

Metro | Agenda

Meeting: Metro Policy Advisory Committee (MPAC)
Date: Wednesday, April 11, 2012
Time: 5 to 7 p.m.
Place: Metro, Council Chamber

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|---------|-----|--|--|
| 5 PM | 1. | <u>CALL TO ORDER</u> | Jerry Willey, Chair |
| 5:02 PM | 2. | <u>SELF INTRODUCTIONS & COMMUNICATIONS</u> | Jerry Willey, Chair |
| 5:05 PM | 3. | <u>CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS</u> | |
| 5:10 PM | 4. | <u>COUNCIL UPDATE</u> | |
| | * | <ul style="list-style-type: none">• April 19th Michael Freedman Presentation | |
| 5:15 PM | 5. | <u>* CONSIDERATION OF THE FEB. 22, 2012 MINUTES</u> | |
| | 6. | <u>INFORMATION/DISCUSSION ITEMS</u> | |
| 5:20 PM | 6.1 | <u>* Affordable Housing/Affordable Living – INFORMATION/DISCUSSION</u> | Ted Reid
Val Valfre
Steve Rudman
Trell Anderson |
| | | <ul style="list-style-type: none">• <u>Outcome</u>: Clarify the role that MPAC would like to play in promoting affordable housing/living. | |
| 6:10 PM | 6.2 | <u>* Climate Smart Communities Scenarios: Shaping Regional and Local Choices – DISCUSSION AND SUPPORT TO MOVE FORWARD REQUESTED</u> | Kim Ellis |
| | | <ul style="list-style-type: none">• <u>Outcome</u>: MPAC support of the Phase 2 approach as proposed so that staff may fully proceed with Phase 2 activities. | |
| 6:30 PM | 6.3 | <u>* Proposed Amendments to the Regional Transportation Functional Plan (Metro Code Chapter 3.08) – INFORMATION / DISCUSSION</u> | John Mermin |
| | | <ul style="list-style-type: none">• <u>Outcome</u>: Understand amendments in preparation for making a recommendation to the Metro Council at MPAC's May 9 meeting. | |
| 6:40 PM | 6.4 | <u>* Public Engagement Review Process Proposal – INFORMATION / DISCUSSION</u> | Patty Unfred |
| | | <ul style="list-style-type: none">• <u>Outcome</u>: Understand proposal; provide input on content and suggestions for implementation. | |
| 6:55 PM | 7. | <u>MPAC MEMBER COMMUNICATION</u> | |
| 7 PM | 8. | <u>ADJOURN</u> | Jerry Willey, Chair |

* Material included in the packet. For agenda and schedule information, call Kelsey Newell at 503-797-1916, e-mail: kelsey.newell@oregonmetro.gov. To check on closure or cancellations during inclement weather please call 503-797-1700.



2012 MPAC Tentative Agendas

Tentative as of 4/2/12 -- Subject to Change

Italicized items are not confirmed

<p><u>MPAC Meeting</u> April 11</p> <ul style="list-style-type: none"> Regional Inventory of Regulated Affordable Housing -- Summary Report (discussion) Climate Smart Communities (discussion) Proposed amendments to the Regional Transportation Functional Plan (Metro Code Chapter 3.08) (Intro/discussion) Metro Public Engagement Review proposal (Intro/discussion) 	<p><u>Special MPAC Event</u> <u>Thursday, April 19, 5-7 pm (prep for SW Corridor tour)</u></p> <ul style="list-style-type: none"> Michael Freedman, urban designer Remaking strip commercial corridors and transforming business parks: Community design and urban innovation for a knowledge economy
	<p><u>MPAC Meeting</u> April 25 (cancelled due to Michael Freedman event)</p>
<p><u>MPAC Meeting</u> May 9</p> <ul style="list-style-type: none"> Lessons learned from Michael Freedman presentation (discussion) Proposed amendments to the Regional Transportation Functional Plan (Recommendation to Council) New Energy Cities (Peter Brandom, Sustainability Manager, City of Hillsboro) 	<p><u>MPAC Meeting</u> May 23</p> <ul style="list-style-type: none"> Economic Development in the Portland region (Sean Robbins, CEO, Greater Portland Inc;) <i>Prep for Industrial Lands tour</i> <i>Regional water plan</i>
<p><u>MPAC Meeting</u> June 13</p> <ul style="list-style-type: none"> <i>Tour of industrial lands (Port of Portland)</i> 	<p><u>MPAC Meeting</u> June 27</p> <ul style="list-style-type: none"> Lessons learned from industrial lands tour/discussion Downtown/Main Street Redevelopment (Prep for downtown/main street tour) East Metro Connections Plan (EMCP) update – (mobility corridor refinement plan) Brownfields research
<p><u>MPAC Meeting</u> July 11</p> <ul style="list-style-type: none"> <i>Tour of Oregon City downtown (Oregon City elected officials and staff)</i> 	<p><u>MPAC Meeting</u> July 25</p> <ul style="list-style-type: none"> Lessons learned on downtown/main street redevelopment tour/discussion Climate Smart Communities <i>Possible 2013 Legislation</i> <i>Prep for corridor tour</i>
<p><u>MPAC Meeting</u> August 8</p> <ul style="list-style-type: none"> <i>SW Corridor Tour</i> 	<p><u>MPAC Meeting</u> August 22 (Cancelled – council recess)</p>

<u>MPAC Meeting</u> September 12 <ul style="list-style-type: none"> • Next steps with SW Corridor Plan • <i>St Johns Town Center tour</i> 	<u>MPAC Meeting</u> September 26 (Cancelled – Yom Kippur)
<u>MPAC Meeting</u> October 10 <ul style="list-style-type: none"> • Lessons from St Johns Town Center tour • Population and Employment Forecast and Growth Distribution (Discussion) • Brownfields Final Report 	<u>MPAC Meeting</u> October 24 <ul style="list-style-type: none"> • Population and Employment Forecast and Growth Distribution (Recommendation to Council) • <i>TriMet Briefing</i> • <i>Concept Planning (local governments/Metro)</i>
<u>MPAC Meeting</u> November 14 <ul style="list-style-type: none"> • <i>Urban Unincorporated Areas – history of Multnomah County urban services policy</i> • <i>Investment Opportunity Mapping</i> 	<u>MPAC Meeting</u> November 28 <ul style="list-style-type: none"> • Climate Smart Communities (Discussion)
<u>MPAC Meeting</u> December 12 <ul style="list-style-type: none"> • Climate Smart Communities (Recommendation to Council) 	<u>MPAC Meeting</u> December 26 (Cancelled)

Michael Freedman

Remaking strip commercial corridors and transforming business parks: Community design and urban innovation for a knowledge economy

5 TO 7 P.M. THURSDAY, APRIL 19

Michael Freedman, an internationally known urban designer, is widely known for:

- providing communities with creative and effective solutions to revitalize their downtowns and regional retail centers
- retrofitting failing or stagnated commercial corridors and workplace districts
- creating special streets, boulevards, and public places that stimulate new investment and vitality.

Join Michael Freedman at this special Metro Policy Advisory Committee event to learn more about redevelopment and revitalization of strip commercial corridors and transforming business parks.

Metro is sponsoring this event in its continuing role of convening regional decision-makers and facilitating on-going discussions to help local governments achieve their development goals.



Metro Regional Center

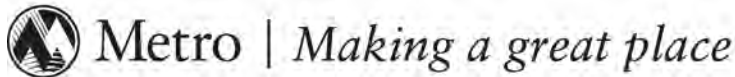
Council chamber
600 NE Grand Ave., Portland

TriMet bus and MAX light rail Northeast Seventh Avenue stop. Covered bicycle parking is available near the main entrance.

For more information, contact Kelsey Newell at Kelsey.Newell@oregonmetro.gov or at (503) 797-1916.



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METRO POLICY ADVISORY COMMITTEE

February 22, 2012

Metro Regional Center, Council Chambers

MEMBERS PRESENT

Matt Berkow
Jody Carson, 2nd Vice Chair
Steve Clark
Amanda Fritz
Kathryn Harrington
Jack Hoffman
Annette Mattson
Keith Mays
Marilyn McWilliams
Wilda Parks
Bill Turlay
Jerry Willey, Chair
William Wild

AFFILIATION

Multnomah County Citizen
City of West Linn, representing Clackamas Co. Other Cities
TriMet Board of Directors
City of Portland Council
Metro Council
City of Lake Oswego, representing Clackamas Co. Largest City
Governing Body of School Districts
City of Sherwood, representing Washington Co. Other Cities
Washington County Special Districts
Clackamas County Citizen
City of Vancouver
City of Hillsboro, representing Washington County Largest City
Clackamas County Special Districts

MEMBERS EXCUSED

Sam Adams
Shane Bemis
Nathalie Darcy
Michael Demagalski
Dennis Doyle
Andy Duyck
Charlotte Lehan
Doug Neeley
Jim Rue
Loretta Smith, Vice Chair
Steve Stuart
Norm Thomas

AFFILIATION

City of Portland Council
City of Gresham, representing Multnomah Co. 2nd Largest City
Washington County Citizen
City of North Plains, representing Washington Co. outside UGB
City of Beaverton, representing Washington Co. 2nd Largest City
Washington County Commission
Clackamas County Commission
City of Oregon City, representing Clackamas Co. 2nd Largest City
Oregon Dept. of Land Conservation & Development
Multnomah County Commission
Clark County, Washington Commission
City of Troutdale, representing other cities in Multnomah Co.

ALTERNATES PRESENT

Stanley Dirks
Kathy Roth
Bob Terry

AFFILIATION

City of Wood Village, representing other cities in Multnomah Co.
City of Oregon City, representing Clackamas Co. 2nd Largest City
Washington County Commission

STAFF:

Jessica Atwater, Nick Christensen, Andy Cotugno, Andy Cotugno, Mike Hoglund, Alison Kean-Campbell, Lake McTighe, Kelsey Newell, Ken Ray, Sherry Oeser, and John Williams.

1. CALL TO ORDER AND DECLARATION OF A QUORUM

Chair Jerry Willey declared a quorum and called the meeting to order at 5:08 p.m.

2. SELF INTRODUCTIONS AND COMMUNICATIONS

All attendees introduced themselves.

3. CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS

There were none.

4. COUNCIL UPDATE

Councilor Harrington updated the group on the following points:

- Metro is considering two potential sites for the Tualatin River boat launch. There will be an open house on Thursday, February 23rd from 6:30-8:30pm at the Clean Water Services administration building in Hillsboro.
- Metro will host an open house for the Glendoveer golf course management contract on Thursday, March 8.
 - Councilor Harrington emphasized that while the golf course will remain intact, management will change.
- Council President Tom Hughes has officially appointed, and the Council has confirmed, Ms. Alison Kean-Campbell as the Metro Attorney.

Mr. Andy Cotugno of Metro presented to the group regarding the annual Joint Policy Advisory Committee on Transportation's lobby trip to Washington, D.C. The official lobby dates are March 7th and 8th. This is a pivotal year; current bills are out of date, and Congress is considering scaling back federal transportation funding. There is much at stake, but our region has good representation on important, transportation and funding related committees in Congress. The JPACT meeting to prepare for the trip is on Monday, February 27th at 5pm at the Metro Regional Center.

5. CONSIDERATION OF THE CONSENT AGENDA

- **The February 8, 2012 MPAC Minutes**
- **2012 MTAC Membership Nominations**

MOTION: Ms. Jody Carson moved, Mr. Steve Clark seconded to adopt the consent agenda.

ACTION TAKEN: With all in favor, the motion passed.

6.0 INFORMATION/DISCUSSION ITEMS

6.1 2012 MPAC WORK PROGRAM

Members reviewed the draft tentative work program. Mayor Willey noted that today's agenda is a reflection of the most recent Metro Technical Advisory Committee (MTC) agenda. Mayor Willey reminded the group that MTAC is a technical advisory body to MPAC, and asked the group to use

this working relationship more effectively. The chair of MTAC, Mr. John Williams of Metro, will be coordinating with Chair Willey to facilitate this relationship.

Group Discussion Included

Councilor Harrington highlighted the special MPAC event on the evening of April 19th, a presentation by urban designer, Dr. Michael Freedman.

Mayor Willey will not be present for the March 14th MPAC meeting, Vice Chair Loretta Smith or Second Vice Chair Jody Carson will lead the meeting.

Some members would like for House Bill 4090 to be on MPAC's topic list. It is a Metro bill and will affect the region. They would like to invite Mayor Lou Ogden, who has been very involved in this bill, to present to MPAC. Chair Willey would like Metro to bring other legislation forward for discussion at MPAC as well.

6.2 GREATER PORTLAND PULSE (GPP) FINANCIAL PLAN, PARTNERSHIP AGREEMENTS, NEXT STEPS

Councilor Harrington introduced the Greater Portland Pulse (GPP) project. She highlighted that public agencies need more funding for their regionally vital projects, such as GPP. Private investors are looking for regional data, and they are interested in the tool that GPP is. The GPP advisory team is comprised of members from around the region who have contributed a great deal, along with staff, to shaping this tool over the last two years.

Mr. Mike Hoglund of Metro gave an overview of the GPP project, its financial plan, and public sector contributions to the GPP project. The primary purposes of GPP are to measure the results of the Metro Future Vision Plan, 2040 Plan, city and county plans, measure effectiveness, identify system linkages, sharpen dialogue, and inspire action. GPP focuses on regional indicators. Metro worked with Portland State University as its primary partner, recruited an advisory team, an equity panel, and nine results teams comprised of over 200 people. GPP developed several products: the regional indicators, online data, the first report, and supporting documents.

GPP hired a national indicator expert, Ms. Rita Conrad, to assist in the development of the indicators. To arrive at the indicators, staff considered the outcomes to be measured, for example, prosperity, and then broke them down, for example business prosperity, personal prosperity, etc. From this, staff examined the drivers behind the outcomes, which resulted in identifying which indicators to measure, as well as secondary indicators. Mr. Hoglund highlighted to MPAC that while Metro's six desired outcomes are an excellent umbrella, the indicators show there are many factors that create an excellent region. Mr. Hoglund encouraged members to revisit the GPP indicator, interactive website.

Mr. Hoglund reviewed what has been happening with GPP since its last presentation to MPAC in the fall of 2011, highlighting the results in the GPP's first report. The region is in a deep economic recession. The higher a person's level of education, the better off that person is in terms of income and employment; people of color are at more of a disadvantage. He clarified that the GPP data does include Clark County.

Portland State University's Institute of Metropolitan Studies (IMS) is the current home of the GPP. There are currently many training efforts on data access and display, program and indicator alignment. Dr. Sheila Martin of PSU's IMS department emphasized that they are proud to be home to be home to the GPP, it will be a vital governance tool for the region. PSU IMS is currently hosting data workshops on GPP throughout the region. These workshops will teach you how to access the data on the GPP website as well as add in your own geographic-specific data. The GPP will be a more powerful tool as more people use the tool.

GPP is asking grantees to consider how this tool can influence those outcomes that the region has agreed are important. GPP is transitioning from the temporary Advisory Committee to a permanent Board. Some board member positions will have a funding component, others will not. GPP will be developing partnership agreements with board members.

Mr. Hoglund discussed the GPP project's funding options. The Project needs approximately \$521,000 to function fully. Metro has put a place-holder in its 2012-2013 budget for \$65,000 for the GPP. The goal is for each county to make a \$32,500 contribution to the GPP Project; the Project hopes that throughout the region cities and counties will be making proportional, regionally equitable contributions. Funders will enjoy specific benefits, including access to workshops, data visualization tools, recognition on materials, among other benefits.

GPP has also analyzed if its work provides direct or indirect support to current and existing programs and projects, and found that its work does directly support many projects and programs. Dr. Martin encouraged anyone who is interested in influencing the indicators the GPP examines to become involved in the project.

Group Discussion Included

Mayor Willey encouraged everyone to review the 9 drivers and 72 indicators on the GPP website as a responsibility to their communities.

Some members expressed concern that food insecurity and food deserts are not included in the 'Healthy People' category. Dr. Martin shared that there are two closely related indicators in the economic prosperity set and housing set. Mr. Hoglund encouraged members to add their own data to the tool.

Some members expressed a desire for the GPP team to return to MPAC in congruence with another presentation and use that topic to give examples. Dr. Martin confirmed that this would be possible, and asked members to please see the 'data story,' on the GPP website.

Some members expressed concern that there is no immediate return on investment in this project. Councilor Harrington explained that this project was initiated to help illuminate what it is this region needs to be doing to attract large investments and businesses, and that this itself is a return.

Councilor Harrington and Mr. Hoglund clarified that the 9 indicator categories are the GPP equivalent of the six desired outcomes.

Some members inquired if economic indicators like freight movement are included in the GPP. Some similar indicators are included.

6.3 REGIONAL ACTIVE TRANSPORTATION PLAN PROJECT OVERVIEW

Councilor Harrington introduced the regional active transportation project. She highlighted that our region is currently lacking a regional strategy to advance active transportation and become more competitive to gain access to outside dollars. She emphasized that this project is not about programming jurisdictions' local dollars, it is about being more organized to secure outside dollars, such as federal TIGER grants.

Ms. Lake McTighe of Metro introduced the Active Transportation Plan. Active transportation is defined as any form of transportation that includes walking or bicycling; transit is included in this definition because people often need to walk to or choose to bike in addition to using transit. She emphasized three themes:

1. The timing is right for an ATP
2. The ATP is the implementation of local aspirations, with regional impact
3. The key to success is partnership

The region has already made great progress in active transportation. The ATP is building on a very rich history of planning and implementation.

Theme 1: Why the timing is right

- The region has built momentum, communities want more active transportation.
- Regional groups have demonstrated a long term commitment to strengthening active transportation.
- More investment in trails is necessary and regionally recognized.
- Communities want more active transportation because it is healthier and more pleasant.
- Public support for completing sidewalks and trails in communities is high; support for funding these projects is high as well.

Theme 2: Implementing local implementation aspirations with regional impact

- This will connect the region physically and politically
- The region will be able to speak with one voice when asking for outside funding, making the ask stronger
- The region will be able to achieve impressive mode share targets
- Active transportation will become safer and more convenient, allowing people to actually choose it rather than feel forced onto transit
- When active transportation is a real choice, it increases economic prosperity as more and more people and employers consider these options when considering moving to a new location
- Active transportation helps the region realize Metro's six desired outcomes
- As Congressman Blumenauer pointed out, the ATP will be a forum for discussion so the region may agree on its priorities in active transportation infrastructure and policy.

Theme 3: The key to success is partnership

While there is a technical component to this plan, it is primarily about making decisions and identifying priorities. It is vital this is done through regional discussion. MPAC will play an important role in this process.

The ATP has identified objectives to achieve between now and June of 2013:

1. Develop guiding principles and criteria to prioritize projects and funding
2. Identify tiered priority projects for the Principal Regional Network
3. Recommended policies, performance targets & performance measures
4. Agreed upon implementation & funding strategies

The ATP will reach several milestones during this time frame, and will return to MPAC after reaching each one. The ATP will be highly aware of other local active transportation plans as well as other Metro projects in its work, and will be using the GPP indicators.

Group Discussion Included

Members asked if the Oregon Department of Transportation (ODOT) is involved in this project. Ms. McTighe confirmed that ODOT is funding this project in part and has representation on the Advisory committee. Members expressed interest in lobbying for sidewalks on state highways.

Members encouraged the ATP to prioritize around outcomes as opposed to projects, and to determine those outcomes measurability. The project must build a sense of trust with the public so when the economy recovers the project is in a position to invest. They emphasized that clarity in why the ATP is important is essential to success. Staff agreed that communication will be essential.

Some members asked if planning tools will be available to communities in which implementing cycling and pedestrian infrastructure is more difficult. There will be cycle and pedestrian zone analysis, and the project will analyze the region for different topographies and identify unique approaches.

Members asked Ms. McTighe what success looks like 10 years from now. She responded that she sees success as active transportation being fully recognized as vital to transportation; the 20 minute neighborhood is a reality for many more people; region is much more connected because of biking and walking, manifested in ways we can't imagine; and that the region will be more of a neighborhood.

Members asked if the project will be tracking cycle sales data. Staff responded that it's out there, and the project will make strong effort to do so.

Members inquired as to whether or not the ATP will be looking for additional funding. Staff responded that yes, they will. Fortunately, biking and walking infrastructure is low-cost compared to other forms of transportation. Members suggested posing the ask for more money as the Greenspaces measure was posed, using lots of data, showing what residents will receive in their neighborhood, as well as per capita.

6.4 COMMUNITY INVESTMENT STRATEGY—SITE READINESS—BROWNFIELDS AND PARCELIZATION

Councilor Harrington introduced the topic of site readiness and brownfields. During the previous Urban Growth Report cycle, MPAC requested to have more information on the topics of brownfields and parcelization. Last year, Councilor Harrington proposed two budget amendments to fund brownfields and parcelization scoping projects.

