

Meeting: Metro Council Work Session
Date: Tuesday September 27, 2016

Time: 2:00 p.m.

Place: Metro Regional Center, Council Chamber

**COUNCIL COMMUNICATION** 

## CALL TO ORDER AND ROLL CALL

2:00 PM 1. CHIEF OPERATING OFFICER COMMUNICATION

2:10 PM 2. SPACE-EFFICIENT HOUSING UPDATE Elissa Gertler, Metro Emily Lieb, Metro

2:40 PM 3. URBAN GROWTH READINESS TASK Council President Hughes, Metro Council

FORCE: UPDATE Councilor Chase, Metro Council

Councilor Collette, Metro Council 3:40 PM 4. COUNCILOR LIASON UPDATES AND

**ADJOURN** 

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## **SPACE-EFFICIENT HOUSING UPDATE**

Metro Council Work Session Tuesday, September 27, 2016 Metro Regional Center, Council Chamber

## **METRO COUNCIL**

## Work Session Worksheet

**PRESENTATION DATE:** Sept. 27, 2016 **LENGTH:** 30 minutes

**PRESENTATION TITLE:** Space Efficient Housing Update

**DEPARTMENT:** Planning & Development

PRESENTER(s): Emily Lieb, <a href="mailto:Emily.Lieb@oregonmetro.gov">Emily.Lieb@oregonmetro.gov</a>, 503-797-1921

Elissa Gertler, Elissa.Gertler@oregonmetro.gov, 503-797-1752

## **WORK SESSION PURPOSE & DESIRED OUTCOMES**

• **Purpose:** Provide an update and get feedback on an opportunity for Metro to take over leadership of a Space Efficient Housing Work Group

• **Outcome:** Council provides feedback on proposed 2017-18 work program

## **BACKGROUND**

This spring, Oregon Department of Environmental Services (DEQ) contacted Metro Equitable Housing staff regarding an opportunity to take over leadership of the Space Efficient Housing Work Group, a cross-sector stakeholder group that has worked to "increase the demand for and supply of space efficient housing types" through a range of strategies spanning policy, research, financial innovation, and education and outreach. Target housing types that the group has focused on include cottage clusters, duplexes, accessory dwelling units (ADUs), division of larger homes into multiple units, and tiny homes on wheels.

The Work Group was launched by DEQ in 2010 in response to statewide research demonstrating the environmental benefits of smaller homes. Over time, much of the discussion and policy efforts surrounding space efficient housing have shifted from a focus on environmental benefits to an interest in the potential for smaller housing to provide more affordable housing choices in high-demand neighborhoods.

A summary of past successes and future opportunities identified by the Work Group is included in the Work Session packet. Metro has previously supported the group through small financial contributions, including sponsorship of a biennial Build Small Live Large Summit, and through staff participation from Metro's Waste Management division.

## **OPPORTUNITY**

DEQ is seeking to transfer leadership of the workgroup to Metro in 2017, and has proposed to contribute \$150,000 via an intergovernmental agreement to support staffing and small contracts for Metro's Planning and Development team to execute a two-year work program.

Supporting space efficient housing—a subset of "missing middle" housing—is an equitable housing strategy that has been identified by the Equitable Housing Initiative as a top priority, as summarized in Metro's "Opportunities and Challenges for Equitable Housing" report published in January 2016. Specifically, the report identifies an opportunity to "Increase and diversify market-rate housing," including supporting a range of smaller home types. Smaller homes can help fulfill multiple policy objectives, from reducing the environmental footprint of housing to supporting land use patterns that align with regional growth objectives to supporting more equitable housing choices in high-demand neighborhoods.

Metro is well positioned to convene partners around this topic and to provide technical assistance to local jurisdictions to facilitate the regulatory and incentive changes needed to eliminate barriers to space efficient and affordable housing options.

## PROPOSED WORK PROGRAM

Included in the Council work session packet is a proposed work program, including scope, schedule, funding and staffing for a two-year work program.

#### **NEXT STEPS**

Planning and Development will move forward with the following next steps:

- Work with Office of Metro Attorney to develop an intergovernmental agreement (IGA) with DEQ to support the transfer of \$150,000 from DEQ to Metro to support staff resources and contracts for a two-year work program.
- Finalize work plan and identify and secure necessary staff resources.
- Meet with key stakeholders to identify opportunities to incorporate partnerships into the work program.
- Launch the first Work Group meeting by spring of 2017.

