

 **Metro | Agenda**

Meeting: Metro Policy Advisory Committee (MPAC)
Date: Wednesday, July 23, 2014
Time: 5 to 7:00 p.m.
Place: Metro, Council Chamber

5:00 PM	1.	<u>CALL TO ORDER</u>	Jody Carson, Chair
5:05 PM	2.	<u>SELF INTRODUCTIONS & COMMUNICATIONS</u>	Jody Carson, Chair
5:10 PM	3.	<u>CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS</u>	
5:15 PM (5 Min)	4.	<u>COUNCIL UPDATE</u>	Kathryn Harrington, Metro Council
5:20 PM (5 Min)	5.	<u>CONSENT AGENDA:</u> * • Consideration of June 25, 2014 Minutes	
5:25 PM (15 Min)	6.	* <u>REFERRAL OF METRO CHARTER LANGUAGE ON SINGLE FAMILY NEIGHBORHOODS – ACTION: RECOMMENDATION TO METRO COUNCIL</u>	Alison Kean, Metro
5:40 PM (45 min)	7.	* <u>GROWTH MANAGEMENT DECISION: RELEASE DRAFT 2014 URBAN GROWTH REPORT – INFORMATION / DISCUSSION</u>	John Williams, Metro Ted Reid, Metro
6:25 PM	8.	<u>MPAC MEMBER COMMUNICATION</u>	
7:00 PM	9.	<u>ADJOURN</u>	Jody Carson, Chair

* Material included in the packet.

** Material will be distributed in advance of the meeting.

Upcoming MPAC Meetings:

- Wednesday, August 13, 2014 MPAC Meeting
- Wednesday, September 10, 2014 MPAC Meeting
- Wednesday, October 8, 2014 MPAC Meeting

For agenda and schedule information, call Troy Rayburn at 503-797-1916, e-mail: troy.rayburn@oregonmetro.gov
To check on closure or cancellations during inclement weather please call 503-797-1700.

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2014 MPAC Tentative Agendas

As of 6/26/2014

Items in italics are tentative; **bold** denotes required items

<p>MPAC Meeting Wednesday, July 23, 2014</p> <ul style="list-style-type: none">• Growth Management Decision: Release Draft 2014 Urban Growth Report – <u>Information / Discussion</u> (45 Min, John Williams & Ted Reid)• Referral of Metro Charter Language on Single Family Neighborhoods – <u>ACTION: Recommendation to Metro Council</u> (15 min, Alison Kean)	<p>MPAC Meeting Wednesday, August 13, 2014</p> <ul style="list-style-type: none">• <i>Land Conservation and Development Commission strategic plan – <u>Information / Discussion</u> (30-45 Min, Carrie MacLaren, DLDC)</i>• Streetcar Evaluation Methods Project: Discuss preliminary results of FTA funded research project focused on developing a tool to better understand economic impacts of streetcar investments – <u>ACTION: Information/Discussion</u> (30-45 min, Elissa Gertler / Jamie Snook, Metro, & Catherine Ciarlo, CH2M Hill)
<p>MPAC Meeting Wednesday, Sept. 10, 2014</p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios Project: Discuss evaluation results and public review draft preferred approach– <u>Information / Discussion</u> (45-60 min, Kim Ellis)• Growth Management Decision: Results of regional Residential Preference Survey – <u>Information / Discussion</u> (30 Minutes, Ted Reid)• <i>Solid Waste Community Enhancement Program Changes – <u>Information / Discussion</u> (30 Minutes) (Primary Staff: Roy Brower)</i> <p>FYI: A comment period is planned from Sept. 18 to Oct. 20, 2014 on the Climate Smart Communities public review draft preferred approach.</p> <p>FYI: 2014 Rail~Volution, Minneapolis, MN, September 21 – 24</p>	<p>MPAC Meeting Wednesday, Oct. 8, 2014</p> <ul style="list-style-type: none">• Growth Management Decision: Discuss recommendation to Metro Council on whether Council should accept 2014 Urban Growth Report as basis for subsequent growth management decision – discussion and begin drafting recommendations (Ted Reid)• <i>2015 legislative session and possible shared regional agenda – Discussion</i>

<p>MPAC Meeting Wednesday, Oct. 22, 2014</p> <ul style="list-style-type: none"> • Climate Smart Communities Scenarios: Discussion of public comments, potential refinements and recommendation to Metro Council – <i>Information/discussion leading to joint meeting on Nov. 7th and recommendation on Dec. 10th</i> (30 min, Kim Ellis) • Growth Management Decision: Continued discussion and finalization of recommendation to Metro Council – Discussion – leading to recommendation on Nov. 12th(Ted Reid) 	<p>MPAC Meeting Wednesday, Nov. 12, 2014</p> <ul style="list-style-type: none"> • Climate Smart Communities Scenarios: Continued discussion of public comments, potential refinements and recommendation to Metro Council – <i>Discussion leading to Dec. 10th recommendation</i> (30 min, Kim Ellis) • Growth Management Decision: Recommendation to Metro Council on whether Council should accept 2014 Urban Growth Report as basis for subsequent growth management decision – Recommendation to Metro Council (Ted Reid) <p><u>HOLD: Nov. 7th Joint MPAC/JPACT meeting: CSC</u></p> <p>FYI: National League of Cities Congress of Cities and Exposition, Austin, TX, November 18 - 22</p>
<p>MPAC Meeting Wednesday, Dec. 10, 2014</p> <ul style="list-style-type: none"> • Climate Smart Communities Scenarios: Adoption of the preferred approach– Recommendation to Metro Council (45-60 min, Kim Ellis) 	

Parking Lot:

- Presentation on health & land use featuring local projects from around the region
- Affordable Housing opportunities, tools and strategies
- Greater Portland, Inc. Presentation on the Metropolitan Export Initiative
- MPAC composition
- “Unsettling Profiles” presentation by Coalition of Communities of Color
- Tour of the City of Wilsonville’s Villebois community



METRO POLICY ADVISORY COMMITTEE (MPAC)

June 25, 2014

Metro Regional Center, Council Chamber

MEMBERS PRESENT

Ruth Adkins
Edward Barnes
Jody Carson, *Chair*
Sam Chase
Tim Clark, *2nd Vice Chair*
Denny Doyle
Maxine Fitzpatrick
Lise Glancy
Jerry Hinton
Dick Jones
Keith Mays
Anne McEnerny-Ogle
Doug Neeley
Martha Schrader
Bob Stacey
Jerry Willey

AFFILIATION

PPS, Governing Body of School Districts
Clark County
City of West Linn, Clackamas Co. Other Cities
Metro Council
City of Wood Village
City of Beaverton, Washington Co. 2nd Largest City
Citizen, Multnomah Co. Citizen
Port of Portland
City of Gresham
Oak Lodge Water District
Sherwood Chamber of Commerce
City of Vancouver
City of Oregon City, Clackamas Co. 2nd Largest City
Clackamas County
Metro Council
City of Hillsboro, Washington Co. Largest City

MEMBERS EXCUSED

Peter Truax, *1st Vice Chair*
Kathryn Harrington

AFFILIATION

City of Forest Grove, Washington Co. Other Cities
Metro Council

ALTERNATES PRESENT

Gretchen Buehner
Carrie MacLaren
Jeff Gudman
Jackie Dingfelder

AFFILIATION

Washington Co. Other Cities
Oregon Dept. of Land Conservation & Development
City of Lake Oswego
City of Portland

Councilors and Staff:

Nick Christiansen, Councilor Shirley Craddick, Kim Ellis, Pietro Ferrari, Alison Kean, John Mermin, Lake McTighe, Juan Carlos Ocana-Chiu, Troy Rayburn, Jessica Rojas, Cassie Salinas, John Williams and Ina Zucker.

1. CALL TO ORDER AND DECLARATION OF A QUORUM

MPAC Chair Jody Carson called the meeting to order at 5:05 p.m. and declared a quorum at 6:00 p.m.

2. SELF INTRODUCTIONS & COMMUNICATIONS

All members introduced themselves. Chair Carson reminded members that the upcoming tour and presentation at Forest Grove's Grove Link replaces the regular MPAC meeting on July 9th. Members were asked to send RSVPs to Troy Rayburn at troy.rayburn@oregonmetro.gov and that each MPAC member is responsible for their own transportation. Chair Carson also informed members that the tour is being opened up to the other engagement committees, TPAC and JPACT to ensure participation.

3. CITIZEN COMMUNICATION ON NON-AGENDA ITEMS

No citizen communications on non-agenda items.

4. COUNCIL UPDATE

- Metro Councilor Sam Chase provided an update to members on the Climate Smart Communities Project in regards to the May 30th meeting results that took place at the World Forestry Center. He reminded members that MPAC and JPACT unanimously recommended a draft approach to evaluate over the summer and referenced the memo in the meeting packet that highlights the recommendation made by members. The Metro Council will consider the recommendations on June 19th as staff will work throughout the summer on the draft recommendations and provide more information in the fall. Councilor Chase thanked everyone who attended the April 11th and May 30th joint meetings as their investment of time and effort will help the project arrive at an informed recommendation that will keep the project moving forward to its deadlines.
- Councilor Chase provided an update to members on the Convention Center Hotel in regards to the Hotel development agreement discussion held on June 17th and expressed how pleased he was with the turnout in support of the hotel in boosting the local economy and encouraging tourism. Next steps include hotel predevelopment discussion with construction set for spring of 2015 with completion set in 2017.
- Councilor Chase informed members of the Let's Talk Trash series is bringing author Edward Humes of the Pulitzer Prize winning book "Garbology: Our Dirty Love Affair with Trash". There will be a panel discussion and book signing from 7 to 9 p.m. on Thursday July 10th and Portland State University, Hoffman Hall and also the City Club of Portland will host a forum on noon, Friday July 11th at the Sentinel Hotel. For more information please visit www.oregonmetro.gov/letstalktrash
- Councilor Chase informed members of the new Metro website created to make information more useful, attractive, easier to find and more friendly to mobile devices. Councilor Chase informed member that Metro is looking to host more online open houses and provide the public with more tools such as maps, surveys and videos to engage with Metro on important decisions and in effort to make the website more accessible to hearing and visually impaired. The new site provides greater access to foreign language speakers with some pages readable in up to 13 languages. The MPAC access will remain the same at oregonmetro.gov/mpac to find the committee roster and meeting information. Feedback is welcomed on how the site works and what can be improved. Please contact Troy Rayburn at troy.rayburn@oregonmetro.gov with your feedback.
- The last item Councilor Chase updated members was in regards to the Metro budget passed last week and offered comments on an amendment he has been involved with that addresses housing strategies and providing opportunities to promote work force housing. Council will be working to approve a work plan in July to create educational opportunities to help local jurisdictions learn more about tools that are available to them help community development and workforce housing.

5. CONSENT AGENDA

- Consideration of June 11, 2014 Minutes
- MTAC Nominations for MPAC Consideration

MOTION: Moved by Denny Doyle and seconded by Ruth Adkins.

ACTION: With all in favor, the motion passed.

6. INTRODUCTION TO METRO EQUITY STRATEGY PROGRAM

Councilor Chase, who is a council liaison to the Equity Strategy Program, offered introductory comments about the equity program and introduced Pietro Ferrari, Metro Equity Strategy Program Manager, Pam Treece of the Westside Economic Alliance and Carl Talton, Chair of the Portland Family of Funds that have all lead the work on the Equity Strategy Project. Councilor Chase reminded the committee that one of Metro's key roles is to convene and bring our cities together collectively in ways that are equitable and cited evidence from the Coalition for a Livable Future's Equity Atlas as an resource in demonstrating the need to address the disparities.

Pietro Ferrari provided members a slide show of the work that the Equity Strategy Program. Takeaways included:

- An overview of existing Metro equity initiatives that include the Community Enhancement Fee, Regional Transportation Plan, Metropolitan Transportation Improvement Program benefits, Burdens and Disparate Impact Analysis, Nature in Neighborhoods Grants program, Parks and Natural Areas levy, Title VI and Metro's Limited English Proficiency Plan and the Diversity Action Plan.
- The goal of the program is to create an organized equity strategy that is actionable, measurable and accountable for greater impact.
- Mr. Ferrari explained to members that in order to advance equity, considerations include promoting the universal value of the common good through justice, impartiality and fairness to achieve a greater impact beyond the basic needs and to understand the underlying root causes of outcome disparities while creating the opportunities to address such disparities.
- Efforts to advance the equity mission at Metro include the Equity Inventory Report (2011), Metro Council authorization of the Equity program and funding of the three year-effort (2012) and the Equity Work plan co-development with community input (2013).
- Next steps for the equity program include development of the equity lens in relation to each of the region's desired outcomes, identifying Metro's role and responsibility to the relative to the equity baseline. In 2015 Metro will define their equity strategy and adopt the Metro Equity Action Plan. In 2016 the equity strategy will be subjected to continuous implementation and evaluation.

Pam Treece of the Westside Economic Alliance in Washington county and Clackamas county reviewed the names of members on the Equity Advisory Committee and offered some of her

experience working with them and Scott Robinson, Carl Talton and the COO of Metro, Martha Bennett. Ms. Treece expressed gratitude for the experience and offered comments on the makeup of the committee; considering the diverse range of sectors and cultural backgrounds. Ms. Treece discussed the options of laying a foundation for a long term presence for such a committee with the flexibility to reassess the direction of their work.

Carl Talton, Chair of the Portland Family of Funds, who also serves as an ambassador to other cities in assisting with economic challenges and the incorporation of equity and diversity, addressed the committee. Mr. Talton offered comments on the directive of the advisory committee, sharing the working definition with members while providing personal background history of working with Metro on the CII Investment initiative. Mr. Talton discussed the areas of equity that the advisory group analyzed and offered feedback on the challenges the group faced in doing the work in relation to what Metro does and how equity fits.

Mr. Talton offered background on the collaborative development in conjunction with Portland State University and the Data Resource Center in the creation of a working definition and how it connects to the six desired regional outcomes as an invitation for action. Mr. Talton provided background research and evidence that contributed to the development of the indicators and details on a competitive community engagement process. The Equity Baseline Report will be available by October 2014 with adoption of the Equity Strategy scheduled for spring of 2015.

Member comments and questions included:

- Members asked questions in regards to imaging in the slides and the messaging portrayed.

Mr. Ferrari explained that the image chosen is about generating discussion.

- Members asked questions about how the Equity project engaged local governments in the region specifically in preparing the definition.

Mr. Ferrari replied that the Advisory group is working with communications to come up with a strategy for outreach and coming before MPAC was the first of more to come in aligning the Equity work with the constituents and generate a conversation about what can Metro do to help create change.

Ms. Treece also responded that the committee has discussed topics by geographic location as well to make sure that there is a coordinated effort by community.

- Members reiterated that implementation is done on the local level and could change based on their values and views.

Councilor Chase confirmed the outreach is done out-front to gain participation.

Mr. Talton commented in regards to the input that is being sought and reiterated the importance of getting feedback on what has been done so far.

Councilor Bob Stacey commented on his experience of working on current projects that cross boundaries and include a steering committee that is diverse. He offered his experience on the feedback received on displacement in the process and reiterated members concerns and offered feedback on how the equity project does already permeate what is being done.

Mr. Talton commented on how to facilitate this within the time frame while still looking at new opps to pursue.

- Members asked questions in regards to the six community-based organizations and how outreach is being conducted and how they were selected.

Mr. Ferrari offered background on the competitive process and discussed how to reach further to those not represented at the table. Sited capacity as well to build long term relations with Metro that is meaningful.

7. ACTIVE TRANSPORTATION PLAN (ATP)

Lake McTighe, Senior Transportation Planner for Metro presented the Active Transportation Plan (ATP) for MPAC's consideration for adoption. Ms. McTighe provided members with the recommendations that that were developed out of the stakeholder process, including the red line changes included in the final document. The importance of the ATP was overviewed in relation to the desired outcomes in the region and suggestions were offered on how to achieve the goals.

Recommendations included:

- Complete the plan network and make it a top priority. Ms. McTighe offered recommendations on how to make it safer for all and discussed various efforts across the country to make bike trips friendlier that have led to an increase in biking and alleviated congestion on roadways.
- Ensure access that is equitable for all; as incomes go up so does driving rates. Ms. McTighe cited studies that show that people of color walk and take transit more than whites in the region. She offered trends in taking transit and using active transportation as the only source of means.
- Increase funding and develop a pipeline of projects. Ms. McTighe offered investment levels and how the difference in funding lies.
- Better integrating walking, biking and transit while improving improve access to transit. Focus on short trips and making biking and walking the safest trip option while leading to less maintenance of roads and improvement of health and health care costs.
- Increase data collection as data is limited. Include multi modal data in planning project and program development and to help prioritize investments.
- Include bike and pedestrian projects in preservation projects whenever possible.

- Regional workgroup provided refinements to the ATP which was included in the public review draft.
- Comments specific to the ATP are included in the ATP public comment report. Staff responded to and if determined necessary, made changes to the plan.
- Comments regarding AT elements/projects in the RTP are included in the RTP public comment report.

Comments and questions included:

- Gretchen Buehner requested a clear footnote in the ATP on certain areas such as Tigard and other various slopes with a high grade. Ms. Buehner commented on the strategies that may work in some areas but could pose challenges to other geographic areas due to topography.

Ms. McTighe responded on the topography technology used and cited electric bikes as resource.

- Members commented in regards to equity and as aspects in the ATP could be challenging for some.
- Members expressed positive aspirations for students.
- Jeff Gudman asked questions as to when would the ATP updated again?

Ms. McTighe responded that there is no set timeline for updating the ATP. There are some data tracking that they will be doing.

- Mr. Gudman responded that the ATP plan at present level of funding is 150 year vision and will be updated within 5-15 years. Mr. Gudman expressed concern for a lack of focus.

Councilor Stacey responded that ATP plan is not a 150 year goal, but does appear to look that way when considering current funding levels, offered advice at looking expenditure priorities and the resources necessary to pursue the project.

MOTION: Moved by Mayor Denny Doyle and seconded by Keith Mays.

ACTION: With all in favor, Jeff Gudman apposed, the motion passed.

8. 2014 REGIONAL TRANSPORTATION PLAN (RTP) ORDINANCE NO. 14-1340

John Mermin, Senior Transportation Planner for Metro presented the Regional Transportation Plan (RTP) and introduced Ordinance No. 14-1340 for MPAC's final recommendation to the Metro Council. Mr. Mermin offered a recap of what has been completed in the RTP process, reminding members that the RTP is required for all metropolitan regions and serves as the long-range blueprint that guides regional and local planning. The RTP addresses several federal and state requirements, documents the needs and establishes the investment priorities for federal and state funding and is the region's key 2040 vision implementation tool.

Mr. Mermin informed members that the RTP must be updated every 4 years per federal law and the current plan will expire in 2040. The RTP will need to be completed by July 2014 so it can be

approved prior to the deadline and if not approved by Sept 2014, the plan will lapse and federal funding opportunities will be missed.

Mr. Mermin shared efforts completed by Metro staff such as the project solicitation packet that included updated financial assumptions, draft policy updates relating to biking, walking and safety, and some existing conditions work. He also informed members of the series of TPAC/MTAC workshops held through July to September to cover topics such as updating RTP revenue projections, updates to Metro's regional travel demand model, demographic/economic trends/ draft policy edits for Safety and Active transportation and travel trends with an overview of the RTP project solicitation process.

Next steps include:

Mr. Mermin is scheduled to present and seek final actions on the RTP ordinance from (June 18th) MTAC, (June 25th) MPAC, (June 27th) TPAC, (July 10th) JPACT, (July 17th) Metro Council and (July 24th) – Submit the RTP to United States Department of Transportation(USDOT) and Department of Land Conservation and Development (DLCD).

Comments and questions included:

Members commented that this was need for tweaking the RTP and if there are refinements in the future to please reach out to local jurisdictions.

Councilor Stacey commented on the timeliness of this matter and that the Metro Council will take action in July; offered some language and comments in regards to some of the potential implications in the RTP. Councilor Stacey expressed he could not support his staff in this recommendation. Councilor Stacey sorted through comments proposed policy language in regards to the safety plan that will be incorporated into the RTP, in regards to the safe crossings as 60% of serious crashes occur on the high speed areas of the region. He expressed concern for changes that soften the language that are specific to Washington County. He informed members that he will raise this concern again in the future as well.

Members reiterated Councilor Stacey's comments and expressed their concerns in relation to major arterials that connect with bus lines.

MOTION: Moved by Keith Mays and seconded by Mayor Doyle.

ACTION: With all in favor, the motion passed.

9. REFERRAL OF METRO CHARTER LANGUAGE ON SINGLE FAMILY NEIGHBORHOODS

Metro Councilor Bob Stacey offered introductory comments in regards to the Referral of the Metro Charter Language. Councilor Stacey explained that Metro is prohibited from requiring cities and counties to up zone properties under the regional framework that are protected in efforts that serve the growth needs of the region.

The 2040 plan addresses setting aside a certain percentage for single family neighborhoods, and the same amendment that created the charter also requires Metro to refer this option later to the voters. John Williams of Metro reiterated how the local jurisdictions implement the plans.

