

Council work session agenda

Tuesday, February 18, 2025 **10:30 AM** **Metro Regional Center, Council chamber,**
<https://zoom.us/j/615079992> (Webinar ID:
615079992) or 888-475-4499 (toll free)

This meeting will be held electronically and in person at the Metro Regional Center Council Chamber.

You can join the meeting on your computer or other device by using this link:

<https://zoom.us/j/615079992> (Webinar ID: 615 079 992)

10:30 Call to Order and Roll Call

10:30 Work Session Topics:

10:30 Investment and Innovation Grant Program Assessment **25-6199**

Presenter(s): Suzanne Piluso (she/her), Investment and Innovation
Program Manager, WPES
Marta McGuire (she/her), WPES Director

Attachments: Staff Report
Attachment 1

11:15 Introduction to Metro's State-Mandated Regional Housing [25-6192](#)
Coordination Strategy

Presenter(s): Emily Lieb (she/her), Housing Department Policy Director
Eryn Kehe (she/her), Urban Policy and Development
Manager

Attachments: [Staff Report](#)
[Attachment 1](#)
[Attachment 2](#)

12:00 Chief Operating Officer Communication

12:05 Councilor Communication

12:10 Adjourn

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការប្រកាសស្តីពីការមិនរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក។

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Investment and Innovation Grant Program Assessment
Work Session Topic

Metro Council Work Session
Tuesday, February 18, 2025

WORK SESSION: INVESTMENT AND INNOVATION GRANT PROGRAM ASSESSMENT FINDINGS

Date: January 30, 2025
Department: Waste Prevention and Environmental Services
Meeting Date: February 18, 2025

Presenters: Marta McGuire, Ph.D, she/her, Waste Prevention and Environmental Services Director; and Suzanne Piluso, she/her, Program Manager

Prepared by: Suzanne Piluso, she/her,
suzanne.piluso@oregonmetro.gov

Length: 45 minutes

ISSUE STATEMENT

Metro Council directed staff to conduct an assessment of the Investment and Innovation grant program. Based on the assessment findings and additional research, staff have identified successful circular economy¹ innovation programs operating in other states that can serve as a framework that Metro could customize to implement in the Metro region. The purpose of this presentation is to share the results of the assessment and seek direction on further developing the innovation concept for Council consideration.

ACTION REQUESTED

Staff seeks Council direction on whether to further develop the innovation pilot concept for the Investment and Innovation program.

IDENTIFIED POLICY OUTCOMES

The Investment and Innovation program advances Metro's 2030 Regional Waste Plan, which serves as the region's blueprint for improving our garbage and recycling system, reducing the impacts of waste, and advancing Metro's racial equity goals. Investment and Innovation grant-funded projects and programs are advancing the three desired outcomes of the plan: shared prosperity, a healthy environment, and an excellent, accessible, and resilient garbage and recycling system. An updated Investment and Innovation program focused on innovation will complement intersecting goals of the draft Regional System Facilities Plan, Metro's Reuse Impact Fund, and the Recycling Modernization Act, among others.

POLICY QUESTIONS

- Would Council like staff to further develop the proposed pilot innovation program?
- If yes, what specific priorities or additional considerations should staff incorporate into the pilot proposal?

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The Metro Council created the Investment and Innovation grant program in 2018 to invest in private and nonprofit sector efforts to reduce the harmful impacts of waste generated in greater Portland, in ways that advance racial equity. The program has invested in impactful waste prevention projects across the region over five funding cycles, awarding more than \$12.7 million in

¹ "Circular economy" is a regenerative model of resource production and consumption that involves sharing, leasing, reusing, repairing, refurbishing, recycling and composting existing materials and products as long as possible.

grants to local businesses, nonprofit organizations, and colleges and universities in greater Portland.

Since the program's inception, the funding and policy landscape has significantly shifted with the emergence of the Recycling Modernization Act and its funding streams and the proposed Reuse Impact Fund. The purpose of the assessment was to evaluate the Investment and Innovation program to ensure alignment with these and other policies and priorities.

ASSESSMENT FINDINGS

The 2024 Investment and Innovation assessment report summarized the program's positive environmental and community impacts. The grant outcomes include reductions in waste disposal and associated greenhouse gas emissions, infrastructure investments and upgrades, and equity benefits including job creation and career pathways.

Engagement Summary

Staff engaged with various interested parties, including local government, private industry, small businesses, and nonprofit organizations, to assess the Investment and Innovation program's impact. Surveys from past applicants highlighted areas for improvement in focus and application processes. Collaborating with Start Consulting, staff identified barriers preventing some community organizations from applying for funding. Participants value the program's support for innovative ideas and recommended targeting materials with high greenhouse gas emissions, avoiding overlap with other funding programs, and providing robust technical assistance, especially for underserved applicants.

Key Findings

Since the assessment began, there have been two major developments. First, the opportunity for new investments through other funding sources. Second, the proposed investment strategy outlined in the System Facilities Plan including investment in regional organics infrastructure and the development of the Reuse Impact Fund that is intended to serve as a dedicated resource for waste prevention and reuse initiatives. Both developments address many of the identified needs in this space.

The assessment identified how the program could more effectively catalyze innovation. Lessons learned from past grant cycles revealed that businesses and organizations proposing innovative concepts often need technical and business support in addition to grant funding to bring novel ideas from the conceptual stage to financial viability, implementation and scaling. This is particularly true for underserved entrepreneurs. Grant review committees were unwilling to recommend public funding for proposals where applicants did not demonstrate critical elements such as material sourcing and end markets, validation of environmental impact claims, community impacts, and how proposed strategies would continue and be scaled after the grant ends. The Investment and Innovation program does not currently have the expertise and capacity to provide business incubation services for applicants.

