



# Metro | Agenda

Meeting: Metro Technical Advisory Committee  
Date: Wednesday, March 16, 2016  
Time: 10:00 a.m. to Noon  
Place: Council Chamber

Time	Agenda Item	Action Requested	Presenter(s)	Materials
10:00 a.m. 10 min.	<b>CALL TO ORDER</b>  <b>Updates from the Chair</b>		John Williams, Chair	
	<b>Citizen Communications to MTAC</b>		All	
15 min.	<b>Equitable Housing Initiative and Summit Update</b>  <i>Purpose: To update MTAC about events since their January 20 briefing</i>	Informational	Emily Lieb, Metro	
10:25 40 min.	<b>Presentation of the Sherwood West Preliminary Concept Plan</b>  <i>Purpose: To update MTAC on Sherwood West preliminary concept plan work</i>	Informational	Bradley Kirby, Sherwood; Kirstin Greene, Cogan Owens Greene; Anais Mathez, Cogan Owens Greene; Martin Glastra Van Loon, Sera Architects	
11:05 55 min.	<b>Growth Distribution Update</b>  <i>Purpose: To update MTAC on growth distribution work to-date and make a recommendation to MPAC</i>	Informational / Recommendation to MPAC	Jeff Frkonja, Metro Rebecca Hamilton, Metro	
Noon	<b>Adjourn</b>			

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## 2016 MTAC Tentative Agendas

<b>January 6</b> <ul style="list-style-type: none"><li>Cancelled</li></ul>	<b>January 20</b> <ul style="list-style-type: none"><li>Housing Equity</li></ul>
<b>February 3</b> <ul style="list-style-type: none"><li>Cancelled</li></ul>	<b>February 17</b> <ul style="list-style-type: none"><li>Cancelled</li></ul>
<b>March 2</b> <ul style="list-style-type: none"><li>Urban Growth Management Update</li><li>2018 RTP Update: 2016 Activities &amp; Milestones</li><li>2018 RTP Update: Background for Regional Leadership Forum #1</li><li>Metro Equity Strategy</li><li>Title 13 Progress Report</li></ul>	<b>March 16</b> <ul style="list-style-type: none"><li>Growth Distribution</li><li>Sherwood West Concept Planning work</li></ul>
<b>April 6</b>	<b>April 20</b> <ul style="list-style-type: none"><li>Metro Equity Strategy Final Report</li></ul>
<b>May 4</b>	<b>May 18</b> <ul style="list-style-type: none"><li>2018 RTP Update: Background for Regional Leadership Forum #2</li></ul>
<b>June 1</b>	<b>June 15</b>
<b>July 6</b>	<b>July 20</b>
<b>August 3</b>	<b>August 17</b> <ul style="list-style-type: none"><li>2018 RTP Update: Background for Regional Leadership Forum #3</li><li>Draft Performance Targets and Measures</li></ul>
<b>September 7</b>	<b>September 21</b>
<b>October 5</b>	<b>October 19</b>
<b>November 2</b>	<b>November 16</b>
<b>December 7</b>	<b>December 21</b>

Updated 1/14/16

### Parking Lot – Future Agenda Items

- Bonny Slope and North Bethany update
- ODOT Highway Performance Measures Project

### Parking Lot – Future Events

- April 22, 2016 – RTP Regional Leadership Forum #1 (Trends, Challenges and a Vision for the Future)
- July 2016 (tentative) – RTP Regional Leadership Forum #2 (Finance)
- October 2016 (tentative) – RTP Regional Leadership Forum #3 (Designing for Safe, Healthy & Equitable Communities)

Materials following this page were distributed at the meeting.



# Sherwood West Preliminary Concept Plan

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*A long range look at our future.*

## MTAC Presentation

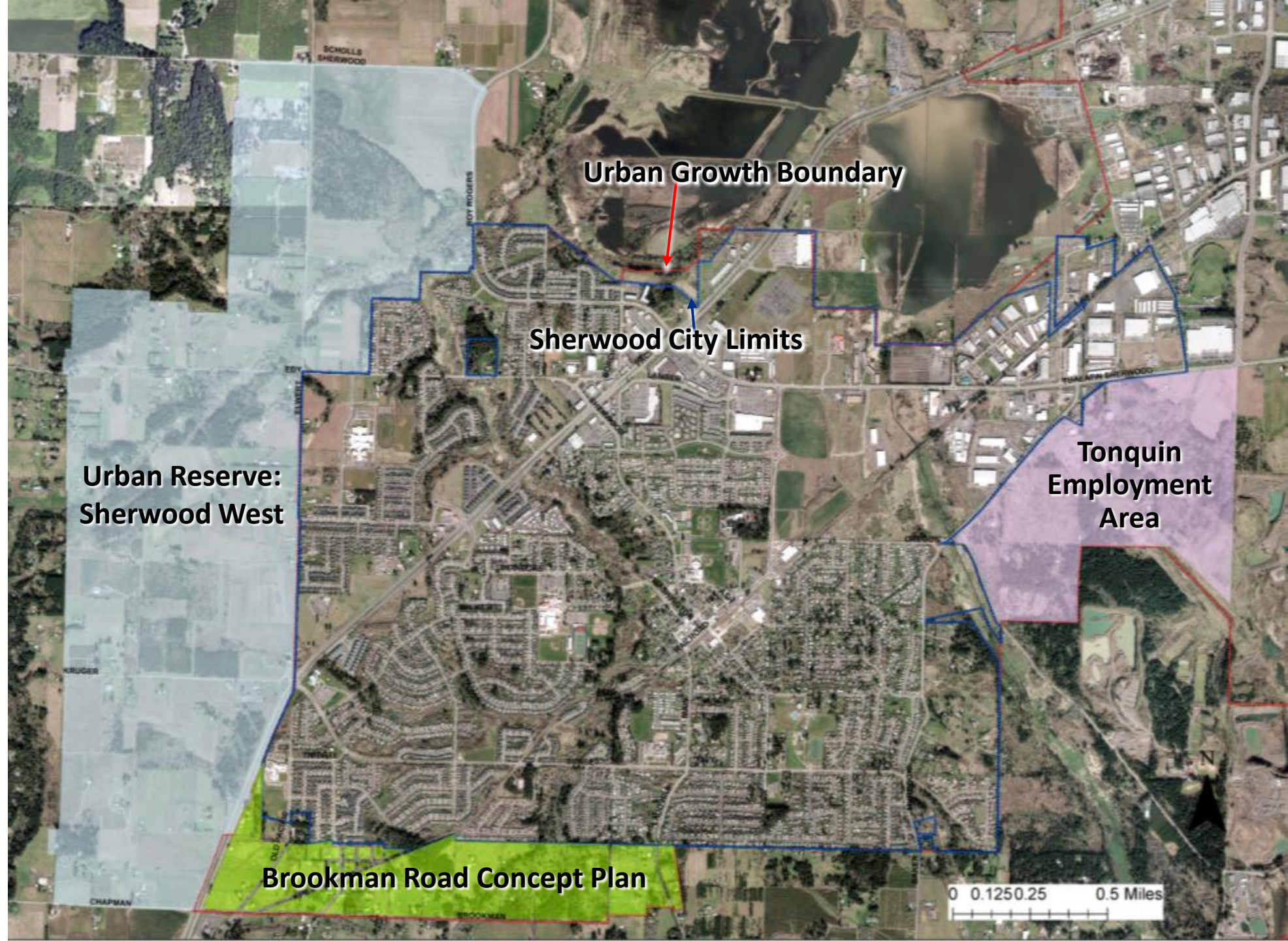
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MARCH 16, 2016

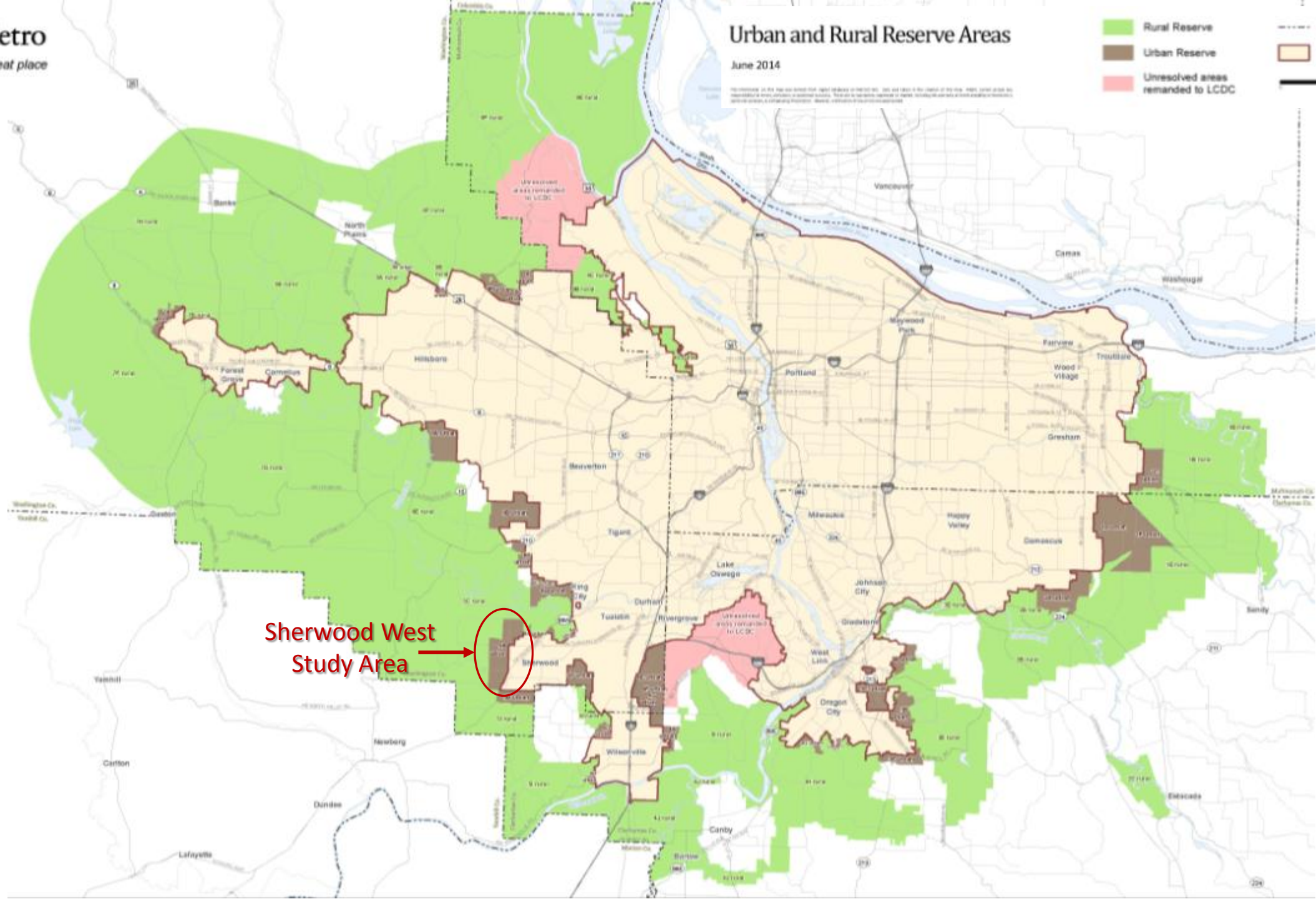


# Context

- City Limits/Urban Growth Boundary
- Annexation Process
- Urban Reserves







# PLAN DOCUMENT

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- EXECUTIVE SUMMARY
- PLANNING PROCESS
- HISTORY AND GROWTH
- SHERWOOD WEST
- CONCEPT PLAN
- PHASING AND FUNDING STRATEGY
- NEXT STEPS AND RECOMMENDATIONS
- APPENDICES