Alison Kean, attorney for Metro provided a short overview of an expert of the charter, specifically referring to Chapter 2, Section 5, Subsection 4B, Footnote 1B in the charter that requires Metro to resubmit this language before the voters in November 2014. Ms. Kean confirmed to members that Metro fully intends to comply with the charter.

Comments and questions included:

- Members offered comments in surprise that a footnote was in the charter and clarifying questions about the vote in November.

Ms. Kean responded that yes there will be another footnote as Metro will submit the language exactly as it is.

- Members asked questions on how the charter language will be messaged to the voters.

Ms. Kean responded that communications will have to put it in non legal terms.

Councilor Stacey offered more background has to how Metro will message and so the community can respond.

- Members expressed concern that revisiting this topic is a waste of community resources to revisit this again.

Chair Carson requested that Metro staff present resources to help policy makers engage citizens and address concerns.

- Ms. Buehner offered historical background with Metro's predecessor, Columbia Region Association of Governments (CRAG), which provided reason to include such language in the charter.

10. MEMBER COMMUNICATIONS:

Chair Carson reminded members to RSVP if they plan to attend the Grove Link tour hosted by Mayor Truax in Forest Grove.

Chair Carson adjourned the meeting at 6:43p.m.

Respectfully Submitted,

Jessica Rojas

Jessica Rojas

Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR JUNE 25, 2014

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
5.	Handout	6/23/14	Updated Work Plan	62514m-01
5.	Handout	6/11/14	61114 Minutes	62514m-02
5.	Memo	6/18/14	61814 MTAC Nominations	62514m-03
5.	Memo	6/18/14	Memo MTAC Approval of ATP	62514m-04
5.	Memo	6/13/14	MEMO 61314 MTAC Nomination	62514m-05
6.	PPT	N/A	PPT: Equity Strategy Program	62514m-07
7.	PPT	6/25/14	PPT: Regional Active Transportation Plan	62514m-08
8.	PPT	6/25/14	PPT: Regional Transportation Plan	62514m-09
5.	Memo	6/25/14	Memo 62514 Corrected MTAC Nomination	62514m-06
8.	Memo	6/25/14	Addendum to public comments received on 2014 RTP and Active Transportation Plan (ATP)	62514m-10
9.	Handout	N/A	Draft Resolution 14-4526	62514m-11
9.	Handout	N/A	Footnote on Metro Charter Language	62514m-12

MPAC Worksheet

Agenda Item Title: Referral of Metro Charter Language on Single Family Neighborhoods

Presenter(s): Alison Kean

Contact for this worksheet/presentation: Alison Kean

Date of MPAC Meeting: July 23, 2014

Purpose/Objective: Provide additional information on upcoming required referral.

Action Requested/Outcome: Discussion on upcoming recommendation to Council.

How does this issue affect local governments or citizens in the region? Metro works with local partners to bring regional and local vision to life across the region – targeting public and private sector investments that spur economic development while preserving the unique character of each community. Most of our region’s growth is planned to happen in downtowns, along main streets and in employment areas. In fact, Metro’s charter contains a provision that prevents Metro from requiring density increases in existing single-family neighborhoods. This prohibition was approved by voters in 2000 and is required to be voted on again at the November 2014 general election. A yes vote on this measure would retain the prohibition for another 15 years. If the measure passes, cities and counties would still be free to determine the right mix of zoning that fits local community needs and visions.

What has changed since MPAC last considered this issue/item? Metro Council Resolution and Exhibits have been drafted.

What packet material do you plan to include? Metro Council Resolution 14-4545

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF SUBMITTING TO THE)	RESOLUTION NO. 14-4545
VOTERS ON NOVEMBER 4, 2014, THE)	
QUESTION OF WHETHER OR NOT TO RETAIN)	Introduced by Chief Operating Officer Martha
METRO CHARTER PROVISION CHAPTER II,)	Bennett in concurrence with Council
SECTION 5 (4)(b))	President Tom Hughes
)	

WHEREAS, on September 7th, 2000 the Metro Council passed Resolution No. 00-2988 (“For the Purpose of Submitting to the Voters on May 21, 2002, an Amendment to the Metro Charter Titled ‘Prohibits, Repeals Metro Housing Density Requirements; requires Notice; and Amends Charter’”); and on February 14, 2002 the Metro Council passed Resolution No. 02-3163 (“For the Purpose of Submitting to the Voters an Amendment to the Metro Charter Requiring Protection of Existing Single Family Neighborhoods, Cost Impact Statements Regarding Urban Growth Boundary Amendments, and Notice to Affected Neighborhoods”); submitting to the voters of the region at the May 21, 2002 primary election a ballot measure amending the Metro Charter, Chapter II, Section 5 subsection (4)(b) of the Metro Charter, which amendment was adopted by the region’s voters in 2002;

WHEREAS, the amended Charter provision includes a footnote sunsetting the provision on January 1, 2016 unless affirmatively retained by public vote at the general election in 2014; and

WHEREAS, pursuant to this Charter provision requirement and Metro Code Chapter 9.02, the Metro Council must submit the measure to the voters in the November 2014 election; now therefore

BE IT RESOLVED by the Metro Council that:

1. The Metro Council hereby submits to the qualified voters of the Metro district the question of whether or not to retain the Metro Charter provision set forth in Charter Chapter II, Section 5, subsection (4) (b) as set forth in Exhibit “A”; and
2. Directing that the measure, be placed on the ballot for the General Election to be held on November 4, 2014; and
3. Directing that this measure, the Ballot Title as set forth in Exhibit B, and the Explanatory Statement as set forth in Exhibit C, be submitted to the Multnomah County Elections Officer and the Oregon Secretary of State for inclusion in the region’s voters’ pamphlets published for the election in a timely manner as required by law.

ADOPTED by the Metro Council this 14th day of August 2014.

Tom Hughes, Council President

Approved as to Form:

Alison R. Kean, Metro Attorney

Metro Charter Chapter II, Section 5, subsection (4)(b)

(4) Protection of Livability of Existing Neighborhoods.

...

(b) Density Increase Prohibited. Neither the Regional Framework Plan nor any Metro ordinance adopted to implement the plan shall require an increase in the density of single-family neighborhoods within the existing urban growth boundary identified in the plan solely as Inner or Outer Neighborhoods.¹

1 (a) Subsection 4(b) of Section 5 of the Metro Charter is repealed on June 30, 2031 unless at the general election held in 2030, a majority of the electors voting on the question of whether or not to retain Subsection 4(b) of Section 5 of the Metro Charter as part of the Metro Charter vote to retain the subsection. If the electors vote to retain the subsection, Subsection 4(b) of Section 5 of the Metro Charter of this measure shall remain in effect. If a majority of the electors do not vote to retain Subsection 4(b) of Section 5 of the Metro Charter, then that subsection is repealed on June 30, 2031.

(b) By appropriate action of the Metro Council, the question described in subsection (a) of this section shall be submitted to the people for their decision at the general election held in 2030.

(c) This section is repealed on January 1, 2032.

BALLOT TITLE
FOR METRO BALLOT MEASURE

Caption (10 words): Retain prohibition on Metro-required single-family neighborhood density increases.

Question (20 words): Shall Metro Charter Provision Prohibiting Metro From Requiring Density Increases in Single-Family Neighborhoods Be Retained, with 16-Year Sunset?

Summary (74 words): Retains provision in Metro Charter prohibiting Metro from requiring local governments to increase density in identified existing single-family neighborhoods. Requires revote in 2030 to remain effective. This prohibition was approved by voters in 2002 and is required by Metro Charter to be voted on again at the November 2014 general election. A “yes” vote on this measure would retain the prohibition for 16 years; a “no” vote repeals the prohibition on June 30, 2015.

**EXPLANATORY STATEMENT
FOR METRO BALLOT MEASURE**

(293 words)

This measure asks voters the question of whether to retain a provision in the Metro Charter at Chapter II, Section 5, subsection (4)(b). This Charter provision was originally approved by the voters in 2002, and the provision includes a clause requiring that it be resubmitted to the electors for a vote at the November 2014 general election.

Metro performs required land-use planning activities under Oregon's land-use planning laws. Oregon law authorizes Metro to adopt "functional plans" addressing matters that affect the development of greater metropolitan Portland. Metro may recommend or require changes to local governments' comprehensive land use plans and to ordinances that implement those plans, unless otherwise limited by state law or its own charter, as in the limitation being voted upon here.

This limitation is contained in Metro Charter Chapter II, Section 5 (4) entitled "Protection of Livability of Existing Neighborhoods," in subsection (b), entitled "Density Increase Prohibited." The provision prohibits Metro from requiring, by the Regional Framework Plan or any ordinance implementing the plan, an increase in the density of single-family neighborhoods within the existing urban growth boundary identified in the plan solely as inner or outer neighborhoods. The provision does not affect the ability of local governments to determine for themselves the density mixes in those areas.

The original provision required that it be re-submitted to the voters in the fall general election in 2014. The provision being voted on at the November 2014 election contains a similar sunset and revote clause. If a majority of the electors vote to retain the provision, it shall remain in effect until the question is again put to the voters in 2030. If a majority of voters do not vote to retain the provision, it will be repealed on June 30, 2015.

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 14-4545, FOR THE PURPOSE OF SUBMITTING TO THE VOTERS ON NOVEMBER 4, 2014, THE QUESTION OF WHETHER OR NOT TO RETAIN METRO CHARTER PROVISION CHAPTER II, SECTION 5 (4)(B)

Date: August 14, 2014

Prepared by: Alison R. Kean,
Metro Attorney
Ext. 1511

BACKGROUND

The Metro Charter was amended in 2002 to add the following provision to Charter Chapter II Section 5, subsection (4) (b):

(4) Protection of Livability of Existing Neighborhoods.

...

(b) Density Increase Prohibited. Neither the Regional Framework Plan nor any Metro ordinance adopted to implement the plan shall require an increase in the density of single-family neighborhoods within the existing urban growth boundary identified in the plan solely as Inner or Outer Neighborhoods.¹

- 1
- (a) Subsection 4(b) of Section 5 of the Metro Charter is repealed on June 30, 2015 unless at the general election held in 2014, a majority of the electors voting on the question of whether or not to retain Subsection 4(b) of Section 5 of the Metro Charter as part of the Metro Charter vote to retain the subsection. If the electors vote to retain the subsection, Subsection 4(b) of Section 5 of the Metro Charter of this measure shall remain in effect. If a majority of the electors do not vote to retain Subsection 4(b) of Section 5 of the Metro Charter, then that subsection is repealed on June 30, 2015.
 - (b) By appropriate action of the Metro Council, the question described in subsection (a) of this section shall be submitted to the people for their decision at the general election held in 2014.
 - (c) This section is repealed on January 1, 2016.

The Metro Charter requires the Metro Council to submit to the Metro area voters at the November 2014 general election the question of whether or not to retain this provision of the Metro Charter. If the voters vote yes, the prohibition is retained until a required vote again in 15 years; if they vote no, the prohibition is repealed.

ANALYSIS/INFORMATION

1. **Known Opposition** None known.

2. **Legal Antecedents**

Metro Council Resolutions 00-2988; 02-3163
Metro Charter Chapter II, Section 5, subsection (4) (b)
Metro Code Section 9.02.070

- 3. Anticipated Effects** If the voters vote yes at the November 2014 general election, the charter provision is retained until 2031, unless the voters again vote in 2030 to retain the provision. If the voters vote no at the November 2014 general election, the provision is repealed on June 30, 2015.
- 4. Budget Impacts** There is a no additional cost to implementing the provision if enacted as it is already part of the Metro Charter; the general election cost is the only cost.

RECOMMENDED ACTION

Adoption of Resolution 14-4545 by the Metro Council.

MPAC Worksheet

Agenda Item Title 2015 urban growth management decision: introduction to the draft 2014 urban growth report

Presenter: Ted Reid, Senior Regional Planner, Metro
John Williams, Deputy Director for Community Development, Metro

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 x
Update
Discussion x
Action

MPAC Target Meeting Date: July 23, 2014

Amount of time needed for:

Presentation 40
Discussion 20

Purpose/Objective:

Provide MPAC with the draft 2014 urban growth report (UGR) and describe how the draft report fits into the regional urban growth management process.

Action Requested/Outcome:

No action requested at this time.

Outcome: MPAC understands:

- The purpose of the draft 2014 UGR
- What's included in the draft report
- The technical engagement that has occurred to create the draft report
- The timeline for the Metro Council's regional urban growth management decision
- MPAC's future opportunities for discussion of the draft report, leading to a formal recommendation to the Metro Council

Background and context:

Metro is required by state law to ensure that the urban growth boundary (UGB) has enough space for jobs and housing for the next 20 years. The timeline for the Metro Council's regional urban growth management decisions are also laid out in state law. To inform the Metro Council's regional urban growth management decision, Metro staff produces an urban growth report that includes a population and employment forecast, an inventory of buildable land already inside the UGB, and information about development trends, challenges, and opportunities.

Under state law, the council must accept a final UGR by the end of 2014. MPAC will have a role in making recommendations to the Metro Council on whether the 2014 UGR provides a reasonable basis for moving forward with the next phase, a regional urban growth management decision.

MPAC will also have a formal role in providing the council with a recommendation on its growth management decision, which the council intends to make before the end of 2015. In its growth management decision, the Council will decide for how much household and job growth to plan. Depending on that amount of planned growth, the growth management decision may also consist of:

- Policies or investments that lead to more efficient use of land already inside the UGB
- UGB expansions to provide additional growth capacity
- Conditions placed on UGB expansions to describe expectations for the areas
- A decision that there is adequate space for growth already inside the UGB (the next UGR will be considered by Council in 2020).

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

MPAC discussed the growth management topic on several occasions this year. On January 8, 2014, the topic was recent economic conditions and how they influence the outlook for the forecast. On February 12, 2014, staff described the accuracy of past regional forecasts. On April 23, staff and Dr. Tom Potiowsky of Portland State University described the draft 2015-2035 forecast and its peer review process. The Metro Council has also discussed these topics at work sessions.

On July 16, Metro staff released a draft 2014 UGR. The Metro Council will have an introductory discussion of the draft report on July 22.

What packet material do you plan to include?

Draft 2014 UGR
2-page summary of draft 2014 UGR
Urban growth management decision timeline 2013-2015

What is the schedule for future consideration of item?

July 2014

Draft 2014 Urban Growth Report, which will incorporate the range forecast

Summer 2014

Results of residential preference survey

Fall 2014

MPAC formal recommendation to Council:

Does the Urban Growth Report provide the Council with a reasonable basis for the growth management decision that it will make in 2015?

Policy considerations (for MPAC and Council):

- Population and employment growth trends and possible implications for future
- Dealing with uncertainty through adaptive growth management
- Possibilities for urban reserve concept plans

December 2014

Council consideration of final 2014 Urban Growth Report as basis for its 2015 growth management decision (using range forecast)

Summer 2015

MPAC discussion of Council's potential growth management options and risks and opportunities of planning for different points in the range forecast

September 2015

Release of Chief Operating Officer recommendation on growth management decision, including point in range forecast for which to plan.

Fall 2015

MPAC formal recommendation to Council:

- Using the approved 2014 Urban Growth Report as a basis, how much housing and employment growth should the Council plan on inside the UGB?
- What measures should the Council adopt to address growth capacity needs (if any)?

Policy considerations (for MPAC and Council):

- What are the risks and opportunities of planning for higher or lower population and employment growth rates?
- How can the region best prepare for future housing needs and employment growth?

By December 2015

Council makes growth management decision, including choosing point in range forecast for which to plan.

Metro guide

2015 Growth Management Decision

HOW WE PLAN FOR THE FUTURE

As the Portland metropolitan region grows, our shared values guide policy and investment choices to accommodate growth and change, while ensuring our unique quality of life is maintained for generations to come. This means striking a balance between preservation of the farms and forests that surround the Portland region, supporting the revitalization of existing downtowns, main streets and employment areas, and ensuring there's land available for new development on the edge of the region when needed.

Urban growth report

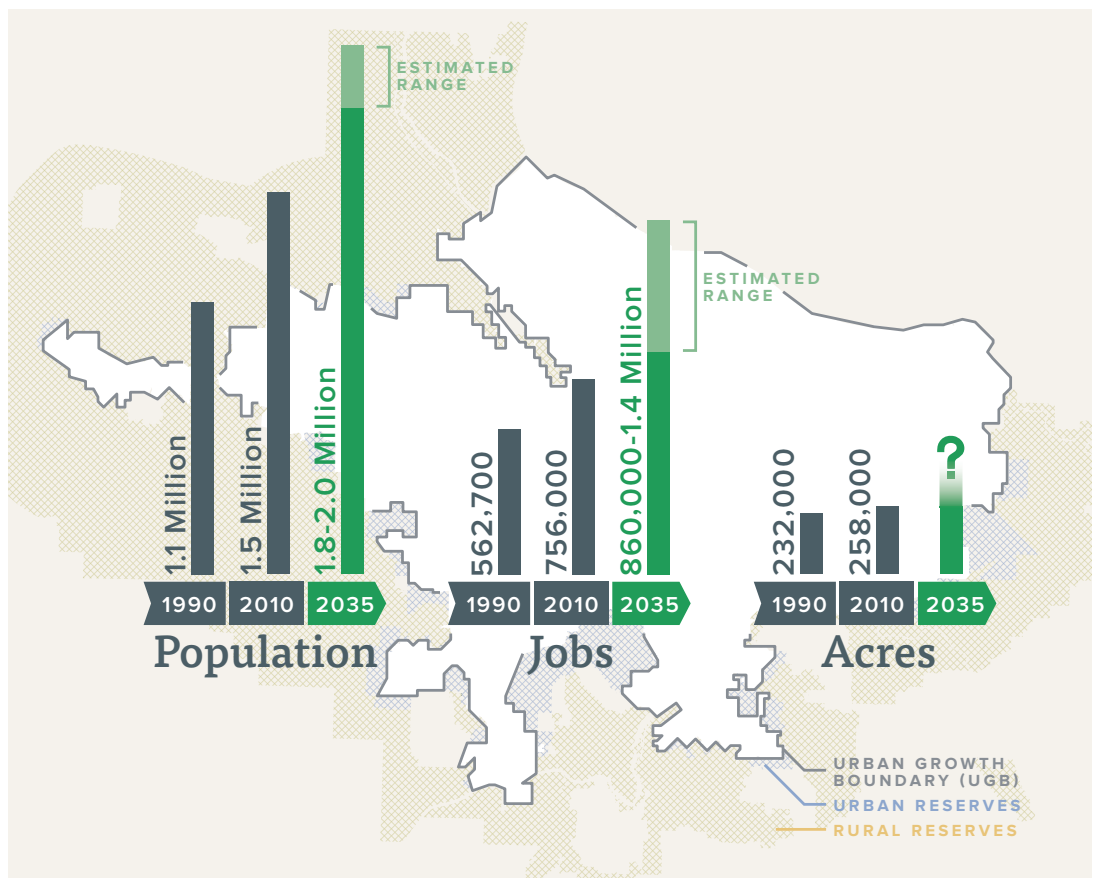
Oregon law requires that every five years, the Metro Council evaluate the capacity of the region's urban growth boundary to accommodate a 20-year forecast of housing needs and employment growth. The results of that evaluation are provided in the urban growth report (UGR). While complying with the requirements of state law, the UGR serves as more than just an accounting of available acres inside the urban growth boundary by drawing our attention to the region's successes and its challenges.

Working together

The urban growth report helps inform Metro, local jurisdictions, and other public and private sector partners as they consider new policies, investments, and actions to maintain the region's quality of life and promote prosperity. But the work does not end with the council's decision. Implementation will require coordination of local, regional and state policy and investment actions. In its role as convener for regional decision-making, Metro is committed to building and maintaining partnerships and alignments among the different levels of government and between the public and private sectors.

Past growth-future forecast

Population and job growth within the Metro urban growth boundary 1990-2035



WHAT THE NUMBERS SHOW

Population and employment forecasts in the urban growth report are expressed as ranges based on probability. Mid-point in the forecast range is Metro's best estimate of what future growth may be. It is less probable that growth will occur at the high or low ends of the range forecast.

This analysis looks at long-term capacity needs for:

- single-family and multifamily housing
- general industrial employment uses
- large industrial sites
- commercial employment uses.

If policymakers choose to plan for the high end of the growth forecast range, there is a need for additional capacity for jobs and housing. But, at mid-point in the range and below, there is no need for additional growth capacity.

Whether you trace your Oregon roots five generations or moved here last week, you have your own reasons for loving this place – and Metro wants to keep it that way. Help shape the future of the greater Portland region and discover tools, services and places that make life better today.

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ONLINE PANEL

To learn more about the growth management decision and the urban growth report, visit oregonmetro.gov/growth



LAND READINESS OR LAND SUPPLY?

For better or worse, our state land use planning system asks Metro to focus on counting acres of land to determine the region's 20-year growth capacity. But over the years, it's become clear that land supply alone isn't the cause or the solution for all of the region's challenges. Working together, we must make the most of the land we already have inside the urban growth boundary to ensure that those lands are available to maintain, improve, and create the kinds of communities that we all want – today and for generations to come.