Mr. John Williams of Metro presented on the brownfields and parcelization projects. The common goal of these two projects is to identify barriers to the kind of development local communities want and to overcome them. Both projects seek to identify the opportunity costs of not acting, and both projects intend to leverage existing work as they continue. These programs are an example of the technical assistance happening in the Planning Department at Metro in concert with local communities.

Mr. Williams overviewed the brownfields project. Staff now knows a lot about individual sites and which areas around the region have brownfields, but there is still a lot to be learned. The project will be based on community case studies rather than a detailed regional inventory and will identify potential solutions and next steps. Metro's role is to provide information about brownfields and facilitate policy discussions at the regional and local level. Metro staff is currently selecting pilot project case studies. The brownfields project has hired a consultant to work on this project in conjunction with a technical review team comprised of a diverse group of community stakeholders.

Mr. Williams gave an overview of the parcelization project. Parcelization and multiple ownerships can be challenges to development in local communities. A consultant at EcoNW has been hired to complete this project, and has been asked to look for best practices inside and outside the region. The project will focus on identifying how parcelization issues are impeding development in downtowns, main streets and employment areas, as well as identifying tools to use to address parcelization.

Mr. Williams asked members to suggest potential case studies for both projects. Staff will return to MPAC in June of 2012 for a deeper conversation on these issues. He plans to return with examples from the selected case studies and staff from the case study's community.

Group Discussion Included

Staff confirmed that the Port of Portland is a key partner in the brownfields project.

Mayor Willey emphasized that these topics are integral to the success of the region.

Members suggested including regional political leaders in future MPAC discussions of this topic.

Councilor Harrington emphasized that Metro is providing resources to the communities that are selected for case studies, and that this work will be different from previously published studies in the region.

7.0 MPAC MEMBER COMMUNICATIONS

Councilor Kathy Roth distributed information on construction on the 'jug handle project,' on the Tualatin Valley Highway during March 22nd-27th.

Mayor Mays shared with the group that the City of Sherwood recently approved a small urban renewal district that will sunset after no more than 21 years.

8. ADJOURN

Chair Willey adjourned the meeting at 7:00 p.m.

Respectfully submitted,



Jessica Atwater
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR 02/22/12:

The following have been included as part of the official public record:

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
5.0	Minutes	2/21/12	February 8, 2012 MPAC Minutes	022212m-01
5.0	List	2/21/12	Metro Technical Advisory Committee 2012 Member Nominations	022212m-02
6.1	List	2/17/12	2012 MPAC Tentative Agendas	022212m-03
6.2	Brochure	2/22/12	Greater Portland Pulse Brochure	022212m-04
6.3	PowerPoint	2/22/12	Greater Portland Pulse Recommendations and Next Steps	022212m-05
6.2	Flyer	2/22/12	Greater Portland Pulse Data Workshop	022212m-06
6.3	PowerPoint	2/21/12	The Regional Active Transportation Plan	022212m-07
7.0	Flyer	2/22/12	Tualatin Valley Highway Construction Project Notice	022212m-08
7.0	Information	2/22/12	Tualatin Valley Highway Construction Project Notice Overview	022212m-09
7.0	Flyer	2/22/12	Westside Economic Alliance Workshop	022212m-10
7.0	Letter	2/22/12	Ms. Nathalie Darcy, Letter to MPAC in response to her 2/8/12 Letter	022212m-11

MPAC Worksheet

Agenda Item Title: Affordable Housing/Affordable Living

Presenter: Ted Reid, planner, Metro Community Development Division
Trell Anderson, Executive Director, Housing Authority of Clackamas County
Steve Rudman, Executive Director, Home Forward
Val Valfre, Executive Director, Housing Authority of Washington County

Contact for this worksheet/presentation: Ted Reid, 503-797-1768, ted.reid@oregonmetro.gov

Council Liaison Sponsor: none

Purpose of this item (check no more than 2):

Information ☒
Update ☐
Discussion ☒
Action ☐

MPAC Target Meeting Date: April 11, 2012

Amount of time needed for:

Presentation 30
Discussion 20

Purpose/Objective (what do you expect to accomplish by having the item on *this meeting's* agenda):

- Provide MPAC with brief summary of 2011 regional inventory of regulated affordable housing
- Provide MPAC with housing authority perspectives on:
 - The need for affordable housing and what housing authorities are doing to address the need
 - Challenges being faced by housing authorities
- Discussion of ways that cities, Metro, special districts, and others could work towards promoting “affordable living” (reducing housing and transportation costs, increasing wages, etc)

Action Requested/Outcome (What action do you want MPAC to take at *this meeting*? State the policy questions that need to be answered.)

What role, if any, would MPAC like to play in promoting affordable housing/living?

Background and context:

On several recent occasions, MPAC members have expressed an interest in discussing affordable housing. As context for MPAC's discussion, following is a brief summary of Metro's history on the topic of affordable housing.

In a settlement to a challenge on the 1997 Urban Growth Management Functional Plan relating to inclusionary housing, the Oregon Land Use Board of Appeals (LUBA) mandated that Metro convene a committee to develop a Regional Affordable Housing Strategy. Based on the work of this group, Metro adopted an ordinance in 2000, amended in 2002, which required local jurisdictions to consider actions that would promote affordable housing and a voluntary affordable housing production goal for five years 2001 - 2006. Local jurisdictions were required to submit progress reports over the next few years to Metro. Our compliance reports found that few cities adopted the voluntary housing goals and, though many jurisdictions considered actions to promote affordable housing, few adopted them.

As required by Title 7 (Housing Choice) of the Urban Growth Management Functional Plan, Metro reconvened the housing task force in 2005. In 2006, MPAC and Council endorsed the recommendations from the Task Force, which called for Metro and the region to take a variety of actions to promote housing. Council followed MPAC's recommendation and voted to retain the voluntary housing production goals, and amended the text to indicate that the goals would be amended over time and to continue reporting requirements for local jurisdictions on affordable housing production.

Within a year of the adoption of the new Title 7, after review and discussion at Council, the Chief Operating Officer suspended reporting requirements for much of the Urban Growth Management Functional Plan (including Title 7) based on the experience that the reports were not providing consistent information, were a burden to local jurisdictions and were not resulting in more affordable housing being built.

However, Metro did address a number of other items in the task force recommendations, including:

- Convened providers of affordable housing and used information from them to complete the first ever regulated affordable housing inventory in 2007. The information provided in that inventory allows the region to determine the number of units built and where they are located. The updated 2011 inventory is included in the MPAC packet.
- Included tools to promote affordable housing in first Community Investment Toolkit (available on Metro's website at <http://www.oregonmetro.gov/index.cfm/go/by.web/id=28446>)
- Dedicated \$1 million in a fund for purpose of leveraging other funds for housing construction, dependent on matching funds (note this fund was later re-appropriated due to lack of match from other funders)
- Developed new modeling methods to measure how the region meets housing needs, considering combinations of household size, age and income and the effect of combined housing and transportation costs.

In early 2011, MPAC recommended and the Metro Council adopted amendments to Title 11 (Planning for new urban areas), which added specificity to Title 11 in regards to planning for housing, particularly affordable housing, in urban reserves and areas added to the UGB.

In the fall of 2010 and again in the fall of 2011, Metro convened regional stakeholders to submit a Sustainable Communities Initiative grant to HUD with housing as a key focus; however, both applications were unsuccessful. This recent work illustrates the shift over time from discussion of regulation to using Metro's role as convener in this topic area.

What has changed since MPAC last considered this issue/item?

MPAC has not recently discussed affordable housing, but members have indicated that they would like to. During the latter half of 2011, Metro staff, with the help of the housing authorities and local jurisdictions, completed an updated inventory of regulated affordable housing. For the purposes of the inventory, regulated affordable housing is defined as housing that is made affordable through public subsidies and/or agreements or statutory regulations that restrict or limit resident income levels and/or rents. Regulated affordable housing generally provides housing for households that otherwise could not afford adequate housing at market rates.

The inventory was updated because local partners have indicated that it is useful for a number of purposes, including grant proposals and consolidated housing plans. Additionally, this inventory is intended to be used as a data layer in a forthcoming regional "opportunity mapping" effort, which will provide a web-based mapping tool for assessing different populations' access to services and community assets such as transit, jobs, parks, housing, and healthy foods. This mapping tool is intended to help inform a variety of planning efforts, policies, and investment decisions. Metro staff is undertaking the opportunity mapping project in partnership with the four counties and The Coalition for a Livable Future, which is updating its Regional Equity Atlas. Finally, the inventory responds to Title 7.

What packet material do you plan to include? (must be provided 8-days prior to the actual meeting for distribution)

The summary report on the 2011 regional inventory of regulated affordable housing is included in the packet. Please note that the version in the MPAC packet has a minor correction to an earlier February 17, 2012 version of the report, which MPAC previously received via e-mail. One site in Lake Oswego, consisting of 126 units was removed from the inventory because its affordability provisions expired in 2002.

What is the schedule for future consideration of item (include MTAC, TPAC, JPACT and Council as appropriate):

Metro Council has been briefed on the 2011 regional inventory of regulated affordable housing. MTAC will take up the topic at its April 18 meeting.

2011 REGIONAL INVENTORY OF REGULATED AFFORDABLE HOUSING

Revised April 3, 2012

WHAT IS REGULATED AFFORDABLE HOUSING?

For the purposes of this inventory, regulated affordable housing is defined as housing that is made affordable through public subsidies and/or agreements or statutory regulations that restrict or limit resident income levels and/or rents. Regulated affordable housing generally provides housing for households that otherwise could not afford adequate housing at market rates.¹

WHY WAS A REGIONAL INVENTORY COMPLETED?

A regional inventory of regulated affordable housing was last completed in 2007. The inventory was updated in 2011 because local partners have indicated that it is useful for a number of purposes, including grant proposals and consolidated housing plans. Updating the inventory also provides a means of understanding what has changed since 2007.

Additionally, this inventory is intended to be used as a data layer in a forthcoming regional “opportunity mapping” effort, which will provide a web-based mapping tool for assessing different populations’ access to services and community assets such as transit, jobs, parks, housing, and healthy foods. This mapping tool is intended to help inform a variety of planning efforts, policies, and investment decisions. Metro staff is undertaking the opportunity mapping project in partnership with the four counties and The Coalition for a Livable Future, which is updating its Regional Equity Atlas.

Finally, this inventory has been updated because the Regional Framework Plan states that it is the policy of the Metro Council to:

- 1.3.1 “Provide housing choices in the region... paying special attention to those households with the fewest housing choices.”
- 1.3.4 “Maintain voluntary affordable housing production goals for the region, to be revised over time as new information becomes available... and encourage their adoption by the cities and counties of the region.”
- 1.3.6 “Require local governments in the region to report progress towards increasing the supply of affordable housing and seek their assistance in periodic inventories of the supply of affordable housing.”

¹ Subsidized ownership units may also include homes built or rehabilitated by non-profits such as Habitat for Humanity. Ownership units were not included in the 2007 inventory, but have been included in this 2011 update.

THE NEED FOR REGULATED AFFORDABLE HOUSING

Tracking the creation of new affordable housing is implemented in Title 7 (Housing Choice) of Metro's Urban Growth Management Functional Plan. Title 7 focuses on households earning less than 30 percent and less than 50 percent of regional median household income. The region's median household income is \$56,049 per year². A household making less than 30 percent of median household income would earn less than \$16,800. A household making less than 50 percent of median household income would earn less than \$28,000. Title 7 uses a standard measure of affordability that posits that housing should cost no more than 30 percent of household income. Based on these assumptions, Table 1 provides estimates of rents that would be affordable for households in these two income brackets.

TABLE 1: ESTIMATED AFFORDABLE RENTS FOR INCOME BRACKETS IDENTIFIED IN TITLE 7

Household income bracket	Household income	Estimate of affordable rent (30% of monthly income)
30 percent median income	<\$16,800	\$420
50 percent median income	<\$28,000	\$700

The private rental market does not produce new³ housing that rents for \$420 per month that is useable for a family of four and probably produces little or no new housing that rents for \$700 per month that is useable for a family of four. However, existing housing stock may be available within this price range. Likewise, the private market does not produce new owner-occupied housing that is affordable for households in these income brackets. This is particularly the case now with tightened lending standards. Practically speaking, the only newly-produced housing that is affordable for people in these income brackets is regulated affordable housing, which is summarized in this report.

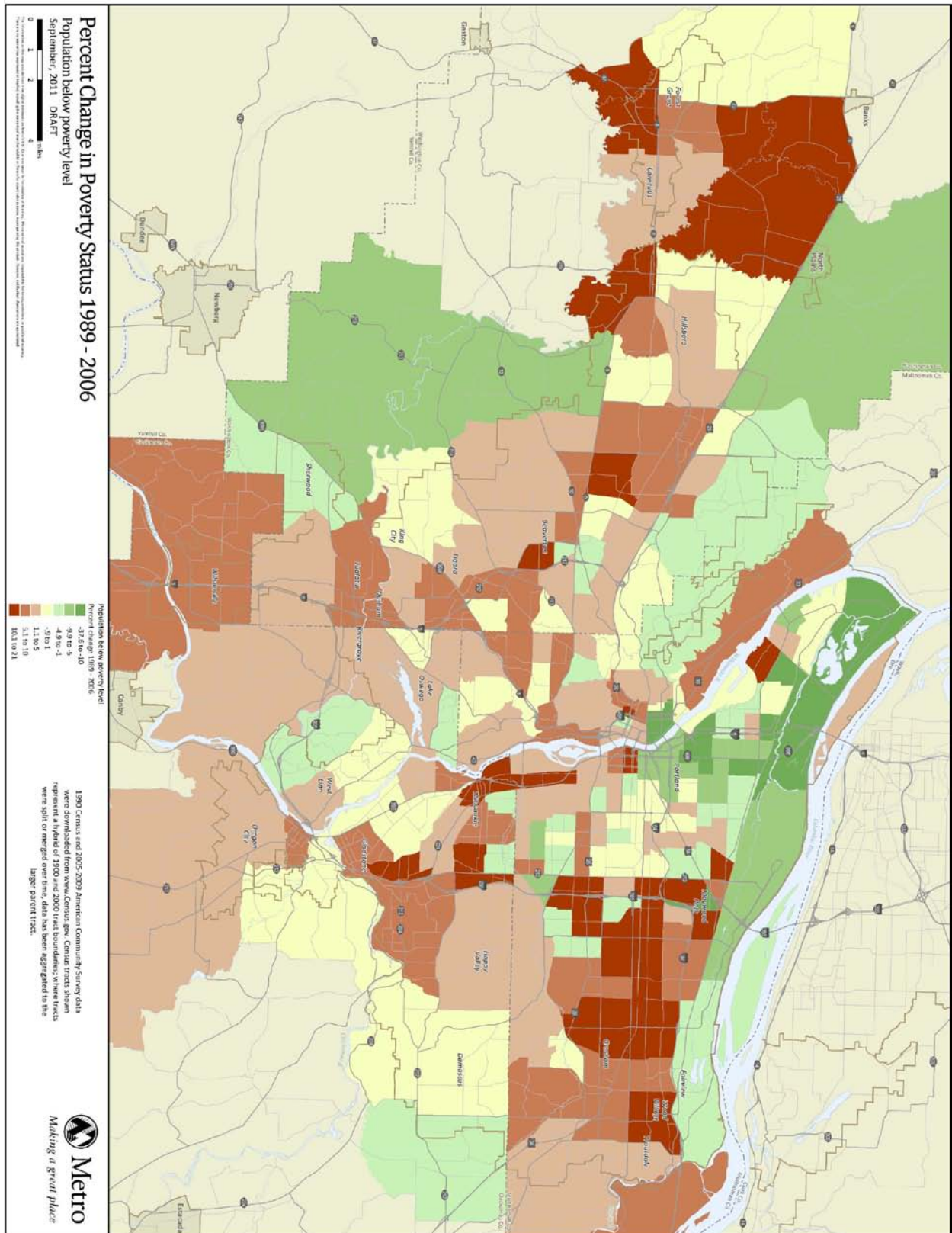
This inventory does not include a formal assessment of the need for regulated affordable housing. However, it is generally understood that demand for these units far outstrips the current inventory. The need for these units appears to be increasing over time as the share of the region's residents living in poverty has increased from 9.98% in 1990 to 12.43% in 2006⁴. As shown in Figure 1, this increase has occurred primarily in first tier suburbs. As noted, the private market does not produce housing to meet the needs of people living in poverty.

² 2009 inflation-adjusted dollars for Portland-Vancouver-Beaverton, OR-WA Metro Area (source: American Community Survey, 5-year estimate, 2005-2009, margin of error +/- 465)

³ Title 7 focuses on new housing production, not existing stock

⁴ Source: 1990 Census and 2005-2009 American Community Survey for the Census Tracts that most closely approximate the Metropolitan Planning Organization boundary.

FIGURE 1: PERCENT CHANGE IN POVERTY STATUS 1989 - 2006



SUMMARY OF RESULTS

The current (2011) four-county area inventory of regulated affordable housing includes 38,089 units. This constitutes 4.5 percent of the total housing stock⁵. The 2011 inventory includes 2,953 more regulated affordable housing units than the 2007 inventory (see Appendix 1 for the 2007 inventory).⁶ Additionally, there are currently 15,039 Housing Choice Vouchers (Section 8 Vouchers) in use in the four-county area. This is an increase of 2,118 vouchers since the 2007 inventory.

NOTES AND CAVEATS ON THE DATA

- This inventory covers a four-county area, including Clackamas, Clark, Multnomah, and Washington counties.
- This inventory does not include:
 - a. Shared bedrooms (i.e., dorms)
 - b. Homeless shelters
 - c. Market-rate affordable housing
- Personal information about tenants is not included in this inventory
- Some jurisdictions may have had a net decrease in the number of subsidized housing units, but an increase in the number of mobile Section 8 vouchers.
- Many duplicate records were found in the initial 2011 inventory and have been cleaned. In reviewing the 2007 inventory for comparison with the 2011 update, 5% of the units (1,987 units) in the 2007 inventory were discovered to be duplicates. The 2007 inventory as reported here has been cleaned of duplicates (see Appendix 1 for the corrected 2007 inventory).
- Only about half of the housing unit records contain an affordability expiration date, the date the rent is no longer regulated for the unit. Therefore, expiration dates have not been summarized in this report.
- The updated inventory includes Habitat for Humanity sites. The addition of this housing type in the 2011 inventory accounts for some of the change in the number of units from years 2007 to 2011.

⁵ 861,640 total housing units in four-county area (source: 2010 Census)

⁶ This net difference is not necessarily all attributable to construction or preservation of new units. Staff believes that data collection for the 2011 inventory was more thorough than the 2007 inventory, so the updated inventory may have captured units that should have also appeared in the 2007 inventory. Additionally, the 2011 inventory includes owner-occupied regulated units (such as Habitat for Humanity homes), which were not included in the 2007 inventory. The 2011 inventory will provide a better baseline for comparison with future inventories.

The following agencies provided data for this 2011 inventory:

- Clackamas County Community Development
- Housing Authority of Clackamas County
- Home Forward (formerly Housing Authority of Portland)
- Portland Housing Bureau
- Portland Bureau of Planning and Sustainability
- Washington County Housing Authority
- Washington County Office of Community Development
- Vancouver Housing Authority
- Oregon Department of Housing and Community Services (OHCS)
- City of Beaverton
- City of Gresham

2011 REGIONAL INVENTORY OF REGULATED AFFORDABLE HOUSING

Figure 2 is a map of the 2011 inventory. On the map, larger dots symbolize sites with more regulated affordable units. The color of the dots corresponds to the type of owner: for-profit, non-profit, government, unknown. Units depicted as “unknown” are listed as such whenever the ownership type was not reported by partner agencies.

