

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF DIRECTING THE) Resolution No. 02-3171A
EXECUTIVE OFFICER TO SUBMIT A PETITION)
TO THE LAND CONSERVATION AND) Introduced by Councilor Park
DEVELOPMENT COMMISSION FOR A)
DECLARATORY RULING UNDER ORS 183.410)
ON THE APPLICATION OF GOAL 14 AND ORS)
197.298 TO THE EXPANSION BY METRO OF)
THE URBAN GROWTH BOUNDARY)

WHEREAS, Metro is responsible for the establishment and management of the urban growth boundary (UGB) for the Portland metropolitan region; and

WHEREAS, ORS 197.299(1) requires Metro to conduct an analysis of the capacity of the UGB for housing and to ensure that the boundary contains capacity for a 20-year supply of land for housing; and

WHEREAS, ORS 197.296 requires Metro to conduct an analysis of the capacity of the UGB for housing every five years; and

WHEREAS, it is likely Metro will have to expand the UGB to add capacity for housing to accommodate housing for the forecast population to year 2022; and

WHEREAS, Metro may find it necessary to allocate housing need to subareas of the region in order to accomplish the objectives of the Regional Framework Plan and the locational factors of Goal 14; and

WHEREAS, neither Goal 14 nor ORS 197.298, which establishes the priority of land to be added to UGBs, expressly states that the goal or statute may be applied to subregions of the Metro region; and

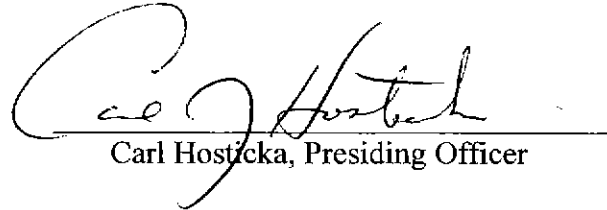
WHEREAS, the analysis Metro would undertake to determine whether allocation of housing and employment need to subregions accomplishes Regional Framework Plan and Goal 14 objectives is costly and time-consuming; now, therefore,

BE IT RESOLVED:

1. That the Executive Officer shall prepare and submit to the Land Conservation and Development Commission a "Petition for Declaratory Ruling" as allowed by ORS 183.410 seeking a determination from the commission whether Metro's practice of allocating regional need for housing and employment to subregions is proscribed or regulated by Goal 14 or ORS 197.298.

2. That the petition shall include the questions set forth in Exhibit A and the methodology set forth in Exhibit B, both attached and incorporated into this resolution.

ADOPTED by the Metro Council this 7th day of March, 2002.


Carl Hosticka, Presiding Officer

Approved as to Form:


Daniel B. Cooper, General Counsel

Attachments: Exhibit A
Exhibit B

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3/6/02

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Questions for Petition for Declaratory Ruling from LCDC Under ORS 183.410

Goal 14 Questions:

1. If Metro determines there is a subregional need (part of regional need), does Goal 14 allow Metro, using the basis and methodology set forth in this petition, to allocate housing and employment to subregions, and to apply the locational factors of Goal 14 by subregion to select land for inclusion within the UGB?
2. If Metro determines there is a subregional need, does Goal 14 allow Metro to treat the Central City and each of the seven Regional Centers within the region as a subregion and, using the basis and methodology set forth in this petition, allocate some of the region's housing and employment need to each?
3. If Metro determines there is a subregional need, does Goal 14 allow Metro to treat each of the 38 centers within the region as a subregion and, using the basis and methodology set forth in this petition, allocate some of the region's housing and employment need to each?
4. If Metro determines there is a subregional need, does Goal 14 allow Metro to treat Wilsonville and Forest Grove/Cornelius as subregions and, using the basis and methodology set forth in this petition, allocate some of the region's housing and employment need to these subregions?

ORS 197.298 Questions:

5. If Metro determines there is a subregional need (part of regional need), does ORS 197.298(1) allow Metro, using the basis and methodology set forth in this petition, to apply the statutory priorities for inclusion of land within a UGB on a subregional basis?
6. May Metro take lower priority land near the subregion into the UGB if the only higher priority land available is too far from the subregion to accommodate the subregional need?
7. May Metro include land of lower priority simply by demonstrating, pursuant to ORS 197.298(1), that there is not enough higher priority land to accommodate the amount of land needed, or must Metro also demonstrate that it must include the lower priority land for one of the reasons set forth in ORS 197.298(3)?
8. May Metro treat subregional need for general housing and employment land as a "specific type of identified land need" under ORS 197.298(3)(a) and bring farmland into the boundary if the only higher priority available is in a distant part of the region?
9. May Metro treat the need for a school in a school district as a "specific type of identified land need" under ORS 197.298(3)(a) and bring farmland within or close to the school district into the boundary if the only higher priority land available is in a distant part of the region?
10. May Metro treat subregional need for affordable housing as a "specific type of identified land need" under ORS 197.298(3)(a) and bring farmland into the boundary if the only higher priority land available is in a distant part of the region?
11. May Metro include lower priority land, when land of higher priority is available, for reasons other than the those set forth in ORS 197.298(3)?

Metro Periodic Review of the Urban Growth Boundary Subregional Assessment Paper

Introduction

Our economic region is composed of 24 cities, 3 counties and a number of cities located in Clark County. The region can be stratified according to any number of economic markets; political boundaries, utility/service providers or travel-sheds or destinations. This memorandum provides background information defining a methodology for examining the region based on various subregional areas.

Stratifying the region according to subregions provides a means of identifying current conditions:

- the possibly correcting imbalances with future changes
- minimizing impacts on areas outside of the region
- and optimizing the 2040 Growth Concept Plan

What follows is the identification of technical and policy issues related to subregional research, a synthesis of State law and the policies contained in Metro's Regional Framework Plan (Framework Plan). A discussion of the use of the MetroScope model to examine this issue also provides a basis to define and evaluate the performance of subregions and to introduce recommendations for a research agenda and new policy development.

Technical, Legal and Policy Issues

In order to identify and begin comparing various subregions a number of questions must be answered. The issues are as follows:

- What are the appropriate entities that make up subregions within our region?
- How does subregional allocation of general housing and employment need fit into the priority scheme in ORS 197.298?
- What policies are currently in place to guide the identification of subregions?
- How important are subregions to the functionality and implementation of the 2040 Growth Concept?
- What policies are necessary to implement to correct imbalances within the region?
- What are the appropriate measures of a subregion in balance?
- How large or small should a subregion be considered? Why?

Entities that Operate within Subregions of Our Economic Region

A number of organizations have been formed to address the provision of services to various parts of the region. The geographic boundaries of these areas have been drawn to take advantage of geographic features and to maximize delivery of services. Other service entities rely less on concrete boundaries related to topographic features such as cities and counties, planning or social organizations. Finally, market areas are defined by businesses and are based on demographic and economic profiles or agglomeration of similar industry types. Examples of some of these districts are shown on Maps 2 through 3. The following entities function as subregional providers of services within the region:

- Special Districts: School, Water, Sewer, Parks and Fire
- Cities and Counties
- Market based areas: clustered around economic centers

- Various community organizations – newspaper, postal service, geopolitical entities such as community planning organizations, business organizations, granges, neighborhood associations, etc.

All of these types of providers operate in specific areas and may have land needs associated with them to provide services or optimize economic activity.

Goal 14 Guidance for Allocation of Need by Subregion

Goal 14 provides a framework for evaluating land needed to serve a subregion. State Goal 14 lists two factors, 3 and 4, that relate to the subregional discussion. Factor 3, *orderly and economic provision for public facilities and services* and Factor 4 *maximum efficiency of land uses within and on the fringe of the existing urban area* provide some guidance on how a subregion might be defined and measured.

In proposed amendments to Goal 14, OAR section 660-024-0070 (published in June 2000, but not adopted), the State expressed some of its ideas about how to perform a subregional analysis:

- subregional need may not exceed needs for the whole region;
- form a policy basis for establishment of subregions;
- establish boundaries and policy objectives for each subregion;
- demonstrate that the boundaries and policy objectives are consistent with and help achieve framework and functional plans for the whole region; and
- demonstrate that the subregions and boundaries of the subregions are necessary to achieve one or more of the Goal 14 locational factors.