## QUESTIONS FOR COUNCIL CONSIDERATION

- Does the Council have feedback on proposed next steps for the program?
- How would the Council like to be engaged in the next steps?

## **PACKET MATERIALS**

- Would legislation be required for Council action  $\square$  Yes X No
- If yes, is draft legislation attached? ☐ Yes ☐ No
- What other materials are you presenting today?
  - o Space Efficient Housing Proposed 2017-18 Work Program
  - Space Efficient Housing Work Group summary of successes and opportunities

## Space Efficient Housing Proposed 2017-18 Work Program Metro Planning and Development Draft 9/13/16

#### Overview

This spring, Oregon Department of Environmental Services (DEQ) contacted Metro staff regarding an opportunity to take over leadership of the Space Efficient Housing Work Group, a cross-sector stakeholder group that has worked to "increase the demand for and supply of space efficient housing types" through a range of strategies spanning policy, research, financial innovation, and education and outreach.

Target housing types that the group has focused on include cottage clusters, duplexes, accessory dwelling units (ADUs), division of larger homes into multiple units, and tiny homes on wheels. Core participants in the work group have included:

- Public planning and sustainability staff (Oregon Department of Land Conservation and Development, Metro, and the cities of Portland and Eugene)
- Developers, builders, and architects (including the Portland Home Builders Association)
- Appraisers, real estate agents, and mortgage brokers
- Nonprofits (EarthAdvantage, Energy Trust, AARP)

The Work Group was launched by DEQ in 2010 in response to statewide research demonstrating the environmental benefits of smaller homes. Over time, much of the discussion and policy efforts surrounding space efficient housing have shifted from a focus on environmental benefits to an interest in the potential for smaller housing to provide more affordable housing choices in high-demand neighborhoods.

A summary of past successes and future opportunities identified by the Work Group is attached. Metro has previously supported the group through small financial contributions, including sponsorship of a biennial Build Small Live Large Summit, and through participation of staff from Metro's Waste Management division.

## Opportunity to expand Metro's Equitable Housing portfolio

DEQ is seeking to transfer leadership of the workgroup to Metro in 2017, and has proposed contributing \$150,000 via an intergovernmental agreement to support staffing and small contracts for Metro's Planning and Development team to execute a two-year work program.

Supporting space efficient housing—a subset of "missing middle" housing—is an equitable housing strategy that has been identified by the Equitable Housing Initiative as a top priority, as summarized in Metro's "Opportunities and Challenges for Equitable Housing" report published in January 2016. Specifically, the report identifies an opportunity to "Increase and diversify market-rate housing," including supporting a range of smaller home types. Smaller homes can help fulfill multiple policy objectives, from reducing the environmental footprint of housing to supporting land use patterns that align with regional growth objectives to supporting more equitable housing choices in high-demand neighborhoods.

Metro is well positioned to convene partners around this topic and to provide technical assistance to local jurisdictions to facilitate the regulatory and incentive changes needed to eliminate barriers to space efficient and affordable housing options. A proposed two-year work program is outlined below.

## **Proposed Scope**

As part of the Equitable Housing Initiative, Metro will take over coordination of monthly or bimonthly work group meetings, which are open to interested stakeholders from across sectors and across the state (with the majority of active participants being located in the Portland metro region). Oregon DEQ will continue to participate in the Work Group and will provide support during the leadership transition.

## Potential areas of interest include:

- Accessory dwelling units
- Cottage clusters
- Duplexes, triplexes, and fourplexes
- Division of larger homes into multiple units
- Rooming houses and single-room occupancy apartments
- Tiny houses on wheels
- Pre-fabricated/modular homes

#### **Potential Outcomes**

Depending on goals and priorities identified by the Work Group in Spring 2017, Metro staff will work with partners to develop and pursue strategies within the following categories to support space efficient housing development:

- Identify and pursue state policy changes to eliminate barriers and create incentives for space efficient housing
- Engage and support local governments in making zoning/code updates and developing local incentives, including identifying opportunities to leverage Metro's Community Planning and Development Grants and Equitable Housing Grants to support this work
- Engage banks and credit unions to create new financing tools
- Manage small contracts to support research, education/awareness, and creation of new policy and financial tools
- Support and expand education and awareness events, including ADU tours and the biennial Build Small Live Large Summit

## **Anticipated Schedule**

Phase 1: Laying the Foundation (Winter - Spring 2017)

- Identify and onboard Metro's Planning and Development lead staff (0.25-0.5 FTE).
- Meet with DEQ to debrief on work to date, identify additional (if any) stakeholders, and plan agenda for the next meeting.
- Meet with key stakeholders to learn more about other collaborative efforts related to Space Efficient Housing (see "Complementary Efforts" section on p. 4).
- Gather and summarize existing data and best practices to help inform collective discussion of goals and priorities for 2017-18.
- Convene 2-4 initial meetings with the Work Group to identify goals and priorities for 2017-18 and to determine the best collaborative structure for moving the priorities forward.
- Update Metro Council, Metro Policy Advisory Committee (MPAC), and Metro Technical Advisory Committee (MTAC) on Work Group efforts.

## Phase 2: Collaborative Implementation (Summer 2017 - Summer 2018)

- Convene monthly or bimonthly work group meetings and facilitate collaborative efforts to advance the goals and priorities established by the work group.
- Ensure ongoing communication with work group members and interested parties.
- Provide ongoing updates to Metro Council, MPAC, and MTAC.
- With partners, support planning for the fall 2017 Build Small Live Large Summit and other outreach, education, and engagement efforts prioritized by the work group.

## Phase 3: Next Steps (Fall 2018)

- Work Group members will take stock of progress toward goals and strategies.
- Metro will evaluate impact and accomplishments of the work group and determine whether or not to move forward with a continued work program.

## **Funding and Resources**

DEQ will provide \$150,000 to Metro through an intergovernmental agreement to support coordination of the work group and associated contracts for a two year term, from Fall/Winter 2016 to Fall/Winter 2018. It is anticipated that funding will be allocated as follows:

- \$60,000-\$100,000 for staffing
- \$50,000-\$90,000 for small contracts

For opportunities identified by the Work Group that have a strong alignment with Metro's Equitable Housing Initiative and require additional financial support for small contracts, Metro may allocate additional funding from the Equitable Housing Initiative budget. When DEQ funding sunsets in Fall/Winter 2018, the Planning and Development department will take stock of progress and alignment with other programmatic efforts and determine whether or not Metro should continue to dedicate staff and resources to coordinating the work group. At this time, staff will also inquire as to whether DEQ or other partners would like to provide funding to continue the work program.

## **Complementary Efforts**

The following is a brief summary of related efforts underway throughout the region. As part of the initial phase of work, staff will meet with these groups to identify opportunities for coordination and alignment.

City of Portland Residential Infill Project: The residential infill proposal that's slated to go to City Council this fall proposes significant changes to single-dwelling zones that limit the size of homes, allow for two ADUs on one lot, and support duplexes, triplexes and other models in single-dwelling zones. Portland for Everyone is an advocacy campaign working to support these changes.

City of Portland Affordable ADU Workgroup: The Portland Housing Bureau and partners are exploring opportunities to link affordable housing incentives to ADUs through mechanisms such as a property tax exemption or a loan program.

Portland State University Institute for Sustainable Solutions (ISS) ADU Initiative: Led by Robert Liberty, ISS has recently launched an initiative and is convening partners to explore opportunities to accelerate development of accessory homes as a strategy to increase housing choices, reduce greenhouse gases, and create jobs.

AARP: AARP is very interested in ADUs as a means to support intergenerational living and aging as place, as well as to help older adults afford to stay in their homes by generating rental income.