Working together, we can:

- ensure that communities have governance structures in place that can respond to growth and change
- provide the types of infrastructure and services that signal to the development community a site or area is primed for investment
- make the strategic investments needed to clean up and reuse neglected lands.

HOW WE ACCOMMODATE GROWTH

URBAN AND RURAL RESERVES Areas outside the current UGB designated by Metro and the three counties through a collaborative process. Urban reserves are the best places for future growth if urban growth expansions are needed over the next 50 years. Rural reserves are lands that won't be urbanized for the next 50 years.

INFILL Development on a tax lot where the original structure has been left intact and the lot is considered developed.

REDEVELOPMENT Development on a tax lot where the original structure has been demolished and there is a net increase in housing units.

VACANT LAND Land inside the UGB that's not developed.

The urban growth report compares a buildable land inventory that has been reviewed by local jurisdiction staff with a peer-reviewed population and employment growth forecast.



Urban growth management decision TIMELINE

2013
Phase 1

**TECHNICAL
ENGAGEMENT**

Jan–Dec 2013
Develop 20-year growth capacity estimates

2014
Phase 2

**URBAN GROWTH
REPORT**

July 2014
Draft urban growth report released

Dec 2014
Metro Council approves UGR

2015
Phase 3

**GROWTH
MANAGEMENT
DECISION**

Sept 2015
COO recommendation to Metro Council

Dec 2015
Council decision to adopt measures to meet housing and employment needs

July / 2014

2014 URBAN GROWTH REPORT

Draft

*Investing
in our
communities
2015 – 2035*



Metro | *Making a great place*

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.

So, hello. We're Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

Metro Council President

Tom Hughes

Metro Councilors

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

Auditor

Suzanne Flynn



Metro

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Draft

2014 URBAN GROWTH REPORT

Investing in our communities
2015 – 2035

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Introduction

As the Portland metropolitan region grows, our shared values guide policy and investment choices to accommodate growth and change, while ensuring our unique quality of life is maintained for generations to come.

Metro, local jurisdictions and many other partners work together to guide development in the region. This means striking a balance between preservation of the farms and forests that surround the Portland region, supporting the revitalization of existing downtowns, main streets and employment areas, and ensuring there's land available for new development on the edge of the region when needed.

Oregon law requires that every five years, the Metro Council evaluate the capacity of the region's urban growth boundary to accommodate a 20-year forecast of housing needs and employment growth. The results of that evaluation are provided in the urban growth report.

While complying with the requirements of state law, the urban growth report serves as more than just an accounting of available acres inside the urban growth boundary. It plays a vital role in the implementation of the region's 50-year plan that calls for the efficient use of land, redevelopment before expansion, and the preservation of the region's resources for future generations.

ACHIEVING DESIRED OUTCOMES

To guide its decision-making, the Metro Council, on the advice of the Metro Policy Advisory Committee (MPAC), adopted six desired outcomes, characteristics of a successful region:

- People live, work and play in vibrant communities where their everyday needs are easily accessible.
 - Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
 - People have safe and reliable transportation choices that enhance their quality of life.
 - The region is a leader in minimizing contributions to global warming.
 - Current and future generations enjoy clean air, clean water and healthy ecosystems.
 - The benefits and burdens of growth and change are distributed equitably.
-

WORKING TOGETHER

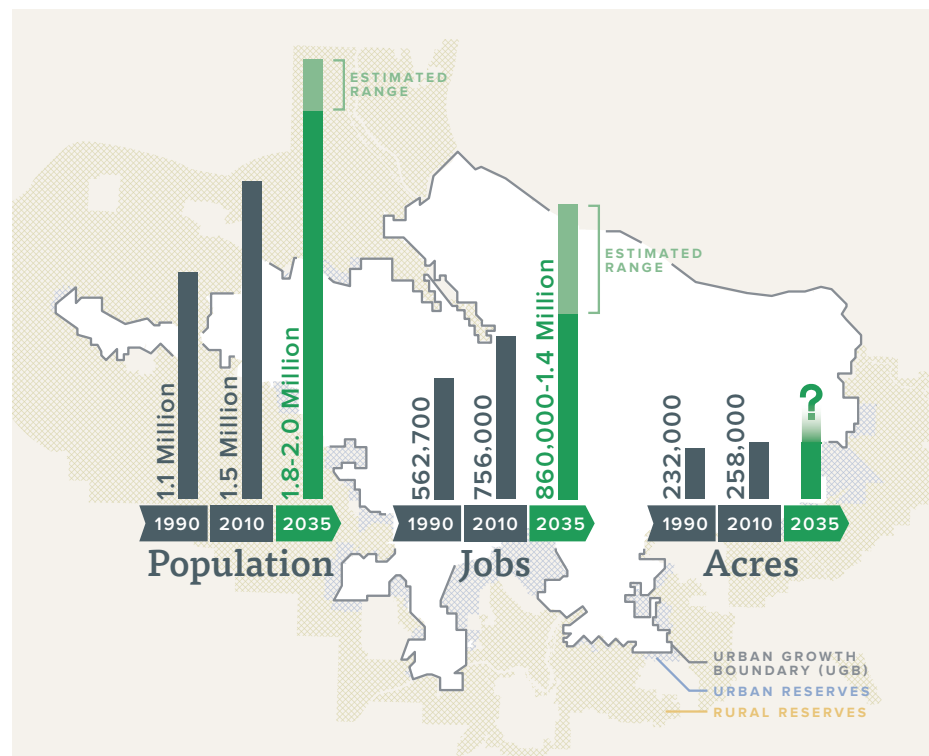
The population and employment range forecasts in the urban growth report help inform Metro, local jurisdictions, and other public and private sector partners as they consider new policies, investments, and actions to maintain the region's quality of life and promote prosperity.

The urban growth report, once accepted in its final form by the Metro Council in December 2014, will serve as the basis for the council's urban growth management decision, which will be made by the end of 2015.

But the work does not end with the council's decision. Implementation will require coordination of local, regional and state policy and investment actions. In its role as convener for regional decision-making, Metro is committed to building and maintaining partnerships and alignments among the different levels of government and between the public and private sectors.

Past growth-future forecast

Population and job growth within the Metro urban growth boundary 1990-2035



SUCCESSSES AND CHALLENGES

The region's longstanding commitment to protecting farms and forests, investing in existing communities, and supporting businesses that export goods and services is paying off in economic growth. From 2001 to 2012, the Portland region ranked third among all U.S. metropolitan areas for productivity growth, outpacing the Research Triangle in North Carolina, the Silicon Valley in California, and several energy producing regions in Texas.ⁱ Likewise, the region's walkable downtowns, natural landscapes, and renowned restaurants, breweries, and vineyards are well known around the world. In 2013, visitors to Clackamas, Multnomah and Washington counties spent \$4.3 billion dollars, supporting 30,100 jobs in the region.ⁱⁱ These successes are no accident – they demonstrate that prosperity, livability and intentional urban growth management are compatible.

However, Metro and its partners also have challenges to face when it comes to planning for additional population and employment growth. These include making sure that workforce housing is available in locations with access to opportunities, providing more family-friendly housing choices close to downtowns and main streets, delivering high quality transportation options that help people get where they need to go, ensuring freight mobility, and protecting and enhancing the environment.



Outcomes-based approach to growth management

A core purpose of the urban growth report is to determine whether the current urban growth boundary (UGB) has enough space for future housing and employment growth. Considerable care and technical engagement have gone into the assessment of recent development trends, growth capacity, and the population and employment forecasts provided in this report. However, this kind of analysis is necessarily part art and part science. State laws direct the region to determine what share of growth can “reasonably” be accommodated inside the existing UGB before expanding it but ultimately, how the region defines “reasonable” will be a reflection of regional and community values.

HOW WE ACCOMMODATE GROWTH

URBAN AND RURAL RESERVES Areas outside the current UGB designated by Metro and the three counties through a collaborative process. Urban reserves are the best places for future growth if urban growth expansions are needed over the next 50 years. Rural reserves are lands that won't be urbanized for the next 50 years.

INFILL Development on a tax lot where the original structure has been left intact and the lot is considered developed.

REDEVELOPMENT Development on a tax lot where the original structure has been demolished and there is a net increase in housing units.

VACANT LAND Land inside the UGB that's not developed.

RESIDENTIAL BUILDABLE LAND INVENTORY

If the region's historic annual housing production records (high and low from 1960 to 2012) are any indication, how long might the residential buildable land inventory last?

SINGLE FAMILY 10 to 52 years

MULTIFAMILY 28 to 354 years

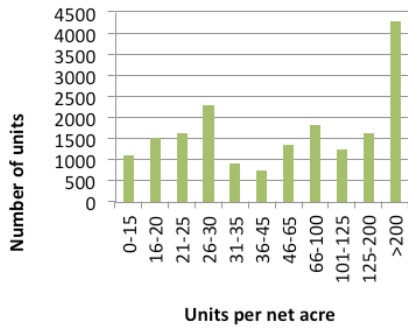


FIGURE 1 Net new multifamily units by density inside UGB (built 2007-2012)

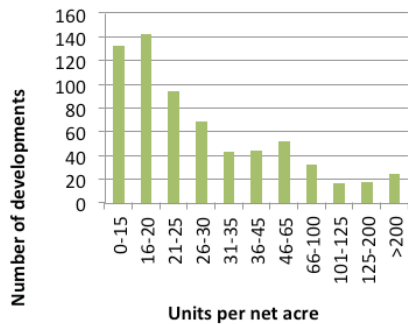
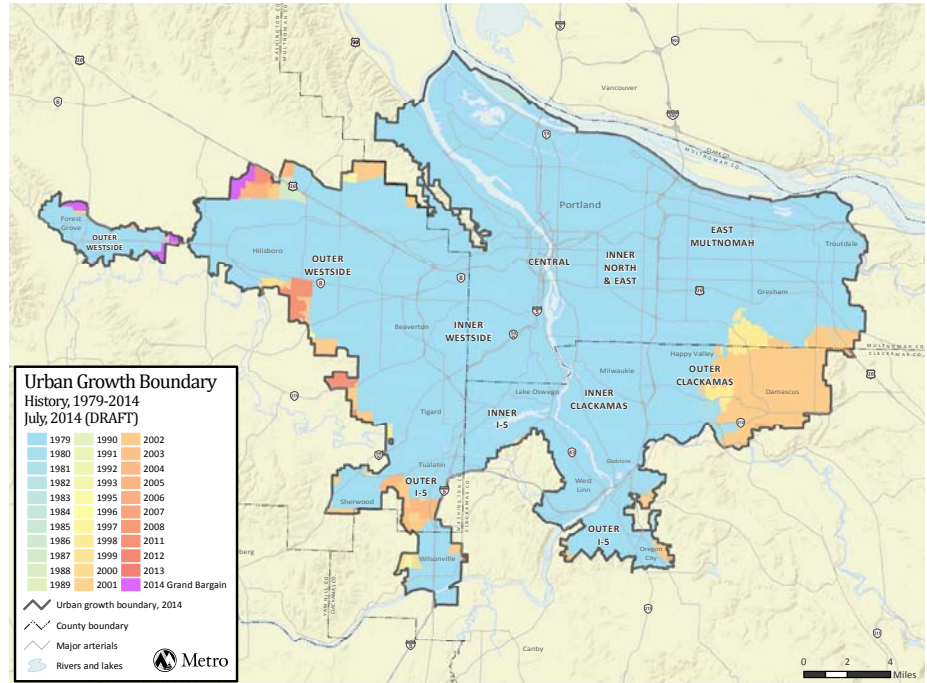


FIGURE 2 Net new multifamily developments by density inside UGB (built 2007-2012)



MAP 1 Metro UGB expansions over time (1979 - 2014)

How has the region been growing?

The Portland region's original urban growth boundary was adopted in 1979. As depicted in Map 1, the UGB has been expanded by about 31,400 acres. During the same time period, the population inside the UGB has increased by over half a million people. This represents a 61 percent increase in population inside an urban growth boundary that has expanded by 14 percent.

RESIDENTIAL DEVELOPMENT TRENDS

From 1998 to 2012, 94 percent of the new residential units were built inside the original 1979 boundary. During these 14 years, post-1979 UGB expansion areas produced about 6,500 housing units compared to the approximately 105,000 units produced in the original 1979 UGB. With a couple of notable exceptions, UGB expansion areas have been slow to develop because of challenges with governance, planning, voter-approved annexation, infrastructure financing, service provision, and land assembly. Development of Wilsonville's Villebois and Hillsboro's Witch Hazel communities demonstrates that new urban areas can be successful with the right combination of factors such as governance, infrastructure finance, willing property owners, and market demand. There are also challenges in our existing urban areas. Infill and redevelopment have been focused in a few communities while many downtowns and main streets have been slow to develop.

The 2040 Growth Concept, the Portland region's 50-year plan for growth, calls for focusing growth in existing urban centers and transportation corridors, and making targeted additions to the urban growth boundary when needed. To achieve this regional vision, redevelopment and infill are necessary. During the six years from 2007 through 2012, which included the Great Recession, the region saw levels of redevelopment and infill that exceeded past rates. During

this time period, 58 percent of the net new residential units built inside the UGB were through redevelopment (46 percent) or infill (12 percent) and 42 percent were on vacant land. There are a variety of views on whether the recession explains this uptick in redevelopment and infill or whether this is an indication of people wanting to live in existing urban areas with easy access to services and amenities. What is clear is that development challenges exist in both urban areas and past expansion areas. In some cases, however, market demand in existing urban areas appears to have overcome those challenges.

During this same six years, new residential development was evenly split between multifamily and single-family units with a total of 12,398 single-family and 12,133 multifamily residences built. The average density of new single-family development was 7.6 units per acre (5,766 square foot average lot size) and multifamily development was 41.8 units per acre. The highest density multifamily developments also tended to be the largest, so while there were many smaller developments, the statistics are dominated by the large high-density developments. This pattern is clear in Figures 1 and 2 (p. 8), which depict the number of units and developments built per net acre, indicating levels of density.

EMPLOYMENT TRENDS

As in most regions, many people in the Portland region lost their jobs in the Great Recession. With the ensuing recovery, total employment in the region was essentially unchanged when comparing 2006 and 2012. However, the recession did lead to some major changes across industries. Private education recorded the highest growth rate at 25.4 percent from 2006 to 2012, while health and social assistance employers saw the largest net gain in employment with the addition of just over 14,000 jobs during the same period. Construction saw the largest decline, with a loss of around 9,600 jobs, or 20.2 percent of total jobs, in the industry as of 2006. The loss of construction jobs reflects the housing crash that brought residential construction nearly to a halt for several years. Appendix 8 describes the region’s employment trends in greater detail.

Aggregating to the sector level, industrial and retail employment declined from 2006 to 2012 while service and government employment increased (Table 1).

Sector	2006 Employment	2012 Employment	Net Change	Percent Change	Avg. Annual Growth Rate
Industrial	244,951	218,311	-26,640	-10.9%	-1.9%
Retail	86,921	84,475	-2,446	-2.8%	-0.5%
Service	396,470	419,516	23,046	5.8%	0.9%
Government	103,736	108,582	4,846	4.7%	0.8%

Table 1 Employment in the three-county area by aggregated sector 2006-2012 (Clackamas, Multnomah, Washington) | Source Quarterly Census of Employment and Wages

Policy considerations

HEALTHY DEBATE AND INFORMED DECISION-MAKING

Though this report strives for completeness, balance, and accuracy, there is always room for debate. At the end of 2014, the Metro Council will be asked to decide if the report provides a reasonable basis for moving forward and making a growth management decision in 2015. Throughout this document, policy questions and topics that have been raised by Metro Council and involved stakeholders are called out for further discussion by policymakers and members of the community.

LAND READINESS OR LAND SUPPLY?

For better or worse, our state land use planning system asks Metro to focus on counting acres of land to determine the region’s 20-year growth capacity. Over the years, it’s become clear that land supply alone isn’t the cause or the solution for all of the region’s challenges. Working together, we must make the most of the land we already have inside the urban growth boundary to ensure that those lands are available to maintain, improve, and create the kinds of communities that we all want – today and for generations to come.

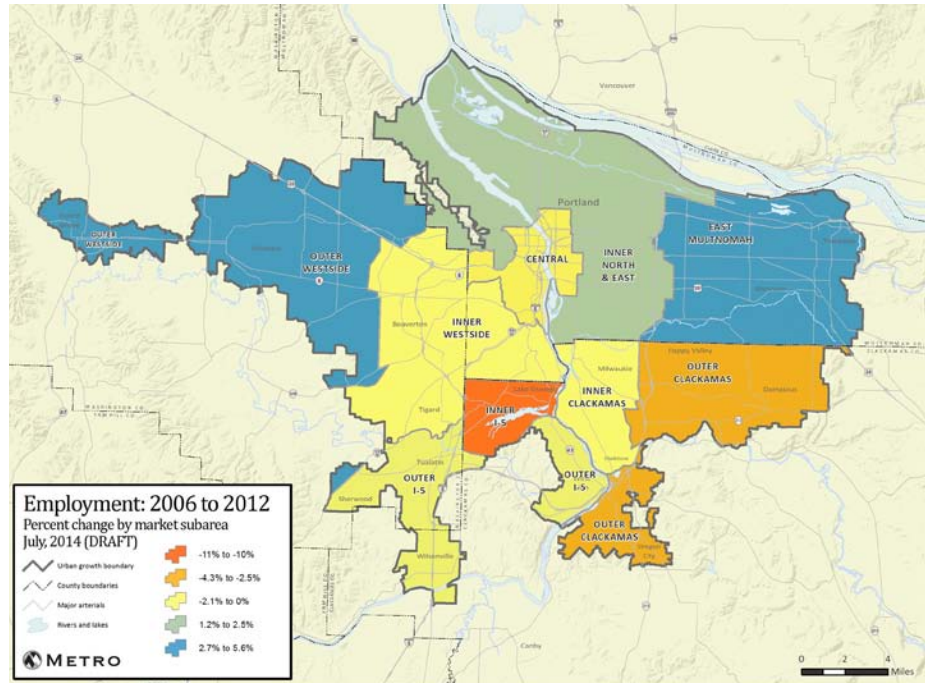
Working together, we can:

- ensure that communities have governance structures in place that can respond to growth and change
- provide the types of infrastructure and services that signal to the development community a site or area is primed for investment
- make the strategic investments needed to clean up and reuse neglected lands.

Policy considerations

CHANGES IN OUR COMMUNITIES

People around the region are concerned about new development in their communities. The concern exists not just in existing urban areas experiencing a new wave of development, but also in areas added to the urban growth boundary. With population growth expected to continue, change is inevitable. What policies and investments are needed to ensure that change is for the better?



Map 2 Employment gains and losses in Metro UGB 2006 - 2012

From 2006 to 2012, there was also a change in where jobs were located in the three-county area (Map 2). While about 25 percent of all jobs could still be found in the central part of the region, the subarea experienced a loss of about 2,300 jobs, or 1.2 percent. The inner I-5 area saw a decline in employment of roughly 2,200 jobs, or 11.0 percent of 2006 employment. This area was home to many firms involved in real estate and finance, industries that were hard hit by the housing collapse and recession. Many businesses in the area, like mortgage and title companies, contracted or closed during this time period. For example, the Kruse Way area in Lake Oswego had an office vacancy rate of 22.4 percent in 2012. In the southeastern part of the region, the outer Clackamas and outer I-5 subareas together lost about 3,400 jobs or 3.2 percent. In contrast, the outer Westside experienced the greatest increase in employment, gaining about 5,800 jobs, an increase of 5.6 percent. The East Multnomah subarea also gained jobs, increasing employment by 1,800 or 2.7 percent.

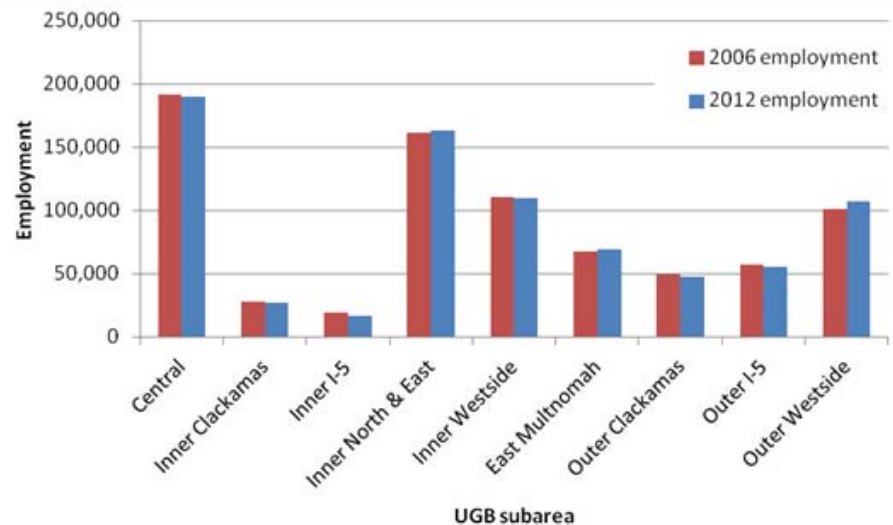


Figure 3 Total employment by subarea for 2006 and 2012



Case study

VILLEBOIS, WILSONVILLE

The Villebois community is one of only a few urban growth boundary expansion areas that has been developed. The roughly 500-acre area was brought into the UGB in 2000. With plans for about 2,600 households, the area quickly rebounded from the recession and is now about half built. Residents benefit from a variety of amenities such as parks, plazas, and community centers.