Additionally, proposed language states:

- Regional governments that have identified subregions of a regional UGB shall follow the requirement in Sections (1) (alternative lands analysis) of this rule for lands adjacent to a segment of the UGB that borders a particular subregion rather than for the entire UGB, provided that segment is coterminous with the urban growth boundary for at least 30 miles.

Based on the tenor of the proposed changes to the rule, the size of subregions and the application of Goal 14 hierarchy of lands are issues that must be taken into consideration when addressing the subregional assessment. Drawing subregional boundaries too small is counter-productive to the formulation and implementation of regional planning policies and circumvents the hierarchical land system in the statute. Conversely, drawing boundaries too large fails to recognize that there may be instances where there are localized land needs that cannot be met outside that localized area. A third point to consider is that all subregions operate within the confines of one economic region that is subject to market equilibrium forces. The market will respond to counter balancing pressures that ultimately seek an equilibrium solution.

ORS 197.298 Guidance for Allocation of Need by Subregion

“ORS 197.298(1) establishes priorities for land that may be included within an urban growth boundary. The subsection requires Metro to include “exception” land (higher priority) before it includes farmland (lower priority), for example. Attachment 1 provides a graphic representation of how the priorities apply to expansion of the UGB. To include farmland, Metro must demonstrate that the exception land is “inadequate to accommodate the amount of land needed.”

The question raised by a subregional allocation of general housing and employment need is whether Metro may apply the priority of lands to just those lands outside the boundary of a designated subregion or must first exhaust all available higher priority (exception) land, no matter how distant from the subregional need, before including lower priority (farm zoned) land. The statute does not expressly answer this question.

The Court of Appeals and LUBA have offered some guidance, however, in the few cases that have considered subregional allocation of housing need. Both have agreed that nothing in the law prohibits subregional allocation.¹ Both say Metro must consider subregional need in the context of overall regional need.² The Court of Appeals has cautioned that Metro must explain the basis for any determination that an area serves as a subregion. It must also explain why the needs of the area should be viewed in isolation from regional need.³ Language in a LUBA footnote suggests that Metro can identify a subregional need and look to rural land near the subregion to accommodate that need.⁴

In sum, neither the statute nor the cases that interpret it give a clear, unequivocal answer to the question raised by subregional allocation. But the cases offer some support for the proposition that Metro may apply the priority of lands in ORS 197.298(1) to just those lands outside the boundary of, but near, a designated subregion.

Schools and Public Facilities

When Metro determines how much land is needed for housing and employment, it includes land for public facilities and services in its calculations. Hence, when Metro adds land to the UGB, it includes land for those facilities and services. It is possible, however, that the only land that is higher priority for UGB inclusion under state law is distant from the provider of the service and cannot meet the provider's need.

State law provides an exemption from the priorities for this situation. The law allows Metro to include lower priority land if it has identified a specific type of need – such as the need for a school or a water storage facility – that “cannot be reasonably accommodated on higher priority land...” ORS 197.298(3)(a). This exemption involves subregional analysis on a small scale. It involves a specific need, for a school site, for example, not the general need for housing and employment. Because the need for the school arises in the district, and must likely be met within or near the district, the appropriate subregion is probably the school district and nearby land.

Metro must apply the priorities in state law to its search for appropriate land for the school site, but only to land in the subregion. Thus, if a site is available on exception land near the school district, Metro must take the exception land into the boundary rather than nearby farmland. But Metro is not bound to take in exception land far from the school district (and the subregion) if that land cannot reasonably accommodate the district's need for a school. If there is no exception land that can reasonably accommodate the use, Metro can take the farmland into the UGB.

Thus, Metro can apply this exemption in state law without having to undertake the kind of analysis required to allocate the general housing and employment need to subregions.

¹ *Residents of Rosemont v. Metro*, 173 Or. App. 321 (2001); *1000 Friends of Oregon v. Metro*, 18 Or. LUBA 311 (1989).

² *1000 Friends of Oregon v. Metro and Ryland Homes*, 174 Or. App. 406 (2001); *1000 Friends of Oregon v. Metro and Ryland Homes*, 38 Or. LUBA 565 (2000).

³ *Residents of Rosemont*, 173 Or. App. 321 (2001).

⁴ *Residents of Rosemont*, LUBA No. 2000-02 (2000).

Metro Framework Plan Policies

The following review of Framework Plan serves as an evaluation of which Metro policies will assist in developing and evaluating subregional needs. The Framework Plan is a document that is intended to unite all of Metro's adopted land use policies and requirements. The Charter directs Metro to address management and amendment of the UGB, evaluate urban design and settlement patterns and monitor housing densities within the region. The Framework Plan contains a lengthy discussion of the 2040 Growth Concept Plan which is intended to serve as an evolving blue print for the region for a period of up to 50 years and states that the preferred form of growth is to be contained within a carefully managed UGB. The introductory section of the Framework Plan provides language that directly states the importance of centers and a subregional examination to evaluate of the functionality of the region as a whole.

The relevant sections are quoted below:

Planning for all centers seek a balance between jobs/housing and unique blends of urban amenities so that more transportation trips are likely to remain local and become more multi-modal.

In keeping with the jobs/housing balance in centers, a jobs/housing balance by subregional areas can and should be a goal. This would account for housing and employment outside of centers, and direct policy to adjust for better jobs/housing ratios around the region.⁵

The Framework Plan divides the region into four market areas besides downtown Portland. The areas represented by these areas in Beaverton, Gresham, Hillsboro and Oregon City.

This review of the Framework Plan is divided into broad topic areas and includes: Built Environment/ Neighbor Cities, Economic Vitality, Transportation, Schools and Clark County.

Built Environment/ Neighbor Cities

- *Description of 2040 Growth Concept, Neighbor Cities* – There should be a strong balance between jobs and housing in the Metro region and in the neighbor cities. The more a balance of jobs and households is retained, the more trips will remain local.
- *Neighbor Cities* – To minimize the generation of new automobile trips, a balance of sufficient number of jobs at wages consistent with housing prices in communities both within the Metro UGB and in neighboring cities should be pursued.
- *1.2 Built Environment* – Continued growth of regional economic opportunity, balanced so as to provide an equitable distribution of jobs, income, investment and tax capacity throughout the region and to support other regional goals and objectives.
- *1.3 Housing & Affordable Housing* – Balance of jobs and housing within the region and subregions.

⁵ Regional Framework Plan page 12 and 17.

Economic Vitality

- *1.4 Economic Opportunity* – Encourage a diverse and sufficient supply of jobs, the number and wage level of jobs within each subregion should be balanced with housing cost and availability within the subregion.
- *1.5 Economic Vitality* – To support economic vitality throughout the entire region, Metro shall undertake the following steps:
 - Monitor regional and subregional indicators of economic vitality, such as the balance of jobs, job compensation and housing availability.
 - If Metro's monitoring finds that existing efforts to promote and support economic vitality in all parts of the region are inadequate, Metro shall facilitate collaborative regional approaches that better support economic vitality for all parts of the region.
- *1.141 School Siting* – Coordinate to site school in an already developed and urbanizing areas.
- *1.14.2 Schools* – Are considered to be public facilities and additions to the UGB may only be approved by Metro following completion of conceptual plans for school facilities.

Transportation

- *Policy Overview* – Ensuring efficient access to jobs, housing, cultural and recreational opportunities, shopping in and throughout the region and providing transportation facilities that support a balance of jobs and housing (policy highlights in Overview).
- *System Objectives* – In developing new transportation system infrastructure, the highest priority should be providing accessibility and mobility to and from central city, regional centers and industrial areas and intermodal facilities. Specific needs, associated with ensuring access to jobs, housing, cultural and recreational opportunities and shipping within and among the centers, should be assessed and met through a combination of intensifying land uses and increasing transportation system capacity so as to mitigate negative impacts on environmental quality and where and how people live, work and play. The region's system-wide policies are (among others):
- *Jobs/Housing Balance* – Support a balance of jobs and housing in each subarea of the region to reduce the need for additional transportation facilities. Provide housing that is easily accessible to jobs and that is affordable to all members of the workforce.
- *2.7* – Support a balance of jobs and housing in each subarea of the region to reduce the need for additional transportation facilities. Provide housing that is easily accessible to jobs and that is affordable to all members of the workforce.