FIGURE 2: 2011 INVENTORY OF REGULATED AFFORDABLE HOUSING (FOUR-COUNTY AREA)

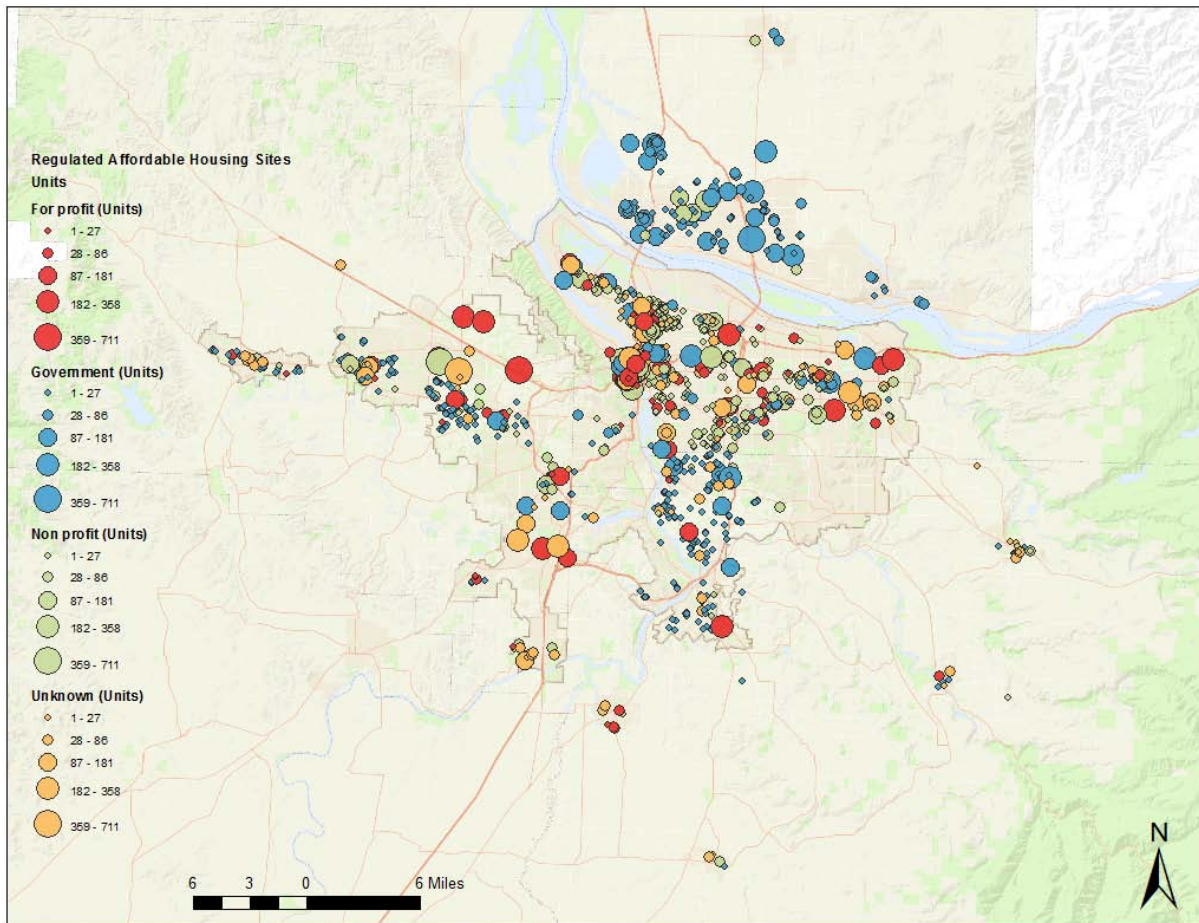


Table 2 sorts the 2011 inventory by jurisdiction. If a jurisdiction is not listed, it is because there are no regulated affordable housing units in that jurisdiction. A site may include a mix of regulated and unregulated housing units. Unregulated units are market rate. Having a mix of regulated and unregulated housing at a site implies that the site has a variety of income levels. This inventory only includes a site if it has at least one regulated unit.

TABLE 2: REGULATED AFFORDABLE HOUSING BY JURISDICTION IN FOUR-COUNTY AREA (2011)

Jurisdiction	Number of sites	Total units	Unregulated units	Regulated units	Share of four-county regulated units
Battle Ground	3	106	22	84	0.2%
Beaverton	34	631	12	619	1.6%
Camas	5	120	53	67	0.2%
Canby	8	343	2	341	0.9%
Cornelius	12	35	5	15	0.0%
Durham	1	210	0	210	0.5%
Estacada	9	143	0	143	0.4%
Fairview	2	480	0	480	1.2%
Forest Grove	31	607	0	607	1.6%
Gladstone	19	62	1	61	0.2%
Gresham	48	2188	23	2165	5.6%
Hillsboro	66	2199	4	2195	5.6%
Lake Oswego	1	30	0	30	0.1%
Milwaukie	34	316	0	316	0.8%
Molalla	7	159	2	157	0.4%
North Plains	1	33	0	33	0.1%
Oregon City	36	553	1	552	1.4%
Portland	731	21273	1315	19953	51.3%
Ridgefield	3	10	0	10	0.0%
Sandy	18	319	1	318	0.8%
Sherwood	7	101	1	100	0.3%
Tigard	18	705	10	695	1.8%
Troutdale	3	432	0	432	1.1%
Tualatin	3	604	0	604	1.6%
Unincorporated (four counties)	254	4847	108	4739	12.2%
Vancouver	94	3875	597	3278	8.4%
Washougal	2	90	2	88	0.2%
West Linn	10	14	0	14	0.0%
Wilsonville	14	588	4	584	1.5%
	1,474	41,073	2,163	38,890	

Table 3 sorts the inventory by county. The majority of the region's inventory of regulated units is in Multnomah County. Multnomah County also has the largest share of the four-county area's total housing stock.

TABLE 3: REGULATED AFFORDABLE HOUSING BY COUNTY (2011)

County	Number of sites	Total Units	Unregulated Units	Regulated Units	Share of four-county regulated units	Total housing stock (2010 Census)	Regulated units as share of total housing stock
CLACKAMAS	285	3735	16	3,719	9.6%	156,945	2.4%
CLARK	150	5975	769	5,206	13.4%	167,413	3.1%
MULTNOMAH	783	24333	1338	22,990	59.1%	324,832	7.1%
WASHINGTON	256	7030	40	6,975	17.9%	212,450	3.3%
	1,474	41,073	2,163	38,890		861,140	4.5%

Generally speaking, people living in incorporated areas will have better access to services and commercial areas, thereby reducing transportation costs. As shown in Table 4, the great majority of sites with regulated affordable units are within incorporated areas.

TABLE 4: REGULATED AFFORDABLE HOUSING SITES IN INCORPORATED VS. UNINCORPORATED AREAS (2011)

County	Incorporated areas: number of sites	Unincorporated areas: number of sites
Clackamas	156	129
Clark	107	43
Multnomah	783	0
Washington	174	82
	1,220	254

The 2040 Growth Concept calls for focusing growth in centers and corridors. These areas are most likely to provide access to services such as transit, banks, and grocery stores, thereby potentially reducing transportation costs. Table 5 shows the inventory of regulated affordable housing that is in designated centers inside the urban growth boundary (UGB). If a center is not listed, it is because there are no regulated affordable housing units in that center.

TABLE 5: REGULATED AFFORDABLE HOUSING BY 2040 GROWTH CONCEPT CENTER INSIDE UGB (2011)

Center type	Center name	Number of sites	Total units	Unregulated units	Regulated units	Share of four-county regulated units
Central City	Portland	77	7484	698	6786	17.4%
Regional Center	Beaverton	1	8	0	8	0.0%
Regional Center	Clackamas	4	387	0	387	1.0%
Regional Center	Gateway	9	585	28	557	1.4%
Regional Center	Gresham	9	539	2	537	1.4%
Regional Center	Hillsboro	5	271	2	269	0.7%
Regional Center	Oregon City	1	1	0	1	0.0%
Town Center	Aloha	5	214	7	207	0.5%
Town Center	Bethany	2	340	0	340	0.9%
Town Center	Cedar Mill	1	608	0	608	1.6%
Town Center	Gladstone	5	5	0	5	0.0%
Town Center	Hillsdale	3	90	2	88	0.2%
Town Center	Hollywood	2	333	28	305	0.8%
Town Center	Lents	6	74	1	73	0.2%
Town Center	Milwaukie	17	282	0	282	0.7%
Town Center	Raleigh Hills	1	73	0	73	0.2%
Town Center	Rockwood	18	702	2	700	1.8%
Town Center	St. Johns	2	21	0	21	0.1%
Town Center	Tigard	2	52	0	52	0.1%
Town Center	Troutdale	1	228	0	228	0.6%
Town Center	Tualatin	1	240	0	240	0.6%
		172	12,537	770	11,767	30.3%

Table 6 describes the inventory by type of center. Of the three types of centers, the Central City has the largest share of units, followed by Town Centers and Regional Centers. All together, these centers in the UGB contain about one-third of the four-county area's inventory of regulated affordable housing.

TABLE 6: SUMMARY OF REGULATED AFFORDABLE HOUSING IN 2040 GROWTH CONCEPT CENTERS INSIDE UGB (2011)

Center type	Number of sites	Total units	Unregulated units	Regulated units	Share of four-county regulated units
Central City	77	7484	698	6786	17.4%
Regional Center	29	1791	32	1759	4.5%
Town Center	66	3262	40	3222	8.3%
	172	12,537	770	11,767	30.3%

The housing choice voucher program (Section 8 vouchers) is the federal government's major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market. Since housing assistance is provided on behalf of the family or individual, participants are able to find their own housing, including single-family homes, townhouses and apartments. The participant is free to choose any housing that meets the requirements of the program and is not limited to units located in subsidized housing projects. Table 7 shows a snapshot of the number of vouchers in each of the four counties. These voucher numbers should not be added to the number of regulated affordable units to come up with a total inventory of subsidized housing in each county. In many cases, Section 8 vouchers are used in regulated affordable units.

TABLE 7: SNAPSHOT OF HOUSING CHOICE VOUCHERS BY COUNTY (2011)

County	Number of housing choice vouchers (snapshot)
Clackamas	1,569
Clark	2,523
Multnomah	8,510
Washington	2,437
Total	15,039

WHAT HAS CHANGED SINCE THE 2007 INVENTORY?

The tables below compare the 2007 inventory⁷ with the updated 2011 inventory. Changes in inventory numbers may be attributed to losses or gains in units, the addition of a new housing type to the 2011 inventory (owner-occupied single-family housing), and improved data collection methods. The 2011

⁷ As noted, duplicate records have been removed for this comparison.

inventory includes 2,953 more regulated affordable units than the 2007 inventory. As shown in Table 8, few jurisdictions have had a net loss in regulated affordable units. Though some jurisdictions have fewer units in 2011 than they did in 2007, they may have more people using tenant-based Section 8 vouchers. If a jurisdiction is not listed here, it is because it did not have any regulated affordable housing units in 2007 and 2011.

TABLE 8: NET DIFFERENCE IN REGULATED AFFORDABLE HOUSING BY JURISDICTION IN FOUR-COUNTY AREA (2007 – 2011)

Jurisdiction	Difference in number of sites	Difference in total number of units	Difference in number of unregulated units	Difference in number of regulated units
Battle Ground	0	0	0	0
Beaverton	0	119	1	118
Camas	1	51	25	26
Canby	0	0	2	-2
Cornelius	2	25	5	5
Durham	0	0	0	0
Estacada	1	48	0	48
Fairview	0	0	0	0
Forest Grove	0	3	-7	10
Gladstone	0	0	0	0
Gresham	2	-57	8	-65
Hillsboro	4	-1	0	-1
Lake Oswego	0	0	-1	1
Milwaukie	2	4	-1	5
Molalla	2	46	1	45
North Plains	0	0	0	0
Oregon City	-1	-7	-10	3
Portland	34	1827	-89	1911
Ridgefield	-2	-2	0	-2
Sandy	6	172	1	171
Sherwood	0	4	0	4
Tigard	0	63	0	63
Troutdale	0	-2	0	-2
Tualatin	0	0	0	0
Unincorporated (four counties)	-35	313	1	312
Vancouver	-44	3	0	3
Washougal	1	28	1	27
West Linn	0	0	0	0
Wilsonville	7	274	1	273
	-20	2,911	-62	2,953

Table 9 shows the net difference in sites and units from 2007 to 2011, summarized by county. For all four counties, the 2011 inventory includes more regulated units than the 2007 inventory.

TABLE 9: NET DIFFERENCE IN REGULATED AFFORDABLE HOUSING BY COUNTY (2007 -2011)

County	Difference in number of sites	Difference in total number of units	Difference in number of unregulated units	Difference in number of regulated units
Clackamas	+21	+599	-5	+604
Clark	-85	+373	+27	+346
Multnomah	+36	+1768	-81	+1844
Washington	+8	+171	-3	+159
	-20	+2,911	-62	+2,953

Table 10 summarizes the net difference between the 2007 and 2011 inventories for sites in incorporated and unincorporated areas. This indicates a slight shift towards incorporated areas, where services are more likely to be close by. Sites may include a mix of regulated and unregulated units.

TABLE 10: NET DIFFERENCE IN REGULATED AFFORDABLE HOUSING SITES IN INCORPORATED VS. UNINCORPORATED AREAS (2007 - 2011)

County	Incorporated areas: difference in number of sites	Unincorporated areas: difference in number of sites
Clackamas	+17	+4
Clark	-44	-41
Multnomah	+36	0
Washington	+6	+2
	+15	-35

Table 11 shows the net difference between the 2007 and 2011 inventories, by center. If a Center is not listed here, it is because it did not have any regulated affordable housing units in 2007 and has none today.

TABLE 11: NET DIFFERENCE IN REGULATED AFFORDABLE HOUSING IN 2040 GROWTH CONCEPT CENTERS INSIDE UGB (2007 - 2011)

Center type	Center name	Difference in number of sites	Difference in number of total units	Difference in number of unregulated units	Difference in number of regulated units
Central City	Portland	+9	+731	-17	+748
Regional Center	Beaverton	0	0	0	0
Regional Center	Clackamas	+1	+52	0	+52
Regional Center	Gateway	+1	+4	-2	+6
Regional Center	Gresham	0	0	0	0
Regional Center	Hillsboro	0	-13	0	-13
Regional Center	Oregon City	0	0	0	0
Town Center	Aloha	0	-6	0	-6
Town Center	Bethany	0	0	0	0
Town Center	Cedar Mill	0	0	0	0
Town Center	Gladstone	0	0	0	0
Town Center	Hillsdale	0	0	0	0
Town Center	Hollywood	0	0	0	0
Town Center	Lents	0	0	0	0
Town Center	Milwaukie	+2	+4	0	+4
Town Center	Raleigh Hills	0	0	0	0
Town Center	Rockwood	+2	-57	-1	-56
Town Center	St. Johns	0	0	0	0
Town Center	Tigard	+2	+52	0	+52
Town Center	Troutdale	0	-2	0	-2
Town Center	Tualatin	0	0	0	0
		+17	+765	-20	+785

Table 12 indicates more regulated affordable units in centers in the 2011 inventory than in the 2007 inventory. Most of this difference is attributable to the Central City.

TABLE 12: NET DIFFERENCE IN REGULATED AFFORDABLE HOUSING IN 2040 GROWTH CONCEPT CENTERS INSIDE UGB (2007 - 2011)

Center type	Difference in number of sites	Difference in number of total units	Difference in number of unregulated units	Difference in number of regulated units
Central City	+9	+731	-17	+748
Regional Center	+2	+43	-2	+45
Town Center	+6	-9	-1	-8
	+17	+765	-20	+785

Several representatives of agencies participating in this inventory update mentioned an increased reliance on housing choice vouchers, which allow people more choice in where to live. Doing so may help ease transportation costs if the vouchers are used in locations with good access to services and transit. The change in the number of vouchers per county is summarized in Table 13.

TABLE 13: NET CHANGE IN NUMBER OF HOUSING CHOICE VOUCHERS BY COUNTY (2007 - 2011)

County	Net change in number of housing choice vouchers
Clackamas	+27
Clark	+336
Multnomah	+2,005
Washington	-250
Net change (4 counties)	2,118

APPENDIX 1 – CORRECTED 2007 INVENTORY

This corrected 2007 inventory includes 1,987 fewer units than the original 2007 inventory since duplicate records were discovered and removed.

TABLE 14: REGULATED AFFORDABLE HOUSING BY JURISDICTION IN FOUR-COUNTY AREA (2007)

Jurisdiction	Number of sites	Total units	Unregulated units	Regulated units	Share of four-county regulated units
Battle Ground	3	106	22	84	0.2%
Beaverton	34	512	11	501	1.4%
Camas	4	69	28	41	0.1%
Canby	8	343	0	343	1.0%
Cornelius	10	10	0	10	0.0%
Durham	1	210	0	210	0.6%
Estacada	8	95	0	95	0.3%
Fairview	2	480	0	480	1.3%
Forest Grove	31	604	7	597	1.7%
Gladstone	19	62	1	61	0.2%
Gresham	46	2245	15	2230	6.2%
Hillsboro	62	2200	4	2196	6.1%
Lake Oswego	1	30	1	29	0.1%
Milwaukie	32	312	1	311	0.9%
Molalla	5	113	1	112	0.3%
North Plains	1	33	0	33	0.1%
Oregon City	37	560	11	549	1.5%
Portland	697	19446	1404	18042	50.2%
Ridgefield	5	12	0	12	0.0%
Sandy	12	147	0	147	0.4%
Sherwood	7	97	1	96	0.3%
Tigard	18	642	10	632	1.8%
Troutdale	3	434	0	434	1.2%
Tualatin	3	604	0	604	1.7%
Unincorporated (four counties)	289	4534	107	4427	12.3%
Vancouver	138	3872	597	3275	9.1%
Washougal	1	62	1	61	0.2%
West Linn	10	14	0	14	0.0%
Wilsonville	7	314	3	311	0.9%
	1,494	38,162	2,225	35,937	

TABLE 15: REGULATED AFFORDABLE HOUSING BY COUNTY (2007)

County	Number of sites	Total Units	Unregulated Units	Regulated Units	Share of four-county regulated units
Clackamas	264	3136	21	3115	8.7%
Clark	235	5602	742	4860	13.5%
Multnomah	747	22565	1419	21146	58.8%
Washington	248	6859	43	6816	19.0%
	1,494	38,162	2,225	35,937	

TABLE 16: REGULATED AFFORDABLE HOUSING SITES IN INCORPORATED VS. UNINCORPORATED AREAS (2007)

COUNTY	Incorporated areas: number of sites	Unincorporated areas: number of sites
Clackamas	139	125
Clark	151	84
Multnomah	747	0
Washington	168	80
	1,205	289

TABLE 17: REGULATED AFFORDABLE HOUSING BY 2040 GROWTH CONCEPT CENTER INSIDE UGB (2007)

Center type	Center name	Number of sites	Total units	Unregulated units	Regulated units	Share of four-county regulated units
Central City	Portland	68	6753	715	6038	16.8%
Regional Center	Beaverton	1	8	0	8	0.0%
Regional Center	Clackamas	3	335	0	335	0.9%
Regional Center	Gateway	8	581	30	551	1.5%
Regional Center	Gresham	9	539	2	537	1.5%
Regional Center	Hillsboro	5	284	2	282	0.8%
Regional Center	Oregon City	1	1	0	1	0.0%
Town Center	Aloha	5	220	7	213	0.6%
Town Center	Bethany	2	340	0	340	0.9%
Town Center	Cedar Mill	1	608	0	608	1.7%
Town Center	Gladstone	5	5	0	5	0.0%
Town Center	Hillsdale	3	90	2	88	0.2%
Town Center	Hollywood	2	333	28	305	0.8%
Town Center	Lents	6	74	1	73	0.2%
Town Center	Milwaukie	15	278	0	278	0.8%
Town Center	Raleigh Hills	1	73	0	73	0.2%
Town Center	Rockwood	16	759	3	756	2.1%
Town Center	St. Johns	2	21	0	21	0.1%
Town Center	Troutdale	1	230	0	230	0.6%
Town Center	Tualatin	1	240	0	240	0.7%
		155	11,772	790	10,982	30.6%

TABLE 18: SUMMARY OF REGULATED AFFORDABLE HOUSING IN 2040 GROWTH CONCEPT CENTERS INSIDE UGB (2007)

Center type	Number of sites	Total units	Unregulated units	Regulated units	Share of four-county regulated units
Central City	68	6753	715	6038	16.8%
Regional Center	27	1748	34	1714	4.8%
Town Center	60	3271	41	3230	9.0%
	155	11,772	790	10,982	30.6%

MPAC Worksheet

Agenda Item Title: Climate Smart Communities Scenarios Project Phase 2 – Shaping Regional and Local Choices

Presenter(s): Kim Ellis

Contact for this worksheet/presentation: Kim Ellis

Date of MPAC Meeting: April 11, 2012

Purpose/Objective

MPAC will receive an update on the Scenarios Project and the proposed Phase 2 approach.

Action Requested/Outcome

MPAC supports the Phase 2 approach as proposed so that staff may fully proceed with Phase 2 activities.

1. Do you support the overall approach for Phase 2?
2. Will the activities proposed in each track provide you with the information you need to direct staff on development of scenario options? If not, what additional information do you need?

With MPAC and JPACT support of the Phase 2 approach, staff will fully proceed with Phase 2 and prepare a summary of 2012 policy meeting discussions.

How does this issue affect local governments or citizens in the region?

The Climate Smart Communities Scenarios project is a multi-year, collaborative effort between Metro, local governments and other regional partners. The project is as much about jobs, livable neighborhoods and public health as it is about clean air. It is focused on working together to find the right combination of land use and transportation actions (e.g., policies and investments) that will keep communities vibrant and prosperous. While the project responds directly to state and regional goals to reduce greenhouse gas emissions from cars and small trucks, the project provides an opportunity for Metro, local governments and others to work together to advance the ambitions of each community and implement the Community Investment Strategy adopted by the Metro Council in 2010.