# WHY DO THIS NOW?

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- We are running out of land for residential development
- Sherwood has experienced annual growth rates between 3-8% since 1990
- Sherwood is consistently ranked as one of the top small towns in America



# Housing Growth Forecast 2015-2035

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- **Forecast for new housing: 1,156 new dwellings**
- **Vacant land capacity: 1,281 new dwellings**
- **Conclusions:**
  - Sherwood can accommodate forecast growth
  - Sherwood will need to annex the Brookman area
  - Forecast growth (0.7% per year) is considerably below historical growth (3.4% per year)
- **If Sherwood grows: 2% to 4% per year**
  - City Limits: 2-5 years of growth
  - City Limits + Brookman: 4-10 years of growth
  - Additional growth depends on availability of development ready land, such as Sherwood West

# Public Involvement

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GUIDED BY THE COMMUNITY ADVISORY COMMITTEE (CAC)



**Consistency of messages and understanding of the benefits of concept planning**



**Frequency and effectiveness of community engagement opportunities**



**Increasing participation over time**



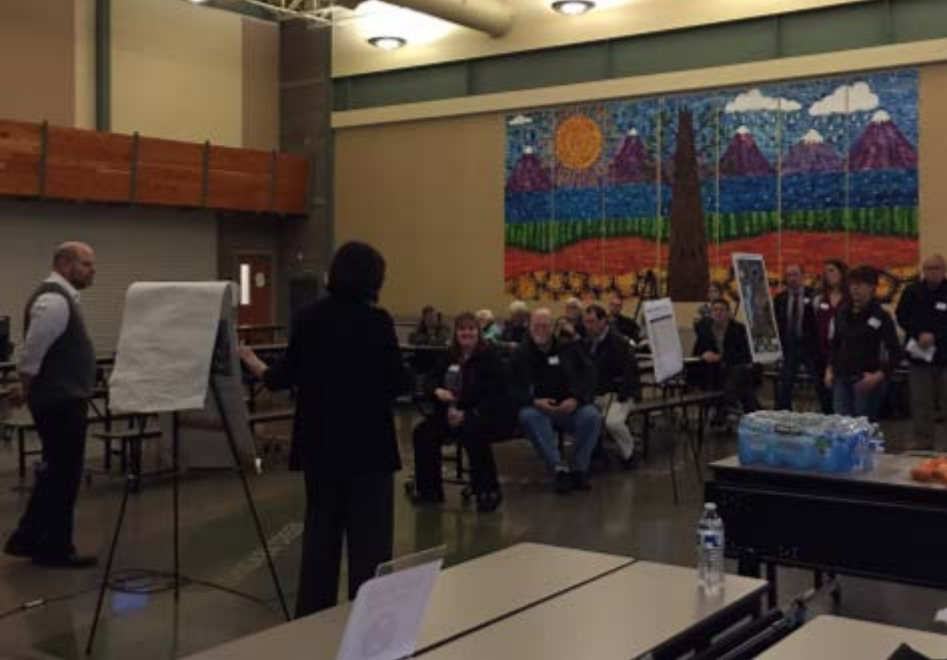
**Piloting new techniques**



**Community concerns identified and addressed**



# **PUBLIC INVOLVEMENT PLAN**



**Project Website**

**E-Newsletter Subscription & Social Media**

**Project Video**

**Property Owner Meetings** *(March-April)*

**Community Workshop** *(May)*

**Community Survey – Vision and Values** *(May-June)*

**Ice Cream Social & Open House** *June 2015*

**Community Survey – Draft Alternatives** *(July-August)*

**Music on the Green** *(July-August)*

**Movies in the Park** *(August)*

**Sherwood Charter School**

**Sherwood Rotary**

**Chamber of Commerce**

**Community Survey – Final Preferred Alternative** *(October)*

**Community Open House** *(October)*

**COMMUNITY ENGAGEMENT EVENTS**



# Vision Statement

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“Sherwood West complements the City’s form and small town character through an integrated and continued pattern of the community’s most valued neighborhoods. Through a range of well-designed housing options and protected natural areas, Sherwood West is a great place for families.

It helps satisfy the City’s need for well-planned growth and other community needs. Designed as a complete community, development is orderly, attractive and protects views. The area is well administered and development contributes to the fiscal health of Sherwood.”

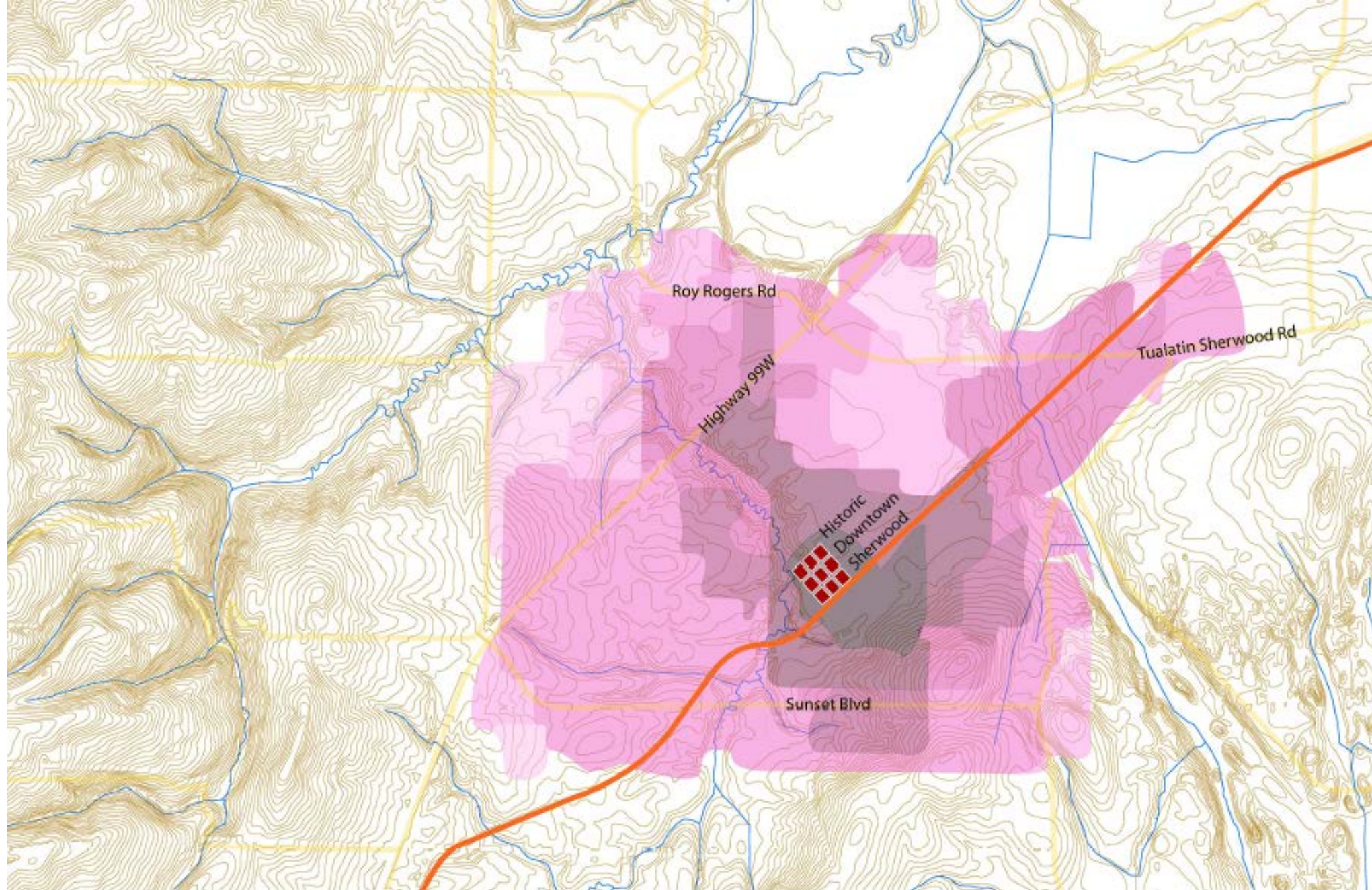
GOAL	EVALUATION CRITERIA
Growth is well-planned	<ul style="list-style-type: none"> <li>• Neighborhoods are phased adjacent to existing development</li> <li>• Well-phased extension of services</li> <li>• Connectivity</li> </ul>
Design includes complete community attributes	<ul style="list-style-type: none"> <li>• Incorporates nature</li> <li>• Neighborhood retail</li> <li>• Provides amenities that cannot be located in existing Sherwood</li> </ul>
Development respects and recognizes Sherwood pattern, heritage, and small-town feel	<ul style="list-style-type: none"> <li>• Walkable</li> <li>• Integrates with existing Sherwood</li> <li>• View corridors, natural features retained</li> </ul>
Concepts promote health	<ul style="list-style-type: none"> <li>• Walking, bicycling easy to access</li> <li>• Access to transportation choice, transit</li> </ul>
Development protects and provides access to nature	<ul style="list-style-type: none"> <li>• View corridor, other assets protected</li> <li>• Walking trails along heritage resources</li> </ul>
Implementation is pragmatic	<ul style="list-style-type: none"> <li>• Options minimize cost of infrastructure</li> <li>• Balance of benefits and burdens of development</li> </ul>