Clark County

- *6.1.5* – Metro should encourage cooperative efforts to promote business location throughout the region, including Clark County, in order to improve the job/housing balance in the metropolitan area.

What Does All Of This Tell Us? – A Policy Basis for Subregional Analysis

These policy statements from the Regional Framework Plan, together with State law (Goal 14 and the statutes), guide the Metro Council's decision on how to accommodate the next 20 years' worth of forecasted growth. Whatever steps Metro chooses to take – expansion of the UGB, measure to

increase the capacity of centers, other steps – Metro must address these Framework Plan policies. The policies, taken together, seek appropriate ratios between housing and employment in various parts of the region in order to accomplish stated objectives: to reduce the number and length of auto trips; to better match wage levels with housing costs; to achieve a higher level of multi-modal transportation; to achieve a more equitable distribution of employment opportunities, investment and tax capacity; and other objectives.

“Metro may choose to allocate housing and employment need to subregions of the region to attain the desired ratios of housing and employment. The Framework Plan identifies subregions – market areas around regional centers – which may prove to be the most effective basis for such an allocation. Testing and measurement (see section on “Measuring the Efficiency of Subregions/MetroScope”) determine which configuration of subregions best achieves the Framework Plan policies.

“If Metro chooses to expand the UGB to accommodate housing and employment need, and to use its selection of expansion land to help accomplish these Framework Plan policies, it must do so in a manner that complies with state law (Goal 14 and the statutes).”

The existing policies that have been highlighted above from the Framework Plan provide some direction for subregional analysis and correcting potential imbalances.

A subregional analysis is proposed to address whether certain geographic areas of the region are expected to be more or less successful than other parts of the region as growth occurs over the next 20 years. If so, are there actions that Metro can take through the land use system to help areas succeed better? With that general objective, what geographic areas, or subregions, are appropriate to examine and what constitutes success?

Two perspectives are recommended for this evaluation:

- What goals have the region set for certain areas and are we expected to achieve those goals?
- Can we identify areas that might suffer negative consequences of the region’s growth management goals and are there actions that can be taken to mitigate those consequences?

Are we achieving our goals?

The most appropriate framework for answering this question on a subregional basis is the 2040 Growth Concept and the “2040 Fundamental” established as performance measures to evaluate the effectiveness of the 2040 Growth Concept. The key priority land use elements identified in the 2040 Growth Concept are Centers and Industrial Areas.

Centers:

The 2040 Growth Concept establishes a hierarchy of higher density mixed-use centers, each intended to serve different functions, as follows:

- The Central City is intended to be the employment, government, services, retail, cultural and entertainment center for the entire region. As such, the market area is in excess of one million people to support these retail, services and cultural activities and to provide labor for this job growth. To achieve this, the goal for the Central City is to maintain its regional share of general and retail employment as the region as a whole grows.

- Regional Centers are intended to be concentrations of employment, services and retail that is supported by a market area of more than 100,000 population to support retail and services and to provide labor for job growth.
- Town Centers are intended to provide local retail and services. All residential areas of the region are intended to be served by a Town Center within three miles.

Industrial Areas:

Industrial Areas and Intermodal freight terminals are identified in the 2040 Growth Concept to provide essential economic prosperity for the region by maintaining areas for basic industry and trade.

Industrial Areas are intended to be restricted from non-industrial development so as to avoid unnecessary traffic congestion hindering truck access and to reserve industrial vacant land inventory for industrial development purposes. Industrial areas also require access to sufficient labor within a reasonable distance.

Measures of Success:

Attachment A are the 2040 Fundamentals which provide a framework for defining measures for a subregional analysis. Presented below are key components relating to Centers and Industrial areas.

1. Development of Centers

- Document the level and density of employment growth within the Central City, each Regional Center and each Town Center to determine if they are expected to grow over the next 20 years at the rate and density desired. Determine if the Central City employment growth is expected to keep pace with total regional employment growth. Identify Regional Centers that are lagging behind; determine if there are regional land use policies and actions that can improve their level and density of development. Note: all centers will not develop at the same rate. Centers that are lagging behind may simply be more likely to expand in the next 20-year period.
- Develop a mixed-use index for each center for current and future conditions to determine the magnitude and degree of job and residential mixed-use diversity (housing x jobs/housing + jobs). This index increases with both size and degree of jobs/household mix within a ½ mile radius. Determine if there are regional land use actions that can improve their magnitude and degree of mix.
- For the Central City, determine if there is sufficient labor within a reasonable distance to support job growth. Define the market area encompassing at least one million people; in addition, define an eight-mile radius market area. For this area:
 - calculate the ratio of total jobs per household; compare to the regional average
 - percent of workers drawn from within this area
 - average work trip length to jobs within the Central City
 - non-SOV mode share for work trips to the Central City
- For the Central City, determine if there is sufficient market area to support retail and service job expansion. Define the market area encompassing at least one million people; in addition, define an eight-mile radius market area. For this area:
 - calculate the ratio of retail and services jobs per household; compare to the regional average
 - percent of non-work trips to the Central City drawn from within this area
 - average non-work trip length to the Central City
 - non-SOV mode share for non-work trips to the Central City

- For the Regional Centers, determine if there is sufficient labor within a reasonable distance to support job growth. Define the market area encompassing at least 100,000 people; in addition, define an eight-mile radius market area. For this area:
 - calculate the ratio of total jobs per household; compare to the average of other Regional Centers
 - percent of work trips to each Regional Center drawn from within this area
 - average work trip length to each Regional Center
 - non-SOV mode share for work trips to each Regional Center
- For the Regional Centers, determine if there is sufficient market area to support retail and service job expansion. Define the market area encompassing at least 100,000 people; in addition define an eight-mile radius market area. For this area:
 - calculate the ratio of retail and services jobs per household; compare to the average of other Regional Centers
 - percent of non-work trips to each Regional Center drawn from within this area
 - average non-work trip length to each Regional Center
 - non-SOV mode share for non-work trips to each Regional Center
- For the Town Centers, determine if there is sufficient market area to support retail and service job expansion. Define the market area encompassing at least three miles. For this area:
 - calculate the ratio of retail and services jobs per household; compare to the average of other Town Centers
 - percent of non-work trips to each Town Center drawn from within this area
 - average non-work trip length to each Town Center
 - non-SOV mode share for non-work trips to each Town Center

2. Development of Industrial Areas

- For Industrial Areas, determine if there is sufficient labor to support industrial job expansion. Define the market area encompassing at least 100,000 people; in addition define an eight-mile radius market area. For this area:
 - calculate the ratio of total jobs per household; compare to the average of other Industrial Areas
 - percent of work trips to each Industrial Area drawn from within this area
 - average work trip length to each Industrial Area
 - non-SOV mode share for work trips to each Industrial Area
- For Industrial Areas, determine if key truck access routes are projected to be impaired by excessive commuter traffic congestion.

Are there undue negative consequences on a subregional basis as a result of our land use policies?

Answering this question does not presuppose a particular geographic area. Therefore, this evaluation should be designed to look for areas within the region that have negative consequences that are disproportionately larger than other parts of the region. For example,

- Identify household incomes throughout the region to determine if there are expected to be concentrations of poverty;

- Determine if parts of the region now have or are expected to have a development pattern that will not have sufficient market value to generate the tax base required to provide public services;
- Determine if parts of the region are expected to have a greater housing affordability problem as compared to other parts of the region;
- Determine if parts of the region have or are expected to have an excessively long commute trip as compared to other parts of the region due to lack of access to jobs;
- Determine if parts of the region have or are expected to have an excessively long trip to obtain local retail services as compared to other parts of the region;
- Evaluate key transportation indicators to determine if certain parts of the region perform better than other parts; and
- Determine if there is an excessive shift of Metro area growth to neighboring cities.