Staff identified successful circular economy innovation programs operating in other states that may serve as a framework that Metro could customize. This approach includes partnering with an experienced contractor team that would provide the business incubator and technical support elements. Although each state's incubator program is unique, staff repeatedly heard from both administrators and beneficiaries that one of the most significant benefits is its function as "connective tissue" for organizations, businesses, investors, and governments working together to prevent waste through ongoing development of public-private partnerships.

Proposed approach

The proposed approach is modeled on a circular economy business incubator program called NextCycle operating in Washington, Colorado and Michigan. These programs are fostering innovation in prevention, reuse, recycling, and composting and development of local end markets for problematic waste streams. This approach provides a continuum of support through seed grants paired with technical support to overcome early-stage hurdles, a business and project accelerator, and larger circular economy grants for implementation. The technical and business support elements ensure projects seeking funding have traction, solid business plans and demonstrated viability and scalability.

As part of the Investment and Innovation assessment, Metro commissioned a feasibility study to evaluate whether this type of circular economy innovation program would be effective in the Metro region; that study would inform development of a pilot program. Staff recommend further developing this concept to address a unique and critical gap in the funding landscape. This approach builds on key learnings from past Investment and Innovation grant cycles on how to more effectively foster innovation, as well as from efforts of other government programs to invest in innovation in the circular economy.

ATTACHMENTS

- 2024 Investment and Innovation Program Assessment Executive Summary
- Is legislation required for Council action? **No**
- If yes, is draft legislation attached? **N/A**
- What other materials are you presenting today? **Slideshow**



Investment and Innovation grants

ASSESSMENT REPORT: EXECUTIVE SUMMARY

Project purpose and goals

The Metro Council established the Investment and Innovation (I&I) grant program in 2018 to invest in private and nonprofit sector efforts to reduce the harmful impacts of waste generated in greater Portland, in ways that advance racial equity. The I&I Assessment and Update Project is a strategic update of the program's objectives and funding priorities considering changes to the policy and funding landscape since the inception of the program. This project is intended to clarify how Metro can prioritize among many possible investment opportunities, to ensure the program:

- Aligns with and advances current strategic priorities, policies and regulations;
- Results in direct and measurable positive environmental impacts;
- Provides direct and measurable benefits for underserved communities; and
- Supports strategic investments and responsible use of public funds.

The project considered multiple intersecting factors, including new policies, regulations and funding opportunities. Program staff analyzed past I&I grants to identify where the program has had the most success and where it has fallen short of its goals. Analytics staff developed an assessment of materials and products in the regional system to determine which are particularly high impact in terms of lifecycle generation of greenhouse gas emissions that drive climate change. Engagement with interested parties through a variety of methods informed needs and opportunities and helped shape program recommendations. The engagement will further inform the grant criteria, solicitation methods and materials, particularly measures to increase the equity impact of the grants.



Research/analytics



Engagement input



Learnings from past
I&I grant cycles

Key findings

The project resulted in numerous findings described in this Assessment Report. Interested parties broadly expressed strong support for the I&I program and the impact it has had on the region's waste system and equity, and encourage the continuation of the program. They also recommended a shift to a more explicit focus on addressing climate change, a Metro strategic priority. The following materials (and products made from those materials) were identified as investment priorities because of the high emissions associated with their product lifecycles, and because they are not fully addressed by Extended Producer Responsibility programs: organics, textiles and electronics.

Waste prevention and reuse were identified as the most beneficial pathways for managing these materials based on the level of emissions associated with their production and disposal. This included a range of materials including furniture, textiles, and organics.

This project fostered a robust conversation on whether Metro should be investing in new ideas for reducing waste, or if Metro's role should be limited to supporting and sustaining proven, low-risk strategies. Many assessment participants support promoting innovation as a primary goal of the program, taking calculated risks on novel solutions that could affect meaningful change.

Program options and staff recommendation

Since the assessment of the Investment & Innovation Program began, there have been two major developments. First, the opportunity for new investments through other funding sources. Second, the proposed investment strategy outlined in the System Facilities Plan includes investment in regional organics infrastructure and the development of the Reuse Impact Fund that is intended to serve as a dedicated resource for waste prevention and reuse initiatives. Both developments address many of the identified needs in this space.

Given these developments, staff recommends focusing the I&I program exclusively on innovation to fill a unique and critical gap in the funding landscape. This approach would support the development and growth of innovative for-profit and nonprofit ventures that expand or strengthen local circular economies and develop local end markets. This concept would include adding technical support and business incubator programming to more effectively support participants in developing strategic partnerships, business and project planning, networking, overcoming technical barriers, and preparation for accessing additional funding to bring projects to scale. Metro could partner with an experienced contractor to provide the technical assistance and business incubation programming and would co-develop and execute the pilot with community representation through an equity advisory panel. Staff recommend developing a more detailed program proposal including a pilot to demonstrate effectiveness, with the potential of expanding statewide with additional funders.

Recommendation

Staff recommend pursuing the development of an innovation incubator program. There is a need to rethink ways of preventing waste and beneficial uses of discarded materials to achieve the environmental and equity goals of the 2030 Regional Waste Plan and Metro Council priorities of addressing climate change and promoting a resilient economy for all. By incorporating elements of technical and business support for entrepreneurs along with funding, Metro can fill a critical gap in the local funding landscape by catalyzing new and lasting ways of preventing and reducing waste. This approach builds on key learnings from past Investment and Innovation grant cycles on how to more effectively foster innovation, as well as from efforts of other government programs to invest in innovation in the circular economy.