Case study

HASSALO ON 8TH, LLOYD DISTRICT, PORTLAND

Adjacent to MAX and streetcar stops, construction is now underway on a site that was previously a parking lot. Once built, the development will provide over 600 rental apartments, plazas, office and retail space, more than 1,000 underground car parking places, and space to park more than 1,000 bikes – all in a central location.

Policy considerations

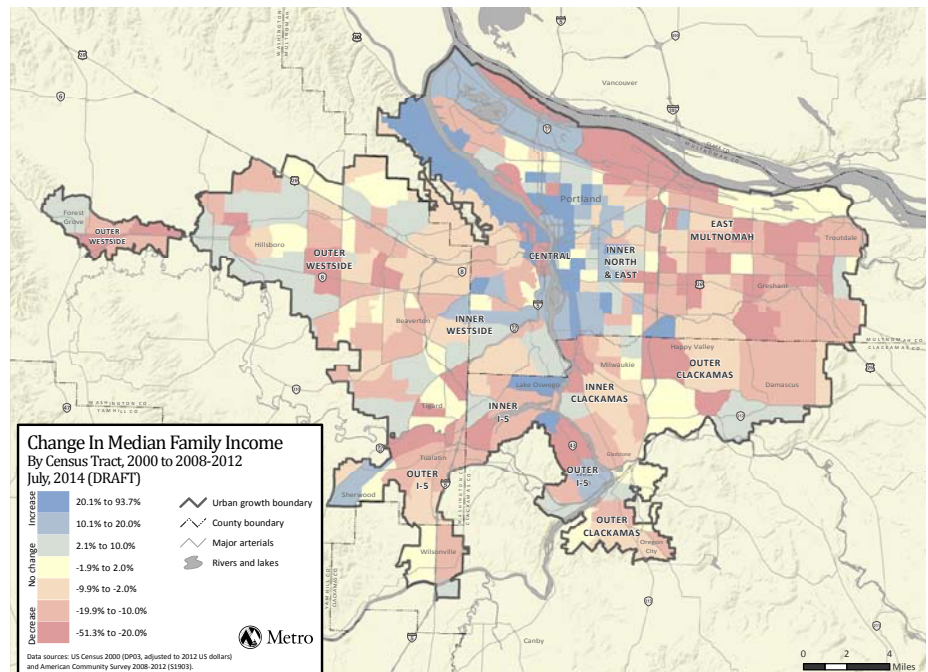
OPPORTUNITIES FOR WORKFORCE HOUSING

Market-rate workforce housing is typically provided by existing housing stock, not new construction. Yet, existing housing in locations with good access to jobs is often too expensive for the region's workforce. What policies, investments, innovative housing designs and construction techniques could provide additional workforce housing in locations with good transportation options? Who has a role?

UNINTENDED CONSEQUENCES OF REDEVELOPMENT

Our region has made a commitment to ensuring its decisions improve quality of life for all. Yet, like many metropolitan areas, we've struggled to make good on that intent. Investments made to encourage redevelopment and revitalization have too often disproportionately impacted those of modest means. The consequence has been that people with lower incomes have often been displaced from their long-time communities when redevelopment in the city center drives up land values and prices follow.

Map 3 shows the change in median family income around the region over the last decade. There is a clear trend of incomes increasing in close-in Northwest, Northeast, and Southeast Portland, Lake Oswego, and West Linn, while incomes have stagnated or decreased elsewhere. Outlying areas like outer east Portland, Gresham, Cornelius, and Aloha stand out as having decreasing incomes. In many cases, increases in incomes in central locations and decreases elsewhere indicate displacement of people from their communities as housing prices increase.



Map 3 Change in median family income 2000-2012

GROWTH WITHOUT SERVICES AND FACILITIES

Over the last couple of decades, the trend of depopulation of the urban core and the movement of the middle class to the suburbs has reversed in many regions in the U.S. The Portland metropolitan region is no exception. While there have been positive outcomes, this has also led to displacement and concentrations of poverty in places that lack adequate services and facilities like sidewalks and transit. Additional information about access to opportunity around the region can be found in Appendix 10. Information about housing and transportation cost burdens can be found in Appendix 12.

COMMUTING TRENDS: THE JOBS-HOUSING BALANCE

For years, leaders have talked about a jobs-housing balance – ensuring there are homes close to employment areas. But evidence and common sense tell us that people’s lives don’t neatly line up with the available housing inventory. Some people work at or close to home, some commute from one end of the region to the other, and some live halfway between where they work and their spouse works. In other words, putting homes next to major employers doesn’t necessarily cut down on commuting.

However, services and amenities near residential areas can make our lives outside of jobs and commutes easier and help create strong local economies. When people can go out to eat, do their shopping, visit the bank or see a doctor close to where they live, they spend less time going somewhere and more time with friends and family, actively enjoying their communities and the region.

Map 4 illustrates the region’s commute patterns. Using Washington County as an example (2011 data):ⁱⁱⁱ

- about 120,000 people who live in Washington County also work there
- about 118,000 people who live outside Washington County work in Washington County
- about 104,000 people who live in Washington County work outside Washington County.



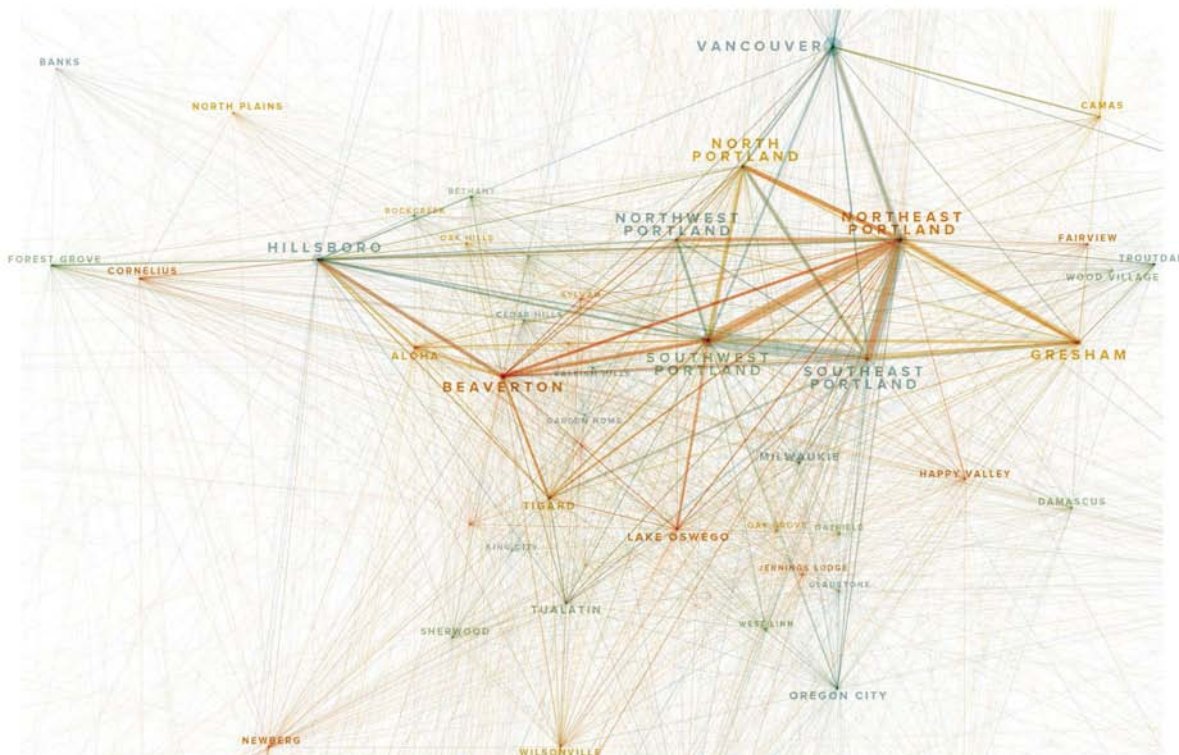
Policy considerations

A BIGGER PICTURE

Regional and local policies and investments also interact with actions taken in neighboring cities, Clark County and Salem. What are the best policies for using land efficiently and reducing time spent in traffic?

TRAVEL COMMUTE PATTERNS

2011 commute patterns from cities/places in the Portland metropolitan region
Lines connect a person’s place of residence to place of employment
Line thickness represents number of people



DATA SOURCE: LONGITUDINAL EMPLOYER-HOUSEHOLD DYNAMICS, U.S. CENSUS BUREAU

MANAGING UNCERTAINTY

■ What are the risks and opportunities of planning for higher or lower growth in the forecast range?

■ Recognizing that the two forecasts are linked, are there different risks when planning for employment or housing growth?

■ Are there different risks when planning for land use, transportation, or for other infrastructure systems?

■ Who bears the public and private costs and benefits associated with different growth management options?

How many more people and jobs should we expect in the future?

A core question this report addresses is how many more people and jobs should the region plan for between now and the year 2035. In creating the 2035 forecast, Metro convened a peer review group consisting of economists and demographers from Portland State University, ECONorthwest, Johnson Economics, and NW Natural. The forecast assumptions and results in this report reflect the recommendations of this peer review panel. A summary of the peer review can be found in Appendix 1C.

However, even with a peer review of the forecast, some forecast assumptions will turn out to be incorrect. For that reason, the population and employment forecasts in this report are expressed as ranges, allowing the region's policymakers the opportunity to err on the side of flexibility and resilience in choosing a path forward. As with a weather forecast, this population and employment range forecast is expressed in terms of probability. The baseline forecast (mid-point in the forecast range) is Metro staff's best estimate of what future growth may be. The range is bounded by a low end and a high end. There is a ninety percent chance that actual growth will occur somewhere in this range, but the probability of ending up at the high or low ends of the range is less.

Appendix 1B describes the accuracy of past forecasts. These typically have been reliable, particularly when it comes to population growth. For example, Metro's 1985 to 2005 forecast proved to be off by less than one percent per year for both population and employment over the 20-year time frame.

POPULATION AND JOB GROWTH IN THE SEVEN-COUNTY PORTLAND/VANCOUVER METROPOLITAN AREA

To “show our work” and to understand our region in its economic context, this analysis starts with a forecast for the larger seven-county Portland/Vancouver/Hillsboro metropolitan area.² Full documentation of the metropolitan area forecast is available in Appendix 1A. It is estimated that there will be about 470,000 to 725,000 more people in the seven-county area by the year 2035. Mid-point in the forecast range, or best estimate, is for 600,000 more people. This amount of growth would be consistent with how the region has grown in the past; the seven-county area grew by about 600,000 people between 1985 and 2005 and by about 700,000 from 1990 to 2010. Adding 600,000 people would be comparable to adding the current population of the city of Portland to the seven-county area.

The forecast calls for 120,500 to 648,500 additional jobs in the seven-county Portland/Vancouver metropolitan area between 2015 and 2035. The forecast range for employment is wider than the forecast range for population since regional employment is more difficult to predict in a fast-moving global economy. Unexpected events like the Great Recession, technological advances, international relations, and monetary policy can lead to big changes. Mid-point in the forecast range, or best estimate, is for 384,500 additional jobs. This amount of growth would surpass the 240,000 additional jobs that were created in the seven-county metropolitan area during the 20-year period from 1990 to 2010, which included job losses from the recession.

² The seven-county Portland/Vancouver metropolitan area includes Clackamas, Clark, Columbia, Multnomah, Skamania, Washington, and Yamhill counties.

POPULATION AND JOB GROWTH IN THE METRO UGB

A market-based land and transportation computer model is used to determine how many of the new jobs and households in the seven-county area are likely to locate inside the Metro urban growth boundary. The model indicates that about 75 percent of new households and jobs may locate inside the UGB. The share of regional growth accommodated inside the boundary varies depending on what point in the forecast range is chosen. More detail can be found in Appendices 4 and 6. It is estimated that there will be about 300,000 to 485,000 additional people inside the Metro urban growth boundary between 2015 and 2035 (Figure 4). At mid-point in this range, the UGB will have about 400,000 additional people. This would be comparable to adding more than four times the current population of the city of Hillsboro to the UGB. The population forecast is converted into household growth for this analysis.

It is estimated that there will be about 85,000 to 440,000 additional jobs in the Metro UGB between 2015 and 2035 (Figure 5). At mid-point in this range, there would be about 260,000 additional jobs between 2015 and 2035. This job forecast is converted into demand for acres for this analysis.

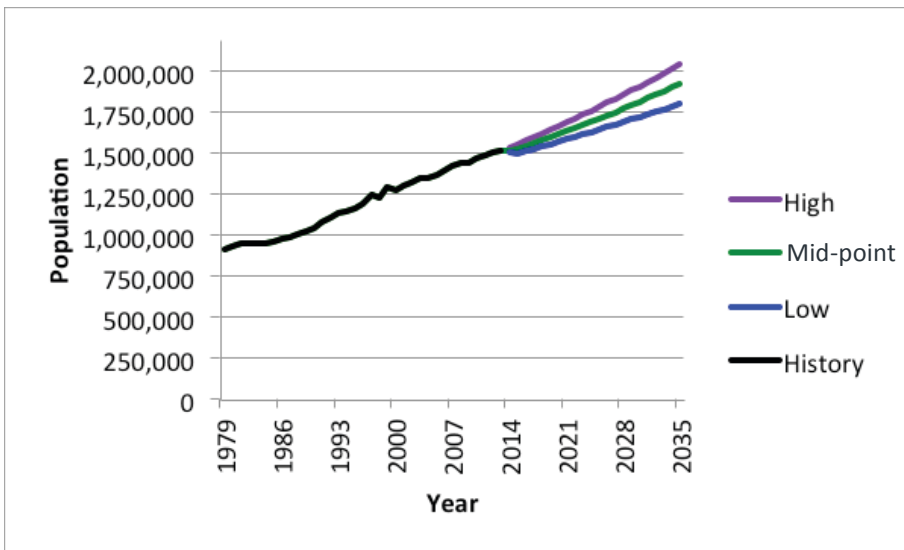


Figure 4 Population history and forecast for Metro UGB 1979 - 2035

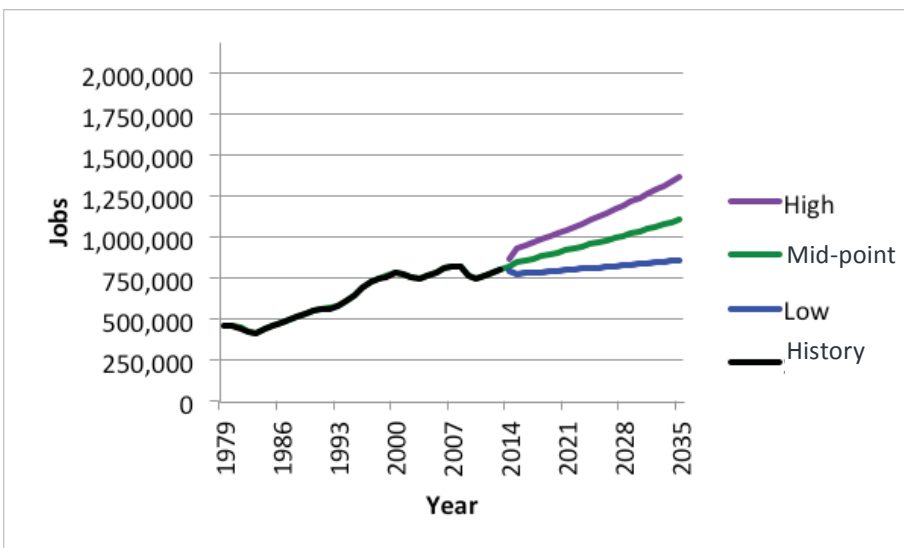


Figure 5 Employment history and forecast for Metro UGB, 1979-2035

DIDN'T THE STATE LEGISLATURE JUST EXPAND THE UGB?

Signed into state law in the spring of 2014, HB 4078 codifies the fundamental principles behind our region's decision about urban and rural reserves. The legislation provides greater protection for farms, forests and natural areas, offers predictability to our communities, home builders and manufacturers, and makes our land use system more efficient. The legislation also expanded the UGB in several locations in Washington County and described how Metro must account for those lands in this urban growth report.



How much room for growth is there inside the UGB?

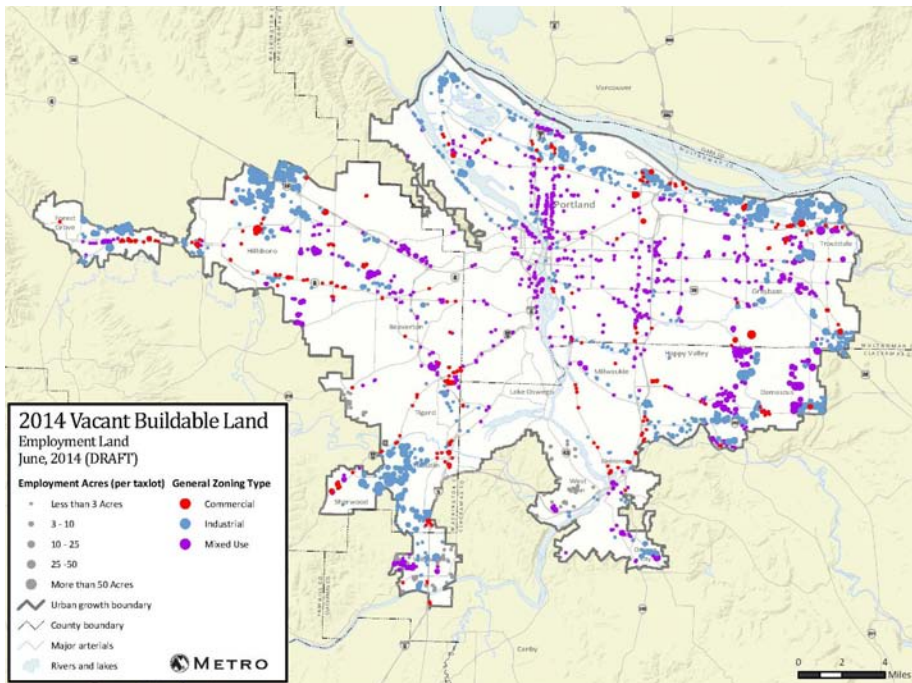
Cities and counties around the region plan for the future and prioritize investments that support their community's vision. In most cases, however, long-term plans for downtowns, main streets and employment areas are more ambitious than what is actually built or redeveloped. One task of this analysis is to help us understand how the market might respond to long-term community plans in the next 20 years.

To analyze the region's growth capacity, detailed aerial photos of all the land inside the urban growth boundary were taken. Factoring in current adopted plans and zoning designations, the photos were used to determine which parcels of land were developed and which were vacant. Methodologies for assessing the redevelopment potential and environmental constraints of the land were developed over the course of a year by Metro and a technical working group consisting of representatives from cities, counties, the state and the private sector (see pages 30-31 for a complete list of technical working group members).

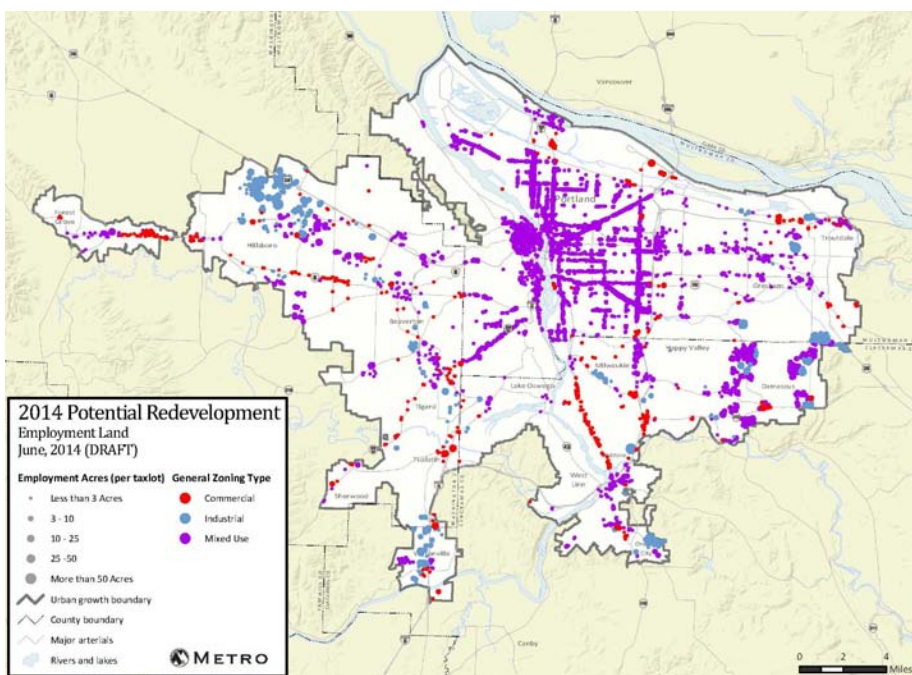
After settling on the methodology described in Appendix 2, Metro produced a preliminary buildable land inventory that local cities and counties had more than two months to review. The draft buildable land inventory described in Appendix 3 reflects refined local knowledge about factors such as environmental constraints including wetlands, steep slopes, and brownfield contamination. Maps 4 through 7 illustrate the buildable land inventory reviewed by local jurisdictions. They are available at a larger scale in Appendix 3. The buildable land inventory is considered a "first cut" at determining the region's growth capacity. For a variety of reasons described in the next section, not all of it may be developable in the 20-year time frame.