Next Steps/Analysis Approach

Metro proposes to carry out the above referenced evaluation through the use of an integrated land use/transportation forecasting tool called MetroScope. MetroScope⁶ is a tool that is available to test the effectiveness of current policies and changes to policies and the resulting impacts on subregions. It involves forecasting growth patterns taking into account input assumptions on available land for development, redevelopment and the relative accessibility of different areas of the region. The process involves incremental allocation of growth every five years, with each five-year step involving changes to developable and redevelopable lands, changes to the transportation system and assessing the resulting performance. Several of the MetroScope case studies that have been completed, in effect test certain subregional concepts. These case studies will be used to evaluate subregional performance issues to provide the basis for testing and evaluating a case study that attempts to mitigate the identified negative consequences. This final “subregional” case study will allow us to evaluate whether we can reasonably expect this option to perform better than other approaches. Based upon this information, it will be possible to draw conclusions about whether it is appropriate and necessary to take land use actions, including UGB amendments, on a subregional basis. It will also define the policy issues that are to be addressed on a subregional basis and the suitable geographic boundaries.

If there is a conclusion that Metro should proceed with a subregional decision, Metro proposes to introduce code amendments defining the requirements to be addressed for such a decision. **If** it is concluded that a subregional decision is unnecessary or inappropriate, there will be no further action taken and Metro will complete its Periodic Review on strictly a regional basis.

The following MetroScope case studies have been completed:

- 1) Base Case – an application of State law and current Functional Plan policies, includes UGB expansion only on exception areas;
- 2) I-5 North Added Capacity – tests the impacts of added capacity improvements to the I-5 Corridor between Portland and Clark County;
- 3) 2040 Centers – tests the impacts of focused transportation investments and incentive programs on selected Regional and Town Centers with limited UGB expansion;
- 4) New Community in Damascus – tests the development of a new community in the Damascus area by focusing UGB expansion in that area;
- 5) Hold the UGB – tests holding the UGB constant while trying to provide incentives to centers (model run is in progress).

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⁶ See MetroScope Technical Documentation Manual, July 16, 2001, for model specifications.



METRO

2040 Fundamentals

Approved by Metro Council Community Planning Committee

June 5, 2001

Reviewed and Recommended by MPAC

June 27, 2001

- 1. Encourage efficient use of land within the UGB by focusing on development of 2040 mixed use centers and corridors;**
- 2. Protect and restore the natural environment through actions such as protecting and restoring streams and wetlands, improving surface and ground water quality, and reducing air emissions;**
- 3. Provide a balanced transportation system including safe, attractive facilities for bicycling, walking and transit as well as for motor vehicles and freight;**
- 4. Maintain separation between the Metro region and neighboring cities by working actively with these cities and their respective counties;**
- 5. Enable communities inside the Metro area to preserve their physical sense of place by using, among other tools, greenways, natural areas, and built environment elements;**
- 6. Ensure availability of diverse housing options for all residents by providing a mix of housing types as well as affordable homes in every jurisdiction;**
- 7. Create a vibrant place to live and work by providing sufficient, accessible parks and natural areas, improving access to community resources such as schools, community centers and libraries as well as by balancing the distribution of high quality jobs throughout the region, and providing attractive facilities for cultural and artistic performances and supporting arts and cultural organizations; and**
- 8. Encourage a strong local economy by providing an orderly and efficient use of land, balancing economic growth around the region and supporting high quality education.**

[Performance Measures Program]

Table 1 provides a comparison of the various inputs to each case study. Case studies were defined by varying land additions, incentives, transportation improvements and by providing more zoning capacity.

Tables 2 and 3 provide a comparison of the results from the Base Case, I-5 North Added Capacity, Enhanced 2040 Centers, developing a new community in Damascus. All of these case studies have been designed to test policy extremes and are not intended to provide a winning combination to satisfying the region's 20-year land supply needs. Analyzing these case studies is helpful to identify hot spots in housing and job prices, concentrations or increases of jobs and housing which may be indicative of latent demand in these areas. The effects of different policy choices on land prices, densities, utilization of land and rates of redevelopment are contained in Tables 2 and 3. Tables 4 and 5 highlight the conditions within the transportation system according to the case study. MetroScope allows the reporting of data in a variety of geographic areas from transportation area zones, census tracts, 20 zones and 6 employment zones. Tables 6 and 7 compare per capita tax base changes for the region segregated by 20 zones. A 20-zone comparison of values was used because the model can not precisely approximate jurisdictional boundaries.

We have stratified commute information in Table 8 by RTP based subregions and contains jobs/housing ratios. By contrasting demand and the existing jobs/housing ratios tools can be applied to develop a subregional case study to test influencing these measures or indicators. Table 8 provides a preliminary tabular summary of the subregional area population, a calculation of an existing jobs/housing ratio (employment/population), and deviations from the regional average and commuting patterns. Those subregions that have a negative difference from the regional average are areas that could benefit from strategies to equalize the imbalances between jobs and housing.

Table 1. MetroScope Case	Base Case	I-5 North Added Capacity	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	Subregional Analysis
Model Inputs						
UGB Acres Added (2000- 2025)	Yes- distributed 34,207 ac.	Yes- distributed 33,873 ac.	Yes- limited 13,339 ac.	Yes- in Damascus 15,878 ac.	No acres added	TBD
UGA Acres Added- Clark County (2000-2025)	23,648 ac.	23,648 ac.	23,648 ac.	23,648 ac.	23,648 ac.	23,648 ac.
2000 Buildable Lands Analysis ⁷	✓	✓	✓	✓	✓	✓
Available Housing Land- Oregon⁸						
Redevelopment and Infill acres	5,832 ac.	5,832 ac.	5,832 ac.	5,832 ac.	5,832 ac.	5,832 ac.
Renewal acres	135 ac.	135 ac.	135 ac.	135 ac.	135 ac.	135 ac.
Vacant acres	22,176 ac.	22,176 ac.	22,176 ac.	22,176 ac.	22,176 ac.	22,176 ac.
Available Jobs Land- Oregon⁹						
Refill acres	4,362 ac.	4,362 ac.	4,362 ac.	4,362 ac.	4,362 ac.	TBD
Renewal acres	338 ac.	338 ac.	338 ac.	338 ac.	338 ac.	338 ac.
Vacant acres	13,292 ac.	13,292 ac.	13,292 ac.	13,292 ac.	13,292 ac.	13,292 ac.
Existing Zoning as of 1/01	✓	✓	✓	✓	✓	✓
Refill Land Filter Applied	2010/ 2020	2010/ 2020	2010/ 2020	2010/ 2020	2010/ 2020	2010/2020
Incentives/ Capacity Measures						
Existing Urban Renewal Subsidy and Tax Incentives /Up-zoning	Yes No no	yes no no	yes yes Yes- Central East side	yes yes Yes- Damascus	yes yes Yes- Central East side	yes TBD TBD
Additional Urban Renewal Areas	Only those currently in place	Only those currently in place	Additional capacity added in regional and town centers	Those currently in place, plus Damascus	Additional capacity added in regional and town centers	TBD
Renewal Subsidy Costs ¹⁰	\$742,348,781	\$735,923,781	\$1,597,292,481	\$1,021,557,274	TBD	TBD
Transportation System						
Priority RTP Improvements	✓	✓	✓	✓	✓	✓
Lane miles	8,022	8,059	7,932	8,054	7,932	TBD
Transit Hours	12,818	12,994	12,633	12,870	12,633	TBD
Modifications to the RTP ¹¹	Yes- along I-5 Columbia Blvd. Interchange Project removed, LRT stops at Expo instead of Vancouver	Yes- along I-5, HOV lanes (NB and SB), 8 lane bridge, Greeley Banfield widening, Loop LRT	Yes- projects at the edge of the UGB are removed	Yes- focused Damascus, new phasing of Sunrise and 205 express lanes added	Yes- projects at the edge of the UGB removed, (same as Centers)	TBD

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⁷ Includes an initial inventory of residential acres less exempt coded Federal, State and local land less church owned land inside of the UGB. Other net factors are removed by MetroScope as land supplies are developed.