**Introduction to Metro's State-Mandated
Regional Housing Coordination Strategy**
Work Session Topic

Metro Council Work Session
Tuesday, February 18, 2025

INTRODUCTION TO METRO'S STATE-MANDATED REGIONAL HOUSING COORDINATION STRATEGY

Date: January 23, 2025
Department: Planning, Development and Research
Meeting Date: February 11, 2025

Prepared by: Laura Combs, Associate Regional Planner,
laura.combs@oregonmetro.gov
Presenter(s): Eryn Kehe (she, her); Emily Lieb (she/her)
Length: 45 minutes

ISSUE STATEMENT

As a part of the Oregon Housing Needs Analysis legislation, the State of Oregon requires that Metro completes a Regional Housing Coordination Strategy (RHCS) by the end of 2025. A project team made of staff from both the Housing and Planning, Development and Research departments will collaborate to produce the RHCS, which will result in a list of actions that Metro will undertake to promote the development of needed housing. At this Council meeting, the project leads will present the draft scope of work and engagement plan and seek Council feedback before the work begins.

The primary goal of the RHCS is to create a roadmap for actions Metro will advance to promote housing production, coordination, and access by lifting up best practices, coordinating and aligning local strategies, and addressing critical gaps that can be filled at the regional level. By statute, the list of actions in the RHCS must address the following:

- The development and maintenance of diverse housing types that are high-quality, physically accessible and affordable
- Housing with access to economic opportunities, services and amenities
- Strategies, policies, or actions that are coordinated among the local governments within the Metro region
- Actions that affirmatively further fair housing

The policies, strategies and actions will be informed by data analysis and engagement with jurisdictional partners. This RHCS creates several opportunities for alignment within Metro's existing body of work and to build on initiatives already underway to promote housing in greater Portland.

ACTION REQUESTED

Metro Council will learn about the background and requirements of the RHCS, the scope of work, and the suggested approach for engagement.

IDENTIFIED POLICY OUTCOMES

The Metro Council may provide feedback to staff regarding the engagement plan and scope of work.

POLICY QUESTION(S)

- Does the Council have any feedback about the planned scope of work or engagement approach?
- Does the Council feel that the planned engagement with Council will lead to their sufficient preparation to make a decision to approve the RHCS by December 2025?

POLICY OPTIONS FOR COUNCIL TO CONSIDER

The Council may provide staff with direction on:

- The scope of work
- Planned engagement activities
- Desired outcomes from the RHCS

STAFF RECOMMENDATIONS

Staff recommends that the Council review the scope of work and engagement plan and direct staff to proceed with the outlined tasks. Staff will return to Council work sessions for future discussion of the development of the RHCS.

STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The Oregon Housing Needs Analysis (OHNA) articulates new responsibilities for state agencies and local governments to reorient the implementation of Statewide Land Use Planning Goals 10 (Housing) and 14 (Urbanization) to produce more housing, increase equitable access to housing and ensure that state and local governments take action to address need. It affects the way all communities plan for housing and urban lands, and cities and unincorporated counties with populations of 10,000 or greater are now required to regularly plan and take action to address needs. These cities and counties in the Metro area will develop and implement a Housing Production Strategy every six years to promote needed housing and affirmatively further fair housing.

As the regional government, Metro will not produce a Housing Production Strategy but instead is tasked to complete a Regional Housing Coordination Strategy (RHCS) by the end of 2025 and within one year of completing an Urban Growth Report thereafter.

BACKGROUND

This work session will be the first update to Metro Council about the RHCS.

ATTACHMENTS

- Is legislation required for Council action? ☐ Yes ☒ No
- If yes, is draft legislation attached? ☐ Yes ☐ No
- What other materials are you presenting today?
RHCS engagement plan
RHCS scope of work summary

Regional Housing Coordination Strategy: Technical Engagement Plan

I. Introduction

The Oregon Housing Needs Analysis (OHNA) articulates new responsibilities for state agencies and local governments to reorient the implementation of Statewide Land Use Planning Goals 10 (Housing) and 14 (Urbanization) to produce more housing, ensure equitable access to housing and ensure state and local governments take action to address need. It affects the way all communities plan for housing and urban lands, and cities and unincorporated counties with populations of 10,000 or greater are now required to regularly plan and take action to address needs. These identified cities and counties in the Metro area will develop and implement a Housing Production Strategy every six years to promote needed housing and affirmatively further fair housing.

As the regional government, Metro will not produce a Housing Production Strategy but instead is tasked to complete a Regional Housing Coordination Strategy (RHCS) by the end of 2025 and within one year of completing an Urban Growth Report thereafter. A project team made of staff from both the Housing and Planning, Development and Research departments will collaborate to produce the RHCS.

The primary goal of Metro's RHCS is to coordinate local activities and build a regional roadmap for the actions that Metro can take. By statute, the list of actions in the RHCS must address the following:

- The development and maintenance of diverse housing types that are high-quality, physically accessible and affordable
- Housing with access to economic opportunities, services and amenities
- Strategies, policies, or actions that are coordinated among the local governments within the Metro region
- Actions that affirmatively further fair housing

The policies, strategies and actions will be informed by data analysis and engagement. This RHCS creates several opportunities for alignment within Metro's existing body of work and to build on initiatives already underway to promote housing in greater Portland.

II. Decision-making framework

Metro Council will approve or accept the final Regional Housing Coordination Strategy (RHCS) and staff will submit it to the Oregon Department of Land Conservation and Development (DLCD) for review by December 2025. The Metro Policy Advisory Committee (MPAC) may make a recommendation about strategy approval to the Metro Council. The final draft RHCS will be shared with interested parties prior to final action by Metro Council.