ESTIMATING RESIDENTIAL GROWTH CAPACITY

Current plans and zoning allow for a total of almost 1.3 million residences inside the urban growth boundary after accounting for environmental constraints and needs for future streets and sidewalks. About half of that potential capacity is in use today. This urban growth report does not count all of this capacity since doing so would assume that every developed property in the region will redevelop to its maximum density in the next twenty years. A rational developer will only build products that are expected to sell. Redevelopment requires market demand, which is a function of a number of factors, including expected population growth. This affects whether a property will be redeveloped and at what density.



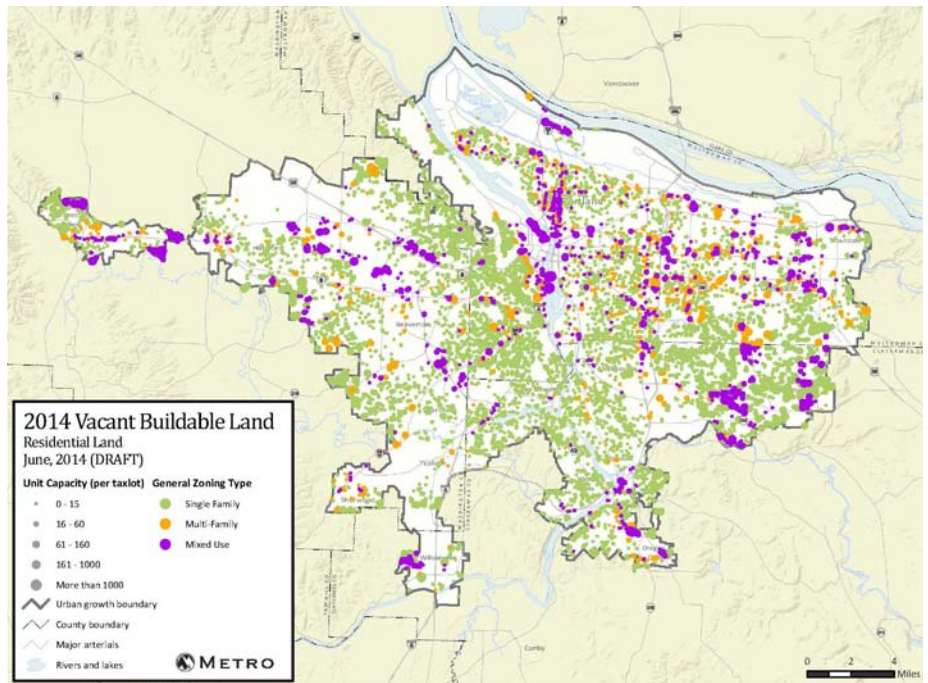
Map 4 Employment vacant buildable tax lots (reviewed by local jurisdictions)



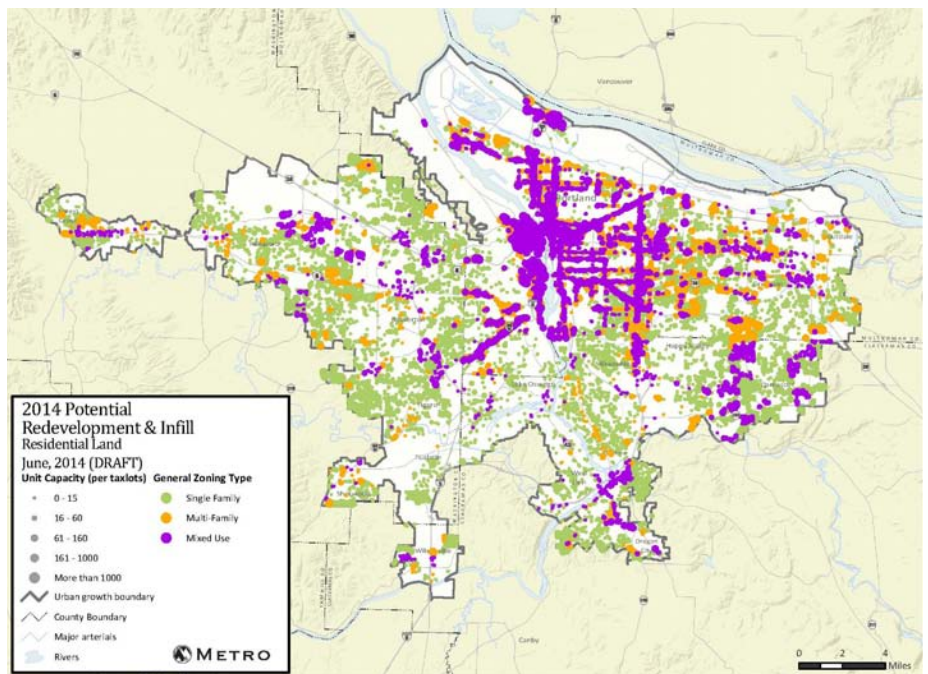
Map 5 Employment infill and redevelopment candidate tax lots (reviewed by local jurisdictions)

Acknowledging this complexity, Metro staff convened representatives from cities, counties, the state and the private sector to establish consensus for estimating how much of the region's buildable land inventory might be absorbed by the year 2035 (see pages 30-31 for a complete list of technical working group members). Redevelopment and infill are most common in locations where there is significant demand for housing, so the growth capacity from redevelopment and infill rises with assumptions for population growth. For this reason, the region's residential growth capacity is expressed as a range. The amount of growth capacity that the region has depends, in part, on the point in the household forecast range for which the Metro Council chooses to plan. Appendix 4 describes the approach for identifying the 20-year capacity range for housing.

Map 6 Residential vacant buildable tax lots (reviewed by local jurisdictions)



Map 7 Residential redevelopment candidate tax lots (reviewed by local jurisdictions)



HOW DO DEVELOPERS EVALUATE REDEVELOPMENT POTENTIAL?

The construction of new infill (original structure intact) and redevelopment (original structure demolished) projects is increasing in some places, fueled by a renewed interest in and market demand for housing and jobs close to the urban core. In order to realize a return on an investment, given the higher costs of urban redevelopment, investors will evaluate the redevelopment potential of the site by considering the following:

- Where is the site located? Is it an up and coming area?
 - What is the value of the existing building or structure on the site? What is the value of the land? At what point does the building become worth less than the land it sits on?
 - What is the developer allowed to build under the local zoning code?
 - What are the construction costs and fees for the new building?
 - How much will the developer be able to sell or rent space for in the new building?
-



Policy considerations

HOW SHOULD POLICYMAKERS EVALUATE DEVELOPMENT POTENTIAL?

Since the adoption of the 2040 Growth Concept, there has often been skepticism about the viability of redevelopment as a source of growth capacity. Our region's history shows that developing urban growth boundary expansion areas is difficult as well. Aside from developing a concept plan, what other factors support the likelihood that an urban reserve will be developed if brought into the UGB?



Case study

4TH MAIN, HILLSBORO

With a shared vision for an active, historic main street area, Metro, the City of Hillsboro and the Federal Transit Administration worked together to attract private sector redevelopment of a city block adjacent to the Hillsboro Central MAX station. 4th Main offers 71 market-rate apartments, underground parking, and active retail along main street. The existing 1950s era vacant bank building on site is being updated for restaurant and retail use. When 4th Main opened in May 2014, over half the units were leased.



ESTIMATING EMPLOYMENT GROWTH CAPACITY

To determine the UGB's employment growth capacity, analysis began with the creation of a buildable land inventory. As with the residential analysis, employment capacity depends on demand since different types of jobs have different space needs. For instance, an office job will have very different location and space needs than a warehouse job. Metro staff convened a group of public and private sector experts to help update these employment demand factors. Appendix 6 describes the approach for identifying the 20-year capacity range. (See pages 30-31 for a complete list of technical working group members).

Different jobs have different space needs





Is there a regional need for additional growth capacity?

Under state law, Metro's analysis must assess regional, not local or subregional, growth capacity needs. While some local jurisdictions may desire additional land for growth, this analysis is required to keep those needs in the regional context, knowing that other locations in the region may have greater growth capacity.

This analysis uses a probabilistic range forecast. The baseline forecast (middle of the range) has the highest probability. Though there is a 90 percent chance that growth will occur within the range, it is less probable at the low and high ends of the range.

DOES THE REGION NEED MORE LAND FOR HOUSING GROWTH?

Regional growth management policy alone cannot ensure adequate housing choices. Other elements that influence what kind of housing gets built include tax policy, lending practices, local plans and decisions, public investments, market demand, and developer responses. All of these factors impact housing production.

Appendix 4 describes in detail the residential demand analysis and includes estimates of potential demand by housing type (single-family and multifamily), tenure (own and rent), average density, as well as detail about demand from different household income brackets. For accounting purposes, the detailed analysis uses rigid supply and demand categories – for instance, single-family and multifamily. In reality, demand for these two housing types is somewhat fluid, particularly as average household sizes continue to decrease. By 2035, about 60 percent of new households are expected to include just one or two people.

WHAT THE NUMBERS SHOW

Population and employment forecasts in the urban growth report are expressed as ranges based on probability. Mid-point in the forecast range is Metro's best estimate of what future growth may be. It is less probable that growth will occur at the high or low ends of the range forecast.

This analysis looks at long-term capacity needs for:

- single-family and multifamily housing
- general industrial employment uses
- large industrial sites
- commercial employment uses.

If policymakers choose to plan for the high end of the growth forecast range, there is a need for additional capacity for jobs and housing. But, at mid-point in the range and below, there is no need for additional growth capacity.

Policy considerations

WHAT ABOUT DAMASCUS?

With its ongoing community and political challenges, how much of Damascus' growth capacity should be counted during the 2015 to 2035 time frame is more of a policy question than a technical question. For this analysis, Metro staff followed the advice of its technical advisory group and used a market-based model to determine that about half of Damascus' estimated buildable land inventory capacity could be counted in the "market-adjusted" residential supply. For modeling purposes, it was assumed that development challenges will persist in Damascus for another decade, delaying its availability to the market. If Damascus' capacity is not available, it may become somewhat more difficult to provide new single-family housing inside the existing urban growth boundary. Does the region have other options for making up for Damascus' capacity if it is not counted?

Policymakers have the challenge of balancing the type of housing and neighborhoods people prefer with funding realities, governance and annexation challenges. They also must consider regional and community goals such as preserving the character of existing neighborhoods, reducing carbon emissions, preserving farms and forests, and creating vibrant downtowns and main streets. To inform that discussion, Metro and a group of public and private sector partners conducted a study on residential preferences across the region and will make results available to policymakers in the early fall of 2014.

The capacity estimation method recommended by Metro's public and private sector advisory group recognizes that infill and redevelopment depend on demand. Consequently, the capacity from those two sources increases with greater household demand (i.e., a higher growth forecast results in a greater housing capacity).

Table 2 and Table 3 summarize the more detailed analysis of residential needs provided in Appendix 4.

Single-family dwelling units

	Buildable land inventory	Market-adjusted supply	Demand	Surplus/need
Low growth forecast	118,700	76,600	70,600	+6,000
Middle (baseline) growth forecast		90,700	89,000	+1,700
High growth forecast		97,700	103,800	-6,100

Table 2 Metro UGB single-family residential needs 2015 to 2035 expressed in dwelling units

Multifamily dwelling units

	Buildable land inventory	Market-adjusted supply	Demand	Surplus/need
Low growth forecast	274,000	119,100	82,700	+36,400
Middle (baseline) growth forecast		130,800	108,400	+22,400
High growth forecast		165,800	132,200	+33,600

Table 3 Metro UGB multifamily residential needs 2015 to 2035 expressed in dwelling units

If policymakers choose to plan for the high end of the growth forecast range, there is a need for additional capacity for jobs and housing. But, at mid-point in the forecast range and below, there is no need for additional growth capacity. No scenarios points to a regional need for additional multifamily housing capacity. However, if policymakers decide to plan for high growth and expand the UGB for residential purposes, there may be valid policy reasons for considering some amount of multifamily housing and commercial uses in the local planning process for the area.

Policy considerations

PROVIDING HOUSING OPPORTUNITIES

As policymakers consider their options for responding to housing needs, there are considerations to keep in mind.

- If policymakers decide that a urban growth boundary expansion is needed to provide room for housing, where should that expansion occur? Metro is aware of two cities in the region that are currently interested in UGB expansions for housing – Sherwood and Wilsonville. Both cities had residential land added to the UGB in 2002 that they have not yet annexed. Sherwood requires voter-approved annexation and voters have twice rejected annexing the area. What is a reasonable time frame for seeing results in past and future UGB expansion areas?
- Given that the region has ample growth capacity for multifamily housing but a more finite supply of single-family growth capacity, should policymakers consider ways to encourage “family-friendly” housing in multifamily and mixed-use zones? To what extent might that address single-family housing needs in this analysis? Are there ways to ensure that housing in downtowns and along main streets remains within reach of families with moderate or low incomes?
- State land use laws and regional policy call for efficient use of any land added to the UGB. However, over the years very little multifamily housing has been built in UGB expansion areas. What is the right mix of housing types in areas added to the UGB in the future and how are they best served?
- How might policymakers balance residential preferences with other concerns such as infrastructure provision, transportation impacts, affordability, and environmental protection?

IMPACT OF MILLENNIALS ON HOUSING

Millennials, those born since 1980, are the biggest age cohort the U.S. has ever had (bigger than the Baby Boomer cohort) and will have a significant influence on the types of housing that are desired in the future. Today, 36 percent of the nation’s 18 to 31-year olds are living with their parents.¹ This has variously been attributed to student loan debt, high unemployment or fear of losing a job, and stricter mortgage lending standards. Builders have responded by reducing their housing production and focusing on apartment construction. What will these trends mean for home ownership, housing type, and location choices in the longer term?





Policy considerations

INVESTING IN JOB CREATION

Metro has been actively engaged in the question of regional investment priorities since the release of the 2008 Regional Infrastructure Analysis and consequential discussion with regional community and business leaders through the Community Investment Initiative. From these efforts, Metro established the Regional Infrastructure Supporting our Economy (RISE) team to deliver regionally significant projects and new infrastructure investment to enhance the local and regional economy. Are there areas where RISE should focus its attention to ensure the region can generate job growth?

DOES THE REGION NEED MORE LAND FOR INDUSTRIAL JOB GROWTH?

Industrial employment includes a wide range of jobs like high tech manufacturers, truck drivers, and metal workers. Since it is common to find commercial jobs (offices, stores, restaurant, etc.) in industrial zones, this analysis shifts a portion of the overall industrial redevelopment supply into the commercial category.

Table 4 summarizes regional needs for general industrial employment growth, expressed in acres. Additional detail about this analysis can be found in Appendix 6. The need for large industrial sites (sites with over 25 buildable acres) is described separately. At mid-point in the forecast range, there is no regional need for additional land for general industrial employment uses. At the high end of the forecast range, there is a deficit. However, there are limited areas in urban reserves that may eventually be suitable for industrial uses.

General industrial employment (acres)

	Buildable land inventory	Market-adjusted supply	Demand	Surplus/need
Low growth forecast	7,100	5,800	1,200	+4,600
Middle (baseline) growth forecast		5,000	3,800	+1,200
High growth forecast		5,000	6,500	-1,500

Table 4 Metro UGB general industrial acreage needs 2015 to 2035

Note: reflecting real market dynamics where commercial uses locate in industrial zones, the market adjustment shifts some of the region's industrial redevelopment supply into the commercial land supply. The amount varies by demand forecast.

Case study
TROUTDALE REYNOLDS INDUSTRIAL PARK

Located between the Columbia and Sandy rivers and bordered by the Troutdale Airport and Marine Drive, this 700-acre superfund site is being redeveloped with a mix of industrial uses, natural areas and utility and trail



access. The Port of Portland is working closely with local, regional and state jurisdictions to redevelop this former aluminum plant brownfield site and return it to productive industrial use with a traded-sector job focus. The Port has invested over \$37 million in the acquisition and redevelopment of the site. Today, a portion of the site is home to FedEx Ground's regional distribution center. Another \$48 million in investment is needed to make the remainder of the site ready to market to industrial employers. At full build-out, this industrial development is projected to result in 3,500 direct jobs, \$410 million in personal income and \$41 million in state and local taxes annually (all jobs).

HOW SHOULD THE REGION PRIORITIZE INVESTMENTS IN LARGE INDUSTRIAL SITE READINESS?

The region's economic development strategy focuses on several sectors with anchor firms that sometimes use large industrial sites (over 25 buildable acres). These firms are important because they often pay higher-than-average wages, export goods outside the region (bringing wealth back), produce spin off firms, and induce other economic activity in the region. However, forecasting the recruitment of new firms or growth of existing firms that use large industrial sites is challenging since these events involve the unique decisions of individual firms. To produce an analysis that is as objective as possible, the estimate of future demand for large industrial sites is based on the employment forecast. That assessment and its caveats are described in Appendix 7.

The analysis finds that there may be demand for eight to 34 large industrial sites between 2015 and 2035. There are currently 50 large vacant industrial sites inside the UGB that are not being held for future expansion by existing firms.³ This does not include sites added to the UGB in 2014 under HB 4078. To exhaust this supply of sites by 2035, the region would need to attract five major industrial firms every two years. In addition to this inventory of 50 sites, there are 24 sites inside the UGB that are being held by existing firms for future expansion (growth of existing firms is implicit in the demand forecast). Given this total supply of 74 large industrial sites and the fact that there are only two areas in urban reserves (near Boring and Tualatin) that may be suitable for eventual industrial use, policymakers can consider whether to focus on land supply or site readiness.

There are a limited number of areas in urban reserves that may be suitable for eventual industrial use. Therefore, this demand analysis may be more useful for informing the level of effort that the region may wish to apply to making its existing large industrial sites development-ready. Existing sites typically require actions such as infrastructure provision, wetland mitigation, site assembly, brownfield cleanup, annexation by cities, and planning to make sites development-ready. Many of these same development-readiness challenges exist in the two urban reserve areas that may eventually be suitable for industrial use. Metro and several public and private sector partners continue to work to understand the actions and investments that are needed to make more of the region's large industrial sites development-ready.



Policy considerations

THE PORTLAND HARBOR

The harbor is a unique environmental, recreational and economic asset that cannot be replaced elsewhere in the Portland region. For more than a century, the harbor has played a critical role in the history of trade and manufacturing in our region. Today, the harbor needs to be cleaned up to continue providing benefits. What is the appropriate balance between environmental and economic goals? What investments and policies can advance those goals?

³ This inventory is preliminary as of June 16, 2014, and will be confirmed by Metro and its partners before Metro Council consideration of the final UGR. This work is being conducted by Mackenzie for an update of the 2012 Regional Industrial Site Readiness project. However, the inventory is not expected to change enough to result in a different conclusion regarding there being no regional need for additional UGB expansion.

Policy considerations

KEEPING SHOPPING AND SERVICES CLOSE BY

It makes sense to locate commercial uses close to where people live. If the Metro Council chooses to plan for a high growth scenario, are there places where it makes sense to expand the UGB for a mix of residential and commercial uses?



DOES THE REGION NEED MORE LAND FOR COMMERCIAL JOB GROWTH?

The commercial employment category includes a diverse mix of jobs such as teachers, restaurant workers, lawyers, doctors and nurses, retail sales people, and government workers. Generally, these are population-serving jobs that are located close to where people live. Table 5 summarizes regional needs for commercial employment growth, expressed in acres. Additional detail about this analysis can be found in Appendix 6. At mid-point in the forecast range, there is no regional need for additional land for commercial employment uses. At the high end of the forecast range, there is a deficit. However, it may not be desirable to locate commercial uses on the urban edge unless those uses are integrated with residential development.

Commercial employment (acres)

	Buildable land inventory	Market-adjusted supply	Demand	Surplus/need
Low growth forecast	4,300	4,200	1,400	+2,800
Middle (baseline) growth forecast		4,500	3,600	+900
High growth forecast		5,100	5,700	-600

Table 5 Metro UGB commercial acreage needs 2015 to 2035

Note: reflecting real market dynamics where commercial uses locate in industrial zones, the market adjustment shifts some of the region's industrial redevelopment supply into the commercial land supply. The amount varies by demand forecast.

Conclusion

The 2014 urban growth report is more than an accounting of available acres and forecast projections. It provides information about development trends, highlights challenges and opportunities, and encourages policymakers to discuss how we can work together as a region to help communities achieve their visions. This region has seen tremendous change and progress over the last 20 years and we know change will continue. Our shared challenge is to guide development in a responsible and cost-effective manner so that we preserve and enhance the quality of life and ensure that the benefits and costs of growth and change are distributed equitably across the region.