⁸ Initial acres for housing purposes located within the UGB.

⁹ Initial acres used for employment purposes.

¹⁰ Includes residential and non-residential subsidies.

¹¹ In addition to modifications of the Priority system RTP improvements from 2020 to 2025 the Preferred system improvements were used. Clark County provided Metro with an improved network that was used for all case study runs.

Table 2. MetroScope Output Summary Land Use Measures	Case Study Results					
Model Outputs- 2000 to 2025	Base Case	I-5 North Added Capacity	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	1997 UGR¹² Update published 1999
Residential Land						
Capture Rate	66.2%	66.0%	59.0%	60.0%	Not available yet	70%
Redevelopment and Infill Rate	26.6%	26.6%	44%	32.3%	"	28.5%
Housing Price Index (price escalation above inflation)						
owner	+27%	+28%	+43%	+43%	"	
renter	+16%	+15%	+16%	+22%	"	
Land Utilization Measures:						
Total Initial Acres Available ¹³	28,143 ac.	28,143 ac.	28,143 ac.	28,143 ac.	28,143 ac.	22,500 ac.
Initial Vacant Acres	22,176 ac.	22,176 ac.	22,176 ac.	22,176 ac.	22,176 ac.	22,176 ac.
Initial Renewal/refill Acres	5,967 ac.	5,967 ac.	5,967 ac.	5,967 ac.	5,967 ac.	5,967 ac.
Acres Added to the UGB	34,207 ac	33,873 ac	13,339 ac	15,878 ac	0 ac	3,897 ac ¹⁴
Consumed Acres within the UGB ¹⁵	52,990 ac	52,630 ac	38,540 ac	41,324 ac	ac	Not available
Refill Acres	7,730 ac	7,715 ac	9,328 ac	8,542 ac	"	" "
Renewal Acres	1,643 ac	1,636 ac	2,528 ac	1,820 ac	"	" "
Vacant Land	21,011 ac	20,991 ac	21,420 ac	21,453 ac	"	" "
Percent Utilization (acres): refill land	90.5%	90.3%	92.2%	94.0%	"	" "
Percent Utilization (acres): vacant land	94.7%	94.6%	96.5%	96.7%	"	" "
Percent Utilization (acres) : UGB additions	76.8%	76.6%	85.8%	90.1%	"	" "
Percent Utilization (acres): renewal land	74.2%	73.8%	82.7%	82.2%	"	" "
Dwelling Unit Capacity/ Owner	731,165	730,554	715,523	730,444	"	" "
Dwelling Unit Capacity/ Renter	348,971	349,574	364,614	349,691	"	" "
Developed Density- vacant land	4.9 du/ac	4.9 du/ac	5.0 du/ac	4.9 du/ac	"	" "
Developed Density- land added to UGB	3.2 du/ac	3.1 du/ac	2.3 du/ac	4.4 du/ac	"	" "
Developed Density- renewal areas	9.6 du/ac	9.8 du/ac	13.9 du/ac	10.0 du/ac	"	" "
Developed Density- refill	6.0 du/ac	6.07 du/ac	6.2 du/ac	6.1 du/ac	"	" "
Overall Density Average	4.5 du/ac	4.5 du/ac	5.5 du/ac	5.3 du/ac	"	" "
Dwelling Unit Allocations:						
Oregon	238,207	236,790	213,287	219,077		
Washington	95,617	96,220	121,157	118,670		

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¹² A numbers of the figures noted have been modified from the UGR to provide a comparison to MetroScope.

¹³ Includes an initial inventory of non-residential acres less exempt coded Federal, State and local land less church owned land inside of the UGB. Other net factors are removed by MetroScope as land supplies get developed.

¹⁴ Includes UGB amendments made in 1998 and 1999 and locational adjustments.

¹⁵ Includes the total acres of land consumed and includes refill, vacant, land additions to the UGB and renewal areas.

Table 3. MetroScope Output Summary Land Use Measures	Case Study Results					
Model Outputs- 2000 to 2025						
Non-residential Land	Base Case	I-5 North Added Capacity	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	1997 UGR Update published 1999
Capture Rate¹⁶	76.5%	76.1%	77.4%	77.3%	Not available yet	82%
Redevelopment and Infill Rate	44.0%	44.0%	43.3%	39.4%	"	40%
Land Utilization Measures¹⁷						
Initial Vacant Acres Available	13,292 ac	13,292 ac	13,292 ac	13,292 ac	13,292 ac	12,700 ¹⁸
Initial Refill and Renewal	4,362 ac	4,362 ac	4,362 ac	4,362 ac	4,362 ac	5,080 ac
<i>Total Initial Acres Available</i>	17,654 ac	17,654 ac	17,654 ac	17,654 ac	17,654 ac	17,780 ac
Additional Refill Acres Added to UGB	2,644 ac	2,644 ac	3,496 ac	4,949 ac	0 ac	Not available
Additional Vacant Acres Added to UGB	3,597 ac	3,597 ac	3,597 ac	5,102 ac	"	"
<i>Total Additional Acres Added to UGB</i>	6,241 ac	6,241 ac	7,093 ac	10,051 ac	"	"
Total Vacant Acres Available	16,889 ac	16,889 ad	16,889 ac	18,394 ac	"	"
Total Refill and Renewal Available	7,006 ac	7,006 ac	7,858 ac	9,311 ac	"	"
<i>Total Non-residential Land</i>	23,895 ac	23,895 ac	24,747 ac	27,705 ac	"	"
Total Refill/Renewal Acres Consumed	3,522 ac	3,522 ac	4,240 ac	4,154 ac	"	"
Consumption rate (refill/renewal)	50.3%	50.3%	54.0%	44.6%	"	"
Total Vacant land/Additions Acres Consumed	10,433 ac	10,433 ac	10,743 ac	11,176 ac	"	"
Consumption Rate (vacant/additions)	61.8%	61.8%	63.6%	60.8%	"	"
Density Measures¹⁹						Not available
Vacant land/additions Allocations	324,015	322,455	331,440	343,639	"	"
Employees per gross acre	31.1 emp/ac	30.9 emp/ac	30.9 emp/ac	30.7 emp/ac	"	"
Refill and Renewal Allocations	254,185	252,959	253,314	240,155	"	"
Employees per gross acre	72.2 emp/ac	71.8 emp/ac	59.7 emp/ac	57.8 emp/ac	"	"
Total Employment Allocation	578,200	575,414	584,754	583,794	"	"
<i>Overall Density</i>	41.4 emp/ac	41.2 emp/ac	39.0 emp/ac	38.1 emp/ac	"	"
Non-residential Price Index²⁰	+26%	+26%	+9%	+9%	"	Not available
Manufacturing	-8%	-8%	-17%	-20%	"	"
Warehouse	+16%	+15%	+4%	+3%	"	"
Retail/ Services	+43%	+43%	+22%	+23%	"	"
General office	+36%	+36%	+13%	+16%	"	"
Medical/Health	+50%	+50%	+20%	+24%	"	"
Government	+11%	+10%	+7%	+7%	"	"
Employment Growth Allocation					"	"
Oregon UGB	578,200	575,414	584,754	583,794	"	"
Clark County UGA	151,600	154,386	145,046	146,006	"	"

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¹⁶ The non-residential capture rate is computed on a fixed UGB as of 2000.

¹⁷ All land is for non-residential purposes.

¹⁸ Total acres of non-residential use based on estimates from the UGR.

¹⁹ Employees per gross acre

²⁰ Represents price increases over the base year 2000 for land and improvements over inflation.