Metro Council		
Metro Advisory Committees	Metro Housing/PD&R Leadership	HPS Implementers work group
MTAC	Technical analysis team	18 Metro region cities
MPAC	Technical engagement team	3 Counties
CORE	Other Metro staff	3 Housing Authorities
Housing experts		

III. Engagement goals and objectives

- A. The strategies in Metro's RHCS are informed by barriers and needs identified by jurisdictions and groups who work with priority populations in the region. The housing production strategies in Metro's RHCS are informed by barriers and needs identified by jurisdictions and housing advocacy groups and experts in the region.
 - a. Inventory regulatory and market barriers to housing production
 - b. Learn about local successes and imagine how they could be shared regionally
 - c. Find out what cities suggest as strategies for Metro to support housing production in their community
 - i. Analyzing and collecting relevant data
 - ii. Creating policies aligned with local implementation plans
 - iii. Exploring ways to increase funding and resources
 - iv. Convening practitioners to share resources and expertise
 - v. Understanding how jurisdictions are or are not currently working together – are there ways to improve or clarify these relationships?
- B. Existing programs and information available at Metro are lifted up and built upon in the strategies.

- C. Collaborative engagement leads to a regional strategy that is responsive to the OHNA mandate and spirit of promoting housing production and choice for all community members in our region.
- D. Facilitating new connections, relationships and points of coordination between entities working to meet housing needs across the region.
- E. This engagement process for the greater Portland region's first ever RHCS informs the resources and approaches for future RHCS cycles so that it becomes integral and valuable to all entities in the region working to meet housing needs.

IV. Engagement approach

- A. Technical engagement is informed by and additive to the work jurisdictions have done locally as part of their Housing Production Strategy and recent housing-related engagement conducted by the Housing and Planning, Development and Research departments. This approach honors past engagement and the input shared by interested groups and seeks to prevent over-engagement/engagement burn out in community members. Understanding and processing the engagement that has already been done at the local level provides insights into opportunities for addressing regional needs through this process.
- B. Technical engagement and technical analysis inform one another throughout the development of the initial list of strategies, evaluation criteria and resulting final RHCS.
- C. Advisory groups will serve as the primary engagement mechanisms for sharing information and updates about the development of the RHCS. In addition to these groups, engagement with other relevant organizations will be an important element of the engagement strategy, especially to uplift perspectives of community members living in needed housing.
- D. Racial equity informs all facets of engagement and is embedded in the analysis of data and in the evaluation of coordination strategies. Engagement will incorporate guidance from the SPAREDI. Additionally, a racial equity framework agreed upon by Metro's Housing and Planning, Development and Research departments will be used to assess racial equity implications of this process through internal meetings held at four key milestones in the process. This racial equity framework will include prompts to address data justice considerations.
- E. Pre-scoping engagement activities serve two primary purposes. The first is building an in-depth understanding of recent housing needs and production work in our region. The second is building and strengthening relationships with partner jurisdictions and interested groups to develop a collaborative process.

V. Engagement outcomes

The outcome of the engagement activities will be:

- A list of strategies or actions that Metro may take to promote the development of needed housing.
- An evaluation framework developed by a technical analysis team of Metro staff with consultant support. The draft evaluation framework will be shared with select groups to

provide technical feedback. The final draft RHCS will recommend strategies for Metro Council consideration and include information about strategy effectiveness, timeline, political impact, benefits, budget and potential partners.

The engagement approach for developing the RHCS relies on collaboration and relationship building with many individuals, governments and organizations from across the region. These efforts will focus on guiding the implementation of the RHCS, sharing resources and lessons to support production of needed housing and fostering stronger relationships through ongoing regional conversations and collaboration. A key goal of this engagement is to reflect on project outcomes, identify areas for improvement and set up the next RHCS for success.

VI. Engagement activities

Pre-scoping engagement

Purpose:

- A. Inform the engagement strategy.
- B. Understand what jurisdictions in the region have already done as a part of completing their Housing Production Strategies – for both policy ideas and community engagement.
- C. Build on recent engagements and their learnings. Prevent from over-engaging/over-burdening interested groups and community members.
- D. Understand what jurisdictions envision as Metro's role in implementing their own housing production strategies and expectations for Metro in producing the RHCS.
- E. Use lessons learned from pre-scoping activities to inform the engagement approach and begin an inventory of existing barriers to housing production and access and preliminary ideas for potential strategies.
- F. Gather information about considerations for scoping technical analysis – particularly related to fair housing.

Pre-scoping research

Leads: Daisy with support from Laura

Timeline: Ends Dec. 1st. 2024

Tasks:

- Collect engagement feedback from Metro housing-related work
 - o Evaluation of AH Investment
 - o Stakeholder Advisory Table Exploration of Funding
 - o SHS implementation engagement
 - o Urban growth management decision
- Scan completed HPSs for identified roles for Metro with implementation.
- Scan completed HPSs for identified barriers for housing production.
- Scan completed HPSs for themes across region.
- Scan completed HPSs to understand engagement input cities have received.

- Collect engagement feedback for preliminary strategy development and to identify relevant interested groups and community members for RHCS engagement.

Deliverables:

- Compile research takeaways and potential applications to the strategy into a memo, a spreadsheet of all comments received and a PowerPoint presentation.
 - o Begin list of potential measures and strategies for Metro.
 - o Begin drafting an inventory of housing production barriers.
 - o Inventory of themes heard by cities in their engagement efforts.
- List of relevant interested groups and community members to engage in this process.