LOCAL LEADERSHIP

Examples of strong partnerships abound already. At the local level, cities and counties are working closely with the private sector to bring new vibrancy to downtowns, more jobs to employment areas, and to provide existing and new neighborhoods with safe and convenient transportation options. Residential and employment areas as varied as Beaverton's Creekside District, Portland's South Waterfront, Hillsboro's AmberGlen, Wilsonville's Villebois, the Gresham Vista Business Park and many others, both large and small, are pointing the way to our region's future.

METRO'S ROLE

At the regional level, Metro supports community work with a variety of financial and staff resources. The Community Planning and Development Grant program has funded over \$14 million in local project work to support development readiness. The RISE (Regional Infrastructure Supporting our Economy) program is designed to deliver regionally significant projects and spur infrastructure investment. The Transit-Oriented Development Program provides developers with financial incentives that enhance the economic feasibility of higher density, mixed-used projects served by transit. Corridor projects such as the Southwest Corridor and East Metro Connections Plan are bringing together Metro, local jurisdictions, educational institutions, residents, businesses and others to develop comprehensive land use and transportation plans for individual areas that will support local community and economic development goals.

INVESTING IN OUR COMMUNITIES

These are just a few examples of the kind of work that's happening all across the region. While the Metro Council's growth management decision must address the question of whether to adjust the region's urban growth boundary, the more difficult questions center on how to find the resources needed to develop existing land within our communities and new land in urban growth boundary expansion areas in a way that meets community and regional goals. Many of these questions and policy considerations are highlighted throughout this urban growth report to support policy discussions in the 2015 growth management decision and beyond.

Next steps

JULY THROUGH DECEMBER 2014 The urban growth report helps inform policy discussions for the Metro Policy Advisory Committee (MPAC) and Metro Council.

DECEMBER 2014 The Metro Council will consider a final urban growth report that will serve as the basis for its growth management decision in 2015. The Metro Policy Advisory Committee will be asked to advise the council on whether the urban growth report provides a reasonable basis for its subsequent growth management decision.

JULY 2014 – MAY 2015 Local and regional governments will continue to implement policies and investments to create and enhance great communities while accommodating anticipated growth.

MAY 2015 Local jurisdictions interested in urban growth boundary expansions in urban reserves must complete concept plans for consideration by MPAC and the Metro Council.

SEPTEMBER 2015 Metro's chief operating officer makes a recommendation for the Metro Council's growth management decision that becomes the basis for MPAC and council discussion during fall 2015. The recommendation will take into account the final urban growth report, assessments of urban reserve areas, actions that have been taken at the regional or local level – such as measures that lead to more efficient land use and adopted concept plans for urban reserves – and other new information that may influence our understanding of future growth in the region.

BY THE END OF 2015 If any additional 20-year capacity need remains, the Metro Council will consider UGB expansions into designated urban reserves. The Metro Policy Advisory Committee will be asked to advise the council on the growth management decision.



References

i U.S. Bureau of Economic Analysis, Per Capita Real GDP by Metro Area, accessed online 4/29/14

ii Dean Runyan and Associates, 2013 Preliminary Travel Impacts for Portland Metro, accessed online 4/30/14 at <http://www.travelportland.com/about-us/visitor-statistics-research/>

iii U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter of 2002-2011)

iv Pew Research Center, A Rising Share of Young Adults Live in Their Parent's Home, August 1, 2013, accessed online 5/20/14 at <http://www.pewsocialtrends.org/files/2013/07/SDT-millennials-living-with-parents-07-2013.pdf>

ACKNOWLEDGMENTS

Metro staff

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John Williams, deputy director community development
Roger Alfred, senior assistant attorney
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Rayna Cleland, senior visual communications designer
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Paulette Copperstone, program assistant
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Laura Dawson-Bodner, record and information analyst
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Peggy Morell, senior public affairs specialist
Tim O'Brien, principal planner
Juan Carlos Ocaña-Chiu, senior public affairs specialist
Maribeth Todd, associate researcher and modeler
Dennis Yee, chief economist

THE FOLLOWING PEOPLE GRACIOUSLY LENT THEIR EXPERTISE TO INFORM THIS REPORT

2014 Urban Growth Report: buildable land inventory technical working group

The following people advised Metro staff on the methods used for identifying the region's buildable land inventory. Additional review of the preliminary inventory was provided by numerous city and county staff.

Jill Sherman, Gerding Edlen
Eric Cress, Urban Development Partners NW
Steve Kelley, Washington County
Brian Hanes, Washington County
Erin Wardell, Washington County
Colin Cooper, Hillsboro
Ali Turiel, Hillsboro
Emily Tritsch, Hillsboro
Ken Rencher, Beaverton
Mike Rizzitiello, Beaverton
Larry Conrad, Clackamas County
Denny Egner, Lake Oswego, Milwaukie
Chris Neamtzu, Wilsonville
Chuck Beasley, Multnomah County
Adam Barber, Multnomah County
Tom Armstrong, Portland
Tyler Bump, Portland (alternate)
Brian Martin, Gresham
Mike Tharp, Norris, Beggs, and Simpson
Bob LeFeber, Commercial Realty Advisors

Drake Butsch, First American Title Company
Stuart Skaug, CB Richard Ellis
Dan Grimberg, Arbor Homes
Jeff Bacharach, Bacharach Law
Andrew Tull, 3J Consulting
Justin Wood, Home Builders Association of Metropolitan Portland
Anne Debbaut, DLCD
Jennifer Donnelly, DLCD
Tom Hogue, DLCD
Gordon Howard, DLCD
Jerry Johnson, Johnson Economics
Eric Hovee, E.D. Hovee and Associates

2014 Urban Growth Report: residential supply range technical working group

This group advised Metro staff on how much of the residential buildable land inventory's redevelopment supply may be developable in the 20-year time horizon.

Erin Wardell, Washington County
Jeannine Rustad, Hillsboro
Emily Tritsch, Hillsboro
Gordon Howard, DLCD
Anne Debbaut, DLCD
Jennifer Donnelly, DLCD
Tom Armstrong, Portland
Justin Wood, Home Builders Association
Jerry Johnson, Johnson Economics
Eric Hovee, E.D. Hovee and Associates

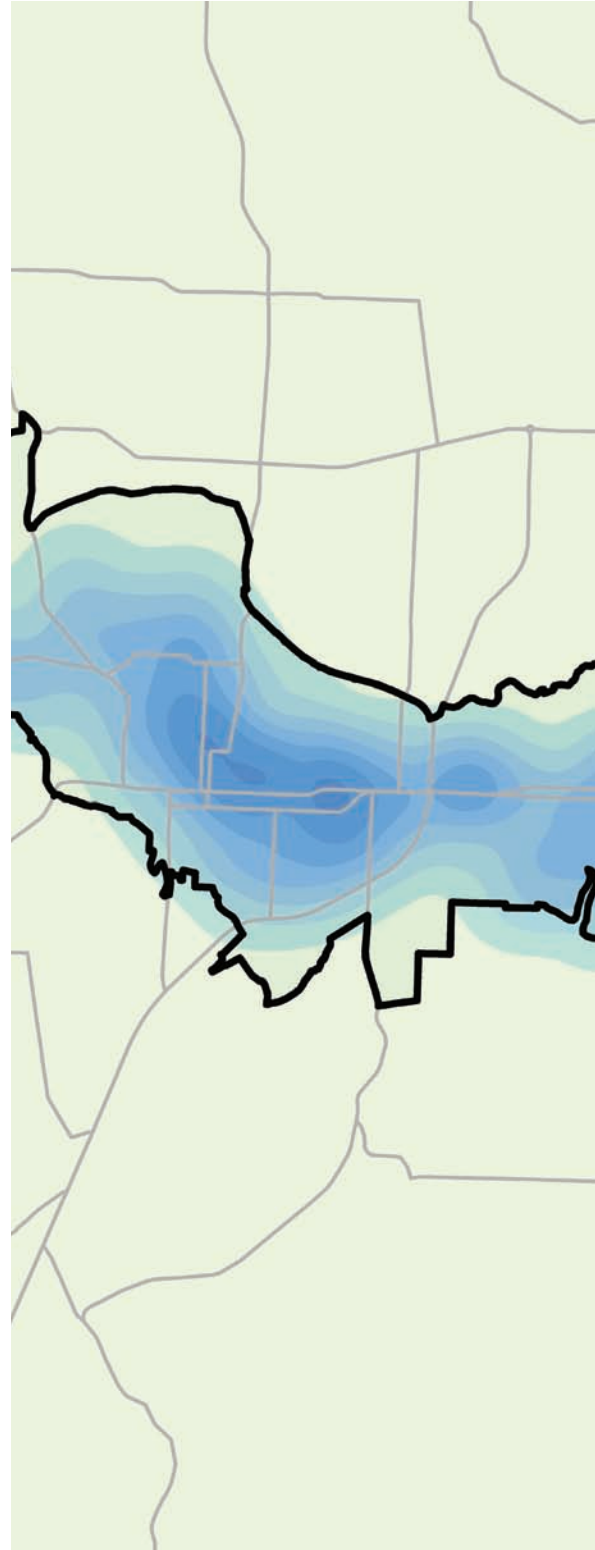
2014 Urban Growth Report: employment land technical working group

This group advised Metro staff on how various employment sectors use building space (square feet per employee and floor-area ratios).

Bob LeFeber, Commercial Realty Advisors
Mark Childs, Capacity Commercial
Steve Kountz, Portland
Tyler Bump, Portland
Brian Owendoff, Capacity Commercial
Mike Tharp, Norris, Beggs, and Simpson

2014 Urban Growth Report: regional forecast advisory panel

Dr. Tom Potiowsky, Chair, Northwest Economic Research Center, PSU
Dr. Jennifer Allen, Institute for Sustainable Solutions, PSU
Jerry Johnson, Johnson Economics
Dr. Jason Jurjevich, Population Research Center, PSU
Dave Lenar, NW Natural
Dr. Randall Pozdena, ECONorthwest
Steve Storm, NW Natural



Materials following this page were distributed at the meeting.



Sarah Bernstein

Francesca Berrini

Alyssa Kail

Michelle Liccardo

Whitney Nye



GLEAN

Sarah Bernstein, Francesca Berrini, Alyssa Kail, Michelle Liccardo and Whitney Nye
August 8 – 31, 2014

Opening Reception: Friday, August 8, 2014, 6 pm – 9 pm

Location: Disjecta – 8371 N. Interstate Ave., Portland, OR – 503.286.9449

Gallery Hours: 12 – 6 pm, Friday, Saturday and Sunday

Residents and businesses in the Portland metropolitan area generate about 2.1 million tons of waste each year – the majority of which is sent to a landfill 150 miles away. Five artists were chosen to help educate the public about excessive waste generation by creating art from discarded materials otherwise destined for the landfill. The exhibition is the public's first opportunity to see the results of the artists' gleanings and creative material adaptation. Please join us to see how waste can be creatively transformed into unique pieces of art.

GLEAN, a collaboration between Recology, Metro and crackedpots, seeks to educate the public about recycling and resource conservation while supporting the local art community and diverting material from landfills.

For more information, contact
Amy Wilson at 503.278.0725



Printed on 100% recycled paper

Please join us for the opening of *Waste Not*:
a project which tells the story of the lives that
manage what we throw away.

Paintings by Natalie Sept
Photography by Natalie Behring
Video by Rachel Bracker

Friday, August 8th
6-9pm
Nisus Gallery (at Disjecta)
8371 N Interstate Ave #1

For more information:
@nataliesept @oregonmetro
#wastenot #letstalktrash

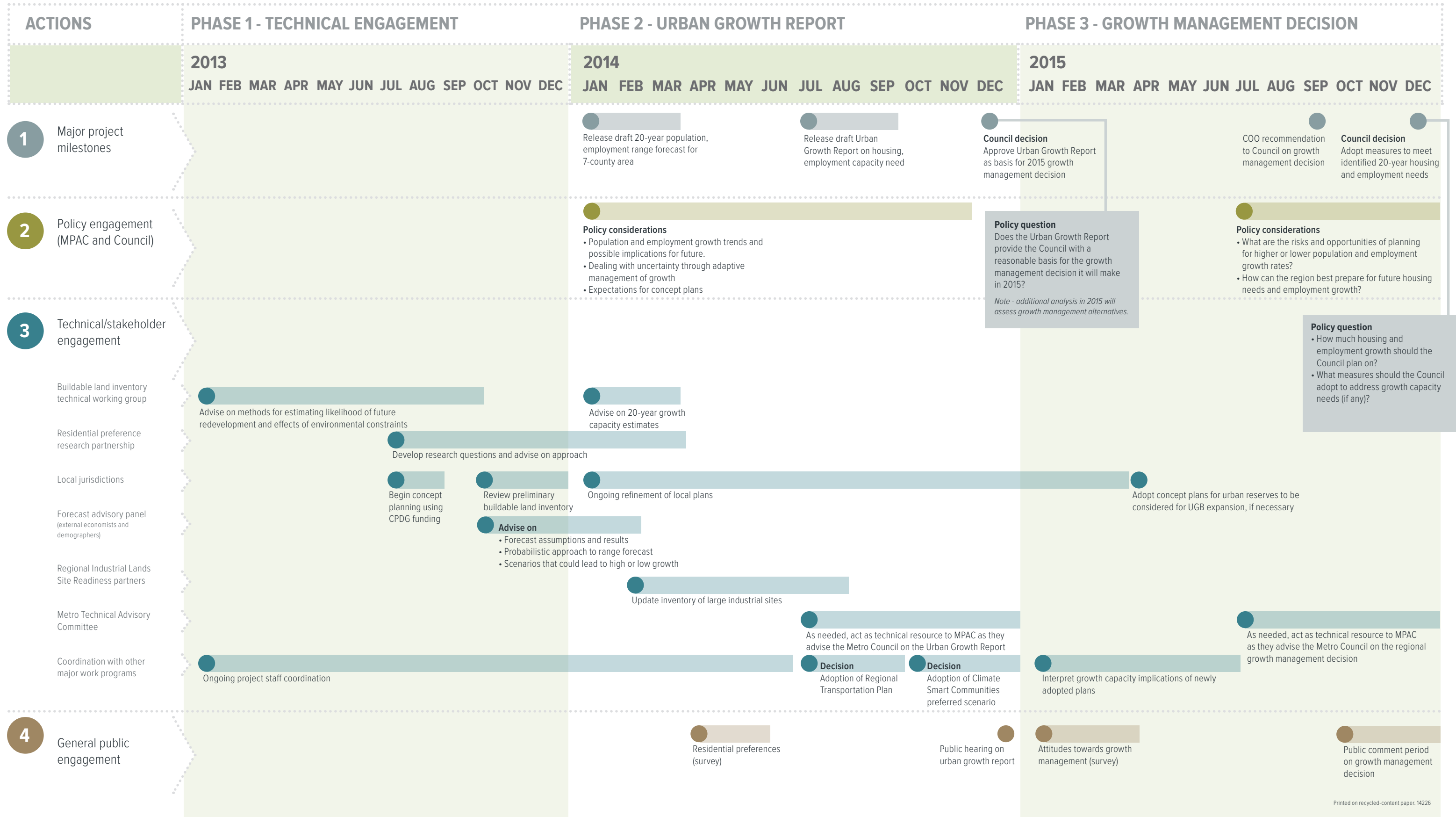
See you there!



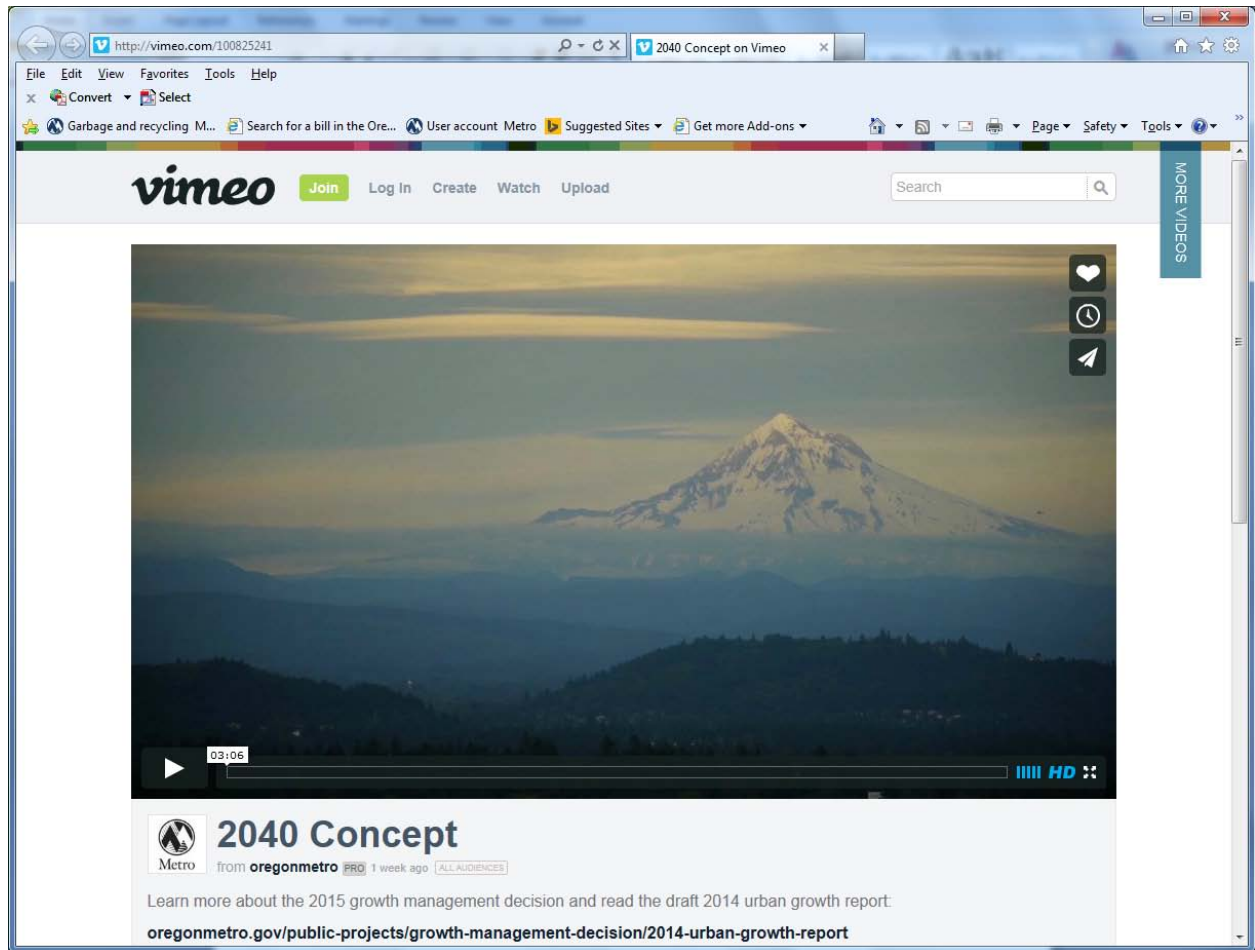
Cover: *Brian*, oil on canvas by Natalie Sept

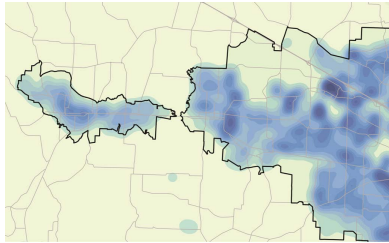
Urban growth management decision TIMELINE 2013–2015

July / 2014
Draft



Video shown at MPAC over viewing the 2040 Urban Growth Report:
<http://vimeo.com/100825241>





2015 growth management decision



Introduction to the draft 2014 urban growth report



Metro Policy Advisory Committee
7/23/14



Metro | *Making a great place*

2040 Regional Growth Concept

Investing in our communities

Urban growth management decision TIMELINE

2013 Phase I

TECHNICAL ENGAGEMENT

Jan–Dec 2013
Develop 20-year
growth capacity
estimates

2014 Phase 2

URBAN GROWTH REPORT

July 2014
Draft urban
growth
report
released

Dec 2014
Metro
Council
approves
UGR

2015 Phase 3

GROWTH MANAGEMENT DECISION

Sept 2015
COO recom-
mendation to
Metro Council

Dec 2015
Council decision to
adopt measures to
meet housing and
employment needs

Phase I (2013- 2014)

Transparent technical engagement

- Regional population and employment forecast
- Buildable land inventory
- “Market-feasible” residential supply
- Assumptions about how different jobs use space

Phase II (2014 Urban Growth Report)