Table 4. MetroScope Output Summary Additional Measures	Case Study Results					
	Base Case	I-5 Trade Corridor	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	2000 Conditions
Vehicle Hours of Delay per 1000 VMT ²¹	8.31	8.09	10.79	10.15	Not available yet	2.49
Vehicle Hours of Delay per VHT	.21	.20	.25	.24	"	.08
Average Week Day VMT/ capita	16.39	16.36	16.54	16.8	"	16.23
Average Week Day VMT/ emp	21.98	21.94	22.17	22.54	"	24.11
Average Speed (PM2)	25	25	23	24	"	31
Auto Percent Commuting w/in the Area					"	
Central Portland	66.3%	66.0%	64.5%	63.8%	"	70.0%
East Multnomah County	34.5%	34.4%	36.5%	32.4%	"	28.9%
East Clackamas County	42.5%	42.3%	46.0%	45.5%	"	42.6%
Southwest	59.3%	59.2%	60.3%	60.6%	"	51.6%
Westside	75.3%	75.2%	74.6%	75.2%	"	66.3%
Clark County	77.5%	78.6%	69.0%	70.0%	"	74.4%
Person Percent Commuting w/in the Area					"	
Central Portland	73.9%	73.6%	73.0%	72.3%	"	74.5
East Multnomah County	33.3%	33.2%	35.6%	31.8%	"	28.9
East Clackamas County	40.6%	40.5%	44.4%	43.6%	"	42.4
Southwest	57.2%	57.2%	58.6%	58.9%	"	50.9
Westside	74.0%	73.9%	73.5%	74.2%	"	65.7
Clark County	75.7%	75.5%	66.8%	67.9%	"	73.7
Mode Share						
Auto	86.83%	86.71%	86.65%	86.87%	"	90.49%
Transit	5.90%	6.03%	5.94%	5.85%	"	3.37%
Walk/Bike	7.28%	7.25%	7.41%	7.28%	"	6.15%
Average Auto Person Commute Distance²² (HBW²³) Begin and End w/in the Area						
Central Portland	4.6	4.6	4.5	4.5	"	4.4
East Multnomah County	3.7	3.7	3.6	3.6	"	3.5
East Clackamas County	5.2	5.2	4.9	5.2	"	5.4
Southwest	4.7	4.7	4.6	4.8	"	5.1
Westside	5.0	5.0	5.0	5.0	"	4.9
Clark County	7.1	7.1	7.6	7.6	"	6.2
Average Auto Person Commute Distance (HBW) Begin in and End Outside Area						
Central Portland	8.0	8.0	8.0	8.2	"	8.2
East Multnomah County	9.5	9.5	9.3	9.2	"	9.6
East Clackamas County	11.6	11.6	11.4	11.4	"	12.1
Southwest	9.8	9.8	9.4	9.5	"	10.1
Westside	9.0	9.1	9.1	9.1	"	9.7
Clark County	15.3	15.3	16.0	16.1	"	14.0

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²¹ VMT= vehicle miles traveled.

²² All distances for auto person trips and total persons are in miles.

²³ HBW= home based work trips.

Table 5. MetroScope Output Summary Additional Measures	Case Study Results					
Model Outputs 2025 Transportation Conditions	Base Case	I-5 Trade Corridor	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	2000 Conditions
Average Auto Person Commute Distance (Non-HBW) Begin and End w/in the Area					Not available yet	
Central Portland	3.0	3.0	2.9	3.0	"	3.0
East Multnomah County	2.6	2.6	2.6	2.6	"	2.6
East Clackamas County	3.3	3.3	3.2	3.3	"	3.3
Southwest	3.0	3.0	2.9	3.0	"	3.1
Westside	3.2	3.2	3.2	3.2	"	3.2
Clark County	4.1	4.1	4.1	4.1	"	3.8
Average Auto Person Commute Distance (Non-HBW) Begin in and End Outside the Area						
Central Portland	7.5	7.5	7.3	7.5	"	7.2
East Multnomah County	6.6	6.6	6.4	6.3	"	6.8
East Clackamas County	8.5	8.6	8.2	8.0	"	9.3
Southwest	7.9	7.9	7.7	7.9	"	8.4
Westside	7.8	7.8	7.6	7.7	"	7.9
Clark County	12.6	12.5	13.8	13.8	"	11.2
Total Person Commute Distance (HBW) Begin and End w/in the Area						
Central Portland	4.0	4.0	3.9	4.0	"	4.1
East Multnomah County	3.5	3.5	3.4	3.5	"	3.4
East Clackamas County	5.0	5.0	4.7	5.0	"	5.3
Southwest	4.6	4.6	4.5	4.6	"	5.0
Westside	4.7	4.8	4.7	4.7	"	4.8
Clark County	7.0	6.9	7.4	7.4	"	6.0
Total Person Commute Distance (HBW) Begin in and End Outside Area						
Central Portland	8.0	8.0	8.0	8.1	"	8.2
East Multnomah County	9.6	9.5	9.4	9.3	"	9.6
East Clackamas County	11.6	11.6	11.3	11.4	"	12.0
Southwest	9.8	9.9	9.4	9.6	"	10.1
Westside	9.0	9.1	9.1	9.0	"	9.8
Clark County	15.3	15.3	16.0	16.1	"	14.1
Total Person Commute Distance (Non-HBW) Begin and End within the Area						
Central Portland	2.7	2.7	2.7	2.7	"	2.8
East Multnomah County	2.5	2.5	2.5	2.5	"	2.5
East Clackamas County	3.2	3.2	3.1	3.2	"	3.4
Southwest	2.8	2.8	2.8	2.9	"	3.0
Westside	3.0	3.0	3.0	3.0	"	3.1
Clark County	3.9	3.9	3.9	3.9	"	3.7
Total Person Commute Distance (Non-HBW) Begin in and End Outside Area						
Central Portland	7.4	7.4	7.3	7.4	"	6.9
East Multnomah County	6.6	6.6	6.4	6.3	"	6.7
East Clackamas County	8.5	8.5	8.1	7.9	"	9.2
Southwest	7.8	7.8	7.6	7.8	"	8.2
Westside	7.7	7.7	7.6	7.6	"	7.8
Clark County	12.6	12.5	13.7	13.8	"	11.3

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Table 6. MetroScope Output Summary Price Measures	Case Study Results						
Model Outputs	Base Case	I-5 Trade Corridor	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	2000 Per DU Value	2000 Conditions Dwelling Units
Per Capita Taxable Values: 20 District Areas							
Tax Base- Residential²⁴							
Zone 1	\$159,487	\$159,487	\$123,922	\$176,163	Not available yet	\$ 85,669.56	9,841
Zone 2	\$163,110	\$163,110	\$183,900	\$182,908	"	\$ 112,249.31	148,622
Zone 3	\$211,308	\$211,308	\$226,514	\$232,821	"	\$ 138,228.08	51,766
Zone 4	\$171,850	\$171,850	\$192,196	\$193,343	"	\$ 111,078.51	39,331
Zone 5	\$179,460	\$179,460	\$195,256	\$199,219	"	\$ 113,768.12	45,541
Zone 6	\$169,306	\$169,306	\$192,686	\$191,255	"	\$ 113,027.53	31,030
Zone 7	\$203,137	\$203,137	\$223,175	\$230,257	"	\$ 119,969.07	19,017
Zone 8	\$234,334	\$234,334	\$263,598	\$263,153	"	\$ 160,284.46	26,121
Zone 9	\$196,925	\$196,925	\$220,109	\$218,619	"	\$ 114,520.58	12,439
Zone 10	\$178,551	\$178,551	\$197,071	\$195,678	"	\$ 112,793.02	15,094
Zone 11	\$189,800	\$189,800	\$207,076	\$204,813	"	\$ 117,027.59	10,920
Zone 12	\$181,625	\$181,625	\$205,048	\$201,639	"	\$ 121,758.82	23,207
Zone 13	\$166,170	\$166,170	\$187,902	\$186,193	"	\$ 113,858.93	40,150
Zone 14	\$180,156	\$180,156	\$201,276	\$199,530	"	\$ 122,942.15	49,657
Zone 15	\$177,708	\$177,708	\$200,930	\$199,763	"	\$ 113,046.01	21,472
Zone 16	\$166,155	\$166,155	\$186,713	\$185,830	"	\$ 102,697.47	11,337
Zone 17	\$170,748	\$170,748	\$196,155	\$194,843	"	\$ 110,779.83	123,460
Zone 18	\$194,331	\$194,331	\$219,752	\$216,864	"	\$ 122,120.76	11,100
Zone 19	\$165,807	\$165,807	\$189,770	\$188,317	"	\$ 102,845.22	27,802
Zone 20	\$181,562	\$181,562	\$211,829	\$208,681	"	\$ 117,237.02	2,593

Revised 2/13/02

²⁴ The 20 plus zone system has been modified to separate rural from urban areas more fully.