**High: Outstanding performance. Plan goes above and beyond the evaluation criteria to meet the goal.**

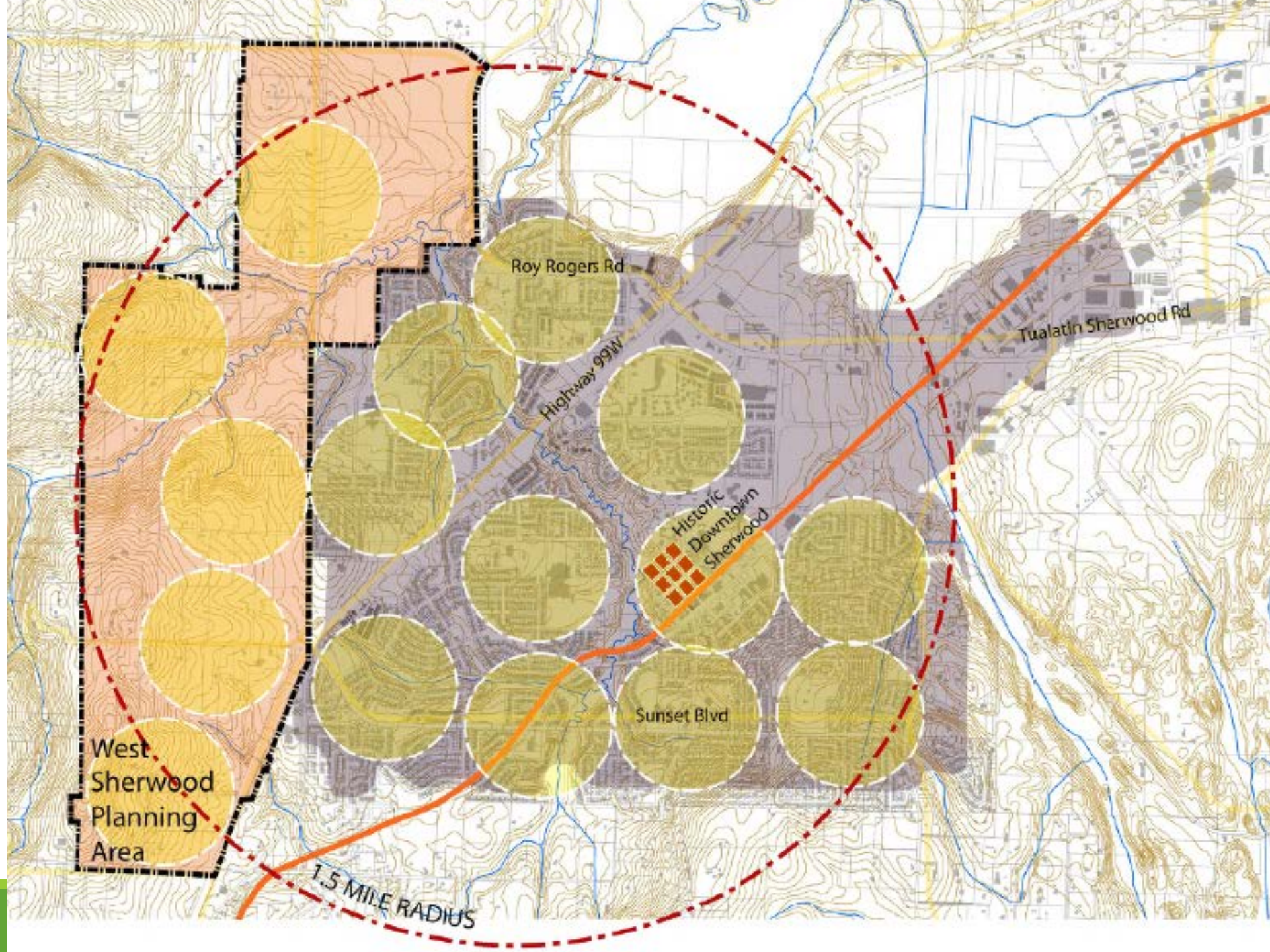
**Medium: Good performance. Plan meets the criteria but may need more work to meet the goal.**

## GOALS AND EVALUATION CRITERIA









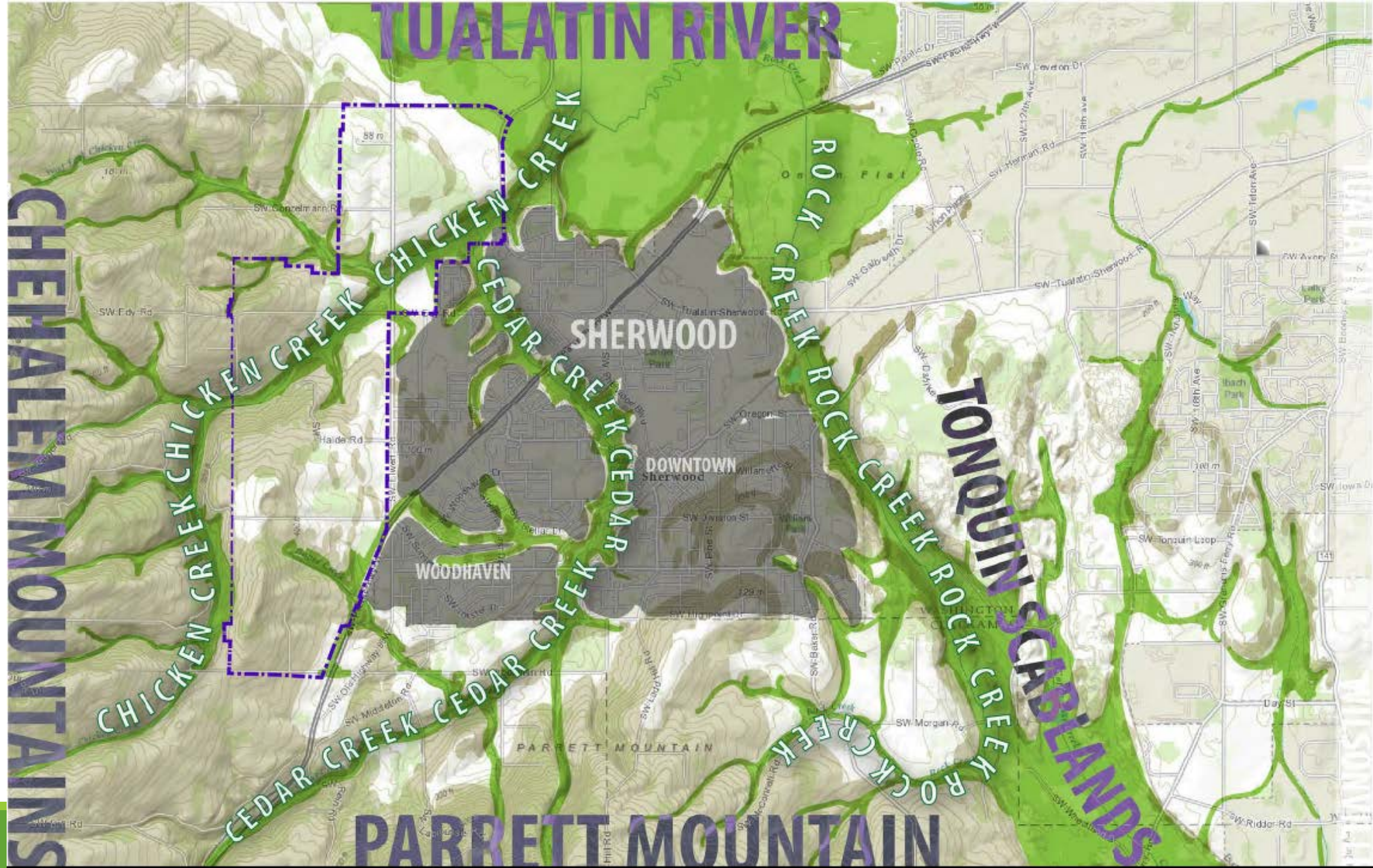


# NESTLED IN THE LANDSCAPE

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LANDFORM AND URBAN SETTLEMENT ANALYSIS







# PREFERRED PLAN

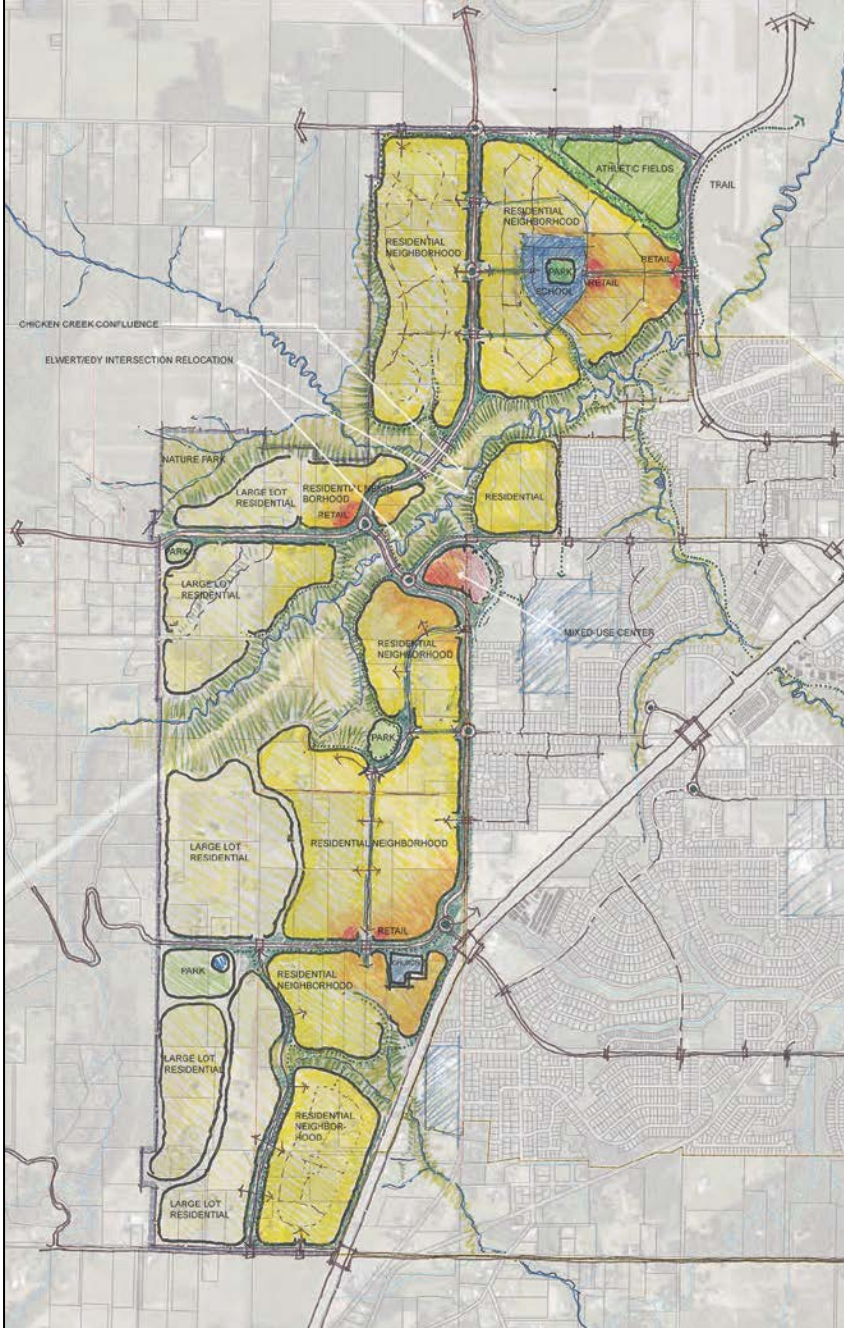
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# PLAN ATTRIBUTES