Pre-scoping interviews

Leads: Daisy and Laura

Timeline: End by Nov. 15th, 2024

Tasks:

- Identify interviewees.
 - o Cities: Portland, Beaverton, Milwaukie, Gresham, Hillsboro
 - o Subject matter experts: 1000 Friends, Community Visions
- Prepare interview questions for review and approval by Emily and Eryn
- Schedule interviews
- Complete interviews

Deliverables (due December 1st, 2024):

- Interview tracking sheet.
- Compile interview takeaways and initial ideas for the strategy into a memo, a spreadsheet of all comments received and a PowerPoint presentation
 - o Pre-scoping comment spreadsheet
 - o Document interested groups involved
 - o Summarize themes from what was heard
 - o Recommend next steps to implement any recommendations
- Share the summary memo with people interviewed.

Pre-scoping internal staff meetings

Leads: Daisy and Laura

Timeline: Nov 1, 2024

Tasks:

- Identify interviewees
 - o Equity managers from Housing (Alexandra Appleton) and PD&R (Tracey Lam)
 - o Amy Trieu from DEI
- Prepare interview questions for review and approval by Emily and Eryn

- Schedule interviews
- Complete interviews and document them

Deliverables:

- Interview tracking sheet
- Inform engagement strategy
 - DEI involvement and equity lens tool
 - CORE engagement options

Engagement to inform strategy development

Purpose: Develop a suggested list of actions, resources, coordination actions, and strategies identified by regional jurisdictions and partners for consideration in the Regional Housing Coordination Strategy. Create a roadmap for actions Metro will take to promote housing coordination, production and access.

HPS Implementers work group

Leads: Laura and Daisy; administrative staff; anticipated consultant support with facilitation

Purpose: Metro will host up to four discussions to receive feedback from jurisdiction staff. The implementers work group will include staff who have or may play a role in the production or implementation of their local Housing Production Strategies, including staff from 18 cities (housing and planning staff) and 3 counties/housing authorities. Additional advocacy groups, housing interest groups, and experts may be invited to join meetings 3 and 4 to contribute their perspectives and provide feedback on the evaluation framework and draft RHCS.

Tasks:

- Define meeting format
- Assess staff support needs – admin, facilitator
- Produce a meeting plan
- Produce meeting agendas

Deliverables:

- Work group recruitment/invitations
- Meetings plans and agenda development
- Meeting #1: Project introduction; panel with cities with completed HPSs
- Meeting #2: Begin collection of potential strategy ideas; share technical data to contextualize strategy brainstorming as available
- Meeting #3: Discuss evaluation framework; add additional detail to strategies as needed
 - o Open invite to larger group
- Meeting #4: Vet/review final draft RHCS and receive feedback
 - o Open invite to larger group
- Brief reports summarizing what was heard in each of the meetings.

External interested group discussions/focus groups

Leads: Laura and Daisy; anticipated consultant support with facilitation

Purpose: Metro will host up to three (3) discussions with external interested groups. These will be one-time meetings with various groups for the purpose of identifying potential strategies. They might include:

- Home Building Association and additional market-rate local housing developers, including multifamily developers
- Housing Oregon and affordable housing developers
- Housing advocacy organizations and service providers

Tasks:

- Define meeting format
- Assess staff support needs – admin, facilitator
- Produce a meeting plan
- Produce meeting agendas

Deliverables:

- Group recruitment/invitations
- Meeting agendas and meeting plans
- A report summarizing what was heard in all three meetings.

Internal staff team review

Leads: Laura and Daisy

Purpose: Metro will host a series of three discussions with internal staff to provide additional institutional context to the development of the RHCS and to ensure coordination and alignment with intersecting Metro projects and programs. Internal Metro staff experts will provide their input to the list of strategies, the evaluation framework, and vet the final draft RHCS.

- Meeting #1: Suggest potential actions and strategies; inventory of measures already implemented by Metro to promote the development of needed housing
- Meeting #2: Review evaluation framework and add any needed details to work towards refined list of strategies in draft RHCS
- Meeting #3: Review draft RHCS

Participants in the three meetings might include:

- GAPD – state advocacy, future bond measures
- Tribal Affairs
- UGMFP - Glen Hamburg
- Housing
- TOD
- MPO and climate team
- DEI

Deliverables:

- List of participants for review and approval by Eryn and Emily
- A report summarizing what was heard in all three meetings.

Metro Technical Advisory Committee (MTAC)

Leads: Laura with support from Daisy

Purpose: The project team will provide regular updates to MTAC because this group includes many representatives with land use and housing expertise as well as including many jurisdictions who will also be engaged in the implementers work group. The role of MTAC is to provide technical feedback as the strategies are developed and evaluated and share the outcomes of their review with MPAC.

- Meeting #1 - introduce RHCS (complete)
- Meeting #2 - review work plan and engagement plan
- Meeting #3 - feedback from engagement; preliminary category of strategies
- Meeting #4 - review technical analysis and draft evaluation framework
- Meeting #5 – review evaluation framework/draft RHCS
- Meeting #6 - final draft RHCS; recommendation to MPAC

Tasks:

- Prepare agendas, materials and presentations
- Work with Eryn and Emily to identify speakers, which may include any member of the project team and/or Steering Committee, or consultants
- Present to MTAC as assigned
- Follow up with group as needed

Deliverables:

- Agenda title and purpose of presentation information provided to Miriam Hanes a month prior
- Design and production of materials or handouts
- PowerPoint presentation one day before meeting

Metro Policy Advisory Committee (MPAC)

Leads: Laura with support from Daisy

Purpose: MPAC will follow the development of the RHCS and bring the perspective of local jurisdictions and relevant organizational leadership to make the recommendation about the final strategy to Metro Council.