The goal of the Scenarios Project is to work with local governments and other regional partners to build consensus, ownership and support for state, local and regional investments and actions needed to achieve local ambitions for growth and development and the 2040 Growth Concept vision, and meet our climate goals.

What has changed since MPAC last considered this issue/item?

- **Phase 1 Findings accepted and submitted to State.** At the recommendation of MPAC and JPACT, the Metro Council formally accepted the Phase 1 Findings report and Strategy Toolbox in January. Staff submitted both reports to the Oregon Department of Transportation (ODOT) and the Department of Land Conservation and Development (DLCD) in January for inclusion in their joint progress report to the 2012 Legislature.

- **Local elected official and stakeholder briefings held and will continue.** Since January, Metro Councilors and project staff have briefed local elected officials and other stakeholders on the project and Phase 1 Findings. This has included briefings to the East Multnomah County Transportation Committee, the Washington County Coordinating Committee, the Hillsboro Chamber of Commerce Policy Committee and the following city councils: Durham, Lake Oswego, Oregon City, Sherwood, Tigard, Tualatin and Wilsonville. Other City Council briefings throughout the region have been or will be scheduled for April and May. The briefings provide an opportunity for project partners to ask questions, share concerns and provide suggestions for how we can best work together to support their community ambitions and ensure that those ambitions are reflected in the region's strategy. A list of the briefings will be provided at the April 11 meeting.
- **Project challenges identified.** Five key challenges have been identified through these briefings and previous discussions with Metro's advisory committees and local governments as the Phase 1 Findings were finalized:
 1. **The project must find a balance between advancing local community ambitions and needs and defining a successful regional strategy.** The project dynamics are still unfolding; political, communications and technical work must be coordinated and balanced. It is critical for the Scenarios Project to continue building on existing efforts and community ambitions and to make that connection clear. To be successful, the process and, ultimately, the preferred scenario must recognize that each community is unique, provide individual and local choice, and work as part of an integrated regional strategy.
 2. **The project's complexity remains a hurdle to achieving understanding and building support.** The complexity of the subject matter and the fact that the scenario planning, visualization and other communication tools are still under development make communication of project direction, relevance to local communities and potential outcomes difficult. Some fear or do not see the broader outcomes the project is trying to achieve even though most strategies being considered are actions and investments that have already been identified as desirable by local communities in their plans.
 3. **The project's ambition and optimism may be overly dampened by current economic conditions.** The fiscal realities of TriMet service cuts, local government budgets and a faltering economy are affecting the project dynamics and highlight the need to develop a preferred scenario that is results-oriented and ambitious, yet implementable and realistic.
 4. **Diverse stakeholders that include business and community leaders will be important contributors to the regional conversation and shaping the policy options that are tested in 2013.** Everyone has a stake in the outcome, and the future project phases will provide meaningful opportunities for business and community leaders to help shape the scenarios that will be developed and evaluated in 2013, and ultimately the preferred scenario that is considered by MPAC, JPACT and the Metro Council in 2014. Given limited local and project resources, the process must also complement and leverage existing outreach efforts, not duplicate them.
 5. **Much work remains to build trust, partnerships, consensus and support. It will take time and resources, but they are keys to success.** Climate change is a polarizing issue, and many are not motivated to act by state requirements or climate change. To date, there hasn't been a locally-driven mandate for this project to be successful. There are many supporters who see this process as a means of achieving their communities' ambitions.

Local elected officials and staff and other stakeholders are engaged, but more champions and partners will be needed.

- **Phase 2 approach and work plan developed, reflecting input received to date.** The early stakeholder discussions and the challenges presented have informed the Phase 2 work plan and engagement approach attached to this worksheet. The materials also reflect comments and suggestions provided by the Metro Council on February 28, the project's technical work group on March 12, MTAC on March 21 and TPAC on March 30.

A goal of Phase 2 is to provide a sufficient level of information to understand the choices and tradeoffs presented by the Phase 1 scenarios and build consensus and support for two or three scenario options to undergo a more in-depth analysis in 2013. The project team has focused on determining how much and what type of information is needed to frame potential scenario options for regional discussion and policymaking. The project team has balanced those options with the project timeline, budget and the desire of many policymakers to begin exploring potential policy options and their implications for their communities and the region. The Policy Track and Technical Track summaries provide an overview of the tasks, activities and information needed to support MPAC, JPACT and the Metro Council in directing staff to develop and evaluate three policy scenarios for testing next year.

Policy Track (Create Building Blocks for Scenarios) is focused on leading to development of **three scenario options** that will be evaluated in 2013. This track will focus on understanding the most effective strategies from Phase 1 as well the policies and strategies that are needed to achieve community and regional ambitions. The technical work group will identify 2040-based **focus areas** that will be the places where additional land use and transportation strategies may be applied in the scenarios to be evaluated in 2013. This work will be conducted in coordination with local governments and the Southwest Corridor Plan, which has already defined focus areas for that effort. The **Envision Tomorrow** scenario planning tool will be used to develop **5 community focus area case studies** to show examples of the types of strategies that are needed to achieve existing community ambitions, and to identify implementation opportunities and barriers that exist within the case study areas. Staff is pursuing funding and other approaches for interested local governments to further explore their community ambitions using the Envision Tomorrow tool. Portland, Gresham, Beaverton and Hillsboro have expressed interest in participating with Metro staff in Envision Tomorrow training, for example. In addition, the Southwest Corridor Plan effort is also looking to the use Envision Tomorrow for the focus area workshops the project will convene later this year.

This track will also develop **state and regional policy options** presented by changes to pricing, transit, roads, marketing, fleet and technology for further discussion by MPAC and JPACT in June. The policy options will provide information to support refining the Phase 1 scenario assumptions. Metro staff will work with the technical work group, MTAC and TPAC to develop **scenario options** using the **Phase 1 results, strategy toolbox**, focus areas, regional and state policy options and local case studies, following further direction by MPAC, JPACT and the Metro Council. Local government, business and community leaders will review the range of scenario options relative to economic opportunities, changing demographics and market trends, access to opportunity, the availability of affordable housing and transportation options, environmental protection and the

potential for job creation and active living. This review will be conducted as part of the Fall 2012 engagement activities.

Technical Track (Create Score Card for Scenarios) is focused on working with the technical work group, TPAC, MTAC and topic experts (e.g., business, public health, freight, social equity and environment) to develop the criteria and methods to be used to evaluate the three scenarios to be tested in 2013. This track will also result in the creation of a **Scenarios Score Card** that will be used to convey the results of the analysis to policymakers and other stakeholders. The score card will report on fiscal, economic, public health, equity and environmental outcomes as they relate to all six of the region's desired outcomes. This work will build on the evaluation framework endorsed by MPAC, JPACT and the Metro Council in June 2010 as well as the evaluation methods work being completed through the Statewide Transportation Strategy. Stakeholder workshops will be convened to specifically address the public health/environment, economy and equity elements of the score card. Preliminary criteria and pilot methods will be used in Policy Track to report on the Phase 1 scenarios (as part of the district and regional analysis). The criteria and score card will continue to be refined throughout Phase 2.

Both tracks culminate in a fall regional discussion that is aimed at building consensus and defining two to three scenario concepts for achieving community and regional ambitions, implementing the 2040 Growth Concept and meeting our climate goals.

What packet material do you plan to include?

- 2012 Policy and Technical Tracks Overview (April 4, 2012)

Additional materials to be provided at the meeting:

- 2011-14 Project Timeline
- 2012 Project Engagement Calendar

DRAFT

2012 Policy and Technical Tracks Overview

Climate Smart Communities Scenarios

Phase 2: Shape Choices

April – September 2012

Policy Track – Create Building Blocks for Scenarios

What: Create a range of scenario options for applying strategies in the region that represent the best paths for achieving climate goals

Who: Technical work group, TPAC, MTAC, following MPAC, JPACT, and Council direction

Technical Track – Create Score Card for Scenarios

What: Create a score card to evaluate the scenarios for fiscal, economic, public health, equity and environmental outcomes

Who: Technical work group, topic experts (e.g., business, public health, freight, social equity and environment), TPAC and MTAC, following evaluation framework endorsed by MPAC, JPACT and the Council in June 2010

Sept. – Nov. 2012

Define the Scenarios

What: Define 2 to 3 scenarios to test that represent different combinations of local, regional and state strategies

Who: Metro Council, JPACT, MPAC, local government, business and community leaders and online public engagement

JPACT, MPAC, and Metro Council direct staff to develop and test three scenarios (Dec. 2012)

DRAFT

2012 Policy Track Climate Smart Communities Scenarios Phase 2: Shape Choices

Policy Track – Create Building Blocks for Scenarios

(April – September 2012)

What: Create a range of scenario options for applying strategies in the region that represent the best paths for achieving climate goals

Who: Technical work group, TPAC, MTAC, following MPAC, JPACT, and Council direction

How: Identify potential options for how and where to apply strategies using Phase 1 scenarios, sensitivity analysis and district results, Strategy Toolbox, Statewide Transportation Strategy, focus areas and 5 locally-developed case studies from the Portland area that illustrate on-the-ground examples of how local actions can achieve community ambitions and other desired outcomes

Building Blocks for Scenario Options



DRAFT

2012 Technical Track Climate Smart Communities Scenarios Phase 2: Shape Choices

Technical Track – Create Score Card for Scenarios

(March – September 2012)

What: Create a score card to evaluate the scenarios for fiscal, economic, public health, equity and environmental outcomes

Who: Technical work group, topic experts (e.g., business, public health, freight, social equity and environment), TPAC and MTAC

How: Define criteria and methods for evaluating scenarios building on Phase 1 evaluation framework and Statewide Transportation Strategy criteria and methods

Technical Refinement of June 2010 Evaluation Framework

Building toward six desired outcomes



Vibrant communities



Equity



Economic prosperity



Transportation choices



Clean air & water



Climate leadership

Evaluation framework



Equity

- Access to affordable housing and travel options
- Access to opportunity
- Public health



Economy

- Access to industry and jobs
- Freight travel time costs
- Economic development opportunities



Environment

- Greenhouse gas
- Air quality
- Access to parks and natural areas

Costs and savings

- Implementation
- Household and business

MPAC, JPACT and the Metro Council endorsed the evaluation framework in June 2010

Sample score card

Outcomes	Current plans and policies	Scenario 1	Scenario 2
Equity			
Economy			
Environment			
Fiscal			

DRAFT

2012 Partnering and Engagement Track Climate Smart Communities Scenarios Phase 2: Shape Choices



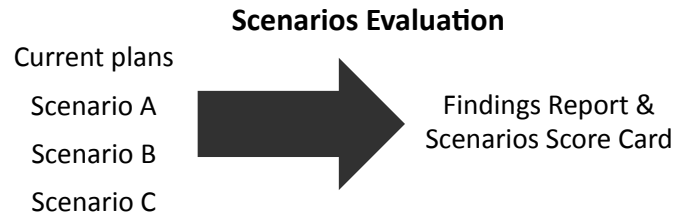
□
DRAFT

2013-14 Policy and Technical Tracks
Climate Smart Communities Scenarios
Phase 3: Test Choices and Create Preferred Scenario

Test and Refine Choices

(January – October 2013)

Develop and evaluate alternative scenarios that combine and phase local, regional and state land use and transportation policies to achieve community and regional goals



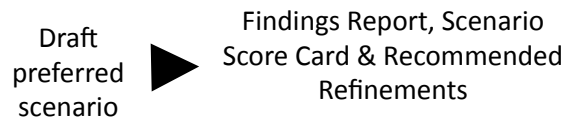
Frame the Draft Preferred Scenario Recommendations

Discuss findings and identify recommendations for draft preferred scenario elements and implementation recommendations

JPACT, MPAC, and Metro Council direct staff to develop and test preferred scenario (Dec. 2013)

**Create and Refine Preferred Scenario
(January – July 2014)**

Develop and evaluate draft preferred land use and transportation scenario, and identify refinements



JPACT, MPAC, and Metro Council release final draft preferred scenario for public review (August 2014)

**Select Preferred Scenario
(September – November 2014)**

Public review and selection of preferred land use and transportation scenario and recommended local, regional and state policies

Release draft preferred scenario for review

MPAC recommends; Council and JPACT select preferred scenario (Dec. 2014)

MPAC Worksheet

Agenda Item Title: Proposed Amendments to the Regional Transportation Functional Plan (Metro Code Chapter 3.08)

Presenter(s): John Mermin

Contact for this worksheet/presentation: John Mermin x1747

Date of MPAC Meeting: April 11, 2012

Purpose/Objective

Inform MPAC of proposed Regional Transportation Functional Plan (RTFP) amendments

Action Requested/Outcome

MPAC understanding of proposed RTFP amendments in preparation for making a recommendation to Metro Council at its May 9 meeting

How does this issue affect local governments or citizens in the region?

The RTFP is the part of Metro code that implements the policies of the Regional Transportation Plan. These policies are intended to influence local transportation policies and projects to help achieve the region's desired outcomes

What has changed since MPAC last considered this issue/item?

The Regional Transportation Functional Plan was recommended for adoption by MPAC during the Spring of 2010. The Urban Growth Management Functional Plan amendments adopted in December 2010, included streamlining the local compliance procedures described in Title 8. Metro staff has acknowledged the need to make the RTFP procedures consistent with the UGMFP.

Additionally, staff realized that making these changes provides an opportunity to address another "housekeeping" amendment to the RTFP to address the issue of exemptions. The State Transportation Planning Rule (TPR) includes a provision for exemption from its requirements, but Metro had not previously addressed exemption from regional transportation requirements.

What packet material do you plan to include?

"Regional Transportation Functional Plan Amendments" memo – (April 3, 2012)



Date: April 3, 2012
To: MPAC & Interested Parties
From: John Mermin, Senior Transportation Planner
Subject: Regional Transportation Functional Plan amendments

Purpose

Inform MPAC of proposed amendments to the Regional Transportation Functional Plan and schedule for legislative process.

Background

On December 16, 2010 the Metro Council adopted Ordinance 10-1244B which amended several Urban Growth Management Functional Plan titles, including streamlining the local compliance procedures described in Title 8. The Council adopted the Regional Transportation Functional Plan six months earlier (June 10, 2010) and did not include these streamlined procedures. Staff has acknowledged the need to make these procedures consistent.

Additionally, staff realized that making these changes would provide an opportunity to address another “housekeeping” amendment to the RTFP to address the issue of exemptions. The State Transportation Planning Rule (TPR) includes a provision for exemption from its requirements, but Metro had not previously addressed exemption from regional transportation requirements.

Recommended amendments to the RTFP

Extensions & Exceptions - Metro staff recommends amending the RTFP procedures for extending compliance deadlines (3.08.620) and granting exceptions to specific requirements (3.08.630) to match the procedures within the UGMFP (3.07.830 and 3.07.840). The changes would make requests from local governments for extensions or exceptions administrative functions of Metro’s Chief Operating Officer (COO), but still allow for an appeal to the Metro Council.

Exemptions - Staff recommends amending the RTFP to add a section (3.08.640) providing for exemption from all RTFP requirements. A jurisdiction would be eligible for an exemption if:

- its existing transportation system is generally adequate to meet its needs,
- little population or employment growth is expected, and
- exempting them would not make it more difficult to accommodate regional or state needs, or to meet regional performance targets.

Staff recommends exemption for three jurisdictions - Johnson City, Maywood Park, and Rivergrove.

Schedule of deadlines - Metro staff recommends moving the schedule for RTFP compliance (Table 3.08-4) from the RTFP into the RTP Appendix (Exhibit A to Ordinance No. 10-1241). This change will ensure that Metro code need not be amended in the future if the COO grants an extension to a compliance deadline.

Next Steps

Metro proposes to take the recommended changes described above through the legislative process necessary to amend Metro code.

Proposed schedule for legislative process

APRIL 3, 2012
MEMO TO MPAC
REGIONAL TRANSPORTATION FUNCTIONAL PLAN AMENDMENTS

March 20 Metro Council Work Session – Information / discussion
March 21 – May 9 Public Comment Period / Notice to DLCD
March 21 MTAC – Information / discussion
March 30 TPAC - Comments from chair, with memo in packet
April 11 MPAC – Information / discussion
April 12 JPACT - Comments from chair, with memo in packet
April 27 TPAC - Recommendation to JPACT
May 2 MTAC - Recommendation to MPAC
May 9 MPAC - Recommendation to Metro Council
May 10 JPACT - Action
May 10 Metro Council - First reading
May 17 Metro Council - Second reading, public hearing, Council consideration and vote

For more information on the proposed RTFP changes or legislative process, please contact *John Mermin*, 503-797-1747

MPAC Worksheet

Agenda Item Title: Public Engagement Review process proposal

Presenter: Patty Unfred, Communications Manager

Contact for this worksheet/presentation: Joshua Shaklee

Council Liaison Sponsor: n/a

Purpose of this item (check no more than 2):

Information X
Update
Discussion X
Action

MPAC Target Meeting Date: 4/11/12

Amount of time needed for:

Presentation 8
Discussion 7

Purpose/Objective:

Inform MPAC of the public engagement review process and solicit suggestions for implementation.

Action Requested/Outcome:

No formal recommendation is requested. Input on implementation.

Background and context:

Metro's Office of Citizen Involvement has been developing the new public engagement review process since the Metro Committee for Citizen Involvement (MCCI) was suspended in 2010. Metro staff has engaged community stakeholders, including local government public involvement staff, former MCCI members, and the International Association of Public Participation (IAP2) Cascade Chapter, to create a multi-track public engagement review process. **It is important to note that the new process involves public and peer review of and input into Metro's public involvement plans. It does NOT cover or address – or replace - the numerous public involvement activities and engagement efforts conducted by Metro staff throughout the year.** The new process will be more effective, increase best practices sharing and development among jurisdictions throughout the region, and more successfully engage communities with Metro's initiatives, helping to prioritize projects for public outreach.

What has changed since MPAC last considered this issue/item?

The Metro Committee for Citizen Involvement (MCCI) was suspended in 2010 due to declining participation that limited its effectiveness and ability to represent the region's

diverse population. Since that time, Metro staff has created a new multi-track public engagement review process that includes a semi-annual meeting of professional public involvement peers, an annual stakeholder summit and the establishment of a new standing public committee, the Public Engagement Review Committee (PERC). An annual public survey and subsequent annual report will be used to evaluate Metro's public involvement efforts.

What packet material do you plan to include?

- Cover memo
- Public engagement review process proposal

What is the schedule for future consideration of item:

The public engagement review proposal will be presented as follows:

- Joint Policy Advisory Committee on Transportation (JPACT) on April 12 – comments from the Chair, not a formal presentation or action
- Metro Council on May 10 (1st reading) and 17 (2nd reading) – ordinance for adoption



Metro | Memo

Date: April 3, 2012
To: Metro Policy Advisory Committee members
From: Patty Unfred, Metro Communications manager
Subject: New review process for Metro public engagement

Metro's Office of Citizen Involvement is pleased to introduce a new public engagement review process to ensure that Metro's public involvement is effective, reaches diverse audiences and use emerging best practices.

The process has been in development since the Metro Committee for Citizen Involvement (MCCI) was suspended in 2010 due to declining participation that limited its effectiveness. Since that time, Metro staff has engaged community stakeholders, including local government public involvement staff, former MCCI members, and the International Association of Public Participation Cascade Chapter, to create a multi-track public engagement review process. The new process includes a semi-annual meeting of professional public involvement peers, an annual stakeholder summit and the establishment of a new standing public committee, the Public Engagement Review Committee (PERC). We are also introducing an annual public survey and subsequent annual report to evaluate Metro's public involvement efforts.

We are seeking review of the proposal and suggestions on how to best implement the process. The attached proposal, which describes the new process, will be presented as follows:

- Metro Policy Advisory Committee (MPAC) on April 11 – feedback requested, no formal recommendation
- Joint Policy Advisory Committee on Transportation (JPACT) on April 12 – comments from the Chair, not a formal presentation or action
- Metro Council on May 10 and 17 – ordinance for adoption

We look forward to hearing your comments, suggestions or concerns, especially in terms of how we can best implement this process to ensure effective public engagement. Feel free to contact me if you have additional comments at patty.unfred@oregonmetro.gov or 503-797-1685.

Thank you.



Metro | *Making a great place*

Metro Public Engagement Review – April 2012

Introduction and overview

Active public engagement is essential to Metro's role as regional convener and makes Metro a more responsive and collaborative agency. Efficient public engagement at the project level requires review at the agency level. In response to evolving communications and public engagement practices, Metro staff has developed a multi-track public engagement review process. This review process engages the public, community organizations, and local government public involvement staff to actively monitor and contribute to Metro's public engagement efforts. The review process is in addition to the public involvement outreach done regularly at the project and program levels.

Mission

Metro's public engagement review process provides:

1. Constructive feedback on Metro's public engagement practices.
2. More focused and effective public engagement process.
3. Access to local expert knowledge and best practices.

