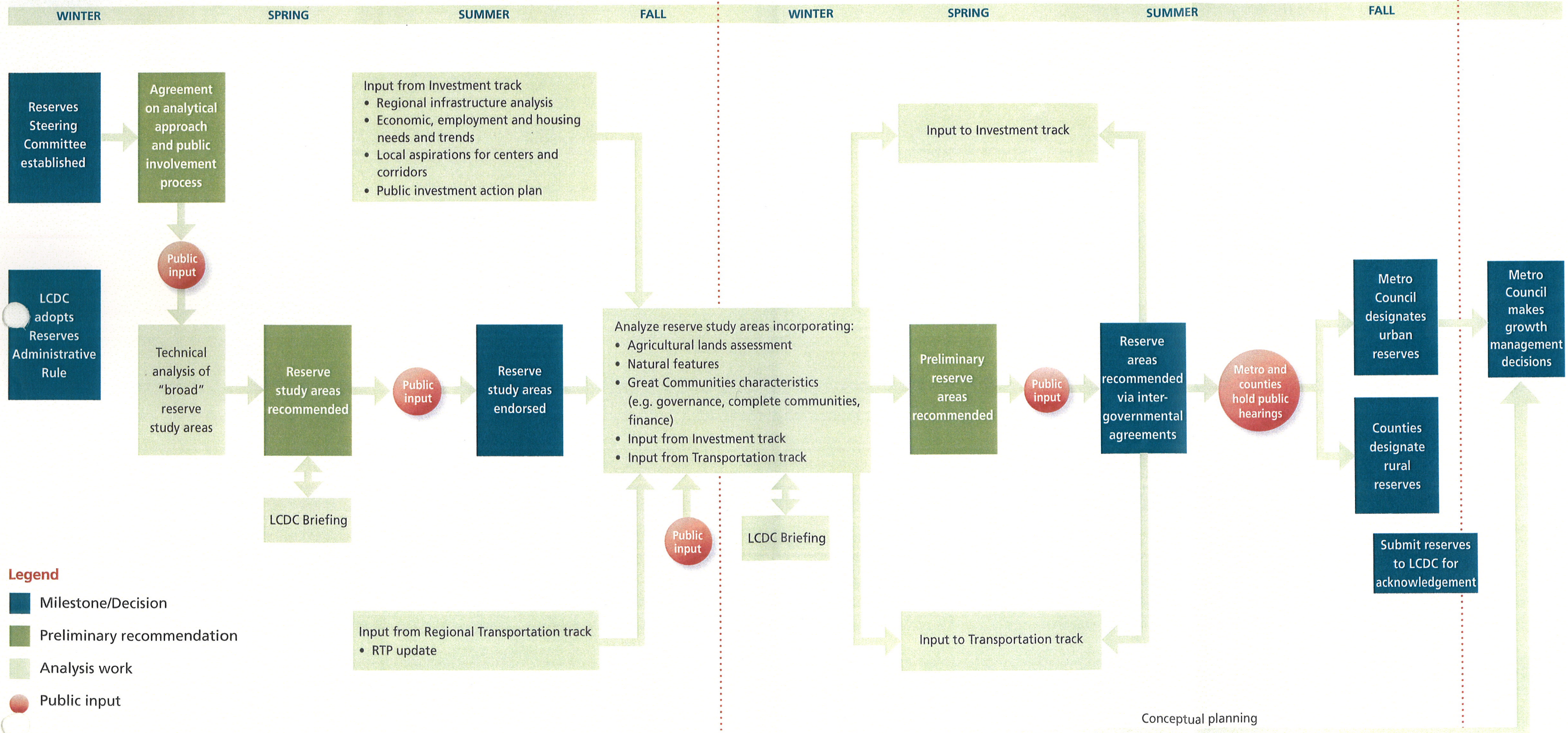
Identifying and analyzing options for urban and rural reserves study areas

2009

Final analysis and decisions on urban and rural reserves

2010

Future decisions



Framing Growth Forecasts in the Context of Urban Reserves

February 27, 2008

Framework: This document recommends a way to integrate growth forecasts and allocations of that growth around the region at the appropriate points in the urban reserves decision-making process.