- Meeting #1 - introduce RHCS (complete)
- Meeting #2 – overview of work plan and engagement
- Meeting #3 – what we're hearing from engagement; introduce categories of strategies
- Meeting #4 –introduce evaluation framework and draft RHCS
- Meeting #5 - final draft RHCS; recommendation to Council

Tasks:

- Produce worksheets
- Prepare chair talking points
- Prepare agendas/work sheets, materials and presentations
- Work with Eryn and Emily to identify speakers, which may include any member of the project team and/or Steering Committee, or consultants
- Present to MPAC as assigned

Deliverables:

- MPAC worksheet provided to Miriam Hanes two weeks prior
- Design and production of materials or handouts
- PowerPoint presentation one day before meeting

Committee on Racial Equity (CORE)

Leads: Daisy and Laura with support from Amy Trieu (DEI)

Purpose: Staff will develop options for CORE's level of involvement and CORE will decide which option is best for them; subsequent tasks and deliverables will reflect their decision about preferred level of involvement

- CORE meeting #1 - project overview, present equity lens tool/framework and results of first equity check-in, CORE members discuss and select their preferred level of engagement throughout the rest of the project
- CORE meeting #2 (TBD)
- CORE meeting #3 (TBD)
- CORE meeting #4 (TBD)

Tasks:

- Amy Trieu will provide notes from CORE debrief meeting with insights about interest, agenda availability, meeting format, etc.
- Daisy and Laura will prepare a list of options for CORE involvement
- Co-chairs and CORE will determine option they'd like to proceed with in 2025 (Feb meeting)
- Amy will meet to help prepare for each meeting
- Attend co-chairs meeting ahead of each CORE meeting
- Prepare meeting agendas, materials, presentations
- Follow up as needed

Deliverables:

- Anticipated CORE meetings, to be refined through in coordination with Amy
- Prepare agendas/work sheets, materials and presentations
- Work with Eryn and Emily to identify speakers, which may include any member of the project team and/or Steering Committee, or consultants
- Present as assigned

Metro Council

Leads: Ted with support from Laura and Daisy

Purpose: Metro Council is the primary decision-maker regarding the adoption of the RHCS and will need to take action to adopt the plan by December 2025. Project staff will periodically update Council on the progress of the strategy development to give them opportunity to shape the creation of the plan and to keep Councilors informed along the way.

- Work session #1 - project overview; seek feedback on work plan and engagement plan
- Work session #2 – themes from engagement and preliminary list of strategies
- Work session #3 – update on evaluation framework, analyses, engagement
- Work session #4 - introduce final draft RHCS; receive recommendations from other advisory groups
- Meeting #5– RHCS adoption through Resolution

Tasks:

- Prepare worksheets and meeting materials
- Prepare presentations and work with Eryn and Emily to identify speakers, which may include any member of the project team and/or Steering Committee, or consultants
- Present to Metro Council as assigned
- Follow up as needed

Deliverables:

- Finalized schedule of Council briefings and work sessions
- Worksheets, meeting materials, and presentations

Equity check-ins

Leads: Daisy, with support from Laura and Leia

Purpose: The RHCS will apply the Metro Racial Equity Framework derived from Metro's Strategic Plan to Advance Racial Equity Diversity and Inclusion (SPAREDI) to prompt reflections at key project milestones about the racial equity outcomes and impacts and adjust the approach or activities accordingly. The framework will be modified to the specific needs of the RHCS project and address the new areas of work like Affirmatively Furthering Fair Housing and a focus on data justice.

- Check-in #1: Engagement plan and scope of work (Jan 2025)
- Check-in #2: Preliminary engagement results and early themes (April 2025); potential to look at technical data work to achieve data justice goals
- Check-in #3: Evaluation framework (June 2025)
- Check-in #4: Final strategy (August 2025)

Tasks:

- Meet with PD&R and Housing equity managers to discuss approach
- Understand application of SPAREDI
- Customize tool to address data justice/data equity considerations

- Organize four equity check-in meetings with project team through the process.
- Document racial equity considerations using the racial equity framework template, including proposed changes to the project
 - o Eryn and Emily to review and direct proposed changes to work plan or approach as a result of racial equity considerations.

Deliverables:

- Racial equity framework worksheets – completed during each check-in
- Racial equity framework memo (completed at the end of the project)

Draft Project Schedule (January 2024)	
Date	Activity
October 16, 2024	MTAC meeting #1 – introduce RHCS
November 13, 2024	MPAC meeting #1 – introduce RHCS
December 4, 2024	Pre-scoping takeaways presentation shared with internal team
December 13, 2024	Pre-scoping engagement memo finalized
December 17, 2024	Steering committee meeting
December 17-18, 2024	Equity check-in #1 – engagement plan and work plan
December 2024	Equity framework plan finalized
December 2024	Scope of work and engagement plan finalized
December 2024	Communications plan finalized
January 6, 2025	Steering committee meeting
January 31, 2025	Consultant procurement completed
January 31, 2025	Finalize content for project web page
February 11, 2025	Metro Council Work Session #1 – project overview; work plan; engagement plan
February 11, 2025	Launch project web page (after Council meeting)
February 20, 2025	CORE meeting #1 – project overview, present equity framework, present options for involvement
February 26, 2025	Steering committee meeting
February 2025	HPS Implementers work group meeting #1- Project intro/overview; panel with cities with completed HPS
March 11, 2025	Internal staff review meeting #1; brainstorm strategies; inventory of measures already implemented by Metro to promote the development of needed housing
March 19, 2025	MTAC meeting #2 – work plan, engagement plan
March 2025	External focus group discussion #1 – identify potential strategies
March 21, 2025	Complete inventory of measures already implemented by Metro to promote the development of needed housing
March 26, 2025	MPAC meeting #2 – work plan, engagement plan
April 2025	External focus group discussion #2 – identify potential strategies
April 2025	External focus group discussion #3 – identify potential strategies
April 2025	Equity check-in #2 – preliminary list of strategies and engagement
April 2025	HPS Implementers work group meeting #2 - preliminary discussion of strategies
April 2025	CORE meeting #2 – engagement update; evaluation framework; present outcomes from equity check-in #2
April 18, 2025	Complete draft evaluation framework
May 6, 2025	Internal staff review meeting #2 - evaluation framework and refined list of strategies
May 14, 2025	Complete preliminary list of strategies