Table 7. MetroScope Output Summary Price Measures	Case Study Results						
Model Outputs <i>Per Capita Taxable Values: 20 District Areas</i>	Base Case	I-5 Trade Corridor	Enhanced 2040 Centers	New Community Damascus	Hold the UGB	2000 Per DU Value	2000 Dwelling Units
Tax Base- Non-residential²⁵							
Zone 1	\$187,970	\$187,970	\$187,950	\$201,888	Not available yet	\$25,838	9,841
Zone 2	\$17,804	\$17,804	\$16,856	\$17,986	"	\$31,066	148,622
Zone 3	\$28,065	\$28,065	\$27,274	\$29,230	"	\$23,053	51,766
Zone 4	\$6,947	\$6,947	\$7,518	\$7,738	"	\$21,709	39,331
Zone 5	\$20,379	\$20,379	\$20,190	\$20,370	"	\$66,081	45,541
Zone 6	\$9,585	\$9,585	\$8,965	\$10,090	"	\$24,339	31,030
Zone 7	\$12,145	\$12,145	\$17,897	\$11,641	"	\$28,344	19,017
Zone 8	\$14,108	\$14,108	\$14,855	\$14,161	"	\$26,197	26,121
Zone 9	\$17,143	\$17,143	\$22,611	\$25,082	"	\$28,891	12,439
Zone 10	\$22,189	\$22,189	\$24,839	\$25,394	"	\$30,337	15,094
Zone 11	\$43,047	\$43,047	\$56,341	\$61,116	"	\$35,487	10,920
Zone 12	\$30,261	\$30,261	\$26,193	\$31,970	"	\$28,588	23,207
Zone 13	\$24,463	\$24,463	\$21,622	\$25,167	"	\$26,661	40,150
Zone 14	\$22,214	\$22,214	\$23,260	\$22,080	"	\$33,610	49,657
Zone 15	\$44,147	\$44,147	\$29,123	\$35,193	"	\$56,079	21,472
Zone 16	\$20,882	\$20,882	\$22,680	\$23,306	"	\$31,622	11,337
Zone 17	\$16,694	\$16,694	\$14,660	\$15,315	"	\$27,569	123,460
Zone 18	\$16,016	\$16,016	\$16,761	\$16,711	"	\$9,720	11,100
Zone 19	\$18,977	\$18,977	\$20,836	\$22,642	"	\$275	27,802
Zone 20	\$5,155	\$5,155	\$10,095	\$5,717	"	\$301	2,593

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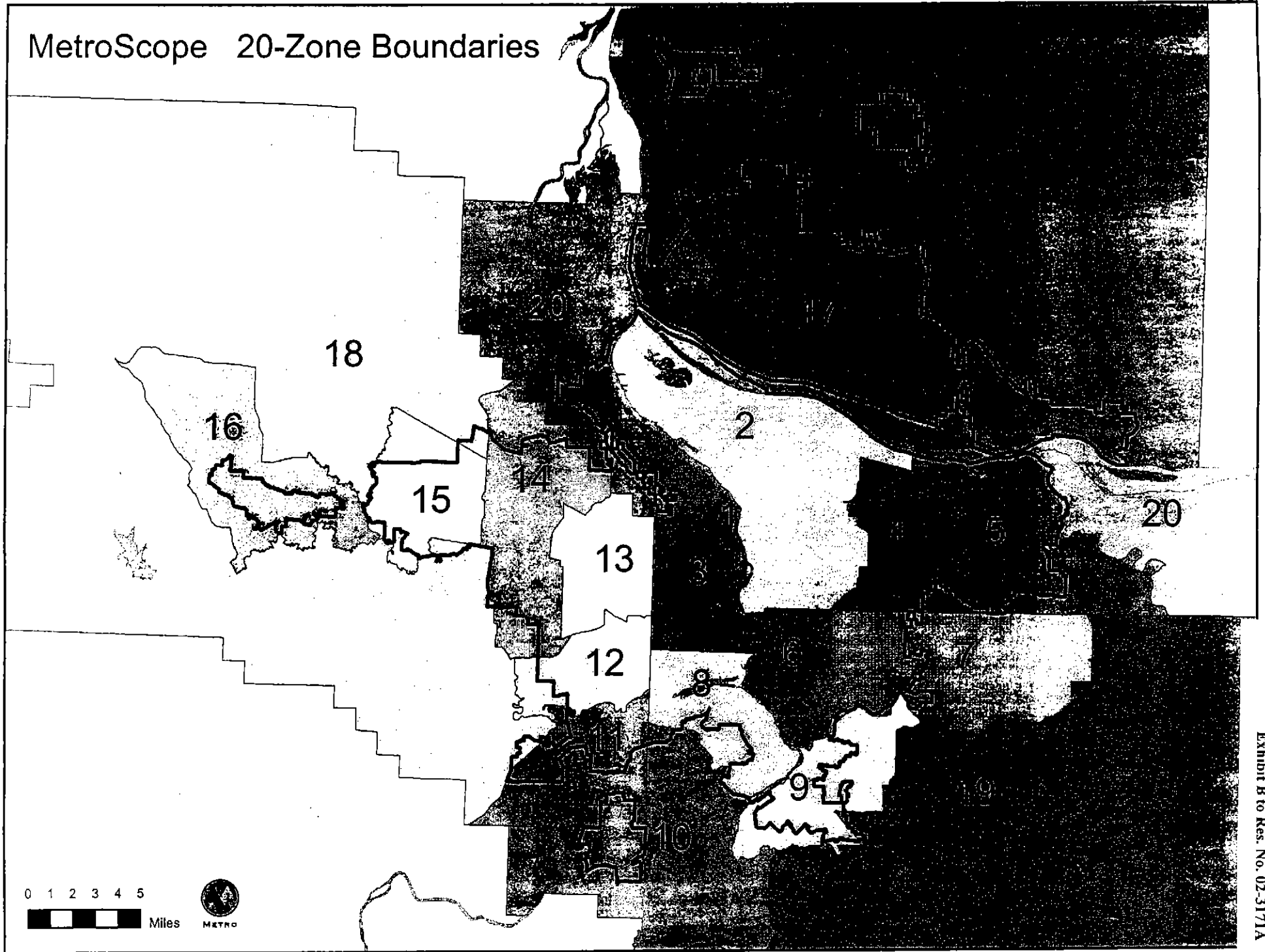
²⁵ The 20 plus zone system has been modified to separate rural from urban areas more fully.

TABLE 8.

SUBREGIONS	Travel Distance 0-8 miles from Regional Centers							
	Population 2000	Employment 2000	Emp/ Pop Ratio	% Difference from the Average	HH working in the subregion	% Difference from the Average	Jobs taken w/in the subregion	% Difference from the Average
Downtown	580,226	561,543	.97	35%	77.0%	31.5%	53.0%	-1.4%
Gateway	493,871	287,269	.58	.7%	52.0%	4.3%	57.0%	.07%
Gresham	276,239	114,444	.41	-28.3%	38.0%	-23.8%	58.0%	2.4%
Clackamas	338,605	179,616	.53	-8.2%	41.0%	-17.8%	51.0%	-9.9%
Oregon City	196,858	107,767	.55	-5.3%	40.0%	-19.8%	48.0%	-15.2%
Wa. Square	402,511	283,134	.7	21.7%	60.0%	20.3%	57.0%	0.7%
Beaverton	408,365	276,510	.68	17.2%	61.0%	22.3%	61.0%	7.7%
Hillsboro	181,353	95,004	.52	-9.3%	55.0%	10.3%	67.0%	18.3%
Clark County/ Vancouver	296,288	191,055	.64	11.6%	52.0%	4.3%	54.0%	-4.6%
Regional Average: W/out Downtown			.58		49.9%		56.6%	
Regional Average: w/ Downtown			.62		52.9%		56.2%	

Revised 2/5/02

MetroScope 20-Zone Boundaries



STAFF REPORT

CONSIDERATION OF RESOLUTION NO. 02-3171, FOR THE PURPOSE OF DIRECTING THE EXECUTIVE OFFICER TO SUBMIT A PETITION TO THE LAND CONSERVATION AND DEVELOPMENT COMMISSION FOR A DECLARATORY RULING UNDER ORS 183.410 ON THE APPLICATION OF GOAL 14 AND ORS 197.298 TO THE EXPANSION BY METRO OF THE URBAN GROWTH BOUNDARY.