1. The reserves process is intended to define the future shape of the Portland metropolitan region including where and how growth will occur.
2. Designation of urban reserves at the end of 2009 will require growth forecasts and allocations to make adequate findings.
3. Growth forecasts and allocations will need to reflect long-term economic and demographic trends to ensure that future businesses, jobs and people are accommodated.
4. Allocations regarding where and how growth will occur cannot be made until the following questions are answered:
 - Regional choices: What is the region's ability and willingness to provide the necessary public facilities and services, governance, and finance to support the creation of "Great Communities" which are sustainable and complete?
 - Local choices: What is the ability and willingness of local jurisdictions and service providers to achieve local aspirations in existing centers, corridors and employment areas (e.g., upzoning, targeted investments, transportation improvements)?
 - New land supply: What is the potential capacity and suitability of the reserve areas to accommodate future jobs and people in a way that creates "Great Communities"?
5. Each decision point along the reserves decision-making continuum will require a greater level of refinement in the growth forecasts and ultimately will lead to allocation of the forecasted population and employment incorporating regional and local agreements on the trends and policy choices described above.
6. Metro will prepare growth forecasts that will be peer-reviewed by an expert review panel. The growth forecast expert review panel should include academic experts, state and local economic experts and local business experts.

Recommendations:

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Reserves Steering Committee Members Contact List

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DRAFT

Coordinated Reserves Work Program Overview

2007

2008

2009

2010 – 11

PHASE 1

Establish committees and public involvement process

November 2007 – March 2008

PHASE 2

Develop Reserve Study Areas

April 2008 – August 2008

PHASE 3

Analyze Reserve Study Areas

September 2008 – April 2009

PHASE 4

Recommend Reserve Designations

May 2009 – September 2009

PHASE 5

Adoption of Urban and Rural Reserves

October 2009 – December 2009

January 2010 – December 2011

OBJECTIVES

- Establish Reserves Steering Committee
- Establish county coordination Committees
- Create coordinated public involvement plan
- Develop analytical approach

- Identify broad reserve study areas
- Review initial 40 – 50 year population and employment forecasts
- Develop indicators to evaluate urban and rural reserve factors
- Review data needs and begin to assemble data

- Analyze how reserve study areas meet urban and rural reserve factors
- Refine 40 – 50 year population and employment forecasts and allocations
- Develop preliminary urban and rural reserves

- Finalize reserve areas
- Draft and adopt intergovernmental agreements

- Draft and adopt required plan and code ordinances
- Draft and adopt joint decision findings
- Adopt reserve areas
- LCDC review and acknowledgement of reserve areas

PUBLIC INVOLVEMENT

- Focus on the need for reserves and an introduction to the reserves process

- Focus on the selection of reserve study areas for further analysis

- Focus on the application of factors to reserve study areas and how factors should be weighed

- Focus on review of urban and rural reserves recommended by the Reserves Steering Committee

- Focus on technical issues relating to the adoption of amendments to existing codes and plans

Following the adoption of reserves, the Metro Council will make Urban Growth Management decisions:

- Review Urban Growth Report and evaluate existing Urban Growth Boundary
- Consider efficiency measures
- Select specific lands for inclusion within Metro UGB as needed

KEY MILESTONE

Agreement on analytical approach and the public involvement process

Reserve study areas endorsed

Preliminary reserve areas recommended

Reserve areas recommended via intergovernmental agreements

Metro designates urban reserves
Counties designate rural reserves

Counties implement rural reserves by conforming their comprehensive plans

STEERING COMMITTEE

Reserves Steering Committee Meetings 1 – 2

Reserves Steering Committee Meetings 3 – 7

Reserves Steering Committee Meetings 8 – 15

Meetings scheduled as needed

Meetings scheduled as needed