May 2025	Council work session #2 – preliminary list of strategies; analyses, engagement
May 21, 2025	MTAC meeting #3 – preliminary list of strategies; engagement themes
May 28, 2025	MPAC meeting #3 – engagement themes; categories of strategies
May 30, 2025	Finalize evaluation framework
June 1, 2025	Finalize AFFH analysis
June 2025	Equity check-in #3 – evaluation framework
June 2025	HPS Implementers work group meeting #3 – draft evaluation framework; adding details to strategies; invite to broader group
June 18, 2025	MTAC meeting #4 – technical analyses results and draft evaluation framework
June 2025	CORE meeting #3 – preliminary list of strategies; evaluation framework; present outcomes from equity check-in #3
June – July 2025	Apply evaluation framework
July 16, 2025	MTAC meeting #5 – evaluation framework results and draft RHCS
July 2025	Council work session #3 – evaluation framework results; prioritized list of strategies; engagement update
July 23, 2025	MPAC meeting #4 – evaluation framework results and draft RHCS
July 31, 2025	Complete refined list of strategies
August 2025	Equity check-in #4 – draft RHCS
August 2025	Internal staff review #3 – draft RHCS
August 2025	HPS Implementers work group meeting #4 – review refined list of strategies; invite broader group
August 28, 2025	Draft RHCS released
September 2025	Public comment period
September 2025	CORE meeting #4 - final draft RHCS; recommendation to Council
September 17, 2025	MTAC meeting #6 - final draft RHCS; recommendation to staff/MPAC
October 22, 2025	MPAC meeting #5 - final draft RHCS; recommendation to Council
October 2025	Council work session #4 – final draft RHCS; receive recommendations from other advisory groups
October 31, 2025	Staff complete final draft of RHCS
December 2025	Metro Council meeting #5 – Discussion of final RHCS; RHCS adoption through Resolution
December 2025	Submit RHCS to DLCD for acknowledgement/adoption

Regional Housing Coordination Strategy:

Scope of work overview

Vision: Create a roadmap for actions Metro will advance to promote housing production, coordination, and access by lifting up best practices, coordinating and aligning local strategies, and addressing critical gaps that can be filled at the regional level.

Scope Development

Plan all project activities and identify consultant tasks.

- Final scope of work and project management plan
- Engagement plan
- Communication plan
- Racial equity framework
- Procurement and consultant selection

Analysis Work Plan

Complete analysis required under statute. Informative for engagement with implementer workgroups, internal staff, and MTAC and will populate final report.

- Socioeconomic and demographic characteristics of households
- Socioeconomic and demographic characteristics of people experiencing housing instability and houselessness
- Market conditions affecting the provision of needed housing
- Inventory of existing and expected barriers to the planning or development of needed housing.
- Affirmatively Furthering Fair Housing Analysis
- Inventory of measures already implemented by Metro to promote the development of needed housing

Ongoing Engagement

Develop a list of potential regional actions, resources, and strategies to support implementation of local Housing Production Strategies.

- HPS implementers work groups
- External focus groups with home builders, developers, service providers, and advocacy groups
- Internal staff team review
- MTAC, MPAC, CORE
- Metro Council

Strategy Evaluation & Adoption

Evaluate preliminary strategies per the framework developed and produce a final draft RHCS that is available for feedback and review from participating groups and the public. Present the final RHCS to Metro Council for adoption through a Resolution.

- Develop evaluation framework
- Evaluation of strategies
- List of strategies, actions, and measures in the RHCS
- Document production
- Council adoption




Ideas and feedback compiled from a variety of engagement activities result in a preliminary list of potential strategies

An evaluation framework is developed, based on relevant technical analysis work

The potential list of strategies is assessed through the evaluation framework

Final RHCS

Draft Project Timeline

2024	2025											
Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Scoping												
		Draft strategies			Continued engagement							
		Analysis										
				Evaluation								
									Review / approval			



Equity framework check-in



Council briefings

Materials following this page were distributed at the meeting.



Metro

Investment and Innovation grant program

Program assessment and recommendations

February 2025



Today's discussion

- Assessment findings and recommendations for Investment and Innovation grant program
- Seek Council feedback on recommendation





I&I program assessment: Strategic update of the Investment & Innovation grant program to align with current priorities and policies.

Assessment overview

Phase 1: Engagement and research to assess needs and opportunities

Phase 2: Develop recommendations for an updated focus and approach



Research/analytics



Engagement input



Learnings from past
I&I grant cycles



What we heard

"Love the program, and the Gresham community has really benefitted from it."

- Local government administrator

"Waste prevention should be the focus the I&I grants. However, leave access open for composting or recycling for certain high impact materials like food."

- Project team member

Appreciation for the distinction between I&I supporting innovation, and the new Reuse Impact Fund for sustaining ongoing operations.