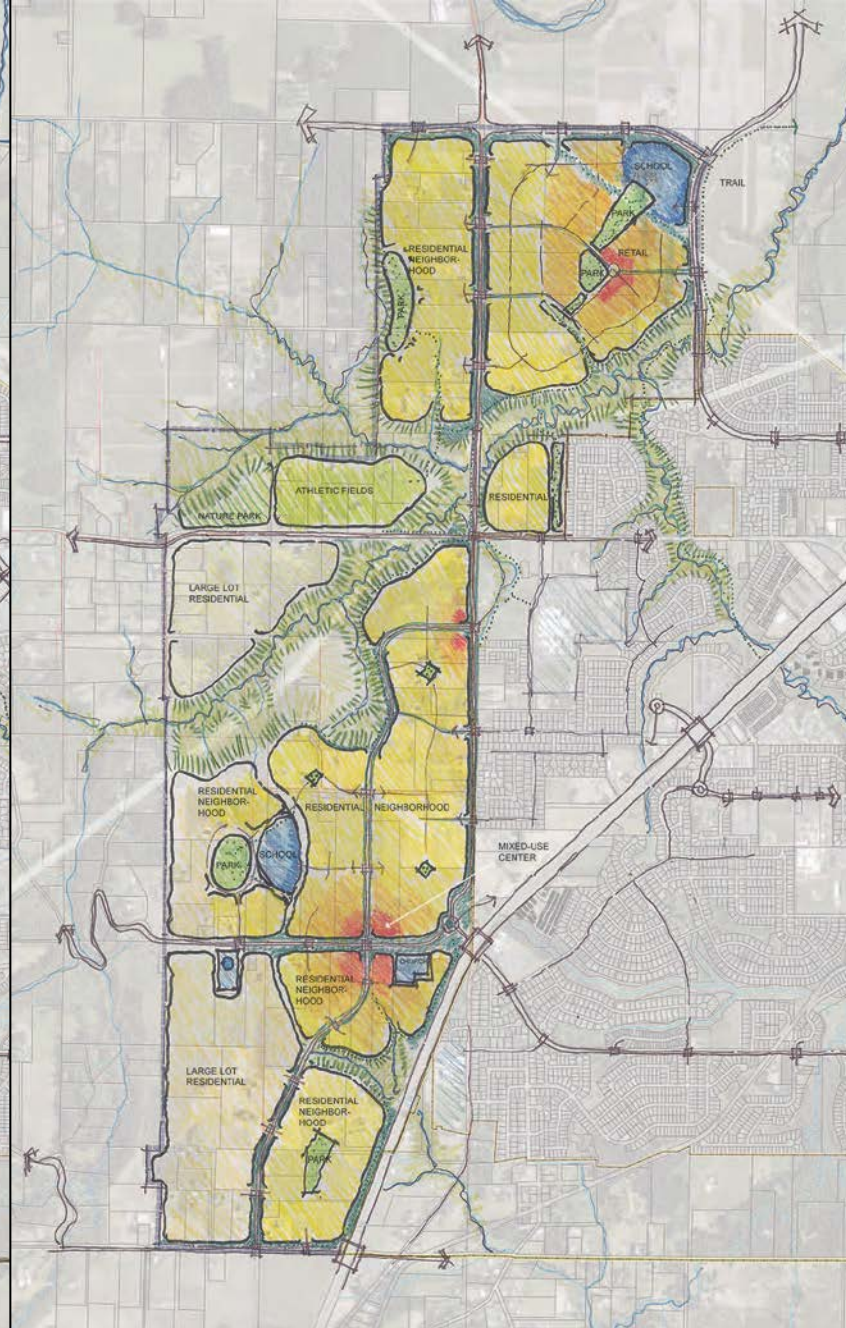
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- 10 minute neighborhood
- Resource protection
- Access to nature - trails
- Schools
- Neighborhood serving retail