# Space Efficient Housing Workgroup Oregon DEQ

## - Past successes -

Over the past five years, a small, informal, group of small home advocates has helped stimulate the development of more space-efficient homes through:

## **Policy**

- Worked with the City bureaus and Portland City Council to **waive Systems Development Charges on Accessory Dwelling Units (ADUs)** and increase the ADU size limit from 33% to 75% of the primary dwelling or 800 SF (whatever is smaller). Collectively, the waiver was passed three times and will be in effect for eight years.
- Incorporated home size into **Oregon's Reach Building** code so building shell requirements will adjust inversely with home size.
- Worked with EarthAdvantage to **quadruple the number of points granted to space-efficient homes** in their proprietary ratings system.
- Worked with Energy Trust of Oregon to **allow ADUs to receive energy incentives** previously available only to primary residences.
- Helped inform the development of **scaled System Development Charges** for the City of Portland Parks SDCs. Smaller homes pay less.
- Helped influence Portland Accessory Structures Zoning Code revisions in 2015.
- Working with City of Portland's Comp Plan process to encourage the inclusion of more space efficient housing forms.

#### Research

- Published Oregon DEQ studies documenting quantitative, life cycle **environmental benefits of smaller and attached homes** compared with other green building practices.
- Documented the widespread existence of **unpermitted ADUs** in the City of Portland that most likely outnumber legal ADUs by at least a 3:1 margin.
- Created a database of **local ADU ordinances** across Oregon.
- Created and are publishing a "Character-Compatible, Space-Efficient Housing Options for Single-Dwelling Neighborhoods" report with DEQ/DLCD/ODOT to help inform statewide model zoning code. Outreach currently being planned.
- Completed the largest survey of ADU owners in the nation and published an interpretation report.

#### **Financing**

- Produced a report providing guidance on consistent **valuation of ADUs** that is published in the Oct/Nov issue of the peer-reviewed *Appraisal Journal*.
- Created **ADU appraisal and financing guides** as a tool for ADU owners.

## **Education, Outreach & Events**

- Launched <a href="www.accessorydwellings.org">www.accessorydwellings.org</a>, a one-stop source of information about ADU's, granny flats, backyard cottages, in-law units, accessory dwelling units. The site also serves as a repository for images, plans, and the stories behind successfully completed projects. Published over fifty case studies of ADU owners, builders and designers.
- Organized and led **four tiny home bike tours**, each one featuring different homes and attended by 100+ cyclists.
- Taught quarterly full-day classes on ADU design, permitting and construction.

- Taught **ADU real estate classes** through the EarthAdvantage Institute.
- Highlighted 'pocket neighborhoods', ADUs, homes-on-wheels, and other space-efficient housing models in **local media** including *The Oregonian, Portland Tribune, The DJC*, and OPB's Think Out Loud.
- Presented environmental findings about the benefits of smaller homes to numerous audiences.
- Organized the first ever **summit on space-efficient housing**, Build Small Live Large, in 2012. A second summit was held in 2015 with over 500 attendees, and a third is planned for fall of 2017.
- Developed educational tracks for the Portland Home Builder's Association's BuildRight conferences.
- Organized two city-wide ADU tours in Portland, both with 800-1,000 attendees.
- Produced an ADU educational video.

For more information, including links to research and tools mentioned above, visit <a href="http://www.deg.state.or.us/lg/sw/wasteprevention/greenbuilding.htm">http://www.deg.state.or.us/lg/sw/wasteprevention/greenbuilding.htm</a>.

# - Future Opportunities -

## **Policy**

- Advocate for local governments to scale residential SDCs based on home size or reduce/waive SDCs on ADUs. Both Portland and Eugene have committed staff time to explore scaled SDCs in the coming year.
- Compile and disseminate **model codes** for pocket neighborhoods, ADUs and other zoning/building regulations that support space-efficient housing types
- Participate in Portland's comprehensive plan process and subsequent zoning code update to adopt code changes supportive of space efficient housing. Target other cities going through code amendment processes for the inclusion of ADU and/or pocket neighborhood language.
- Work with Salem (the largest city in Oregon that prohibits ADUs) to adopt ADUs into their zoning code.
- Advocate for home size to be given appropriate weight in LEED Residential and other environmental ratings systems
- Collaborate with affordable housing organizations, AARP, and other groups with overlapping interests in creating smaller, more affordable, and more accessible housing options.
- Develop **long-term affordable housing mechanisms** for supporting ADUs
- Tiny Homes on Wheels
  - Create a legal pocket through pilot projects.
  - o Help lead the community to legalization
  - Create a legal pathway for clusters of tiny homes