Purpose

The public engagement review process guides Metro staff in the development and implementation of successful public engagement outreach with residents of the region.

Objectives and outcomes

Build public trust: through transparent and open policy development and planning processes. Respect and consider all citizen input.

Build consensus: by convening diverse regional stakeholders and residents in order to identify and realize mutual interests and beneficial outcomes.

Promote equity: by recognizing the rich diversity of the region and ensuring that benefits and burdens of growth and change are distributed equitably.

Understand local aspirations: by engaging local experts and community members in order to access local knowledge and aspirations.

Achieve efficiency: by organizing public engagement activities to make the best use of public participants' time, effort, and interests.

Improve best practices: by coordinating with other public involvement experts and community members.

Tools and tactics

Metro will convene a standing Public Engagement Review Committee, a stakeholder summit, and Public Engagement Peer Group to monitor Metro’s public engagement efforts. The public engagement review process will also include an annual Opt In public engagement review survey and the production of an annual public engagement report. Tools and tactics are outlined below.

Public Engagement Review Committee (PERC)

Chapter V, Section 27 of the Metro Charter requires that a standing "citizens' committee" be established and maintained by the Metro Office of Citizen Involvement. The Public Engagement Review Committee (PERC) meets this requirement. The PERC will convene twice each year, in May or June and again in November.

Duties of the PERC include:

- Assist in developing the stakeholder summit agenda
- Assist with outreach to stakeholder summit participants
- Assist in facilitating the stakeholder summit
- Review the annual public engagement report
- Provide input on content of the annual Opt In public engagement review survey

The Committee will be made up of public involvement staff persons from Clackamas, Multnomah, and Washington county governments; staff persons from community organizations; and at-large representatives of the region as follows:

Clackamas County.....	1
Multnomah County.....	1
Washington County.....	1
Community Organizations.....	3
At-Large Representatives.....	3
<hr/>	
9 total members	

PERC members will be appointed by the Metro Council President and confirmed by the Metro Council, following a selection process outlined below, as applicable:

- Representatives (and alternates if desired) of the counties shall be nominated by the presiding executive of the county. Alternatively, a county may nominate an employee of a city within the county, with the consent of the city’s administrator.
- Community organization representatives (and their alternates, if desired) will be nominated by their organizations and apply to be appointed through a public application process.
- The at-large representatives of the region will apply for appointment through a public application process.

Criteria for the selection of community organization representatives include:

- Representative: Broadly representative of geographic areas and interests related to land use and land-use decisions and of demographics of the region.
- Experience: Demonstrated skills, knowledge or experience valuable to fulfill Metro's public engagement mandate.

Criteria for the selection of at-large members include:

- Community Service: Demonstrated commitment to community involvement.
- Experience: Demonstrated skills, knowledge or experience valuable to fulfill Metro's public engagement mandate.
- Representative: Broadly representative of geographic areas and interests related to land use and land-use decisions and of demographics of the region.

Stakeholder Summit

Metro will convene an annual summit of community stakeholders representing diverse aspects of the region, members of Metro citizen advisory committees and oversight committees on ongoing projects. Meetings will be advertised and open to the general public.

The function of the stakeholder summit is to:

- Evaluate Metro public engagement practices from the previous year
- Share local community information
- Give advice on priorities and engagement strategies for upcoming Metro policy initiatives

Public Engagement Peer Group

Metro will convene two meetings annually of public engagement staff and professionals from across the Portland metropolitan region.

The function of the public engagement peer group is to:

- Share and learn about best practices and new tools, including international, national and local examples and case studies
- Share information, upcoming policy discussions and events to facilitate collaboration and leverage individual jurisdiction outreach efforts
- Provide input on public engagement process for individual projects
- Document best practices for public engagement
- Review and update public engagement principles and planning guide

Public engagement review annual schedule

Winter

Public engagement peer group meeting #1

Spring

Public Engagement Review Committee meeting #1

- Assist with pre-planning stakeholder summit

Public engagement peer group meeting #2

- Assist with pre-planning stakeholder summit

Early fall

Stakeholder summit

Annual Opt In public engagement review survey

Late fall

Annual public engagement report released

Public engagement review committee meeting #2

- Review annual public engagement report

Measurement and evaluation

The success of Metro's public engagement program is defined by consistently effective and efficient communication between Metro and the public. Metro staff will use the following tools to evaluate the success of Metro's public engagement processes:

- An annual Opt In public engagement review survey will measure public perception of Metro's public engagement processes
- Stakeholder summit and public engagement peer group participant interviews, questionnaires, and/or collected comments
- The public engagement report will summarize project evaluations, including:
 - Objectives
 - Context
 - Levels of involvement
 - Methods and techniques used
 - Who was involved
 - Inputs (costs)
 - Outputs (products and activities)
 - Outcomes (benefits/impacts)

Materials following this page were distributed at the meeting.

Metro | Agenda

Meeting: Metro Policy Advisory Committee (MPAC)
Date: Wednesday, April 11, 2012
Time: 5 to 7 p.m.
Place: Metro, Council Chamber

REVISED, 4/10/12

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- | | | | |
|---------|-----|--|--|
| 5 PM | 1. | <u>CALL TO ORDER</u> | Jerry Willey, Chair |
| 5:02 PM | 2. | <u>SELF INTRODUCTIONS & COMMUNICATIONS</u> | Jerry Willey, Chair |
| 5:05 PM | 3. | <u>CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS</u> | |
| 5:10 PM | 4. | <u>COUNCIL UPDATE</u> | |
| | * | <ul style="list-style-type: none">• April 19th Michael Freedman Presentation | |
| 5:15 PM | 5. | <u>CONSENT AGENDA</u> | |
| | * | <ul style="list-style-type: none">• Consideration of the Feb. 22, 2012 Minutes | |
| | * | <ul style="list-style-type: none">• MTAC Member Nomination | |
| | 6. | <u>INFORMATION/DISCUSSION ITEMS</u> | |
| 5:20 PM | 6.1 | * Affordable Housing/Affordable Living – <u>INFORMATION/ DISCUSSION</u> <ul style="list-style-type: none">• <i>Outcome:</i> Clarify the role that MPAC would like to play in promoting affordable housing/living. | Ted Reid
Val Valfre
Steve Rudman
Trell Anderson |
| 6:10 PM | 6.2 | * Climate Smart Communities Scenarios: Shaping Regional and Local Choices – <u>DISCUSSION AND SUPPORT TO MOVE FORWARD REQUESTED</u> <ul style="list-style-type: none">• <i>Outcome:</i> MPAC support of the Phase 2 approach as proposed so that staff may fully proceed with Phase 2 activities. | Kim Ellis |
| 6:30 PM | 6.3 | * Proposed Amendments to the Regional Transportation Functional Plan (Metro Code Chapter 3.08) – <u>INFORMATION / DISCUSSION</u> <ul style="list-style-type: none">• <i>Outcome:</i> Understand amendments in preparation for making a recommendation to the Metro Council at MPAC's May 9 meeting. | John Mermin |
| 6:40 PM | 6.4 | * Public Engagement Review Process Proposal – <u>INFORMATION / DISCUSSION</u> <ul style="list-style-type: none">• <i>Outcome:</i> Understand proposal; provide input on content and suggestions for implementation. | Patty Unfred |

Continued on back...

- 6:55 PM** **7. MPAC MEMBER COMMUNICATION**
7 PM **8. ADJOURN**

Jerry Willey, Chair

* Material included in the packet.

For agenda and schedule information, call Kelsey Newell at 503-797-1916, e-mail: kelsey.newell@oregonmetro.gov. To check on closure or cancellations during inclement weather please call 503-797-1700.



Revised Version

METRO POLICY ADVISORY COMMITTEE

February 22, 2012

Metro Regional Center, Council Chambers

MEMBERS PRESENT

Matt Berkow
Jody Carson, 2nd Vice Chair
Steve Clark
Amanda Fritz
Kathryn Harrington
Jack Hoffman
Annette Mattson
Keith Mays
Marilyn McWilliams
Wilda Parks
Bill Turlay
Jerry Willey, Chair
William Wild

AFFILIATION

Multnomah County Citizen
City of West Linn, representing Clackamas Co. Other Cities
TriMet Board of Directors
City of Portland Council
Metro Council
City of Lake Oswego, representing Clackamas Co. Largest City
Governing Body of School Districts
City of Sherwood, representing Washington Co. Other Cities
Washington County Special Districts
Clackamas County Citizen
City of Vancouver
City of Hillsboro, representing Washington County Largest City
Clackamas County Special Districts

MEMBERS EXCUSED

Sam Adams
Shane Bemis
Nathalie Darcy
Michael Demagalski
Dennis Doyle
Andy Duyck
Charlotte Lehan
Doug Neeley
Jim Rue
Loretta Smith, Vice Chair
Steve Stuart
Norm Thomas

AFFILIATION

City of Portland Council
City of Gresham, representing Multnomah Co. 2nd Largest City
Washington County Citizen
City of North Plains, representing Washington Co. outside UGB
City of Beaverton, representing Washington Co. 2nd Largest City
Washington County Commission
Clackamas County Commission
City of Oregon City, representing Clackamas Co. 2nd Largest City
Oregon Dept. of Land Conservation & Development
Multnomah County Commission
Clark County, Washington Commission
City of Troutdale, representing other cities in Multnomah Co.

ALTERNATES PRESENT

Stanley Dirks
Kathy Roth
Bob Terry

AFFILIATION

City of Wood Village, representing other cities in Multnomah Co.
City of Oregon City, representing Clackamas Co. 2nd Largest City
Washington County Commission

STAFF:

Jessica Atwater, Nick Christensen, Andy Cotugno, Andy Cotugno, Mike Hoglund, Alison Kean-Campbell, Lake McTighe, Kelsey Newell, Ken Ray, Sherry Oeser, and John Williams.

1. CALL TO ORDER AND DECLARATION OF A QUORUM

Chair Jerry Willey declared a quorum and called the meeting to order at 5:08 p.m.

2. SELF INTRODUCTIONS AND COMMUNICATIONS

All attendees introduced themselves.

3. CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS

There were none.

4. COUNCIL UPDATE

Councilor Harrington updated the group on the following points:

- Metro is considering two potential sites for the Tualatin River boat launch. There will be an open house on Thursday, February 23rd from 6:30-8:30pm at the Clean Water Services administration building in Hillsboro.
- Metro will host an open house for the Glendoveer golf course management contract on Thursday, March 8.
 - Councilor Harrington emphasized that while the golf course will remain intact, management will change.
- Council President Tom Hughes has officially appointed, and the Council has confirmed, Ms. Alison Kean-Campbell as the Metro Attorney.

Mr. Andy Cotugno of Metro presented to the group regarding the annual Joint Policy Advisory Committee on Transportation's lobby trip to Washington, D.C. The official lobby dates are March 7th and 8th. This is a pivotal year; current bills are out of date, and Congress is considering scaling back federal transportation funding. There is much at stake, but our region has good representation on important, transportation and funding related committees in Congress. The JPACT meeting to prepare for the trip is on Monday, February 27th at 5pm at the Metro Regional Center.

5. CONSIDERATION OF THE CONSENT AGENDA

- **The February 8, 2012 MPAC Minutes**
- **2012 MTAC Membership Nominations**

MOTION: Ms. Jody Carson moved, Mr. Steve Clark seconded to adopt the consent agenda.

ACTION TAKEN: With all in favor, the motion passed.

6.0 INFORMATION/DISCUSSION ITEMS

6.1 2012 MPAC WORK PROGRAM

Members reviewed the draft tentative work program. Mayor Willey noted that today's agenda is a reflection of the most recent Metro Technical Advisory Committee (MTC) agenda. Mayor Willey reminded the group that MTAC is a technical advisory body to MPAC, and asked the group to use

this working relationship more effectively. The chair of MTAC, Mr. John Williams of Metro, will be coordinating with Chair Willey to facilitate this relationship.

Group Discussion Included

Councilor Harrington highlighted the special MPAC event on the evening of April 19th, a presentation by urban designer, Dr. Michael Freedman.

Mayor Willey will not be present for the March 14th MPAC meeting, Vice Chair Loretta Smith or Second Vice Chair Jody Carson will lead the meeting.

Some members would like for House Bill 4090 to be on MPAC's topic list. It is a Metro bill and will affect the region. They would like to invite Mayor Lou Ogden, who has been very involved in this bill, to present to MPAC. Chair Willey would like Metro to bring other legislation forward for discussion at MPAC as well.

6.2 GREATER PORTLAND PULSE (GPP) FINANCIAL PLAN, PARTNERSHIP AGREEMENTS, NEXT STEPS

Councilor Harrington introduced the Greater Portland Pulse (GPP) project. She highlighted that public agencies need more funding for their regionally vital projects, such as GPP. Private investors are looking for regional data, and they are interested in the tool that GPP is. The GPP advisory team is comprised of members from around the region who have contributed a great deal, along with staff, to shaping this tool over the last two years.

Mr. Mike Hoglund of Metro gave an overview of the GPP project, its financial plan, and public sector contributions to the GPP project. The primary purposes of GPP are to measure the results of the Metro Future Vision Plan, 2040 Plan, city and county plans, measure effectiveness, identify system linkages, sharpen dialogue, and inspire action. GPP focuses on regional indicators. Metro worked with Portland State University as its primary partner, recruited an advisory team, an equity panel, and nine results teams comprised of over 200 people. GPP developed several products: the regional indicators, online data, the first report, and supporting documents.

GPP hired a national indicator expert, Ms. Rita Conrad, formerly of the Oregon Progress Board, to assist in the development of the indicators. To arrive at the indicators, staff considered the outcomes to be measured, for example, prosperity, and then broke them down, for example business prosperity, personal prosperity, etc. From this, staff examined the drivers behind the outcomes, which resulted in identifying which indicators to measure, as well as secondary indicators. Mr. Hoglund highlighted to MPAC that while Metro's six desired outcomes are an excellent starting point, the indicators show there are many factors that create an excellent region. Mr. Hoglund encouraged members to revisit the GPP indicator, interactive website.

Mr. Hoglund reviewed what has been happening with GPP since its last presentation to MPAC in the fall of 2011. Mr. Hoglund highlighted the results in the GPP's first report. The region is in a deep economic recession. The higher a person's level of education, the better off that person is in terms of income and employment. People of color are at more of a disadvantage. He clarified that the GPP data does include Clark County.

Portland State University's Institute of Metropolitan Studies (IMS) is the current home of the GPP. There are currently many training efforts on data access and display, program and indicator alignment. Dr. Sheila Martin of PSU's IMS department emphasized that they are proud to be home to the GPP, it will be a vital governance tool for the region. PSU IMS is currently hosting data workshops on GPP throughout the region. These workshops will teach you how to access the data on the GPP website as well as add in your own geographic-specific data. The GPP will be a more powerful tool as more people use the tool.

GPP is asking grantees to consider how this tool can influence those outcomes that the region has agreed are important. GPP is transitioning from the temporary Advisory Committee to a permanent Board. Some board member positions will have a funding component, others will not. GPP will be developing partnership agreements with board members.

Mr. Hoglund discussed the GPP project's funding options. The Project needs approximately \$521,000 to function fully. Metro has put a place-holder in its 2012-2013 budget for \$65,000 for the GPP. Each county in the four-county region needs to make a \$32,500 contribution to the GPP Project; the Project hopes that throughout the region cities and counties will be making proportional, regionally equitable contributions to reach the \$32,500 share. Funders will enjoy specific benefits, including access to workshops, data visualization tools, recognition on materials, among other benefits. Other funding will come from universities, private sector businesses, and foundations.

GPP has also analyzed if its work provides direct or indirect support to current and existing programs and projects, and found that its work does directly support many projects and programs. Dr. Martin encouraged anyone who is interested in influencing the indicators the GPP examines to become involved in the project.

Group Discussion Included

Mayor Willey encouraged everyone to review the 9 drivers and 72 indicators on the GPP website as a responsibility to their communities.

Some members expressed concern that food insecurity and food deserts are not included in the 'Healthy People' category. Dr. Martin shared that there are two closely related indicators in the economic prosperity set and housing set. Mr. Hoglund encouraged members to add their own data to the tool.

Some members expressed a desire for the GPP team to return to MPAC in congruence with another presentation and use that topic to give examples. Dr. Martin confirmed that this would be possible, and asked members to please see the 'data story,' on the GPP website.

Some members expressed concern that there is no immediate return on investment in this project. Councilor Harrington explained that this project was initiated to help illuminate what it is this region needs to be doing to attract large investments and businesses, and that this itself is a return.

Councilor Harrington and Mr. Hoglund clarified that the 9 indicator categories are the GPP equivalent of the six desired outcomes.

Some members inquired if economic indicators like freight movement are included in the GPP. Some similar indicators are included.

6.3 REGIONAL ACTIVE TRANSPORTATION PLAN PROJECT OVERVIEW

Councilor Harrington introduced the regional active transportation project. She highlighted that our region is currently lacking a regional strategy to advance active transportation and become more competitive to gain access to outside dollars. She emphasized that this project is not about programming jurisdictions' local dollars, it is about being more organized to secure outside dollars, such as federal TIGER grants.

Ms. Lake McTighe of Metro introduced the Active Transportation Plan. Active transportation is defined as any form of transportation that includes walking or bicycling; transit is included in this definition because people often need to walk to or choose to bike in addition to using transit. She emphasized three themes:

1. The timing is right for an ATP
2. The ATP is the implementation of local aspirations, with regional impact
3. The key to success is partnership

The region has already made great progress in active transportation. The ATP is building on a very rich history of planning and implementation.

Theme 1: Why the timing is right

- The region has built momentum, communities want more active transportation.
- Regional groups have demonstrated a long term commitment to strengthening active transportation.
- More investment in trails is necessary and regionally recognized.
- Communities want more active transportation because it is healthier and more pleasant.
- Public support for completing sidewalks and trails in communities is high; support for funding these projects is high as well.

Theme 2: Implementing local implementation aspirations with regional impact

- This will connect the region physically and politically
- The region will be able to speak with one voice when asking for outside funding, making the ask stronger
- The region will be able to achieve impressive mode share targets
- Active transportation will become safer and more convenient, allowing people to actually choose it rather than feel forced onto transit
- When active transportation is a real choice, it increases economic prosperity as more and more people and employers consider these options when considering moving to a new location
- Active transportation helps the region realize Metro's six desired outcomes
- As Congressman Blumenauer pointed out, the ATP will be a forum for discussion so the region may agree on its priorities in active transportation infrastructure and policy.

Theme 3: The key to success is partnership

While there is a technical component to this plan, it is primarily about making decisions and identifying priorities. It is vital this is done through regional discussion. MPAC will play an important role in this process.

The ATP has identified objectives to achieve between now and June of 2013:

1. Develop guiding principles and criteria to prioritize projects and funding
2. Identify tiered priority projects for the Principal Regional Network
3. Recommended policies, performance targets & performance measures
4. Agreed upon implementation & funding strategies

The ATP will reach several milestones during this time frame, and will return to MPAC after reaching each one. The ATP will be highly aware of other local active transportation plans as well as other Metro projects in its work, and will be using the GPP indicators.

Group Discussion Included

Members asked if the Oregon Department of Transportation (ODOT) is involved in this project. Ms. McTighe confirmed that ODOT is funding this project in part and has representation on the Advisory committee. Members expressed interest in lobbying for sidewalks on state highways.

Members encouraged the ATP to prioritize around outcomes as opposed to projects, and to determine those outcomes measurability. The project must build a sense of trust with the public so when the economy recovers the project is in a position to invest. They emphasized that clarity in why the ATP is important is essential to success. Staff agreed that communication will be essential.

Some members asked if planning tools will be available to communities in which implementing cycling and pedestrian infrastructure is more difficult. There will be cycle and pedestrian zone analysis, and the project will analyze the region for different topographies and identify unique approaches.

Members asked Ms. McTighe what success looks like 10 years from now. She responded that she sees success as active transportation being fully recognized as vital to transportation; the 20 minute neighborhood is a reality for many more people; region is much more connected because of biking and walking, manifested in ways we can't imagine; and that the region will be more of a neighborhood.

Members asked if the project will be tracking cycle sales data. Staff responded that it's out there, and the project will make strong effort to do so.

Members inquired as to whether or not the ATP will be looking for additional funding. Staff responded that yes, they will. Fortunately, biking and walking infrastructure is low-cost compared to other forms of transportation. Members suggested posing the ask for more money as the Greenspaces measure was posed, using lots of data, showing what residents will receive in their neighborhood, as well as per capita.

6.4 COMMUNITY INVESTMENT STRATEGY—SITE READINESS—BROWNFIELDS AND PARCELIZATION

Councilor Harrington introduced the topic of site readiness and brownfields. During the previous Urban Growth Report cycle, MPAC requested to have more information on the topics of brownfields and parcelization. Last year, Councilor Harrington proposed two budget amendments to fund brownfields and parcelization scoping projects.