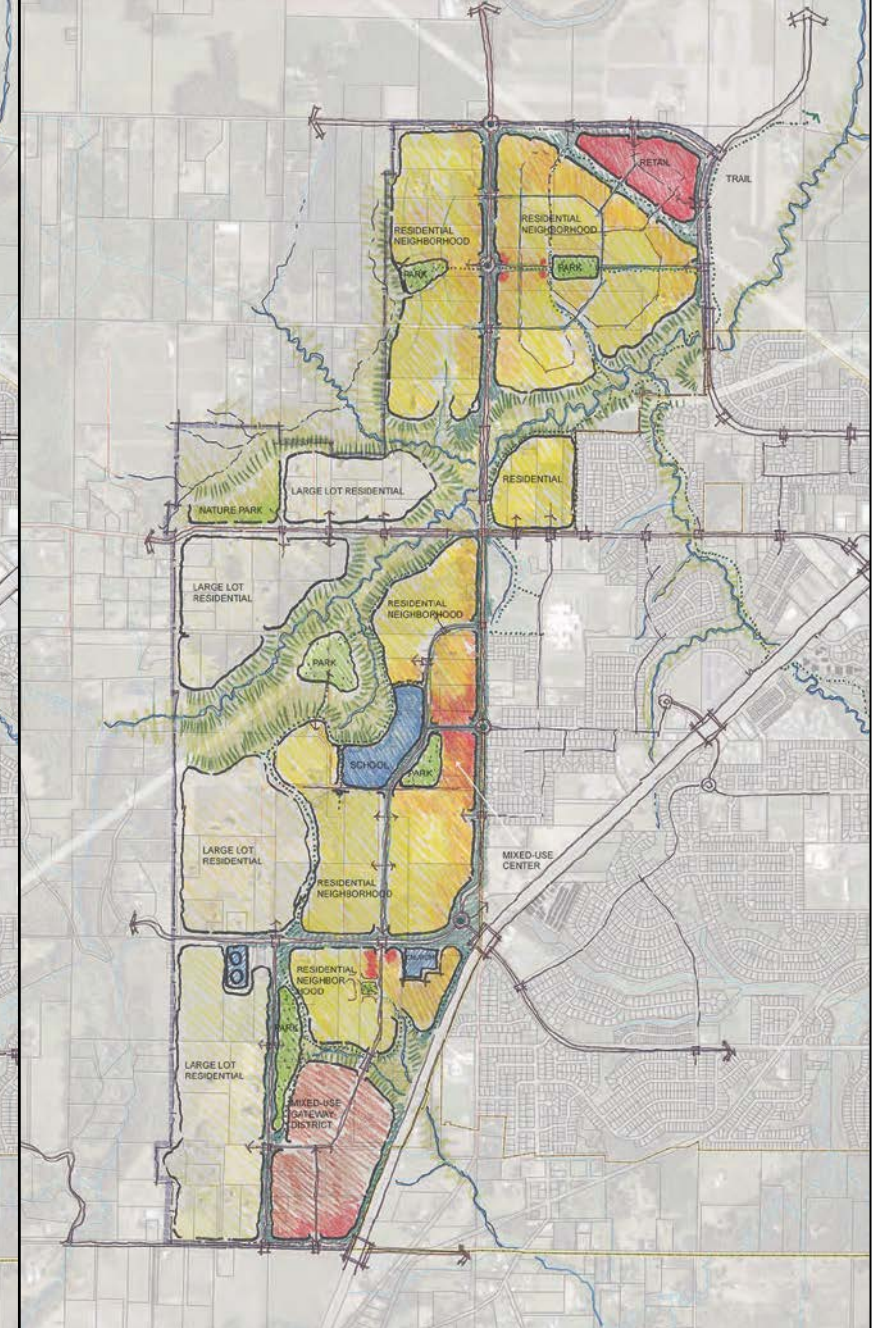




DRAFT ALTERNATIVE A

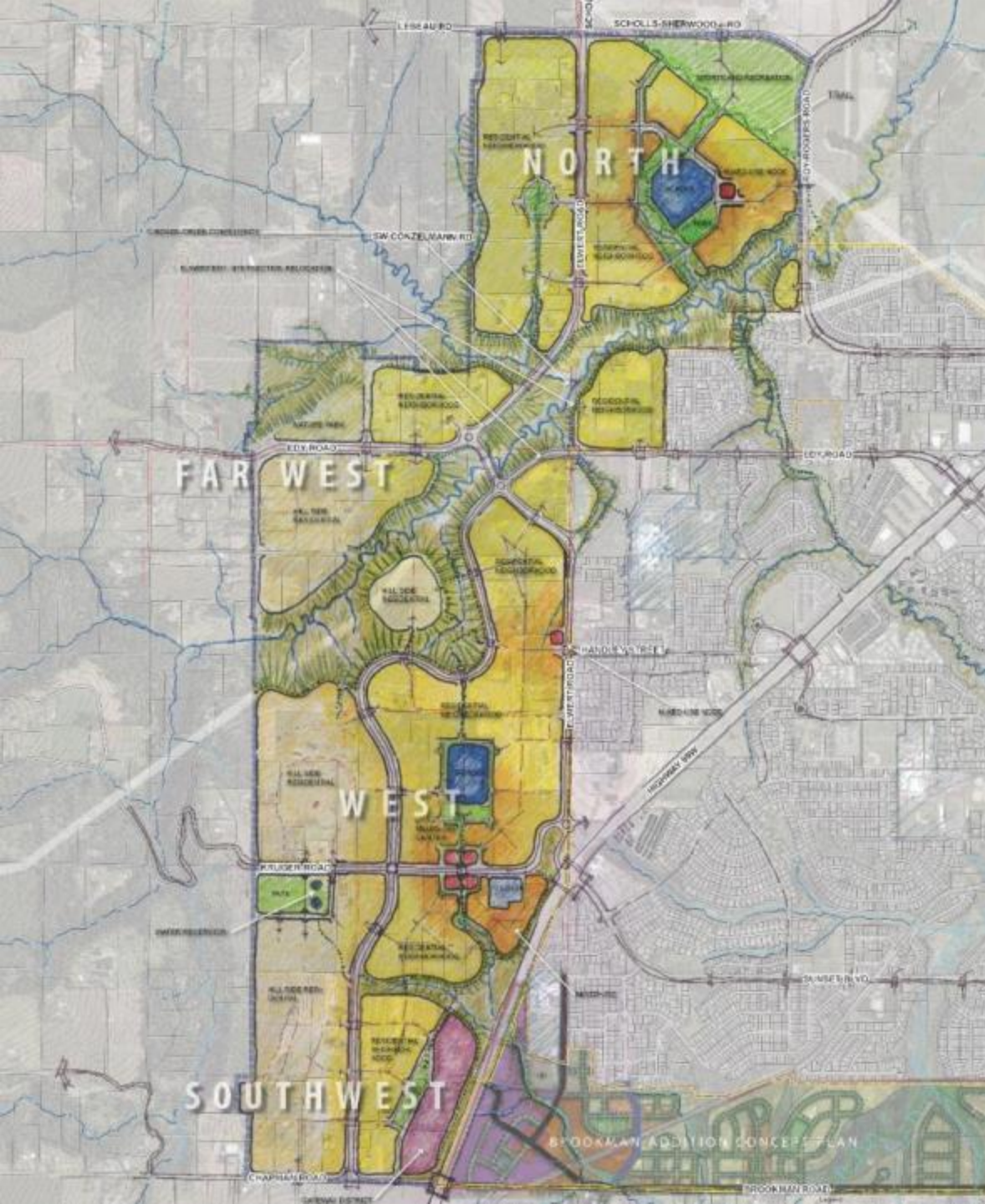


DRAFT ALTERNATIVE B



DRAFT ALTERNATIVE C





#### LEGEND

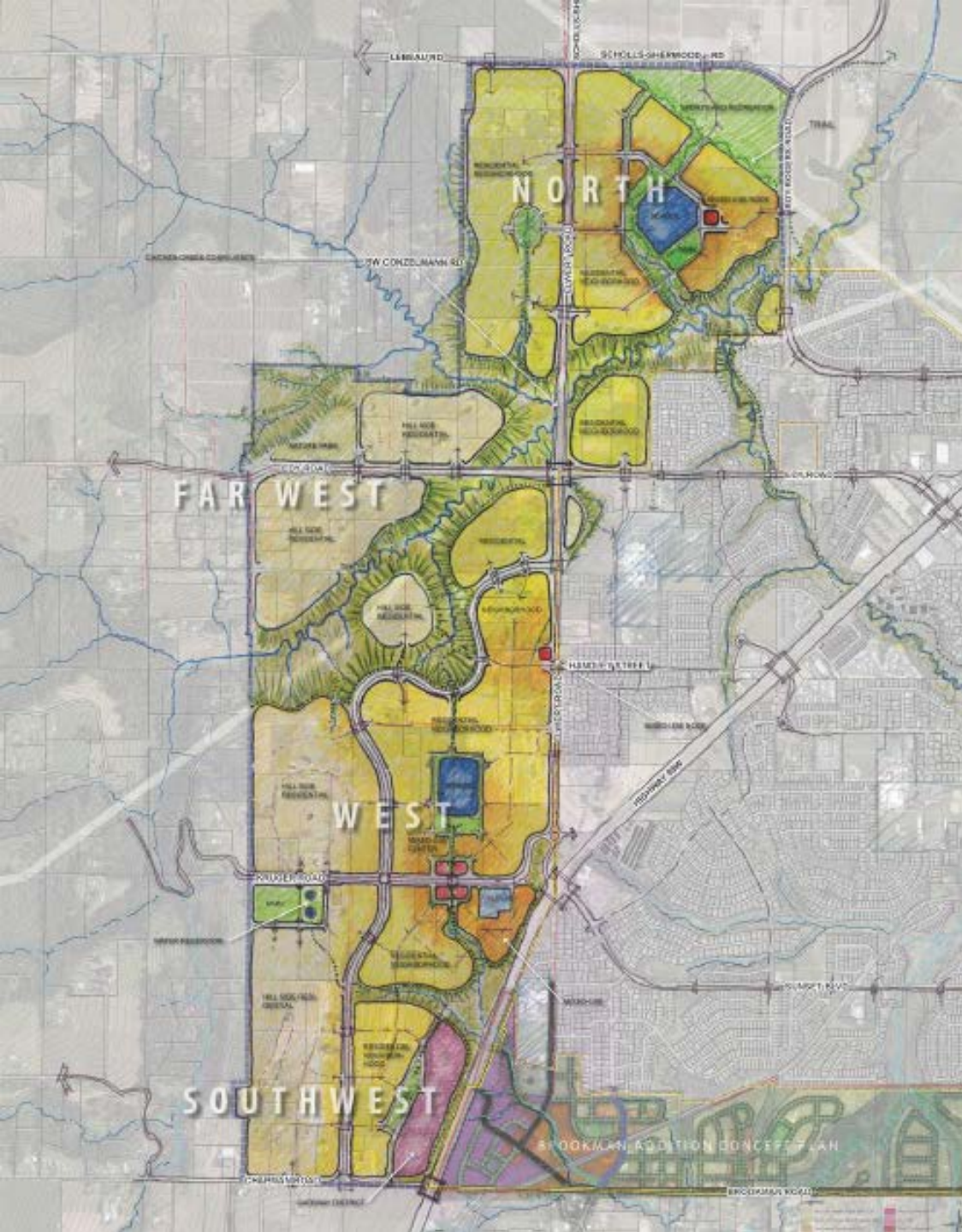
- RESIDENTIAL - HILLSIDE
- RESIDENTIAL - NEIGHBORHOOD
- RESIDENTIAL - NEIGHBORHOOD
- RESIDENTIAL - MIXED-USE
- MIXED USE COMMERCIAL
- GATEWAY DISTRICT
- SCHOOL
- CHURCH
- PARK/OPEN SPACE
- CREEK CORRIDOR OPEN SPACE
- TRAIL

0 600 1200 2400



**PREFERRED PLAN, Option 1**





## LEGEND

- RESIDENTIAL - HILLSIDE
- RESIDENTIAL - NEIGHBORHOOD
- RESIDENTIAL - NEIGHBORHOOD
- RESIDENTIAL - MIXED-USE
- MIXED USE COMMERCIAL
- GATEWAY DISTRICT
- SCHOOL
- CHURCH
- PARK/OPEN SPACE
- CREEK CORRIDOR OPEN SPACE
- TRAIL

0 600 1200 2400



**PREFERRED PLAN, Option 2**

# PHASING & FUNDING

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**Transportation**  
*(Roads, ROW, other traffic elements)*

**Storm, Sanitary, Water**

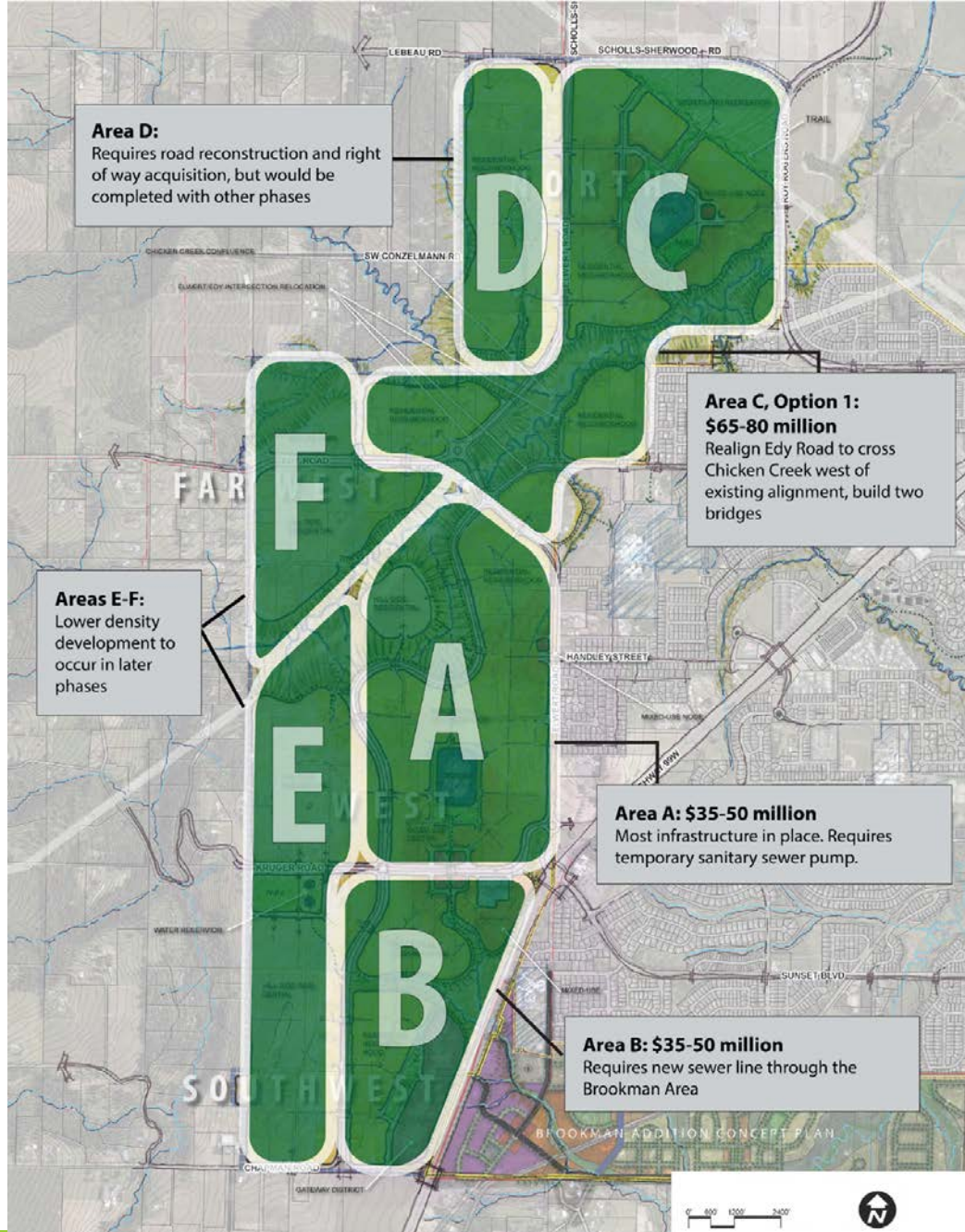
**Parks**  
*(Trails and resource lands)*