## Research:

- Collaborate with PSU or other research institution to study the impact **demographic trends** will have on housing needs, especially in growing cities (ie. Portland, Salem, Eugene).
- Study the **potential of ADUs to help meet housing growth projections** for the Metro area. (This project was started but never completed).
- Research the role **tiny homes on wheels** play for providing a mix of housing choices.
- Study **building and zoning code barriers to tiny affordable homes** (ground bound, less than 200 SF) and identify potential **pilot projects** to demonstrate pathways to overcome barriers.
- Study how **AirBnB and other short term rental platforms** support or hinder space efficient housing.
- Consider a **follow-up survey of ADU owners**. (Requested at 4/13/16 Portland City Council meeting.)
- Identify opportunities to partner with the **Living Building Challenge**.
- Align research with other similar organizations and efforts.

## **Financing:**

- Work with local lenders (and perhaps governments) to create and market mortgage products that work well for financing ADUs
- Update the **financing fact sheet** for ADU-friendly mortgage lenders

## **Education/Outreach/Events:**

- Produce an Annie Leonard-style video that summarizes the environmental benefits of smaller homes in a fun, concise and accessible way.
- Explore the possibility of a **Street of Small Homes** event and tour in conjunction with the Homebuilder Association of Portland and/or Office of Planning and Sustainability
- Organize more bike tours; keep adding projects to the <u>www.accessorydwellings.org</u>
  website; continue teaching ADU classes; and hold a follow-up space efficient housing
  summit.
- Extend outreach activities into **Washington State** and beyond Oregon's Willamette Valley. Share what Portland has accomplished with others.
- Organize social mixers to help connect the TINY community (PAD Tiny Houses initiated this already)
- Organize a Build Small Live Large Lecture Series. (PAD Tiny Houses Organized 2016 series at NW Woodworking Studio.
- Actively distribute and present on the findings of the DLCD/DEQ "Character Compatible Space Efficient Housing Options for Single-Dwelling Neighborhoods

# **Priorities Identified by workgroup in May 2016:**

- 1. Advocate for scaling SDC based on home size
- 2. Collaborate with traditional affordable housing organizations and others like AARP to develop new affordable housing options (City of Portland is already exploring ADU affordable housing program)
- 3. Tiny Homes on Wheels create a pathway to legalization
- 4. Work with local lenders to create mortgage products that work well with ADUs
- 5. "Street of Small Homes" tour
- 6. Build Small Live Large Summit for 2017

## For more information contact:

Jordan Palmeri | palmeri.jordan@deq.state.or.us | 503.229.6766

## **URBAN GROWTH READINESS TASK FORCE: UPDATE**

Metro Council Work Session Tuesday, September 27, 2016 Metro Regional Center, Council Chamber

#### **METRO COUNCIL**

#### **Work Session Worksheet**

**PRESENTATION DATE:** September 27, 2016 **LENGTH:** 60 minutes

**PRESENTATION TITLE:** Urban Growth Readiness Task Force: Update

**DEPARTMENT:** Planning and Development

**PRESENTER(s):** Council President Hughes, Councilor Chase, Councilor Collette

#### **WORK SESSION PURPOSE & DESIRED OUTCOMES**

<u>Purpose:</u> To provide the Metro Council with an update from their liaisons about the third meeting (September 21, 2016) of the Urban Growth Readiness Task Force.

<u>Outcome</u>: The full Council is aware of the results of the third Task Force meeting and has an opportunity to provide initial direction to staff on next steps.

## **TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION**

When the Metro Council made its most recent urban growth management decision in November 2015, the Council indicated its intent to convene partners to discuss possible improvements to the region's process for managing residential growth. Staff returned to a February 2, 2016 work session with a proposed work program, which is now being implemented per Council direction. That work program included convening an Urban Growth Readiness Task Force, which has held two meetings. Council President Hughes is chairing the Task Force, with Councilor Collette and Councilor Chase also serving as liaisons.

At a September 13, 2016 work session, the Council expressed support for the policy concepts that will be discussed by the Task Force on September 21. Council is seeking a recommendation on these concepts from the Task Force at the September 21, 2016 meeting. This worksheet does not summarize that recommendation since the meeting has not occurred as of the time of this writing.