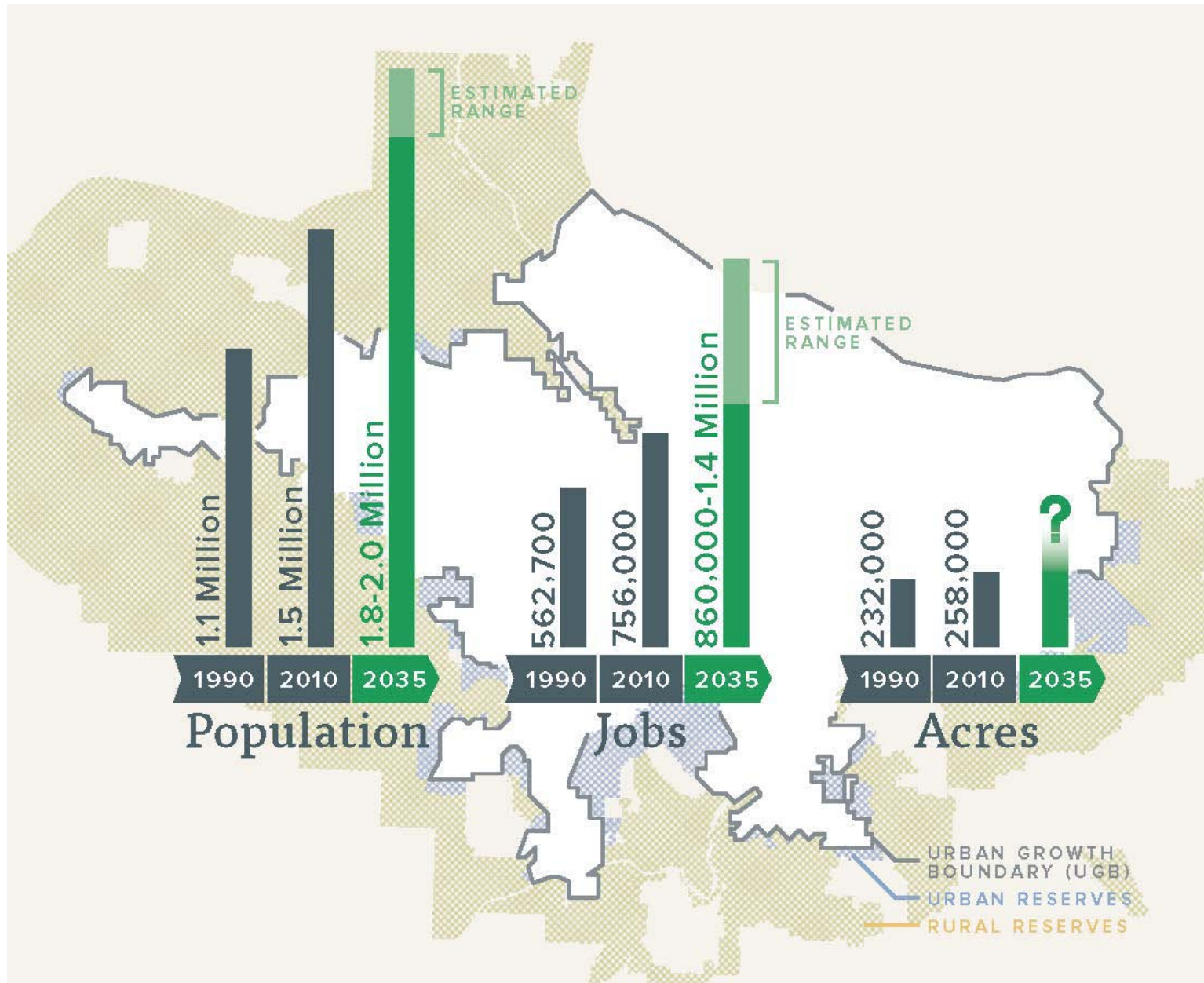


- | | |
|----------|---|
| 7/22/14 | Council – intro to draft UGR |
| 7/23/14 | MPAC – intro to draft UGR |
| 9/9/14 | Council – residential preference study |
| 9/10/14 | MPAC – residential preference study |
| 9/23/14 | Council – housing needs |
| 10/7/14 | Council – employment needs |
| 10/8/14 | MPAC – housing needs |
| 10/22/14 | MPAC – employment needs |
| 11/12/14 | MPAC – recommendation to Council on UGR |
| 12/4/14 | Council – hearing and decision on UGR |

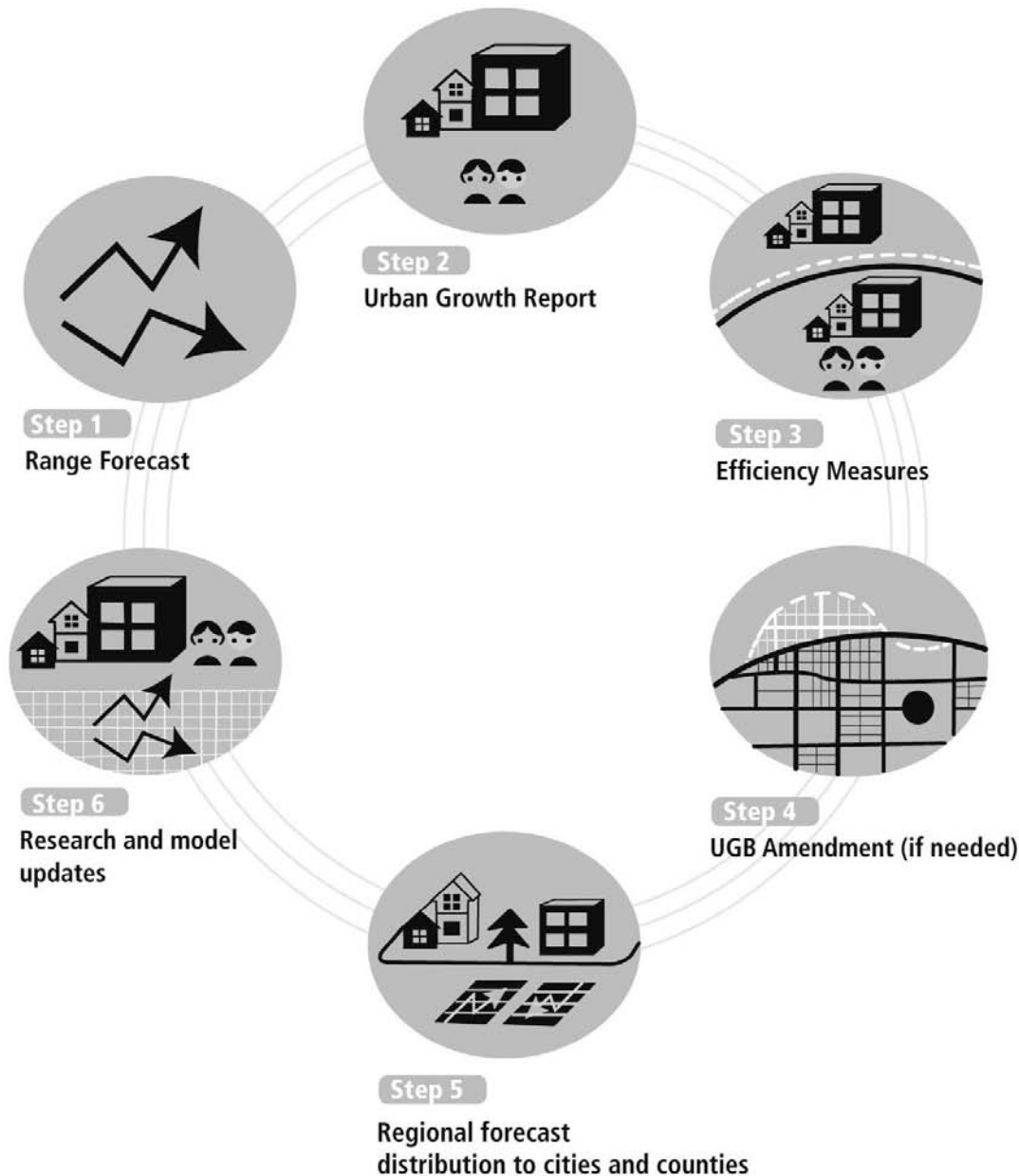
Additional information in draft urban growth report appendices

www.oregonmetro.gov/growth

Past growth – future growth



Forecast coordination cycle



Step 1

Range Forecast

How many more household and jobs will we have in the 7 county area and what share of these will be in the UGB?

Step 2

Urban Growth Report

How much of the region's growth can we meet in the current UGB and what is the additional need, if any?

Step 3

Efficiency Measures

What actions can increase the capacity to meet anticipated growth in the UGB, if needed?

Step 4

UGB Amendment (if needed)

If a UGB expansion is needed, which areas are most suitable to include to meet the region's forecast need for jobs and housing?

Step 5

Regional forecast distribution to cities and counties

Where will the forecast growth locate within the region?

Step 6

Research and model updates

What policy questions do we anticipate for the next UGB review cycle and what analysis can support the decisions?

Policy considerations when planning for potential population & job growth

- What if we plan for low growth and high growth occurs?
- What if we plan for high growth and low growth occurs?
- Who will realize benefits and who will realize burdens of getting it wrong in either direction?
- What is the best course of action, knowing that we will update the forecast in six years?

Which choices will help the region to achieve desired outcomes?

- Vibrant communities
- Economic competitiveness and prosperity
- Safe and reliable transportation
- Leadership addressing climate change
- Clean air, clean water and healthy ecosystems
- Equity

Successes around the region:

Investing in our communities



Exports



Villebois, Wilsonville



Troutdale Reynolds

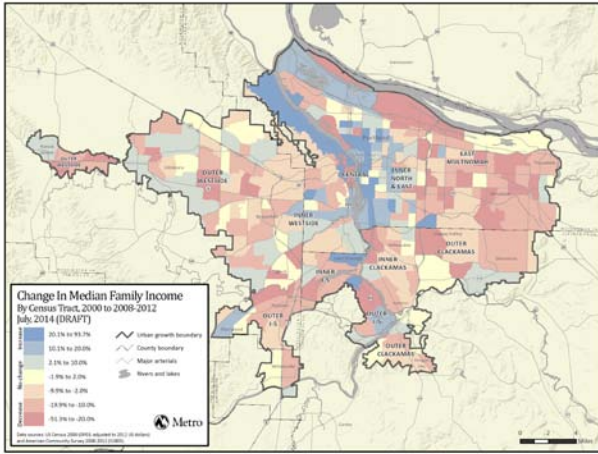


4th Main, Hillsboro

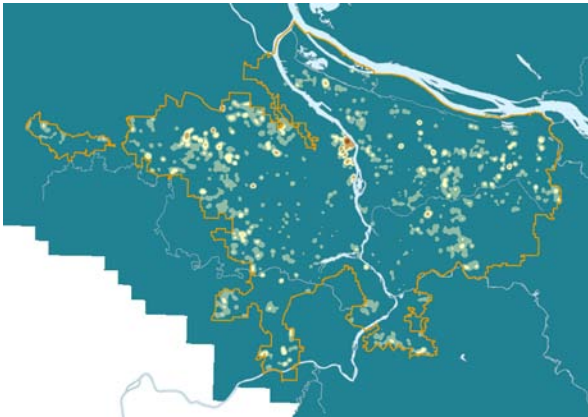


Hassalo on 8th, Portland

Challenges around the region

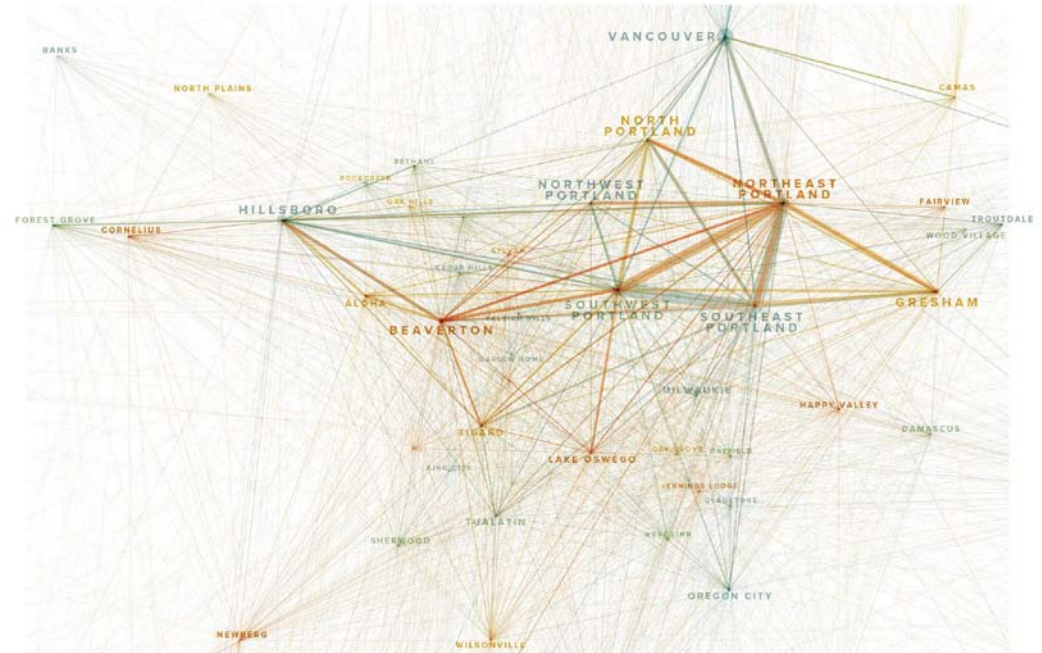


Displacement



TRAVEL COMMUTE PATTERNS

2011 COMMUTE PATTERNS FROM CITIES/PLACES IN THE PORTLAND METROPOLITAN AREA
LINES CONNECT A PERSON'S PLACE OF RESIDENCE TO PLACE OF EMPLOYMENT
LINE THICKNESS REPRESENTS NUMBER OF PEOPLE



DATA SOURCE: LONGITUDINAL EMPLOYER-HOUSEHOLD DYNAMICS, U.S. CENSUS BUREAU

Traffic

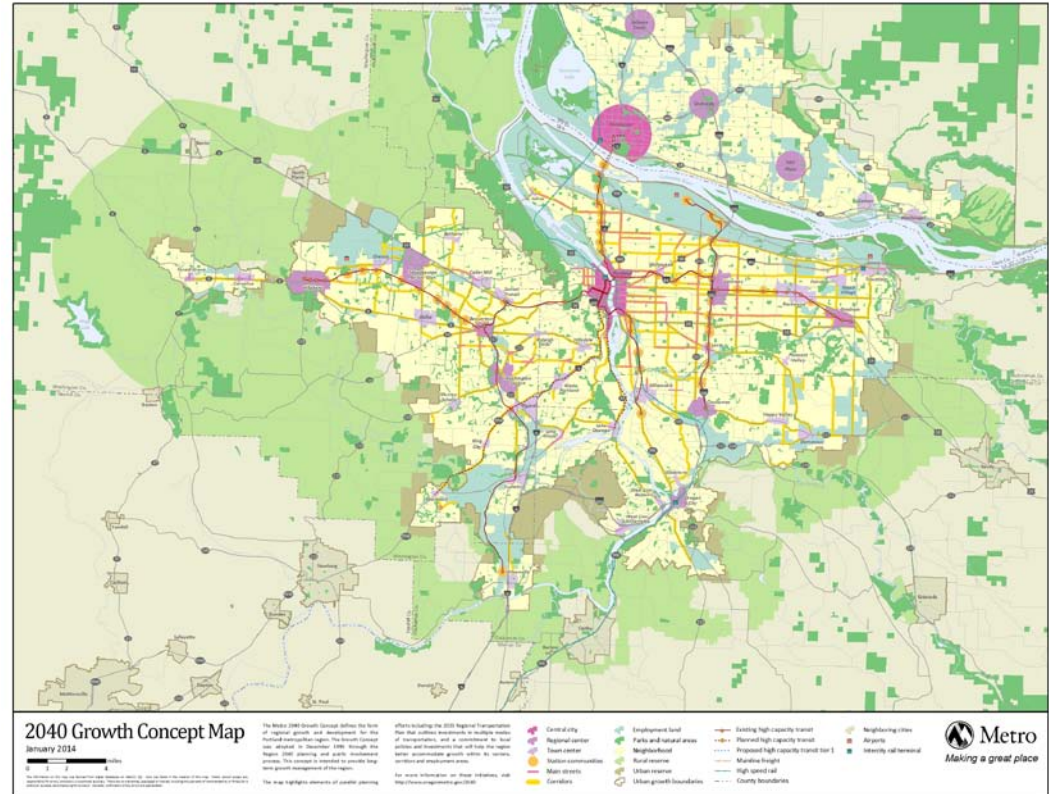
Concerns with new development

Many have a role in preparing for growth and change

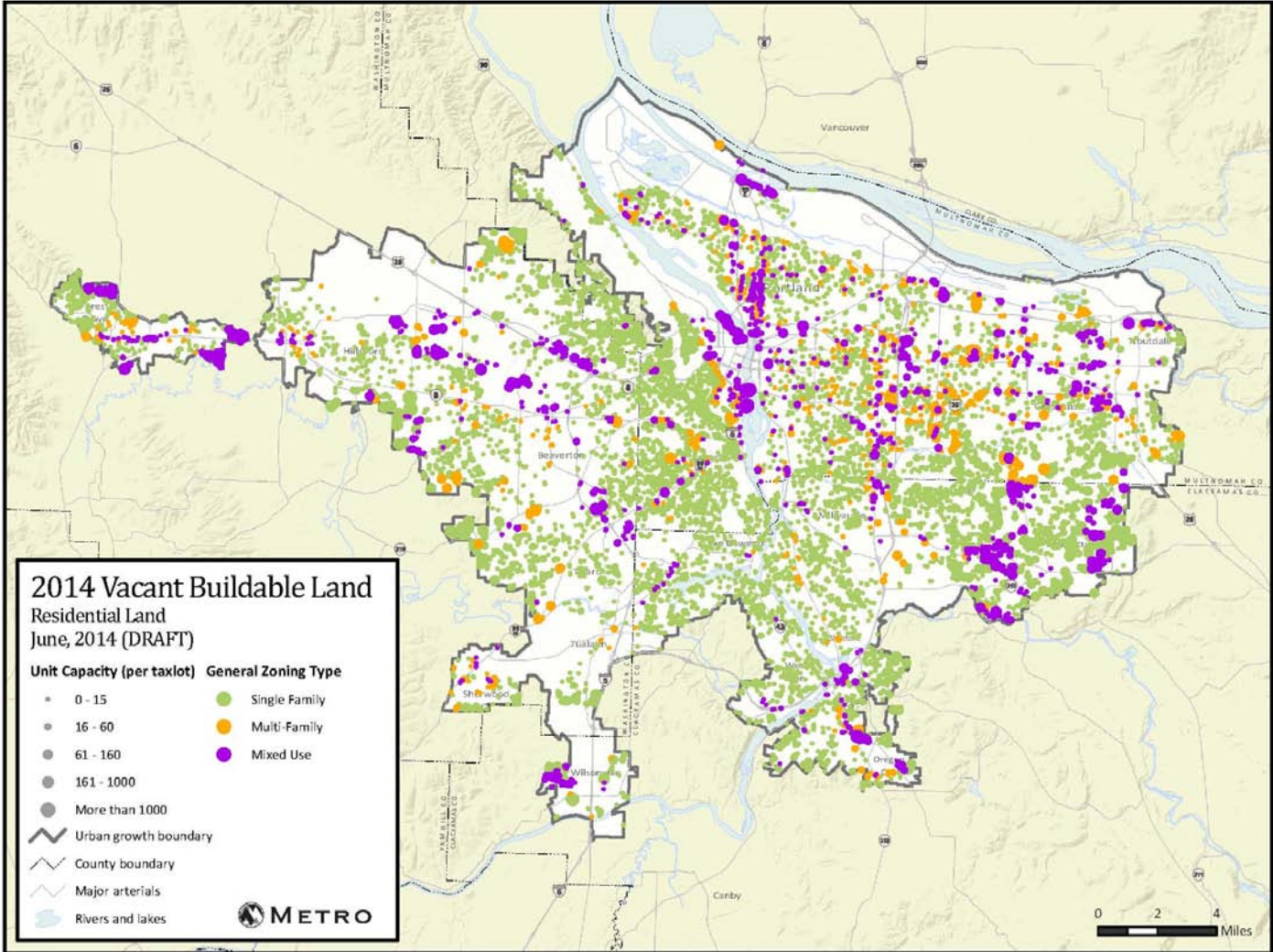
- Metro
- Cities and counties
- Special districts
- Non-profits
- Businesses
- Individuals
- State