**Schools**

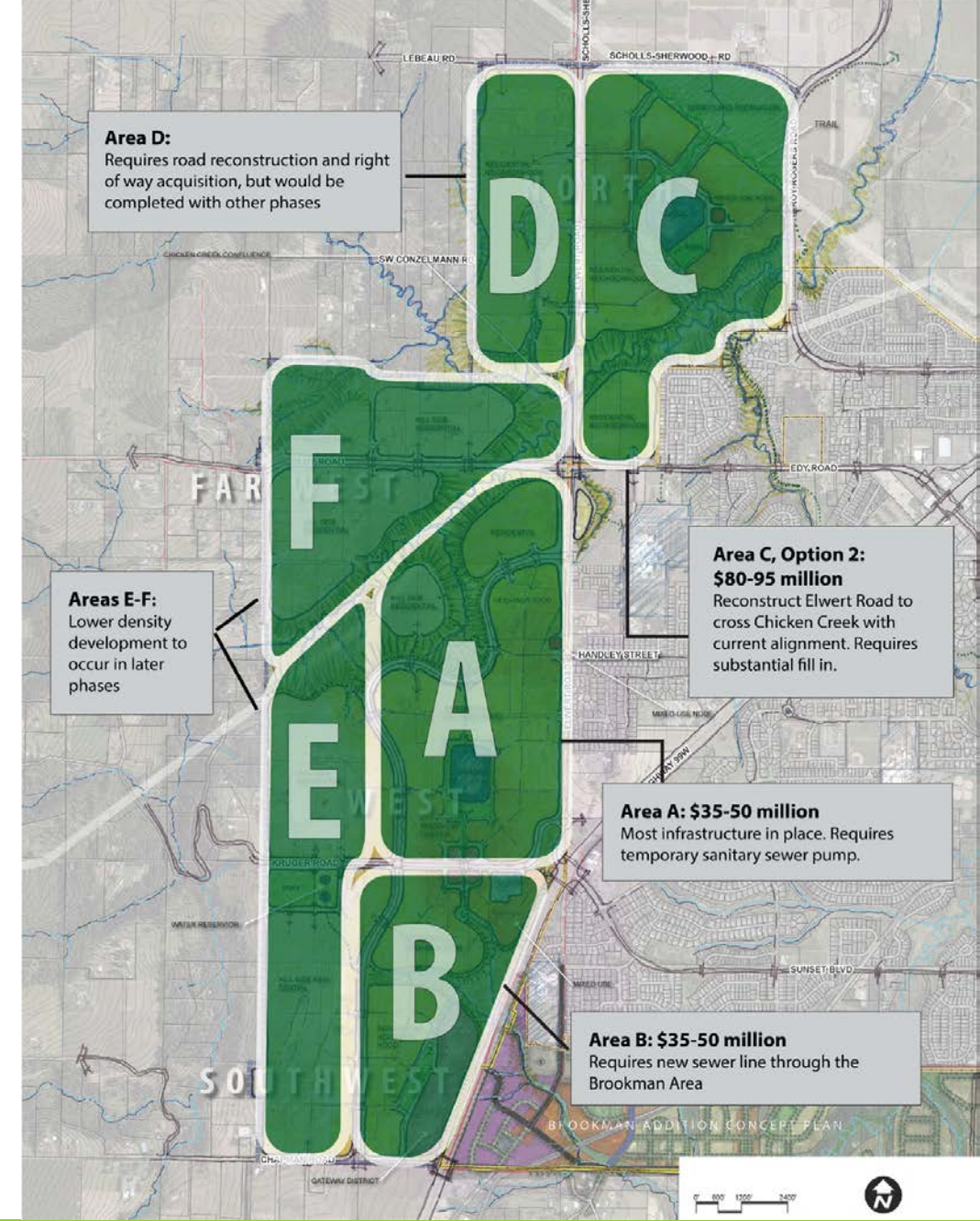


**SHERWOOD WEST INFRASTRUCTURE NEEDS**





Conceptual Phasing, Option 1



Conceptual Phasing, Option 2

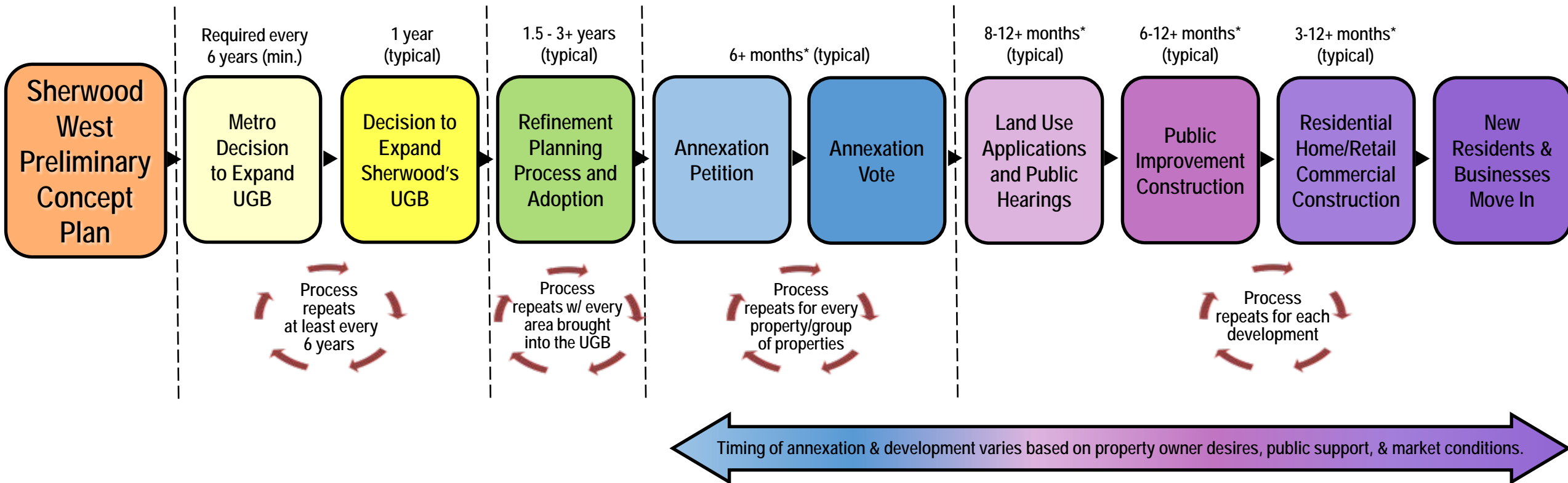
# Evaluation of New Funding Tools

		EFFICIENCY					FAIRNESS	LEGALITY	POLITICAL ACCEPTABILITY
		CAPACITY	TIMING	ADMINISTRATIVE EASE	STABILITY/PREDICTABILITY	FLEXIBILITY			
CITYWIDE TOOLS	Property Tax: Government Obligation (GO) Bonds	+	+	+	+	+	✓	✓	✓
DEVELOPMENT DERIVED	Sole Source SDC	✓	-	+	-	✓	+	✓	+
	Supplemental SDC	+	-	✓	-	+	+	✓	✓
	Local Improvement District (LID)	✓	✓	✓	✓	+	+	✓	+
	Urban Renewal	+	-	✓	✓	+	✓	✓	-
	Construction Excise Tax (CET)	✓	-	✓	-	?	+	-	+
OTHER	Utility Fee	+	✓	+	+	+	✓	✓	✓
	Transient Lodging Tax	-	-	✓	✓	✓	-	✓	+
	Special Service District	+	+	✓	+	+	?	✓	?

LEGEND			
GOOD	+	BAD	-
OK	✓	FATAL FLAW	-
UNKNOWN	?	PREFERRED TOOL	+



# Potential Sherwood West Planning and Development Process 2015-2065





# CAC COMMENTS

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# THANK YOU

<http://www.sherwoodoregon.gov/sherwoodwest>



# Growth Distribution Update (2015 to 2040)

March 16, 2016

MTAC

Metro Council Chambers



# Our Ask

Recommend to MPAC that Metro Council adopt the draft TAZ Forecast Distribution.





# Background

- What is a TAZ Forecast Distribution?
- When was the last time Metro completed a forecast distribution?



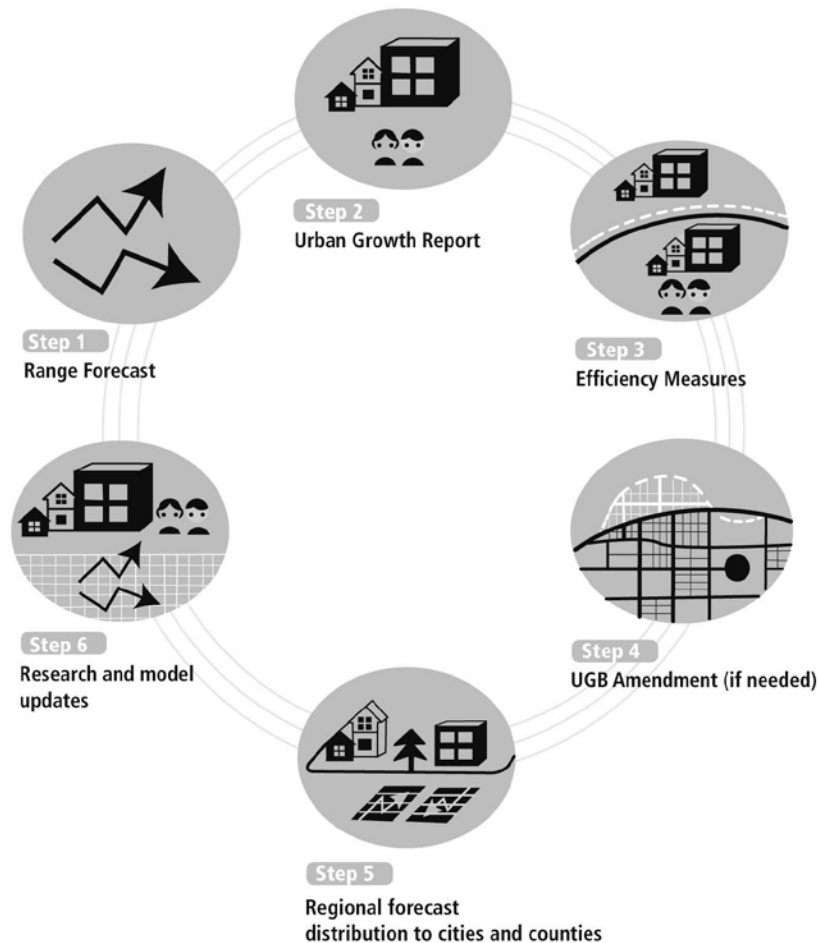
# Why was a new forecast needed?