Mr. John Williams of Metro presented on the brownfields and parcelization projects. The common goal of these two projects is to identify barriers to the kind of development local communities want and to overcome them. Both projects seek to identify the opportunity costs of not acting, and both projects intend to leverage existing work as they continue. These programs are an example of the technical assistance happening in the Planning Department at Metro in concert with local communities.

Mr. Williams overviewed the brownfields project. Staff now knows a lot about individual sites and which areas around the region have brownfields, but there is still a lot to be learned. The project will be based on community case studies rather than a detailed regional inventory and will identify potential solutions and next steps. Metro's role is to provide information about brownfields and facilitate policy discussions at the regional and local level. Metro staff is currently selecting pilot project case studies. The brownfields project has hired a consultant to work on this project in conjunction with a technical review team comprised of a diverse group of community stakeholders.

Mr. Williams gave an overview of the parcelization project. Parcelization and multiple ownerships can be challenges to development in local communities. A consultant at EcoNW has been hired to complete this project, and has been asked to look for best practices inside and outside the region. The project will focus on identifying how parcelization issues are impeding development in downtowns, main streets and employment areas, as well as identifying tools to use to address parcelization.

Mr. Williams asked members to suggest potential case studies for both projects. Staff will return to MPAC in June of 2012 for a deeper conversation on these issues. He plans to return with examples from the selected case studies and staff from the case study's community.

Group Discussion Included

Staff confirmed that the Port of Portland is a key partner in the brownfields project.

Mayor Willey emphasized that these topics are integral to the success of the region.

Members suggested including regional political leaders in future MPAC discussions of this topic.

Councilor Harrington emphasized that Metro is providing resources to the communities that are selected for case studies, and that this work will be different from previously published studies in the region.

7.0 MPAC MEMBER COMMUNICATIONS

Councilor Kathy Roth distributed information on construction on the 'jug handle project,' on the Tualatin Valley Highway during March 22nd-27th.

Mayor Mays shared with the group that the City of Sherwood recently approved a small urban renewal district that will sunset after no more than 21 years.

8. ADJOURN

Chair Willey adjourned the meeting at 7:00 p.m.

Respectfully submitted,



Jessica Atwater
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR 02/22/12:

The following have been included as part of the official public record:

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
5.0	Minutes	No date	February 8, 2012 MPAC Minutes	022212m-01
5.0	List	No date	Metro Technical Advisory Committee 2012 Member Nominations	022212m-02
6.1	List	2/17/12	2012 MPAC Tentative Agendas	022212m-03
6.2	Brochure	No date	Greater Portland Pulse Brochure	022212m-04
6.3	PowerPoint	2/22/12	Greater Portland Pulse Recommendations and Next Steps	022212m-05
6.2	Flyer	No date	Greater Portland Pulse Data Workshop	022212m-06
6.3	PowerPoint	2/22/12	The Regional Active Transportation Plan	022212m-07
7.0	Flyer	No date	Tualatin Valley Highway Construction Project Notice	022212m-08
7.0	Information	No date	Tualatin Valley Highway Construction Project Notice Overview	022212m-09
7.0	Flyer	No date	Westside Economic Alliance Workshop	022212m-10
7.0	Letter	2/22/12	Ms. Nathalie Darcy, Letter to MPAC in response to her 2/8/12 Letter	022212m-11



Date: April 9, 2012

To: Metro Policy Advisory Committee

From: John Williams
Deputy Director, Planning & Development
Chair, MTAC

Re: MTAC Nominees for MPAC Approval

Please see the 2012 nominations for the Metro Technical Advisory Committee in the attached table. As per MPAC bylaws, MPAC may approve or reject any nomination.

The nomination is for the Washington County Citizen Representative alternate position. Any vacant positions are still pending and will be submitted for MPAC consideration as soon as they are received.

If you have any questions or comments, do not hesitate to contact me.

Thank you.

**METRO TECHNICAL ADVISORY COMMITTEE
2012 MEMBERS**

	<i>Position</i>	<i>Member</i>	<i>Alternate</i>
1.	Clackamas County Citizen	Jerry Andersen	Susan Nielsen
2.	Multnomah County Citizen	Kay Durtschi	<i>Vacant</i>
3.	Washington County Citizen	Bruce Bartlett	Tom Black
4.	Largest City in the Region: Portland	Susan Anderson	Joe Zehnder (1st), Tom Armstrong (2nd)
5.	Largest City in Clackamas County: Lake Oswego	Denny Egner	<i>Vacant</i>
6.	Largest City in Multnomah County: Gresham	Jonathan Harker	Stacy Humphrey
7.	Largest City in Washington County: Hillsboro	Pat Ribellia	Colin Cooper (1st), Alwin Turiel (2nd)
8.	2nd Largest City in Clackamas County: Oregon City	Tony Konkol	Pete Walter
9.	2nd Largest City in Washington County: Beaverton	Don Mazziotti	Tyler Ryerson
10.	Clackamas County: Other Cities	John Sonnen, West Linn	Katie Mangle, Milwaukie (1st), Michael Walter, Happy Valley (2nd)
11.	Multnomah County: Other Cities	Lindsey Nesbitt, Fairview	Rich Faith, Troutdale
12.	Washington County: Other Cities	Julia Hajduk, Sherwood	Jon Holan, Forest Grove (1st), Aquilla Hurd-Ravich, Tualatin (2nd), Richard Meyer, Cornelius (3rd)
13.	City of Vancouver	Laura Hudson	Matt Ransom
14.	Clackamas County	Dan Chandler	Jennifer Hughes
15.	Multnomah County	Chuck Beasley	Karen Schilling (1st), Jane McFarland (2nd)

16.	Washington County	Brent Curtis	Andy Back (1st), Joanne Rice (2nd)
17.	Clark County	Michael Mabrey	Oliver Orjiako
18.	ODOT	Lainie Smith	Kirsten Pennington (1st), Lidwien Rahman (2nd)
19.	DLCD	Jennifer Donnelly	Anne Debbaut
20.	Service Providers: Water and Sewer	Kevin Hanway (Water)	Dean Marriott (Sewer)
21.	Service Providers: Parks	Hal Bergsma	<i>Vacant</i>
22.	Service Providers: School Districts	Tony Magliano (Portland Public Schools)	Dick Steinbrugge (1st – Beaverton); Ron Stewart (2nd – N. Clackamas)
23.	Service Providers: Private Utilities	Shanna Brownstein	Annette Mattson
24.	Service Providers: Port of Portland	Susie Lahsene	Tom Bouillion
25.	Service Providers: TriMet	Jessica Engelmann	Eric Hesse (1st); Alan Lehto (2nd)
26.	Private Economic Development Associations	Peter Livingston	Darci Rudzinski
27.	Public Economic Development Organizations	<i>Vacant</i>	<i>Vacant</i>
28.	Land Use Advocacy Organization	Mary Kyle McCurdy	Tara Sulzen
29.	Environmental Advocacy Organization	Jim Labbe	Bob Sallinger
30.	Housing Affordability Organization	Ramsay Weit	<i>Vacant</i>
31.	Residential Development	Justin Wood	Ryan O'Brien (1st), Dave Nielsen (2nd)
32.	Redevelopment / Urban Design	David Berniker	Joseph Readdy

33.	Commercial / Industrial	Dana Krawczuk	<i>Vacant</i>
34.	Green Infrastructure, Design, & Sustainability	Mike O'Brien	<i>Vacant</i>
35.	Public Health & Urban Form	Moriah McSharry McGrath	Paul Lewis (1st), Jennifer Vines (2nd)
	Non-voting Chair	Robin McArthur	John Williams



Date: April 10, 2012
To: MPAC
From: Ted Reid, Metro Community Development
Re: 2011 Inventory of Regulated Affordable Housing errata

Since the completion of the report on the 2011 Regional Inventory of Regulated Affordable Housing, Metro staff has become aware of an error in the summary of Housing Choice Vouchers (Section 8 Vouchers) found in tables 7 and 13 of the report. Metro staff is aware that there is an error in the voucher count for Washington County and has requested, but not yet received in time for this memo, confirmation of voucher counts from the other three housing authorities. A revised report on the inventory will be posted to Metro's website. Any future revisions to the report will also be posted to the website.

The corrected Housing choice voucher data for Washington County is as follows:

Washington County Housing Choice Vouchers¹

Year 2007	Year 2011	Difference 2007 - 2011
2,570	2,610	+40

¹ This is the number of Housing Choice Vouchers under the housing authority's Annual Contributions Contract (ACC) with the U.S. Department of Housing and Urban Development. The report erroneously summarized for Washington County a 2011 snapshot of the "lease up" number of vouchers, which is less than the ACC voucher count. Metro staff believes that the ACC voucher count was what was used in determining the 2007 voucher inventory and is what should be used for 2011 to allow comparisons. As noted, Metro staff is seeking to confirm these numbers with the remaining housing authorities and will post any future revisions to the report on Metro's website.



To: Portland MPAC Members

FM: Tom Cusack, [Oregon Housing Blog](#)

Subject: Correctable Problems with the March 27, 2012 *Inventory of Regulated Affordable Housing* Report.

I applaud Metro staff for producing a long delayed March 2012 report on Housing Supply (*Inventory of Regulated Affordable Housing*) required by the Metro Functional Plan since 2007. However, as a person who played a central role in developing the concept of this housing supply report while at HUD and while serving on the Metro Housing Choice Task Force, I must point out a series of *correctable* errors and omissions in this report.

I also encourage Metro to publish in MS Excel format the underlying housing supply data used to develop the report so that the public has the tools to further analyze the data relevant to their interests and to their community. If appropriate, I would welcome the opportunity to further discuss these problems with MPAC members and Metro staff.

This document includes a listing of 8 problems and 12 recommended corrective actions, four Appendices with Draft Reports providing more insight on the availability of affordable housing in Centers and cities and a [one page summary](#) (p.8) listing all problems and recommended corrective actions. (Active links within this document also reference source documents posted on the web).

Problem 1: The Report has No Breakout of Regulated Units by Income Groupings Even Though Metro Has the Underlying Data to Do So and There Is Clear Intent in the Functional Plan to Focus on Households Below 30%, 50% and 60% of Median Family Income.

A preliminary review of the unit totals in the "Unit Detail" 2011 database table indicates that **only 1/3^d** of the reported units are affordable to families with incomes below 50% of MFI.

A preliminary review of the unit totals in the "Unit Detail" 2011 database table, graciously provided to me by Metro staff, indicates that only 13,000 of the 40,000 reported units are affordable to families with incomes below 50% of Median Income (50% Median Income is the maximum income target included in the Functional Plan voluntary local production goals).

Metro's underlying data used to construct this report DOES include unit counts for multiple income groupings including <30%, <50% and <60% MFI. The count and distribution of those units is vitaly important to track Functional Plan housing supply changes and progress towards voluntary affordable housing goals. Including those breakouts will show a count of Functional Plan units relevant to the voluntary local production targets that is substantially below the "regulated" totals in the report; income specific distributions by City and County may also be different from the report .

Evidence of the Functional Plan Intent to Focus on Specific Income Groups:

- Metro's Functional plan targets for voluntary affordable housing production are specifically focused on 30% and 50% of median income. As this report notes on page 1, one of the key goals stated in the Metro

Functional Plan is “ 1.3.1 “Provide housing choices in the region... **paying special attention to those households with the fewest housing choices.**”

- A review of background materials for the housing supply report shows that draft reporting formats included only targets up to **60%** of median family income (See draft reporting format exhibit (p.52) in [Metro Ordinance 06-3677B](#), accepting the *Implementation Strategy of the Housing Choice Task Force*). This was an expansion from the 50% median income target for the voluntary local production targets and was done to incorporate less than 60% MFI production possible from the largest current rental housing production program, the LIHTC.
- For the Portland Metro area **85% of all cost burdened renters are found at incomes below \$35,000 (49% of MFI)**. Note also that the incidence of cost burdened renters drops from **80%** in the \$20,000-\$35,000 income range to only **23%** in the \$35,000 to \$50,000 range. (See Table Below).

Portland Metro Renter Cost Burden by Income, ACS 2007-2009						
Courtesy, Oregon Housing Blog						
Rent Range	Total Renters	Total HH Where Burden Computed	# Cost Burden 30% or More	% Cost Burden 30% or More	% of All Cost Burdened Calc HH's	% of <u>All</u> Cost Burdened HH Found in HH Incomes Below \$35,000
Less than \$10,000 (Estimate)	35,262	29,367	27,118	95%	19%	
\$10,000 to \$19,999 (Estimate)	50,583	48,940	44,388	89%	31%	
\$20,000 to \$34,999 (Estimate)	69,658	67,768	49,788	80%	35%	85%
\$35,000 to \$49,999 (Estimate)	55,673	54,096	15,058	23%	11%	
\$50,000 to \$74,999 (Estimate)	54,075	52,910	5,217	13%	4%	
\$75,000 to \$99,999 (Estimate)	21,392	20,780	495	5%	0%	
\$100,000 or more (Estimate)	18,257	17,688	99	0%	0%	
Total (Estimate)	304,900	291,549	142,163	49%	100%	

Source: ACS Table B25074, HOUSEHOLD INCOME BY GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME IN THE PAST 12 MONTHS

Recommended Corrective Actions:

1. Add a table to the report that shows by City and County the count and % of all dwelling units located in regulated projects that are affordable at 30%, 50% and 60% of median family income. [See draft in Appendix 4].
2. Focus future housing supply data collection and goal setting on projects affordable to those at 30%, 50% and 60% of median family income and insure that counts by jurisdiction and Center include breakouts by these income categories.

Problem 2: Data on Regulated Units in Centers Does Not Include Counts of ALL Dwelling Units, Does Not Include Distribution of Affordable Units by Income, and Does Not List Nearly Half of Centers That Have NO “Regulated” Housing Supply.

In order to determine the relative incidence of regulated housing units in centers, it is critical to include counts of ALL dwelling units in Centers, counts of units by targeted income levels, and to include those Centers with NO regulated housing.

The 2011 Metro [Centers Report](#) from Metro DOES include a count of ALL dwelling units in each regional and town center so I went back and added a column to Table 5 in the report to include the count of total dwelling units in each regional and town center and the % of all dwelling units in each Center that were “regulated” according to the Metro

Report. This revised Table 5 is included as Attachment 1 to this document. [I excluded the Portland Central City data from this table as the Metro Centers Report did not show a total count of dwelling units for the Portland Central City).

Some Initial Regional/Town Center Observations:

Nearly Half of the 38 Regional and Town Centers Have NO “Regulated” Units and Only 3% Of ALL Dwelling Units in ALL Town Centers Were Reserved for Those With Incomes Below 50% Median Family Income.

1. In the 38 regional and town centers, 5,053 (11%) of the 45,985 total dwelling units were reported as regulated. (I combined two West Linn town centers into one to match available data in the Centers report). **However that count/percentage was ZERO in 18 (47%) of the regional and town centers that had a combined total of 14,729 dwelling units.** This included the Regional Center in Beaverton and Town Centers in Tansaborne, Washington Square, West Linn, West Portland, Lake Oswego, Murray/ Scholls, and Orenco. (Note that Lake Grove Center data is in error because of late 2011 occupancy for Oakridge Park project [see Problem 7 below]).
2. A preliminary look at regional /town center housing supply data (Not including Portland Central City) suggests the percentage of reported units affordable at 50% or below of Median Family Income was only 28% [1,399 /5,053=28%].
3. When compared to the TOTAL number of dwelling units in ALL regional and town centers, the supply of units available to those with incomes below 50% Median family income drops to only 3% [1,399/45,985=3%].

3%:

The share of ALL dwelling units in ALL Centers that are reserved for those with incomes below **50% Median family income** [1,399/45,985=3%]

Recommended Corrective Actions:

3. Modify Table 5 to add all regional and town centers, to include a count of total dwelling units and the % of total dwelling units that are regulated [See my DRAFT sample in Appendix 1].
4. In a separate table show the percentage of total dwelling units in each Center that are regulated AND affordable below 30%, 50% and 60% MFI income levels [See my DRAFT sample in Appendix 2].
5. Publish an Excel file that show the entire unduplicated list of 2011 affordable housing supply with all data fields in a single worksheet.

Problem 3: “Affordable” rents shown in Table 1 of the report at 30% and 50% Median Incomes are UNDERSTATED by 29% and by as much as \$200 per month.

The Functional Plan language inadvertently references a much lower median household income standard, when the clear history of the voluntary affordable housing targets in Title 7 shows they were developed using a substantially higher median family income standard. Median Family Income is the same income definition used by HUD and all other mainstream affordable housing programs AND is also the income definition used in the Metro database of projects used to construct the data in this report. [Median household income used to construct the data in the Table 1 was \$56,000 while the HUD 2011 Median family income was a much higher \$72,000].

The median household income used in Table 1 is 29% lower than the actual HUD FY 2011 median family income standard, meaning that the “affordable rents” shown in the report are also UNDERSTATED by 29%. This means that “affordable” rents shown in by report are UNDERSTATED by \$120 per month for households at 30% of Median Family Income and by \$200 per month for families at 50% of MFI. The table pasted on the next page shows these differences:

METRO REPORT DATA, TABLE 1				
Income Grouping	Income	Affordable Rents		
30 percent median HOUSEHOLD income	\$16,800	\$420		
50 percent median HOUSEHOLD income	\$28,000	\$700		
ACTUAL HUD 2011 Income and Rent Limits				
Income Grouping	Income	Affordable Rents	% Diff Between HUD and Metro Report Rents	\$\$ Diff Between HUD and Metro Report Rents
30 percent median FAMILY income	\$ 21,600	\$540	29%	\$120
50 percent median FAMILY income	\$ 36,000	\$900	129%	\$200

Recommended Corrective Action:

6. Correct Table 1 in the report to reflect median family income.
7. Until the Functional Plan language can be formally changed, add a staff footnote to the functional plan to reference that “median household income” is incorrect and that “median family income” was the income standard used to develop the voluntary targets.

Problem 4: In the database, the sum of units in “Main Table” [41,077] is 1,121 (2.8%) more than Sum of Units [39,956] in the “Unit Detail” Table; the sum of units in the database “Main Table” [41,077] is also slightly different than the “sum of units” [41,199] showing in Table 3 of the report.

Recommended Corrective Action

8. Insure that the total unit count in the 2011 “Main” Table and “Unit Detail” Table in the database are the same and insure that the totals appearing in the report match the data in the database. (Or provide an explanation of the discrepancy).

Problem 5 : The “What Has Changed Since 2007” Section [pg 10] of the Report Does Not Show Any Impact from Project Basing of Vouchers; PBV Seem Likely to Have Responsible for At Least Some Portion of the Production of Units Affordable to Families at 30%/50% of Median Family Income.

Given that *Home Forward* alone reports 1,318 project based vouchers in their most recent [Dashboard Report](#), and that project basing of vouchers was a specific strategy in Metro adopted [Implementation Strategy of the Housing Choice Task Force Report](#) (p.42), it would seem important to note the positive impact that project basing of vouchers likely had in producing the most financially challenging housing supply to produce (<50% and < 30% MFI units).

Corrective Action:

9. Add a statement that summarizes the count of project based vouchers in the region and link it back to the Metro Adopted Implement Strategy of the Housing Choice Task Force.

Problem 6: The report does not provide any information about the number of projects/units that were preserved from 2007-2011.

Preservation was a specific strategy in the [Housing Choice Task Force Implementation Strategy](#) (p.84) adopted by Metro and preserved units were specifically intended to count toward production targets. While the Metro database

may not have accurate data on expiration and renewal dates, the [Preserve Oregon Home](#) project should be able to assist in providing a listing of all projects in the 3 county Portland metro area that were preserved from 2007-2011.

Corrective Action:

- 10. Request or Extract from the [Preserve Oregon Home database](#) an Excel spreadsheet that shows all the detail in the Preserve Oregon Home database for those projects in the 3 county Portland metro area that were preserved from 2007-2011.**

Problem 7: At Least One Town Center Project Occupied in Late 2011 Is Not Included in this Report.

The 45 unit Oakridge Park elderly project opened in November 2011 and is not included in the inventory report; this Lake Oswego/Clackamas project is also part of the Lake Grove town center area. It is possible that other projects developed in late 2011 are also not included in the database or in the report.

Recommended Corrective Action

- 11. Add the Lake Oswego/Lake Grove Town Center project to the database and to the report and canvass partners to assure projects occupied in late 2011 are included in the database and the report.**

Problem 8: The report mixes in Habitat for Humanity home ownership data for 2011, but the “unit details” table in the Metro database has no breakout of income levels for H4H units, nor does the database include other income restricted home ownership units.

Recommended Corrective Action:

- 12. To avoid confusion, I would suggest that home ownership supply counts be kept in a separate database, that the database include the income grouping that sale is restricted to on resale, and that the database include other home ownership units that have resale restrictions, like Community Land Trusts.**

[Appendices 1, 2, 3 Follow on the Next Three Pages].