One of Metro's roles: Regional urban growth management

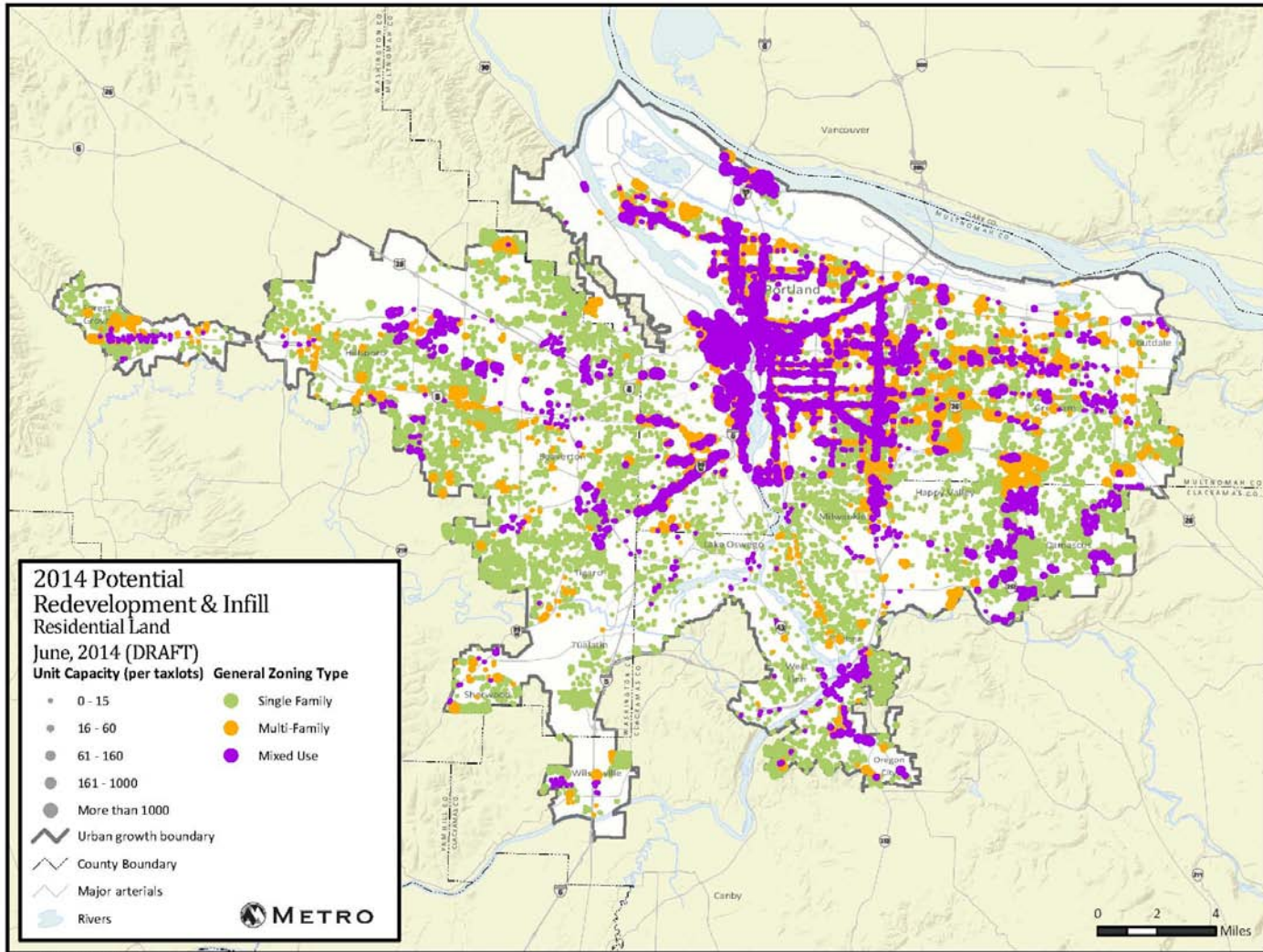
Ensure that there is enough space inside the urban growth boundary for housing and jobs for the next 20 years



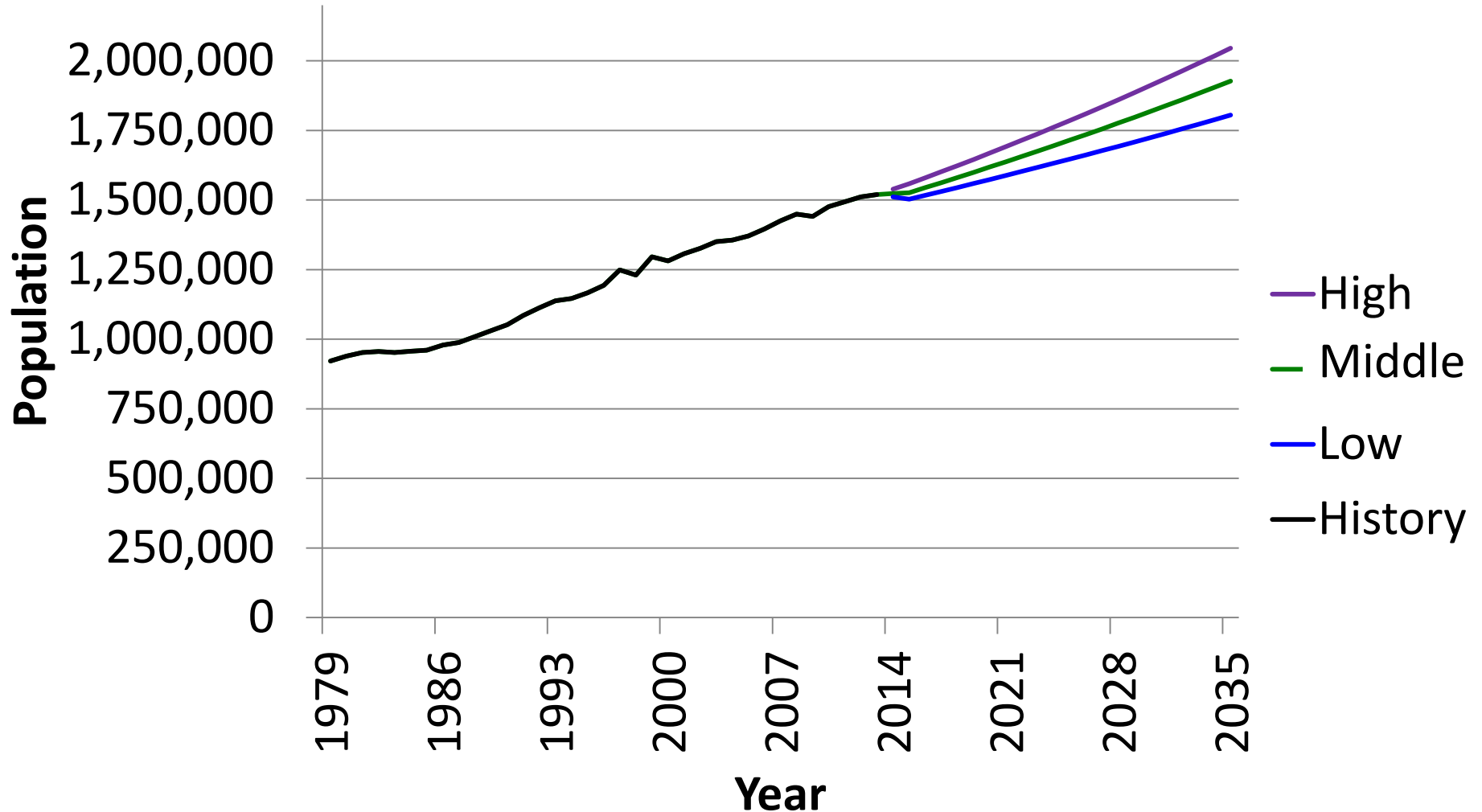
Residential buildable land: vacant tax lots



Residential buildable land: redevelopment and infill candidate tax lots



Estimated population growth for the Metro UGB



Single-family housing capacity needs (2015 – 2035, Metro UGB)

	Single-family dwelling units			
	Buildable land inventory	Market-adjusted supply	Demand	Surplus or need
Low growth forecast	118,700	76,600	70,600	+6,000
Middle growth forecast		90,700	89,000	+1,700
High growth forecast		97,700	103,800	-6,100

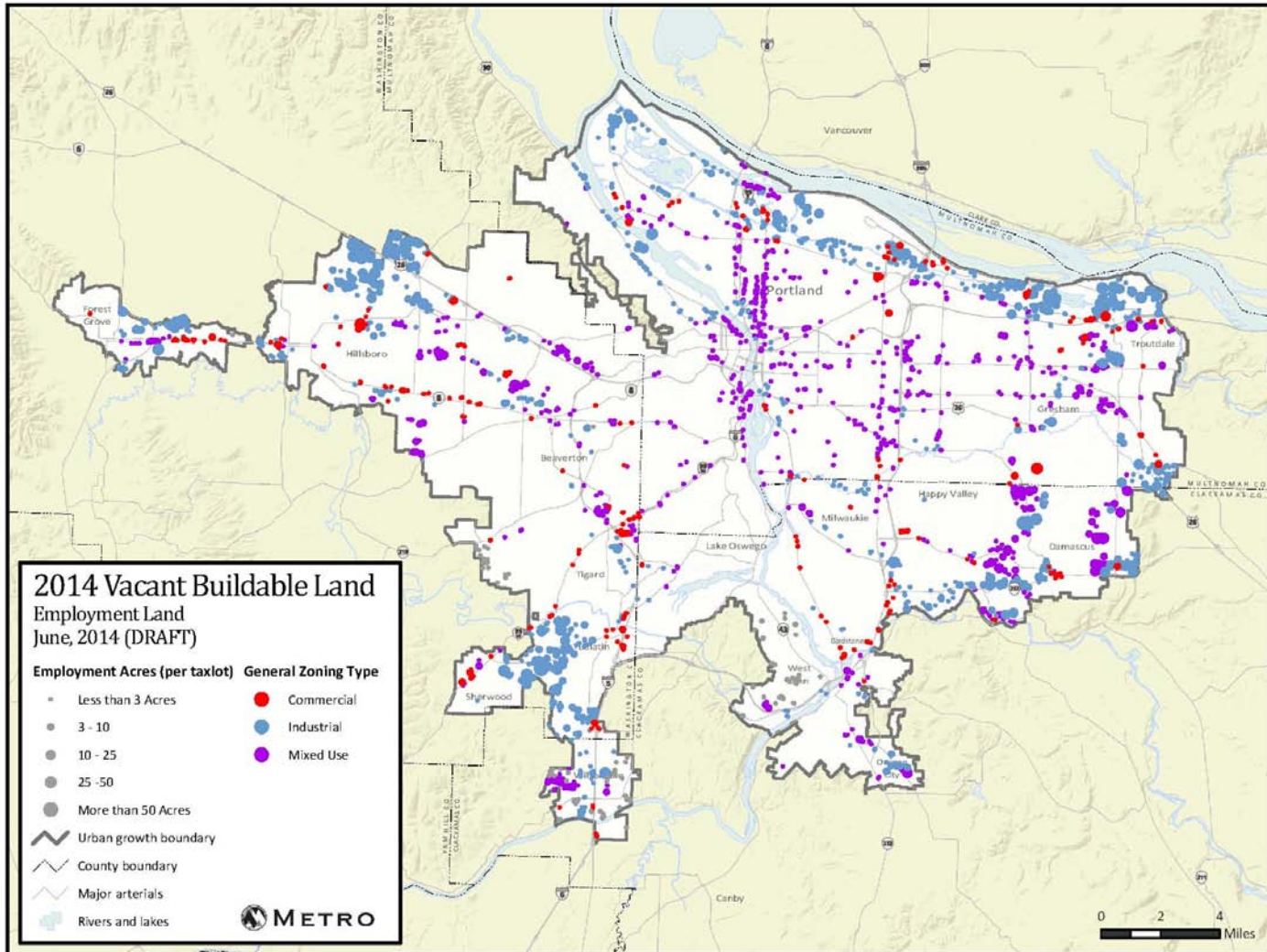
Multifamily housing capacity needs (2015 – 2035, Metro UGB)

	Multifamily dwelling units			
	Buildable land inventory	Market-adjusted supply	Demand	Surplus or need
Low growth forecast	274,000	119,100	82,700	+36,400
Middle growth forecast		130,800	108,400	+22,400
High growth forecast		165,800	132,200	+33,600

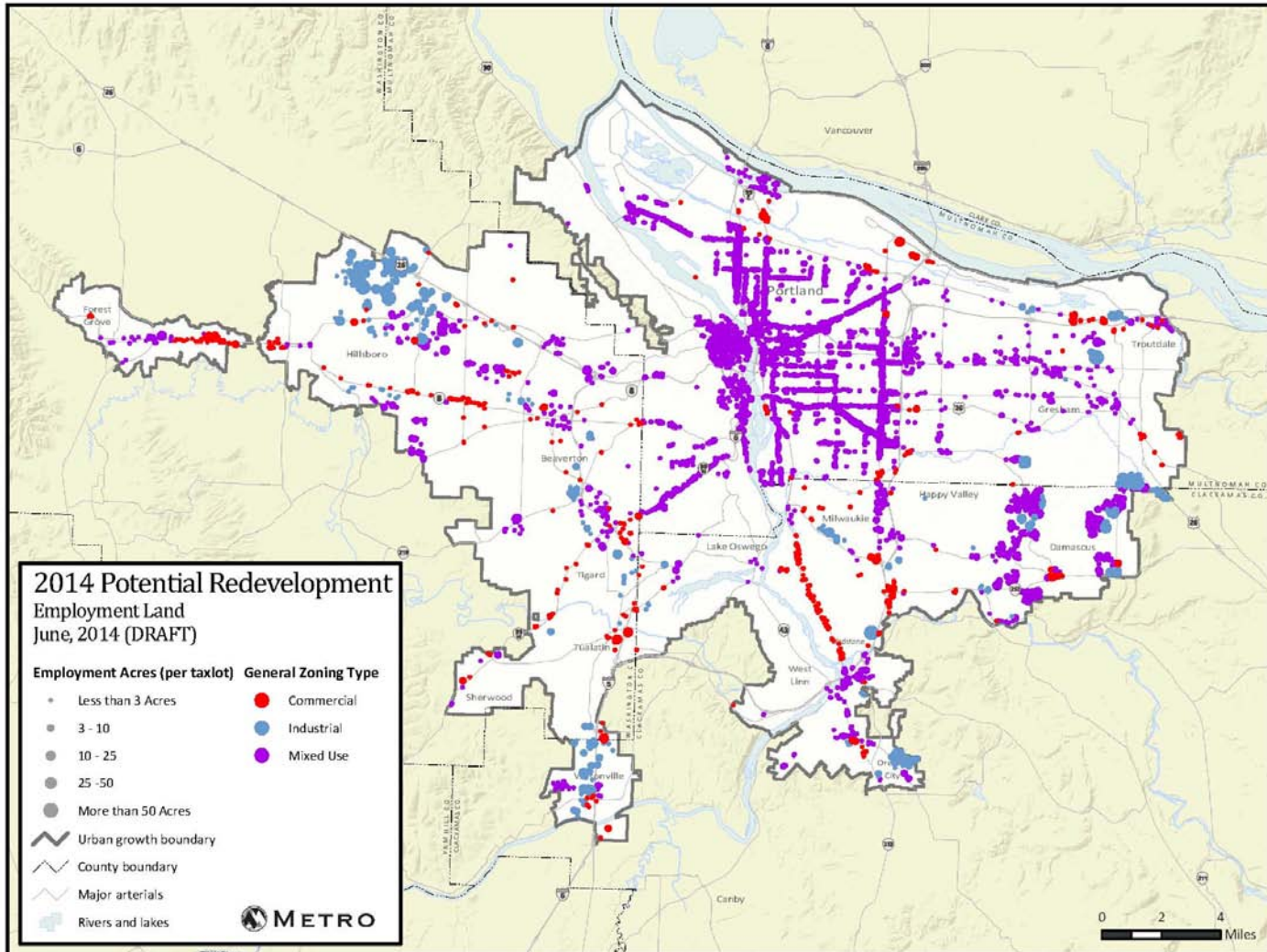
Policy considerations: housing

- Is the real challenge land readiness or land supply?
- How can we encourage “family-friendly” housing in urban areas?
- What is the right mix of housing in UGB expansions?
- How should policy makers balance housing preferences with other concerns such as infrastructure provision and affordability?
- How much can we rely on growth capacity in Damascus? Are there other options that are more viable, either in existing urban areas, urban reserves?

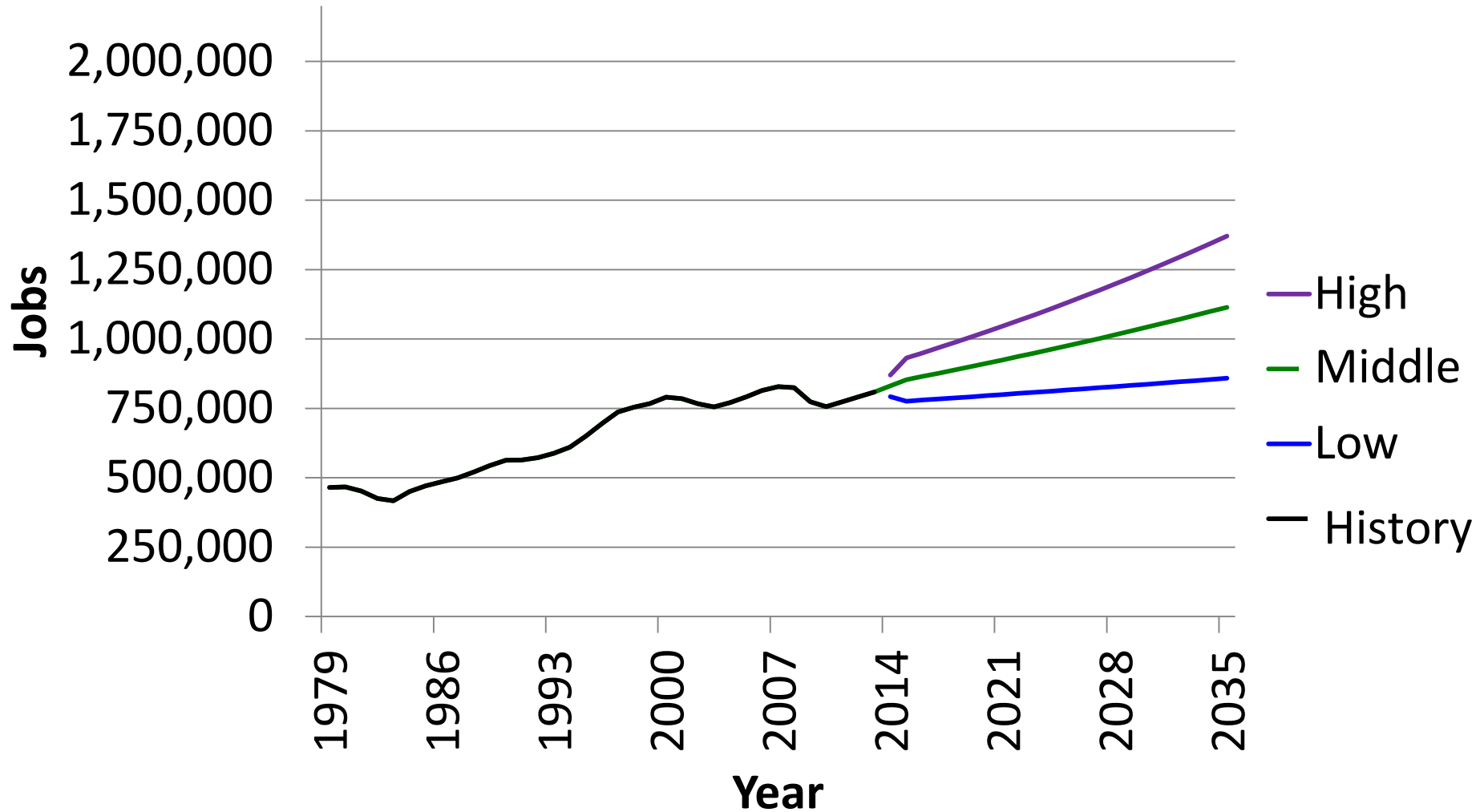
Employment buildable land: vacant tax lots



Employment buildable land: redevelopment candidate tax lots



Estimated job growth for the Metro UGB



General industrial capacity needs (2015 – 2035, Metro UGB)

	General industrial employment (acres)			
	Buildable land inventory	Market- adjusted supply	Demand	Surplus or need
Low growth forecast	7,100	5,800	1,200	+4,600
Middle growth forecast		5,000	3,800	+1,200
High growth forecast		5,000	6,500	-1,500

Large industrial site needs (25+ acres) (2015 – 2035, Metro UGB)

	Number of sites (preliminary update by Mackenzie)	Demand	Surplus or need
Low growth forecast	74	8	+66
Middle growth forecast		21	+53
High growth forecast		34	+40

Notes:

- 24 of the 74 sites in the inventory are, at this time, being held by firms for future expansion opportunities.
- Growth of existing firms is implicit in demand forecast.
- Inventory includes vacant land only, not redevelopment or reuse of buildings

Commercial capacity needs (2015 – 2035, Metro UGB)

	Commercial employment (acres)			
	Buildable land inventory	Market- adjusted supply	Demand	Surplus or need
Low growth forecast	4,300	4,200	1,400	+2,800
Middle growth forecast		4,500	3,600	+900
High growth forecast		5,100	5,700	-600

Policy considerations: job growth

- Is the real challenge land readiness or land supply?
- Where should RISE focus its attention to ensure the region can generate job growth?
- Are there urban reserve locations where it makes sense to plan for a mix of housing and commercial jobs?

Phase II (2014 Urban Growth Report)



- | | |
|----------|---|
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