- The **Great Recession** lasted longer and deeper than reflected in the 2012 forecast distribution.
- **Recovery** from the Great Recession was slower and weaker than expected in the 2012 forecast distribution.
- The City of Damascus appears likely to **disincorporate** in 2016, with implications for long-term development.
- Census data show **demographic shifts** that have implications for slower regional growth.



# Regional Forecast Process

Major technical and process milestones, together



## 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?

## Process and Project Timeline

Late July 2015	Convene county coordination leads to review purpose, timelines and roles
Mid-to-late Aug. 2015	Convene city/county planning mgrs. for overview of process and timelines
Sep. 15, 2015	Metro Council initial direction on point in range forecast
Sep. 11 - Oct. 7, 2015	County leads convene meetings with city staff to confirm: <ul style="list-style-type: none"><li>• 2015 base year jobs and population</li><li>• Buildable land inventory assumptions (BLI)</li></ul>
Oct 12 – Oct. 30, 2015	Metro staff completes modeling based on local review of base year numbers and BLI
Nov. 2-Nov. 9, 2015	Metro staff prepares draft distribution results for local review
Nov. 19, 2015	Metro Council Urban Growth management decision
Nov. 10, 2015 – Jan. 15, 2016	County leads convene meetings with city staff to review draft distribution results
Jan 19-Jan 29, 2016	Metro staff finalizes distribution results based on local reviews
Mid-March	Present results to Advisory Committees
Mid April 2016	Council consideration of ordinance adopting forecast distribution

# Partner Experience Survey

Follow-up survey was conducted to learn about our partners' experiences throughout the process.

- 100% felt review time was about right
- Most (60%) felt that Metro was responsive to questions
- Roles & responsibilities could have been more clear
- We can explore other options for transferring secure files



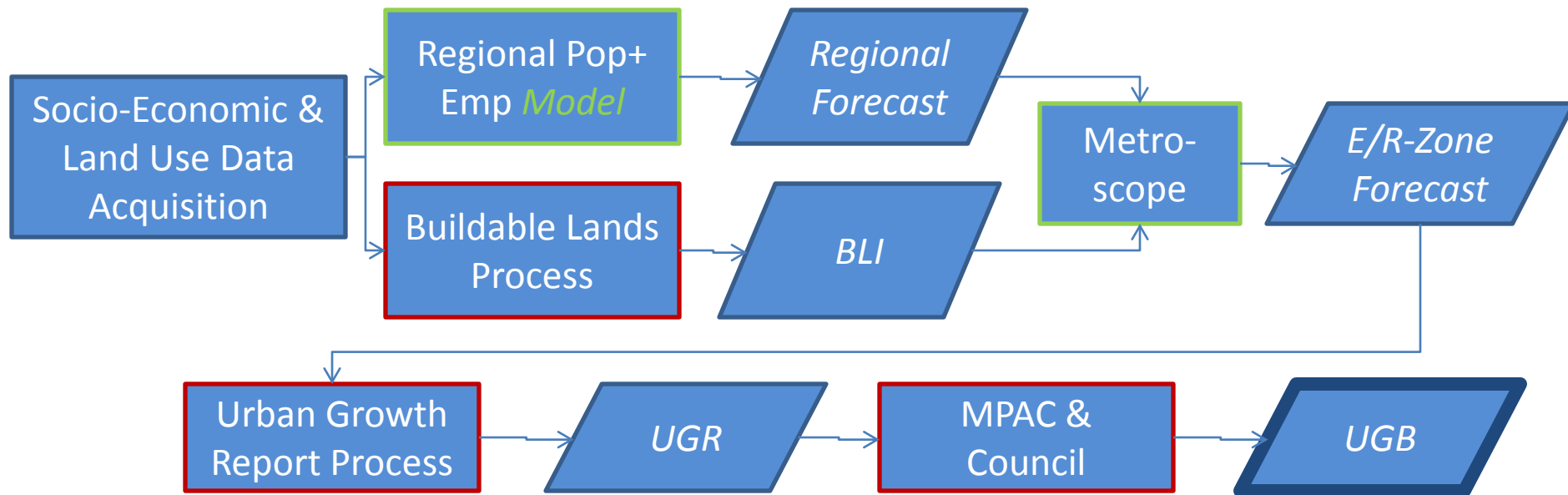
# Technical Steps\* in Distribution Process

- Technical milestones for UGR & Regional Forecast
- Regional Forecast Summary
- Technical process for TAZ Forecast Distribution
- Jurisdictional review activity summary
- TAZ Forecast Distribution Summary
- Questions?

\* Rebecca covered the coordination & outreach processes

# Regional Forecast Process

Major technical and process milestones, together

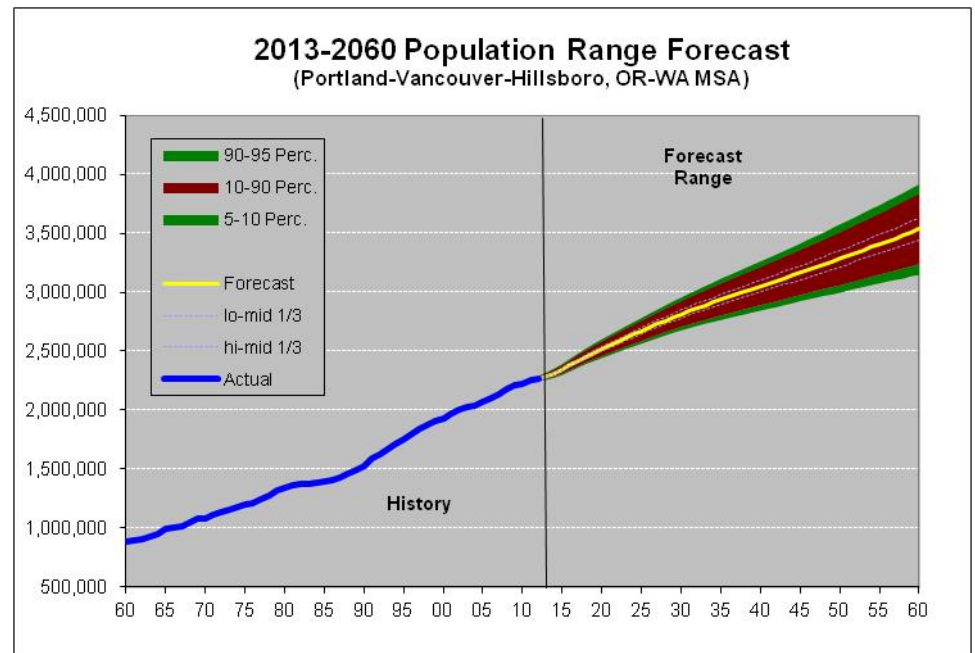


# Adopted Regional Forecast

## Summary

### Population for 7-county MSA

<u>Year</u>	<u>Observed or Forecast</u> <u>Population</u>
2005	2,067,325
2010	2,226,009
2015	2,342,500
2020	2,519,200
2025	2,671,800
2030	2,814,100
2035	2,937,900
2040	3,052,100



Source: Metro. 2014 Urban Growth Report, Appendix 1a (Released 2015).