- Appendix 1: Metro Centers Sorted by Regulated Unit Share of Total Dwelling Units.
- Appendix 2: Centers, Share of ALL Units by Income Groupings; <30 %, < 50%, <60% Median Family Income.
- Appendix 3: Summary Table with All Problems and Recommended Corrective Actions.
- Appendix 4 :Metro City Tenure and Regulated Housing Supply By Income

Appendix 1/Revised Table 5: Metro Centers Sorted by Regulated Unit Share of Total Dwelling Units

Courtesy, [Oregon Housing Blog](#)

Type	Center Name	Total Dwelling Units	Number of Sites	Total Units	Unregulated Units	Regulated Units	Share of 4 County Regulated Units	Regulated Unit Share of Total Dwelling Units	Included in Metro Table?
ALL	ALL	45,985	95	5,053	72	4,981		10.8%	ALL
Town Center	Bethany	868	2	340	-	340	0.90%	39%	Yes
Town Center	Hollywood	829	2	333	28	305	0.80%	37%	Yes
Town Center	Cedar Mill	1,735	1	608	-	608	1.60%	35%	Yes
Regional Center	Hillsboro	784	5	271	2	269	0.70%	34%	Yes
Town Center	Troutdale	853	1	228	-	228	0.60%	27%	Yes
Regional Center	Gresham	2,098	9	539	2	537	1.40%	26%	Yes
Town Center	Milwaukie	1,877	17	282	-	282	0.70%	15%	Yes
Town Center	Tualatin	1,660	1	240	-	240	0.60%	14%	Yes
Regional Center	Clackamas	2,680	4	387	-	387	1.00%	14%	Yes
Regional Center	Gateway	3,878	9	585	28	557	1.40%	14%	Yes
Town Center	Lents	636	6	74	1	73	0.20%	11%	Yes
Town Center	Rockwood	6,278	18	702	2	700	1.80%	11%	Yes
Town Center	St. Johns	219	2	21	-	21	0.10%	10%	Yes
Town Center	Hillsdale	935	3	90	2	88	0.20%	9%	Yes
Town Center	Aloha	2,520	5	214	7	207	0.50%	8%	Yes
Town Center	Raleigh Hills	948	1	73	-	73	0.20%	8%	Yes
Town Center	Tigard	944	2	52	-	52	0.10%	6%	Yes
Town Center	Gladstone	342	5	5	-	5	0.00%	1%	Yes
Regional Center	Oregon City	125	1	1	-	1	0.00%	1%	Yes
Regional Center	Beaverton	1,047	1	8	-	8	0.00%	1%	Yes
Regional Center	Tansaborne	2,037				0	0.00%	0%	NO
Regional Center	Washington Square	1,161				0	0.00%	0%	NO
Town Center	Cornelius	722				0	0.00%	0%	NO
Town Center	Damascus	88				0	0.00%	0%	NO
Town Center	Fairview	813				0	0.00%	0%	NO
Town Center	Forest Grove	460				0	0.00%	0%	NO
Town Center	Happy Valley	244				0	0.00%	0%	NO
Town Center	King City	300				0	0.00%	0%	NO
Town Center	Lake Grove	234	NOTE : Oakridge Park Missing			0	0.00%	0%	NO
Town Center	Lake Oswego	1,429				0	0.00%	0%	NO
Town Center	Murray/Scholls	1,322				0	0.00%	0%	NO
Town Center	Orencia	1,910				0	0.00%	0%	NO
Town Center	Pleasant Valley	14				0	0.00%	0%	NO
Town Center	Sherwood	69				0	0.00%	0%	NO
Town Center	Sunset Transit	879				0	0.00%	0%	NO
Town Center	West Linn-Willamette AND BOLTON	896				0	0.00%	0%	NO
Town Center	West Portland	1,489				0	0.00%	0%	NO
Town Center	Wilsonville	662				0	0.00%	0%	NO

Appendix 2: Centers, Alpha Share of ALL Units by Income Groupings ; <30%, <50%, <60% Median Family Income

Courtesy, [Oregon Housing Blog](#)

Type	Center Name	Total Dwelling Units	Total Below 30% MFI	Total Below 50% MFI	Total Below 60% MFI	Share of TDU Below 30% MFI	Share of TDU Below 50% MFI	Share of TDU Below 60% MFI	Center Included in Metro Table?
All Regional and Town Centers	Total	45,985	748	1,399	3,966	2%	3%	9%	N/A
Town Center	Aloha	2,520	-	1	199	0%	0%	8%	Yes
Regional Center	Beaverton	1,047	-	-	-	0%	0%	0%	Yes
Town Center	Bethany	868	-	-	340	0%	0%	39%	Yes
Town Center	Cedar Mill	1,735	-	243	608	0%	14%	35%	Yes
Regional Center	Clackamas	2,680	71	75	123	3%	3%	5%	Yes
Town Center	Cornelius	722				0%	0%	0%	NO
Town Center	Damascus	88				0%	0%	0%	NO
Town Center	Fairview	813				0%	0%	0%	NO
Town Center	Forest Grove	460				0%	0%	0%	NO
Regional Center	Gateway	3,878	21	90	553	1%	2%	14%	Yes
Town Center	Gladstone	342	-	-	-	0%	0%	0%	Yes
Regional Center	Gresham	2,098	32	69	452	2%	3%	22%	Yes
Town Center	Happy Valley	244				0%	0%	0%	NO
Regional Center	Hillsboro	784	1	115	154	0%	15%	20%	Yes
Town Center	Hillsdale	935	64	74	88	7%	8%	9%	Yes
Town Center	Hollywood	829	286	286	305	34%	34%	37%	Yes
Town Center	King City	300				0%	0%	0%	NO
Town Center	Lake Grove	234	Note: Oakridge Park Missing			0%	0%	0%	NO
Town Center	Lake Oswego	1,429				0%	0%	0%	NO
Town Center	Lents	636	4	35	64	1%	6%	10%	Yes
Town Center	Milwaukie	1,877	101	103	167	5%	5%	9%	Yes
Town Center	Murray/Scholls	1,322				0%	0%	0%	NO
Regional Center	Oregon City	125	-	-	-	0%	0%	0%	Yes
Town Center	Orencia	1,910				0%	0%	0%	NO
Town Center	Pleasant Valley	14				0%	0%	0%	NO
Town Center	Raleigh Hills	948	73	73	73	8%	8%	8%	Yes
Town Center	Rockwood	6,278	93	223	323	1%	4%	5%	Yes
Town Center	Sherwood	69				0%	0%	0%	NO
Town Center	St. Johns	219	-	-	1	0%	0%	0%	Yes
Town Center	Sunset Transit	879				0%	0%	0%	NO
Regional Center	Tansaborn	2,037				0%	0%	0%	NO
Town Center	Tigard	944	2	12	48	0%	1%	5%	Yes
Town Center	Troutdale	853	-	-	228	0%	0%	27%	Yes
Town Center	Tualatin	1,660	-	-	240	0%	0%	14%	Yes
Regional Center	Washington Square	1,161				0%	0%	0%	NO
Town Center	West Linn-Willamette AND BOLTON	896				0%	0%	0%	NO
Town Center	West Portland	1,489				0%	0%	0%	NO
Town Center	Wilsonville	662				0%	0%	0%	NO

Appendix 3: Summary: Problems and Recommended Corrective Actions for Metro March 2012 *Inventory of Regulated Affordable Housing* Report

[Oregon Housing Blog](#)

Report Problem:	Related Recommended Corrective Actions
<u>1:</u> The Report has No Breakout of Regulated Units by Income Groupings Even Though Metro Has the Underlying Data to Do So and There Is Clear Intent in the Functional Plan to Focus on Households Below 30%, 50% and 60% of Median Family Income.	<ol style="list-style-type: none"> 1. Add a table to the report that shows by City and County the count and % of all dwelling units located in regulated projects that are affordable at 30%, 50% and 60% of median family income. 2. Focus future housing supply data collection and goal setting on projects affordable to those at 30%, 50% and 60% of median family income and insure that counts by jurisdiction and Center include breakouts by these income categories.
<u>2:</u> Data on Regulated Units in Centers Does Not <ul style="list-style-type: none"> • Include Counts of ALL Dwelling Units, • Include Distribution of Affordable Units by Income, • List Nearly Half of Centers That Have NO "Regulated" Housing Supply, • Note that when compared to the TOTAL number of ALL dwelling units in ALL regional and town centers, the supply of total units available restricted to those with incomes below 50% Median family income drops to only 3% 	<ol style="list-style-type: none"> 3. Modify Table 5 to add all regional and town centers, to include a count of total dwelling units, and the % of total dwelling units that are regulated. [See my draft sample in Appendix 1] 4. In a separate table show the percentage of total dwelling units in each Center that are regulated AND affordable below 30%, 50% and 60% MFI income levels [See my draft sample in Appendix 2]. 5. Publish an Excel file that show the entire unduplicated list of affordable housing supply with all data fields in a single worksheet.
<u>3:</u> "Affordable" rents shown in Table 1 of the report at 30% and 50% Median Incomes are UNDERSTATED by 29% and as much as \$200 per month.	<ol style="list-style-type: none"> 6. Correct Table 1 in the report to reflect median <u>family</u> income. 7. Until the Functional Plan language can be formally changed, add a staff footnote to the functional plan to reference that "median household income" is incorrect and that "median family income" was the income standard used to develop the voluntary targets.
<u>4:</u> In the database, the sum of units in "Main Table" [41,077] is 1,121 (2.8%) more than Sum of Units [39,956] in the "Unit Detail" Table; The sum of units in the database "Main Table" [41,077] is slightly different than the "sum of units" [41,199] showing in Table 3 of the report.	<ol style="list-style-type: none"> 8. Insure that the total unit count in the 2011 "Main" Table and "Unit Detail" Table in the database are the same and insure that the totals appearing in the report match the data in the database. (Or provide an explanation of the discrepancy).
<u>5 :</u> The "What Has Changed Since 2007" Section [pg 10] of the Report Does Not Show Any Impact from Project Basing of Vouchers; PBV's Seem Likely to Have Produced at Least Some Portion of the 30%/50% MFI units.	<ol style="list-style-type: none"> 9. Add a statement that summarizes the count of project based vouchers in the region and link it back to the Metro Adopted Implement Strategy of the Housing Choice Task Force.
<u>6:</u> The report does not provide any information about the number of projects that were preserved from 2007-2011.	<ol style="list-style-type: none"> 10. Request from Preserve Oregon Home an Excel spreadsheet that shows all the detail in the Preserve Oregon Home database for those projects in the 3 county Portland metro area that were preserved from 2007-2011.
<u>7:</u> At Least One Town Center Project Occupied in Late 2011 Is Not Included in this Report.	<ol style="list-style-type: none"> 11. Add the Lake Oswego/Lake Grove Town Center project to the database and to the report and canvass partners to assure projects occupied in late 2011 are included in the database and the report.
<u>8:</u> The report mixes in Habitat for Humanity home ownership data for 2011, but the "unit details" table in the Metro database has no breakout of income levels for H4H units, nor does the database include other income restricted home ownership units.	<ol style="list-style-type: none"> 12. To avoid confusion, I would suggest that home ownership supply counts be kept in a separate database, that the database include the income grouping that sale is restricted to on resale, and that the database include other home ownership units that have resale restrictions, like Community Land Trusts

Appendix 4: Portland Metro Cities: Comparison of Regulated Supply of Housing by Income Group to Total Housing Units

Portland Rate of Regulated Units Affordable to Incomes Below 50% MFI/Total Housing Units is Nearly 6 Times The Average of 23 Other Cities

Courtesy, Oregon Housing Blog

Area	Census 2010 Total Housing Units	Affordable Regulated Supply of Units Below 30% MFI	Affordable Regulated Supply of Units Below 50% MFI	Affordable Regulated Supply of Units Below 60% MFI	Affordable Regulated Supply of Units ABOVE 60% MFI	Total Regulated Supply of Units	Share of ALL Units That Are In Regulated Supply <30% MFI	Share of ALL Units That Are In Regulated Supply <50% MFI	Share of ALL Units That Are In Regulated Supply <60% MFI	Share of ALL Units That Are In Regulated Supply ABOVE 60% MFI	Share of ALL Units That Are In Regulated Supply
24 Metro Cities	511,178	4,802	10,830	22,636	9,785	32,421	0.9%	2.1%	4.4%	1.9%	6.3%
23 Metro Cities WO Portland	245,739	631	1,427	4,799	5,681	10,480	0.3%	0.6%	2.0%	2.3%	4.3%
Portland	265,439	4,171	9,403	17,837	4,104	21,941	1.6%	3.5%	6.7%	1.5%	8.3%
Beaverton	39,500	39	80	878	1,523	2,401	0.1%	0.2%	2.2%	3.9%	6.1%
Cornelius	3,499	5	5	5	34	39	0.1%	0.1%	0.1%	1.0%	1.1%
Durham	561	-	-	-	210	210	0.0%	0.0%	0.0%	37.4%	37.4%
Fairview	3,786	-	-	-	480	480	0.0%	0.0%	0.0%	12.7%	12.7%
Forest Grove	7,845	-	70	184	423	607	0.0%	0.9%	2.3%	5.4%	7.7%
Gladstone	4,779	-	-	43	16	59	0.0%	0.0%	0.9%	0.3%	1.2%
Gresham	41,015	124	254	994	770	1,764	0.3%	0.6%	2.4%	1.9%	4.3%
Happy Valley	4,708	-	4	52	-	52	0.0%	0.1%	1.1%	0.0%	1.1%
Hillsboro	35,487	6	355	575	285	860	0.0%	1.0%	1.6%	0.8%	2.4%
Johnson City	278						0.0%	0.0%	0.0%	0.0%	0.0%
King City	1,920						0.0%	0.0%	0.0%	0.0%	0.0%
Lake Oswego	16,995	30	30	30	1	31	0.2%	0.2%	0.2%	0.0%	0.2%
Maywood Park	312						0.0%	0.0%	0.0%	0.0%	0.0%
Milwaukie	9,138	227	240	550	300	850	2.5%	2.6%	6.0%	3.3%	9.3%
Oregon City	12,900	171	182	182	473	655	1.3%	1.4%	1.4%	3.7%	5.1%
Rivergrove	133						0.0%	0.0%	0.0%	0.0%	0.0%
Sherwood	6,569	-	4	68	32	100	0.0%	0.1%	1.0%	0.5%	1.5%
Tigard	20,068	3	45	185	546	731	0.0%	0.2%	0.9%	2.7%	3.6%
Troutdale	5,907	-	18	272	162	434	0.0%	0.3%	4.6%	2.7%	7.3%
Tualatin	10,528	-	3	504	100	604	0.0%	0.0%	4.8%	0.9%	5.7%
West Linn	10,035	-	-	-	15	15	0.0%	0.0%	0.0%	0.1%	0.1%
Wilsonville	8,487	26	137	277	311	588	0.3%	1.6%	3.3%	3.7%	6.9%
Wood Village	1,289						0.0%	0.0%	0.0%	0.0%	0.0%



Date: April 5, 2012
To: MPAC, JPACT and interested parties
From: Kim Ellis, Principal Transportation Planner
Re: Climate Smart Communities Scenarios Phase 2: Shaping Regional and Local Choices –
SUPPLEMENTAL MATERIALS

On April 11 and 12, MPAC and JPACT will be asked to support the approach for shaping regional and local choices during Phase 2 of the Climate Smart Communities Scenarios project. An overview of the Phase 2 approach has been included in your meeting packets, and will be the focus of the staff presentation.

More detailed draft work plans for the Policy Track and Technical Tracks are also provided for reference for interested members.

Please contact me with any questions you have at kim.ellis@oregonmetro.gov or 503.797.1617.

/attachments

- Policy Track: Create Building Blocks for Scenarios (April 5, 2012)
- Technical Track: Create Score Card for Scenarios (April 5, 2012)

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Climate Smart Communities Scenarios – Phase 2

Policy Track: Create Building Blocks for Scenarios

Draft

April 5, 2012

Purpose

This summary provides an overview of the Policy Track for the second phase of the Climate Smart Communities Scenarios Project. This work plan seeks to identify the desired outcomes, research questions, activities and deliverables needed to assist MPAC, JPACT and the Metro Council in directing staff to develop and evaluate three scenario options for testing in 2013. These scenario options will be developed with the aim of achieving community ambitions, supporting jobs, protecting neighborhoods and ensuring clean air while reducing greenhouse gas emissions.

Overview

This track will create a range of scenario options for how and where to apply the policies that are needed to achieve community and regional ambitions for growth and development and meet climate goals. The options will be developed using the Phase 1 scenarios, subsequent district and sensitivity analysis results, the Strategy Toolbox, Statewide Transportation Strategy, focus areas, locally- developed case studies, and state and regional policy options. MPAC, JPACT and the Metro Council will provide staff with direction on a framework to guide creation of the options.

Staff will work with the technical work group, TPAC and MTAC to further evaluate the Phase 1 scenarios to identify the most effective land use and transportation strategies and report on their potential benefits and impacts at a regional and household level. This research will be complemented by the project's Strategy Toolbox (developed in Phase 1) and ODOT's on-line Greenhouse Gas Toolkit Database. The Strategy Toolbox and ODOT database summarize the effectiveness and applicability of various strategies based on existing research. They also provide estimates of cost-effectiveness, when known, and the time required for implementation (e.g., near-, medium- and long-term).

Staff will also work with local government staff to develop 5 community investment case studies to show how policies and individual strategies might be tailored in a community to help advance that community's economic development ambitions. The Envision Tomorrow scenario planning tool and place types will be central to the creation of these case studies. Staff is pursuing funding and other approaches for interested local governments to further explore their community ambitions using the Envision Tomorrow tool beyond the case studies. Portland, Gresham, Beaverton and Hillsboro have expressed interest in participating with Metro staff in Envision Tomorrow training, for example. In addition, the Southwest Corridor Plan effort is also looking to the use Envision Tomorrow for the focus area workshops the project will convene in 2012. State and regional policy options will also be developed to

Partnering and engagement

January through November 2012

The **technical work group** will continue to be convened in 2012.

Periodic **newsfeed updates** and background **briefings** to print and broadcast media.

Speakers and other events may be identified pending available resources.

January through May 2012

Policymaker and stakeholder briefings will continue from January through April 2012 to inform them about the Phase 1 Findings

May - June 2012

Metro sponsors **Envision Tomorrow training** for interested local governments to begin building Metro and local government capacity. Participating local governments will be asked to contribute resources to help support this activity.

Local government meetings to develop community investment case studies. In the Southwest Corridor this will be coordinated with project partners meetings and at a workshop on the focus areas.

May - August 2012

Policymaker and stakeholder briefings with local leaders and key stakeholders on project work completed to date and ideas for local, regional and state policy choices to be tested in 2013

September through November 2012

MPAC, JPACT, Council work session(s) or regional summit to build consensus

complement the case studies to highlight the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology. The policy options will provide information to support refining the Phase 1 scenario assumptions.

The work will be coordinated with the Statewide Transportation Strategy, Southwest Corridor Plan, East Metro Connections Plan and Active Transportation Plan and build on existing plans and policies identified through the Community Investment Strategy in 2009. Opportunities to integrate new ambitions identified since 2010 through the Southwest Corridor Plan, East Metro Connections Plan, Portland Plan and other local planning efforts will be identified.

Information from this track will be presented to the Metro Council and Metro's technical and policy advisory committees as research is completed and new information and findings are developed.

Desired outcomes

- The Scenarios Project strengthens partnerships and builds understanding of which land use and transportation strategies are most effective at reducing greenhouse gas emissions and the policies that are needed to achieve community ambitions.
- Diverse stakeholders, including the region's elected officials and business and community leaders, have a meaningful opportunity to shape the scenario options to be tested in 2013.
- Feedback from a diverse set of stakeholders will inform MPAC, JPACT and the Metro Council in directing staff to develop and test three scenario options in 2013.

Research questions

- What are the most effective land use and transportation strategies and how might they be applied in the region to advance local community and economic development ambitions?
- What are the tradeoffs between scenario options relative to their potential benefits and the cost, complexity and difficulty of implementing different strategies?
- Which three scenario concepts does the region want to consider for further evaluation and refinement in 2013?

Activities

1. **Conduct a regional and district level evaluation of the Phase 1 scenarios** to understand the range of variation in performance across the region. The preliminary research conducted in Phase 1 focused exclusively on regional greenhouse emissions reductions. Additional research is needed to support refining the scope and range of options identified in Phase 1. This research will be conducted in consultation with the project's technical work group, and will provide more information to frame the potential benefits, costs and savings of different scenarios at a regional and

and define two to three scenarios to test and outcomes to be measured.

On-line engagement to gather input on scenario options and outcomes to be evaluated.

Policymaker and stakeholder briefings with local leaders and key stakeholders on project work completed to date and ideas for local, regional and state policy choices to be tested in 2013

household level. A summary of key findings and recommendations will be written to inform development of potential scenario options and the outcomes-based evaluation methods in the Technical Track.