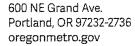
## QUESTIONS FOR COUNCIL CONSIDERATION

Does Council wish to provide staff with any initial direction regarding next steps?

## **PACKET MATERIALS**

- Would legislation be required for Council action □Yes ☑No
- If yes, is draft legislation attached? □Yes □No
- What other materials are you presenting today? None

Materials following this page were distributed at the meeting.





September 27, 2016

People for Bikes P.O. Box 2359 Boulder, CO 80306

To Whom It May Concern:

The Metro Council is excited to lend its support to the City of Portland's "Gateway to Opportunity" grant proposal. Gateway is a historically underserved area with wide roadways, difficult road crossings, and insufficient pedestrian and bicycle facilities. As the regional government for the Portland metropolitan area, Metro envisions safe and reliable transportation choices as a core desired outcome for the future of our region.

As we seek to improve transportation safety, access to transit, safe routes to school, and connections to parks and open spaces, we view the goals and strategy behind the City of Portland's proposal as the right approach. This approach is strong because it seeks to marry infrastructure investment with on-the-ground outreach to community members. Given Portland's leadership on transportation demand management tools and significant infrastructure investment in Gateway we think it is likely that the rate of people biking in Gateway can triple by 2019.

Metro has a history of partnering with the City of Portland and building support for transportation projects that improve safety and access. Portland is a key partner on two of our current transit corridor projects, a steadfast supporter of Metro's Regional Active Transportation Plan and a recipient of numerous Metro funding allocations for transportation and planning projects.

We believe the Gateway to Opportunity grant will benefit Gateway because it will allow people to reach community destinations like parks, schools, transit centers, and libraries safely – without necessarily having to rely on owning a car.

We are excited to support the City of Portland's Gateway to Opportunity proposal and look forward to partnering with the City and other community organizations to realize the goals of increased bicycle ridership in Gateway and the many health, economic, and environmental benefits this will bring.

Sincerely,

Metro Council President Tom Hughes On behalf of the Metro Council

Draft 1



600 NE Grand Ave. Portland, OR 97232-2736 oregonmetro.gov

September 29, 2016

Mayor Charlie Hales Office of the Mayor Room 340 1221 SW 4th Avenue, Portland, OR 97204

Dear Mayor Hales:

Vision Zero is a powerful framework to address the unacceptable level of traffic related deaths and severe injuries on our roadways. We appreciate the City of Portland's leadership on Vision Zero and appreciate partnering in the process to develop a community driven and equitable plan to eliminate fatalities and severe injuries by 2025.

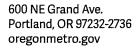
We recognize the effort and community conversations that went into producing a plan that seeks to balance enforcement actions and strategies with equity concerns. Enforcement, including policing and photo radar programs, is necessary to achieve Vision Zero. At the same time, the Metro Council shares the concerns of others that the current State traffic fine structure can have unintended and disproportionate impacts on people with low incomes. Metro is committed to equity and will work with the City and other partners to find ways to remedy the disproportionate effects of traffic penalties on vulnerable communities while also making travel in our region safe for all.

Portland is often a leader on issues that impact the health and livability of our region. Your leadership in this area moves the region forward towards adoption of a regional Vision Zero target in the 2018 Regional Transportation Plan. Metro is a committed partner in this effort; we look forward to continued participation on the Vision Zero advisory committee and supporting actions to implement and fund Vision Zero. On behalf of the Metro Council, we support the adoption and implementation of Portland's Vision Zero Action Plan and commends the Portland City Council for taking bold steps to make our streets safe for all users.

Sincerely,

Tom Hughes Metro Council President Bob Stacey Metro Councilor Vision Zero Executive Committee

Cc: Commissioner Steve Novick Commissioner Nick Fish Commissioner Amanda Fritz





Commissioner Dan Saltzman



DISAZ

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Metro is committed to equity and will work with the City, State and other partners to find ways to remedy the disproportionate effects of traffic penalties on vulnerable communities while also making travel in our region even safer for all. We look forward to exploring and advancing such remedies as notices that accompany tickets and identify payment options or alternatives to payment such as drivers education.

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Tom Hughes Metro Council President Bob Stacey Metro Councilor Vision Zero Executive Committee





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