Date: March 5, 2002

Prepared by: Michael Morrissey

Proposed Action: Resolution 02-3171 seeks clarification from LCDC on aspects of state planning Goal 14 and ORS 197.298, with regard to conducting a subregional analysis as part of its periodic review work program.

Factual Background and Analysis: The Metro periodic Review work program Task 2, subtask 8 requires the assessment of subregions. The work program explicitly allows Metro to request clarification from LCDC with respect to the implementation of these tasks. Developing and identifying a policy basis for examining subregional issues is essential prior to considering land additions to the UGB.

Metro Planning Department staff have developed a proposed methodology for a subregional approach that has been discussed with the Community Planning Committee, MTAC and MPAC. The methodology is outlined in a February 20, 2002 memo and package from Andy Cotugno to Rod Park, chair of the Community Planning Committee (Exhibit B). The Subregional Assessment Paper describes the use of MetroScope to “test a strategy to improve the efficiency of subregions by seeking an optimal balance of jobs and housing thereby supporting complete communities.” Subregions would be based on the areas defined by 2040 designated city and regional centers, supported by town centers.

A list of questions for LCDC is detailed in Exhibit A to the resolution. They are divided into two sets of questions on the application of state law to subregional analysis. Questions 1-4 involve the application of statewide planning Goal 14; questions 5-11 involve the application of ORS 197.298. For answers to the latter, LCDC will consult with the Oregon Department of Justice.

In order to conduct the analysis and reach policy conclusions, Metro is attempting to put these issues before LCDC at their April 2002 meeting. This requires Metro to submit its questions as early in March as possible. MPAC did take up the submission of these questions, and likely would have preferred more time to consider options. However, MPAC approved their submittal to LCDC for consideration at its April meeting.

Known Opposition: City of Portland and 1000 Friends of Oregon.

Budget Impact: The cost of conducting subregional analysis is time consuming, and therefore expensive. The rationale for the request to LCDC is to avoid costs for work products that could be overturned upon challenge.

Existing Law: ORS chapter 197.296 requires Metro to conduct an analysis of the capacity of our urban growth boundary, approximately every five years. Metro is currently conducting such an analysis in a periodic review framework.

Metro is seeking a declaratory ruling from LCDC. This provides an opportunity for Metro to seek an opinion from LCDC about how their law (Goal 14) applies to our set of facts. Upon such a request, LCDC could take two actions; first agree whether or not to take on the questions. If they agree to take on the questions, the second action involves their substantive response. LCDC's ruling would be subject to an appeal to the Court of Appeals. Other methods for querying LCDC and/or the Attorney General's office have also been discussed.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF DIRECTING THE) Resolution No. 02-3171
EXECUTIVE OFFICER TO SUBMIT A PETITION)
TO THE LAND CONSERVATION AND) Introduced by Councilor Park
DEVELOPMENT COMMISSION FOR A)
DECLARATORY RULING UNDER ORS 183.410)
ON THE APPLICATION OF GOAL 14 AND ORS)
197.298 TO THE EXPANSION BY METRO OF)
THE URBAN GROWTH BOUNDARY)

WHEREAS, Metro is responsible for the establishment and management of the urban growth boundary (UGB) for the Portland metropolitan region; and

WHEREAS, ORS 197.299(1) requires Metro to conduct an analysis of the capacity of the UGB for housing and to ensure that the boundary contains capacity for a 20-year supply of land for housing; and

WHEREAS, ORS 197.296 requires Metro to conduct an analysis of the capacity of the UGB for housing every five years; and

WHEREAS, it is likely Metro will have to expand the UGB to add capacity for housing to accommodate housing for the forecast population to year 2022; and

WHEREAS, Metro may find it necessary to allocate housing need to subareas of the region in order to accomplish the objectives of the Regional Framework Plan and the locational factors of Goal 14; and

WHEREAS, neither Goal 14 nor ORS 197.298, which establishes the priority of land to be added to UGBs, expressly states that the goal or statute may be applied to subregions of the Metro region; and

WHEREAS, the analysis Metro would undertake to determine whether allocation of housing and employment need to subregions accomplishes Regional Framework Plan and Goal 14 objectives is costly and time-consuming; now, therefore,

BE IT RESOLVED:

1. That the Executive Officer shall prepare and submit to the Land Conservation and Development Commission a "Petition for Declaratory Ruling" as allowed by ORS 183.410 seeking a determination from the commission whether Metro's practice of allocating regional need for housing and employment to subregions is proscribed or regulated by Goal 14 or ORS 197.298.
2. That the petition shall include the questions set forth in Exhibit A, attached and incorporated into this resolution.

ADOPTED by the Metro Council this ___th day of March, 2002.

Carl Hosticka, Presiding Officer

Approved as to Form:

Daniel B. Cooper, General Counsel

Attachment: Exhibit A

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Questions for Petition for Declaratory Ruling from LCDC Under ORS 183.410

Goal 14 Questions:

1. If Metro determines there is a subregional need (part of regional need), does Goal 14 allow Metro, using the basis and methodology set forth in this petition, to allocate housing and employment to subregions, and to apply the locational factors of Goal 14 by subregion to select land for inclusion within the UGB?
2. If Metro determines there is a subregional need, does Goal 14 allow Metro to treat the Central City and each of the seven Regional Centers within the region as a subregion and, using the basis and methodology set forth in this petition, allocate some of the region's housing and employment need to each?
3. If Metro determines there is a subregional need, does Goal 14 allow Metro to treat each of the 32 (??) centers within the region as a subregion and, using the basis and methodology set forth in this petition, allocate some of the region's housing and employment need to each?
4. If Metro determines there is a subregional need, does Goal 14 allow Metro to treat Wilsonville and Forest Grove/Cornelius as subregions and, using the basis and methodology set forth in this petition, allocate some of the region's housing and employment need to these subregions?

ORS 197.298 Questions:

5. If Metro determines there is a subregional need (part of regional need), does ORS 197.298(1) allow Metro, using the basis and methodology set forth in this petition, to apply the statutory priorities for inclusion of land within a UGB on a subregional basis?
6. May Metro take lower priority land near the subregion into the UGB if the only higher priority land available is too far from the subregion to accommodate the subregional need?
7. May Metro include land of lower priority simply by demonstrating, pursuant to ORS 197.298(1), that there is not enough higher priority land to accommodate the amount of land needed, or must Metro also demonstrate that it must include the lower priority land for one of the reasons set forth in ORS 197.298(3)?
8. May Metro treat subregional need for general housing and employment land as a "specific type of identified land need" under ORS 197.298(3)(a) and bring farmland into the boundary if the only higher priority available is in a distant part of the region?
9. May Metro treat the need for a school in a school district as a "specific type of identified land need" under ORS 197.298(3)(a) and bring farmland within or close to the school district into the boundary if the only higher priority land available is in a distant part of the region?
10. May Metro treat subregional need for affordable housing as a "specific type of identified land need" under ORS 197.298(3)(a) and bring farmland into the boundary if the only higher priority land available is in a distant part of the region?
11. May Metro include lower priority land, when land of higher priority is available, for reasons other than the those set forth in ORS 197.298(3)?