2. **Conduct sensitivity testing of individual community design, pricing and technology strategies from Phase 1** to identify the most effective land use and transportation strategies. Phase 1 focused on the overall effectiveness of different levels of implementation for each policy area. The analysis did not address the extent to which each of the individual strategies within each policy area is contributing to the emissions reductions, and therefore did not facilitate an understanding of the primary drivers within each policy area. To address this information gap and support refining the scope and range of options to be considered in Phase 2 and 3, this activity will complete a sensitivity analysis to isolate individual strategies within the community design, pricing and technology policy areas and estimate their relative effectiveness at reducing greenhouse gas emissions, compared to all other strategies within the policy area. Only community design, pricing and technology policy areas are proposed to be subject to the sensitivity analysis given the relatively lower greenhouse emissions reduction potential of the other policy areas.

This research will be complemented by the Strategy Toolbox developed in Phase 1 and ODOT's on-line searchable Greenhouse Gas Toolkit Database. The Strategy Toolbox and ODOT's database summarize the effectiveness and applicability of various actions and programs based on existing research. The database also estimates cost-effectiveness, when known, and the time required for implementation (e.g., near-, medium- and long-term). A summary of key findings and recommendations will be written to inform development of potential scenario options considering potential effectiveness, synergies, cost and timeframe for implementation.

3. **Compile 2010 existing conditions and 2035 Reference Case regional snapshot** to frame existing conditions and inform future potential policy options. The materials and information compiled will summarize existing and future socio-demographic, land use and transportation characteristics and assumed growth and development for different parts of the region based on adopted plans and policies. The analysis will also consider access to opportunity and the availability of housing options in an effort to identify pathways that result in increased social and economic health for all communities. Existing planning work and data will be used when possible, including the Southwest Corridor Plan, East Metro Connections Plan, Portland Plan and Active Transportation Plan existing conditions assessments. This activity is intended to provide a snapshot. Phase 3 of the Scenarios Project will develop more in-depth analysis as part of the scenarios evaluation, and the Regional Transportation Plan update that will begin in 2013.
4. **Define and categorize 2040 focus areas** in the region based on zoning, the development intensity of residential, jobs and services, block size, network connectivity, and other urban characteristics that predict market readiness, redevelopment and economic development opportunities and the pedestrian, bicycle and transit friendliness of an area. The analysis will

incorporate RLIS and Envision Tomorrow data and build on the locally-adopted 2040 Growth Concept design type boundaries and focus areas identified in the Southwest Corridor study and other planning efforts underway in the region (e.g., Portland Plan, East Metro Connections Plan).

The focus areas are the places where additional land use and transportation strategies may be applied in the scenarios to be evaluated in 2013. They will typically be 2040 Design Types located in existing downtowns, corridors, main streets and employment areas designated on the 2040 Growth Concept map – those areas that are currently zoned, or that are being contemplated to be zoned, medium- or high-density residential, commercial or industrial. The focus areas will be classified based on their readiness for development and other factors to be determined.

This approach reinforces the importance of leveraging land use and transportation policies and investments to get the most out of each action and spur additional investment. This approach also allows for protection of existing neighborhoods from inappropriate development. The technical work group, TPAC and MTAC and local government staff will review and refine focus areas.

5. **Compile place types toolbox and worksheet** that document and describe the range of place types for use in Envision Tomorrow, and the land use and transportation characteristics assumed in each place type. Characteristics include anticipated primary and secondary land uses, frequency of transit service, streetscape design, bicycle and pedestrian facilities, job and housing units per acre, and parking.

A common palette of 16 different place types will be used to generalize the various development categories that appear in the region. Normalizing terms and concepts used to describe development in the region improves communication and the project's ability to describe, measure, and evaluate the built environment within a scenario planning process. The worksheet provides a tool for linking the land use and transportation characteristics of each place type to specific land use and transportation strategies that are needed to realize the ambitions reflected in individual place type.

The project will use the place types toolbox and worksheet in combination with the focus areas and Envision Tomorrow scenario planning tool to create community investment case studies. The case studies will highlight community ambitions and the strategies needed to achieve those ambitions. The Southwest Corridor Plan will also use the place types toolbox and worksheet in combination with Envision Tomorrow to describe an integrated land use and transportation investment strategy for each of the project's focus areas; each strategy will be developed in collaboration with local partners and be consistent with local planning efforts.

6. **Partner with local government staff to develop five community investment case studies** to highlight both the location and range of place

types represented in current community plans and policies, and the strategies needed to achieve community ambitions. Case study locations are proposed to include an employment area, a regional center, a town center and a corridor. Opportunities to convene two or more jurisdictions together will be sought to discuss connecting focus areas, shared ambitions and investment needs. *Participants will include: Metro staff, community planning director, community development director, work group member, and senior staff.* Participants may engage their respective City Councils, Planning Commissions, County Boards, as needed, for additional input. The Southwest Corridor project will develop an integrated investment strategy for each of the project's focus areas that will inform the community investment case studies for this part of the region.

Potential community investment case study research questions

- How might strategies be tailored to advance local community and economic development ambitions?
 - What opportunities and assets already exist in your community?
 - What redevelopment opportunities exist to advance your community's ambitions?
 - Where is development happening now?
 - Is there land available for development?
 - What barriers exist to achieving your ambitions?
 - What investment needs will be essential to achieving your ambitions?
- How might your community ambitions and investments contribute to meeting the region's climate goals?

7. **Work with the technical work group, MTAC and TPAC to develop regional and state policy options** to frame the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology, following MPAC, JPACT and Metro Council direction.

Potential regional and state policy options questions

- What role might these policies play in helping to advance local community and economic development ambitions, in addition to meeting the region's climate goals?
 - What opportunities already exist in the region that could advance implementation of these policies?
 - What barriers exist to implementing these policies and how might those be overcome?
 - What policies and level of implementation should the region pursue?
 - Should the scenario options focus on policies that are largely within local and/or regional control?
8. **Create scenario policy options** to kick-off a regional discussion on a narrowed range of scenario options for meeting community and regional ambitions and the region's climate goals. The proposals will be tied to lessons learned from sensitivity testing of the Phase 1 scenarios and will

continue to be refined as other Policy Track activities are completed.

9. **Prepare recommendations on the most effective strategies and focus areas to be carried forward and the scenario policy options** to be tested in 2013.

Deliverables

- Report documenting Phase 1 scenarios district and regional performance and sensitivity testing
- Scenario policy options
- Place Types Toolbox and worksheet
- Focus Areas Map(s)
- 2010 Existing Conditions and 2035 Reference Case maps and summary materials
- Community case studies showcasing existing community efforts and ambitions, and highlighting demographics, existing assets, barriers and investment needs
- State and regional policy options highlighting the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology

Related Projects/Programs

- Southwest Corridor Plan (2012-13)
- East Metro Connections Plan (EMCP) (2012)
- Regional Active Transportation Plan (2012-13)
- Industrial Land Readiness/Inventory (2012)
- Metro Parking Management Study (*pending TGM funding*)
- Regional Travel Options Strategic Plan update and work plan
- Transit Oriented Development Strategic Plan and work plan
- Transportation System and Management Operations Plan implementation
- Regional opportunity mapping (2012)
- Community Investment Initiative (2011-13)
- Oregon Sustainable Transportation Initiative (2011-14)
- Local comprehensive plan and transportation system plan updates related to periodic review and other locally-led studies (2011-14)
- Tualatin Valley Highway Corridor Refinement Plan (2012)
- Aloha-Reedville Study and Community Livability Plan (2013)
- McLoughlin Area Plan (2011)
- TriMet Strategic Plan
- Others as they are identified

Schedule

April – September 2012

Climate Smart Communities Scenarios – Phase 2

Technical Track: Create Score Card for Scenarios

Draft

April 5, 2012

Purpose

This summary provides an overview of the Technical Track for the second phase of the Climate Smart Communities Scenarios Project. This work plan seeks to identify the desired outcomes, research questions, activities and deliverables needed to assist MPAC, JPACT and the Metro Council in directing staff to develop and evaluate three scenario options for testing in 2013. These scenario options will be developed with the aim of achieving community ambitions, supporting jobs, protecting neighborhoods and ensuring clean air while reducing greenhouse gas emissions.

Overview

This track is focused on working with the technical work group, TPAC, MTAC and topic experts (e.g., business, public health, freight, social equity and environment) to develop the criteria and methods to be used to evaluate the three scenarios to be tested in 2013. This track will also result in the creation of a Scenarios Score Card that will be used to convey the results of the analysis to policymakers and other stakeholders. The score card will report on costs, savings (individual/public/private) and other fiscal, economic, public health, equity and environmental outcomes as they relate to all six of the region's desired outcomes. This work will build on the evaluation framework endorsed by MPAC, JPACT and the Metro Council in June 2010, and the tools and methods developed as part of the Oregon Sustainable Transportation Initiative and development of the Statewide Transportation Strategy. The project's technical work group, MTAC and TPAC will advise Metro staff on the criteria and methods for evaluating scenarios.

Desired outcomes

- The project seeks to confirm specific economic, social and environmental outcomes that decision-makers want measured.
- Diverse stakeholders will have a meaningful opportunity to shape the outcomes to be evaluated in 2013.
- Feedback from a diverse set of stakeholders will inform MPAC, JPACT and the Metro Council in directing staff to develop and test three scenario options and specific outcomes to be measured in 2013.

Research questions

- How might different strategies affect the economy, social equity, community, and the environment (e.g., pathways mapping)?
- What information would be most useful to decision-makers?

Partnering and engagement

January through November 2012

The **technical work group** will continue to be convened in 2012.

Periodic **newsfeed updates** and background **briefings** to print and broadcast media.

January through May 2012

Policymaker and stakeholder briefings will continue from January through April 2012 to inform them about the Phase 1 Findings.

March through July 2012

Score card workshops with community leaders and technical work group to develop evaluation criteria and a scenarios score card that can be piloted on the Phase 1 scenarios and then applied during the scenarios evaluation in 2013.

September through November 2012

MPAC, JPACT, Council work session(s) or regional summit to build consensus and define two to three scenarios to test and outcomes to be measured.

On-line engagement to gather input on outcomes to be evaluated.

Activities

1. **Workshop with the equity and environmental justice stakeholders to develop a regional equity analysis method** that can be applied during the scenarios evaluation in 2013. Metro will co-sponsor the equity and environmental justice workshop with leaders from Coalition for a Livable Future, Centro Cultural, OPAL, IRCO (*suggested, but not confirmed*) and other community groups. The method will consider demographics, access to opportunity and the availability of housing and transportation options in an effort to identify pathways that result in increased social and economic health for all communities.
2. **Workshop with ODOT, the Port of Portland and other stakeholders to develop an economic analysis method** that can be applied during the scenarios evaluation in 2013. Metro will co-sponsor the business, freight and developer workshop in partnership with the Urban Land Institute, the Port of Portland, the Portland Business Alliance, Columbia Corridor Association, Westside Economic Alliance, East Metro Economic Alliance (*suggested, but not confirmed*) and other interested groups. The method will focus on the cost and financial feasibility of implementation, economic development opportunities, region-wide job creation, and other benefit and impacts.
3. **Workshop led by the Oregon Health Authority to develop a health impact assessment method** that can be piloted on the Phase 1 scenarios and then applied during the scenarios evaluation in 2013. Metro will co-sponsor the environment and public health workshop with the Oregon Public Health Authority. This work is funded through a OHA received grant funding to convene public health experts, land use, planning and transportation experts, and community health, environmental and community development advocates to determine the scope of the assessment. In the assessment, OHA will describe the direction and magnitude of health impacts from the strategies that have been prioritized by the advisory work group. OHA may use the following analytic methods, depending on the scope and resources and what will best answer the research questions: literature review, meta-analysis, stakeholder interviews, risk analysis, and health effects modeling.
4. **Preparing recommendations on the political, economic, social, and environmental outcomes to be evaluated** in the scenarios that are tested in 2013.

Deliverables

- Report summarizing input provided at stakeholder workshops and other engagement activities.
- Report documenting evaluation measures and methods recommended for the scenarios evaluation in 2013.
- Scenarios Score Card

Related Projects/Programs

- Greater Portland Pulse (2012)
- Southwest Corridor Plan (2012-13)
- East Metro Connections Plan (EMCP) (2012)
- Regional Opportunity Mapping (2012)
- Oregon Sustainable Transportation Initiative (2011-14)
- Oregon Public Health Division Health Impact Assessment of the scenarios developed during Phase 1 of the Scenarios Project (2012)

Schedule

March – September 2012

DRAFT



Climate Smart Communities Scenarios Phase 2 Approach

Shaping local and regional choices

Metro Policy Advisory Committee
April 11, 2012

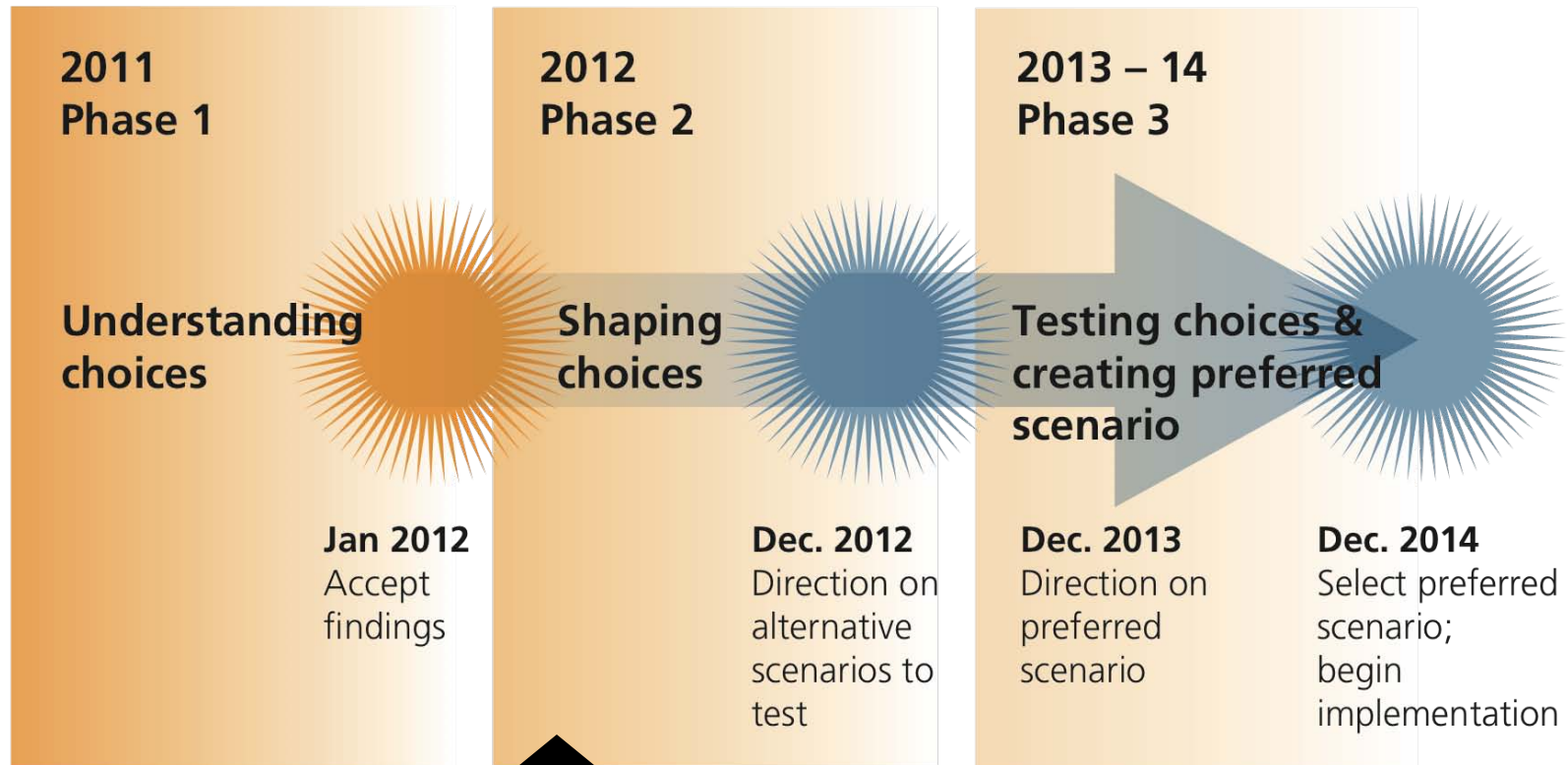
Kim Ellis, project manager



Action Requested

Support Phase 2 approach
to allow staff to fully proceed with
Phase 2

Timeline



We are here.

Key challenges



1. Balancing community ambitions and regional approach
2. Complexity remains a hurdle
3. Economic realities dampening ambitions
4. Broadening engagement to shape choices
5. Building trust, partnerships and commitment

Phase 2 purpose

- Identify range of options for applying strategies
- Create a score card to evaluate options
- Define 2-3 scenario options to evaluate in detail

Shape local and regional choices, not to choose a preferred alternative

How we get there...

Policy Track – Create Building Blocks for Scenarios *April – September 2012*

Building Blocks for Scenario Options



...How we get there

Technical Track – Create Score Card for Scenarios *March – September 2012*

Refinement of Evaluation Framework

Building toward six desired outcomes



Vibrant communities



Equity



Economic prosperity



Transportation choices



Clean air & water



Climate leadership

Evaluation framework



Equity

- Access to affordable housing and travel options
- Access to opportunity
- Public health



Environment

- Greenhouse gas
- Air quality
- Access to parks and natural areas



Economy

- Access to industry and jobs
- Freight travel time costs
- Economic development opportunities

Costs and savings

- Implementation
- Household and business

MPAC, JPACT and the Metro Council endorsed the evaluation framework in June 2011

Sample score card

Outcomes	Current plans and policies	Scenario 1	Scenario 2
Equity			
Economy			
Environment			
Fiscal			

Next steps

Jan. - May

Share findings with local elected officials and stakeholders

April - May

Request JPACT, MPAC and Council support for Phase 2 activities

May

Develop more detailed schedule of policy discussions and engagement activities

June

MPAC, JPACT and Council kick-off policy options discussion

Discussion



- What are your community's ambitions and how can this work help you be successful?
- Will this approach provide you with the information needed to direct staff on scenario options to test?
- What additional information do you need?
- Do you support the overall approach?

**Local government engagements on Climate Smart Communities Scenarios Project
(does not include county coordinating committees), as of April 11, 2012**

There are two types of engagements described here:

- **Brief overviews:** Brief overviews (usually 10 minutes or less) of the Climate Smart Communities project, and usually as part of a discussion of a broader range of Metro issues
- **Longer discussions:** More involved discussions (at least 30 minutes, and longer in some cases, usually in work sessions) of the project's findings and recommendations and how local communities' goals and aspirations for growth can be addressed through this effort

Brief overviews

- West Linn (Collette), Jan. 23
- Hillsboro (Harrington), Feb. 7
- Milwaukie (Collette), Feb. 7
- Gladstone (Collette), Feb. 14
- Beaverton (Harrington), Feb. 28
- Wilsonville (Hosticka), March 5
- Forest Grove (Harrington), March 26
- Cornelius (Harrington), April 2

Longer discussions

- Durham (Hosticka), Jan. 24
- Tualatin (Hosticka), Feb. 13
- Tigard (Hosticka), Feb. 14
- Sherwood (Hosticka), Feb. 21
- Lake Oswego (Collette), Feb. 28
- Oregon City (Collette), March 21
- Beaverton and Tigard joint session (Harrington and Hosticka), April 10
- Cornelius (Harrington), April 16
- Hillsboro (Harrington), May 1
- Washington County (Harrington, Hosticka, Hughes), June 12

2012 Scenarios Project At-a-Glance Engagement Calendar
Last update: April 11, 2012

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Policymaker briefings w/ local leaders, key stakeholders	◆◆	◆ ◆◆ ◆◆ ◆◆	◆◆ ◆	◆◆ ◆◆	◆◆◆	◆			◆		◆	◆
Local government meetings to develop case studies					◆◆	◆◆	◆					
Four Score Card workshops (Health, EJ, Environment, Business)			◆		◆	◆◆						
Local government workshops on community aspirations						◆	◆◆ ◆◆ ◆◆ ◆◆	◆◆				
Envision Tomorrow Training					◆							
Newsfeeds				◆	◆◆	◆◆	◆◆	◆◆ ◆◆	◆◆	◆◆	◆◆ ◆◆	◆◆
Online public engagement through Opt In										◆	◆	
MPAC/ JPACT/Council work sessions and/or summit										◆		
Presentation Opportunities				Active Transp. Summit		Assoc Oregon Counties			League Oregon Cities	OPI, CLF, APA	Assoc Oregon Counties	Or Biz Summit, OMPOC Summit

NOTE: Project will work closely with SW Corridor Plan to incorporate results from SW Corridor community workshops this summer

◆=completed event
◆=planned event