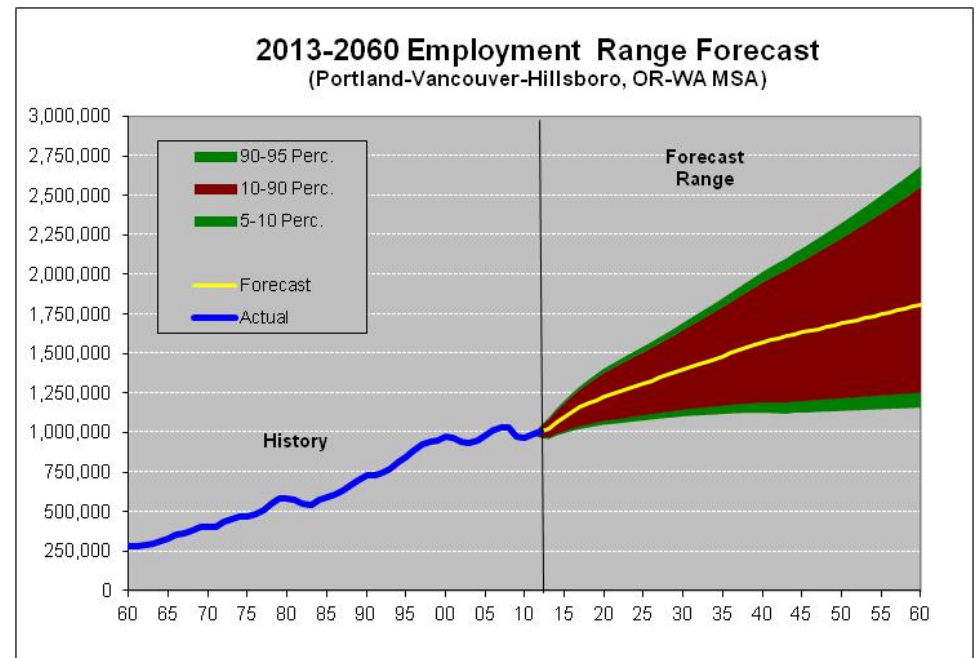


# Adopted Regional Forecast

## Summary

### Employment for 7-county MSA

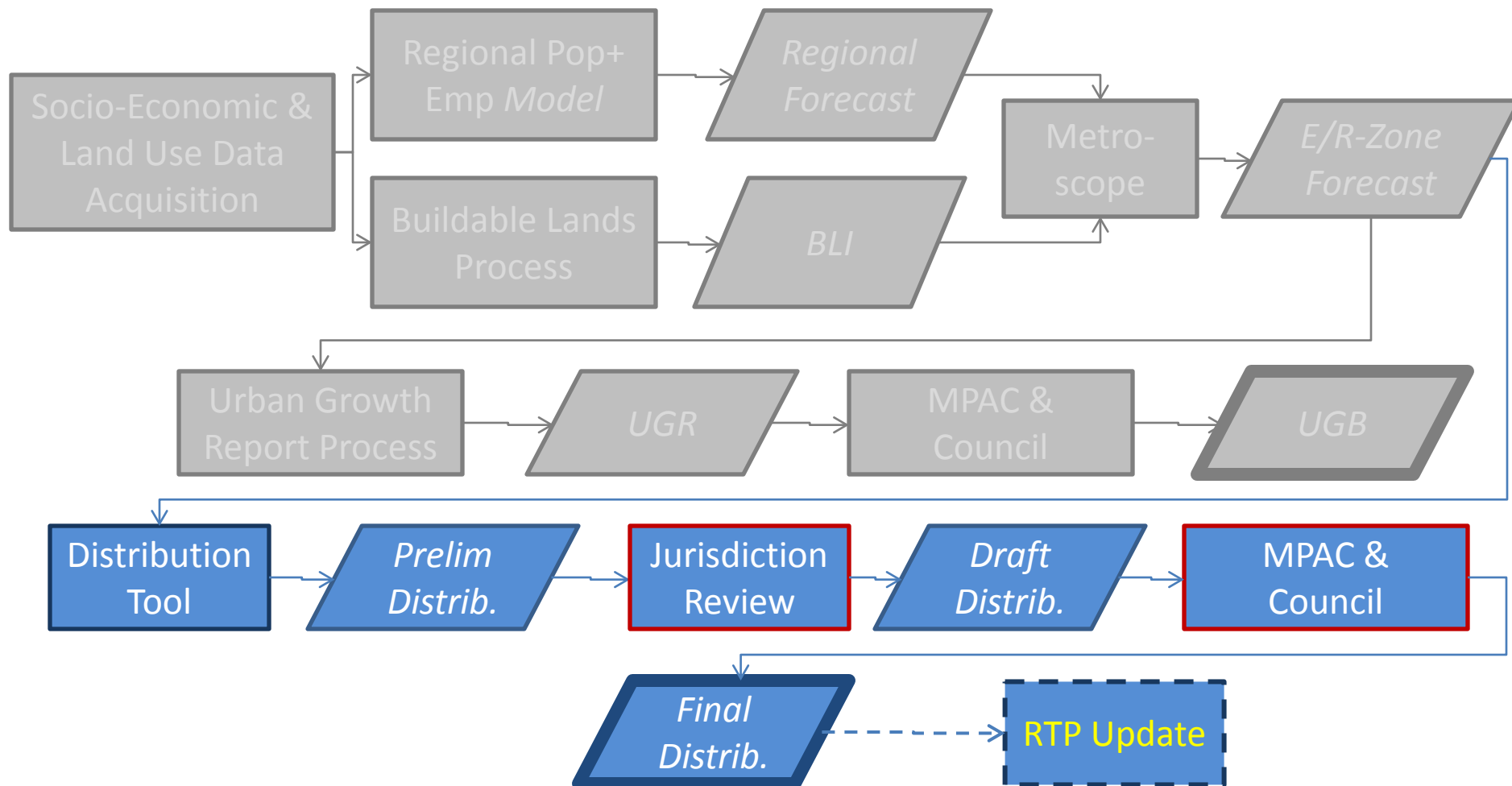
<u>Year</u>	<u>Observed or Forecast</u> <u>Employment</u>
2005	983,526
2010	968,800
2015	1,100,000
2020	1,228,100
2025	1,311,600
2030	1,399,800
2035	1,484,500
2040	1,571,300



Source: Metro. 2014 Urban Growth Report, Appendix 1a (Released 2015).

# TAZ Forecast Distribution Process

Major technical and process milestones, together



# Resultant Data Products

## UGR

- Regional Forecast  
(*total* population and employment)
- UGB boundary

## TAZ Distribution

- TAZ Forecast Distribution  
(households & employment by TAZ)
- Jurisdiction Atlas (report)



# TAZ Distribution: Jurisdictional Review Process

## **Cooperative efforts:**

- County lead coordination
- Within-jurisdiction adjustments
- City-city adjustments
- City-county adjustments
- County-county adjustments
- County lead coordination



# TAZ Distribution: Jurisdictional Review Results

## Metro staff

- Consulted numerous jurisdictions
- Made adjustments to preliminary distribution per jurisdiction requests

TAZ-level jurisdiction review adjustments		
	Households	Jobs
TAZs Adjusted*	214	1,857
% TAZs Adjusted	10%	86%
Max Adjustment	2,136	4,700
Max Prelim Value	5,360	18,677
Total MSA Value	1,244,000	1,571,300
Value Adjustments	53,042	132,901
Adj. % of Total	4.3%	8.5%
* Out of 2148 four-county TAZs		

# Draft TAZ Forecast Distribution

## Summary

### Clackamas County

	Households		
	2015	2040	
	Reviewed	Preliminary	Reviewed
<b>Clackamas County</b>	<b>151,352</b>	<b>193,087</b>	<b>199,420</b>
Damascus	3,711	11,734	11,734
Gladstone	4,209	4,584	4,584
Happy Valley	5,391	10,045	10,358
Johnson City	1,444	1,493	1,493
Lake Oswego	16,428	18,484	18,484
Milwaukie	8,292	9,698	9,689
Oregon City	12,618	15,712	16,201
Rivergrove	677	734	734
West Linn	10,185	11,538	11,538
Wilsonville	9,259	11,124	11,400

	Jobs		
	2015	2040	
	Reviewed	Preliminary	Reviewed
<b>Clackamas County</b>	<b>154,089</b>	<b>217,556</b>	<b>226,537</b>
Damascus	1,430	5,063	5,063
Gladstone	2,524	3,863	3,863
Happy Valley	1,906	7,212	6,598
Johnson City	278	435	435
Lake Oswego	20,434	25,514	25,433
Milwaukie	12,769	16,604	16,606
Oregon City	14,775	22,548	22,545
Rivergrove	78	110	110
West Linn	4,761	6,206	6,206
Wilsonville	19,031	26,007	25,708

Source: Draft "William" Scenario 1522 TAZ Forecast Distribution



# Draft TAZ Forecast Distribution

## Summary

### Multnomah County

	Households		
	2015	2040	
	Reviewed	Preliminary	Reviewed
<b>Multnomah County</b>	<b>323,466</b>	<b>465,785</b>	<b>460,602</b>
Fairview	3,655	4,200	4,132
Gresham	39,128	46,310	46,861
Maywood Park	832	890	890
Portland	265,262	394,466	388,800
Troutdale	5,898	6,855	6,855
Wood Village	1,530	1,751	1,751

	Jobs		
	2015	2040	
	Reviewed	Preliminary	Reviewed
<b>Multnomah County</b>	<b>494,001</b>	<b>657,577</b>	<b>644,854</b>
Fairview	2,838	5,639	5,921
Gresham	38,118	55,095	55,092
Maywood Park	190	234	234
Portland	441,369	572,565	560,220
Troutdale	5,771	10,287	10,286
Wood Village	2,329	4,319	4,319

Source: Draft "William" Scenario 1522 TAZ Forecast Distribution

# Draft TAZ Forecast Distribution

## Summary

### Washington County

	Households		
	2015	2040	
	Reviewed	Preliminary	Reviewed
Washington County	212,318	301,206	301,296
Beaverton	41,727	48,485	47,693
Cornelius	3,581	4,641	5,472
Durham	341	377	377
Forest Grove	7,779	10,579	12,239
Hillsboro	36,462	47,388	50,197
King City	874	915	915
Sherwood	6,784	7,653	7,653
Tigard	19,178	27,198	27,835
Tualatin	10,752	11,523	11,523

	Jobs		
	2015	2040	
	Reviewed	Preliminary	Reviewed
Washington County	280,822	398,023	417,661
Beaverton	58,022	77,970	79,973
Cornelius	2,739	4,717	4,716
Durham	1,023	1,266	1,266
Forest Grove	6,156	8,925	8,906
Hillsboro	73,895	106,644	112,822
King City	552	804	804
Sherwood	5,499	8,432	8,430
Tigard	46,010	65,621	63,561
Tualatin	28,109	36,241	39,484

Source: Draft "William" Scenario 1522 TAZ Forecast Distribution

# Draft Jurisdictional Atlas

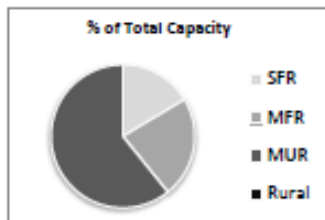
## Example City (Counties follow same format)

City **Beaverton**  
County **Washington**

Note: Cities are approximated by TAZ boundaries. Year 2010 estimates will not match Census data exactly.

Household Forecast							
Year	SF	MF	Total	%APR	% SF	% MF	Total
2010	18,128	21,953	40,081		45%	55%	100%
2015	17,949	23,778	41,727	0.8%	43%	57%	100%
2040	19,616	28,077	47,693	0.5%	41%	59%	100%
2015 - 2040 Change	1,667	4,299	5,966		28%	72%	100%

Household Capacity, by Zoning Type							
	SFR	MFR	MUR	Rural	All SF	All MF	Total
Capacity	1,853	2,564	6,852	0	1,853	9,416	11,269
% of Total	16%	23%	61%	0%	16%	84%	100%



SFR = Single Family Residential  
 MFR = Multi-Family Residential  
 MUR = Multi-Family, Mixed Use  
 Rural = Rural Residential

Capacity includes vacant, infill, and redevelopment supply

% Capacity Used by 2040		
All SF	All MF	Total
90%	46%	53%
All SF = SFR + Rural All MF = MFR + MUR		

Employment Forecast				
Year	Retail	Service	Other	Total
2010	11,041	19,261	21,539	51,841
2015	12,319	24,946	20,757	58,022
2040	14,497	33,152	32,324	79,973
2015-2040 Change	2,178	8,206	11,566	21,951

Employment Capacity		
	IND	COM
Acres	136	110
% of Total	55%	45%
IND = Industrial Land COM = Commerical Land		



# Questions?

# Ask

- Recommend to MPAC that Metro Council adopt the draft TAZ Forecast Distribution