- Reuse Roundtable participant

"Every program, business, or organization funded by the I&I program should be able to demonstrate how it is either advancing equity or taking measures to [not create] harm."

- Community based organization



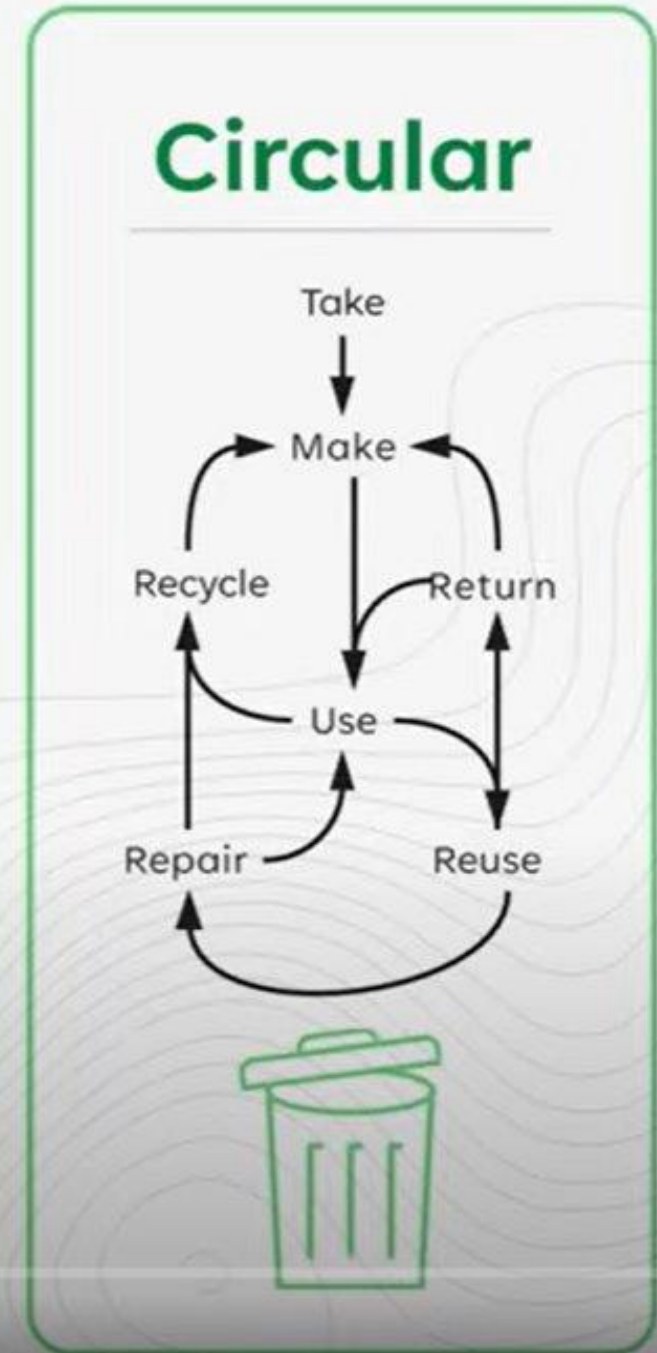
... and much more

Key assessment findings

- Program has had a significant impact on waste reduction and equity
- Need for a stronger focus on climate change and high-impact materials
- Need to reduce barriers to support underserved communities and emerging businesses
- Overlap with Recycling Modernization Act funding and proposed Reuse Impact Fund

Opportunities for Innovation

- Potential for fostering innovation in the circular economy
- Review committees need ways of validating new strategies and technologies
- Applicants need support beyond just \$: overcoming hurdles, culturally-specific mentoring, building partnerships/networks



Innovation approaches

- Fostering innovation in the circular economy by combining business incubator and accelerator elements with funding
- Partnering with a contractor on the business and technical support



Considerations

- Emergence of new funding streams focused on waste reduction and recycling infrastructure
- Innovation concept is a significant shift in approach that requires substantial new resources and capacity
- Regional System Fee investment priorities are focused on filling critical system gaps



Discussion question

Does Council support the staff recommendation to defer the development of a new innovation-focused program?



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Introducing Metro's state-mandated Regional Housing Coordination Strategy

February 18, 2025

State requirements under OHNA

- HB 2003 established the Oregon Housing Needs Analysis (OHNA) framework
- Cities and unincorporated counties with populations over 10,000 are required to create Housing Production Strategies every six years
- Metro is required to create a Regional Housing Coordination Strategy (RHCS) within one year of UGB decision (by Dec 2025)

What is the Regional Housing Coordination Strategy?

List of actions Metro will take to promote the development of housing

- Coordinate with local production strategies
- Fill regional gaps (resources, capacity, tools)

Data and analysis required

- Socioeconomic and demographic characteristics of households
- Inventory of measures implemented by Metro
- Market conditions
- Inventory of existing and expected barriers to planning or development of housing
- Evaluation of potential strategies

Approach

- Collaboration between Metro Housing and Planning, Development and Research Departments
- Coordination with local jurisdictions
- Engagement with housing developers and advocates
- Fair housing and racial equity lens

Draft vision statement

Create a roadmap for actions Metro will advance to promote housing production, coordination, and access.

This will be achieved by lifting up best practices, coordinating and aligning local strategies, and addressing critical gaps that can be filled at the regional level.

Process

- Pre-scoping
- Scope development
- Analysis work plan
- Ongoing engagement
- Strategy evaluation
- Adoption

Ideas and feedback compiled from a variety of engagement activities result in a preliminary list of potential strategies

An evaluation framework is developed, based on relevant technical analysis work

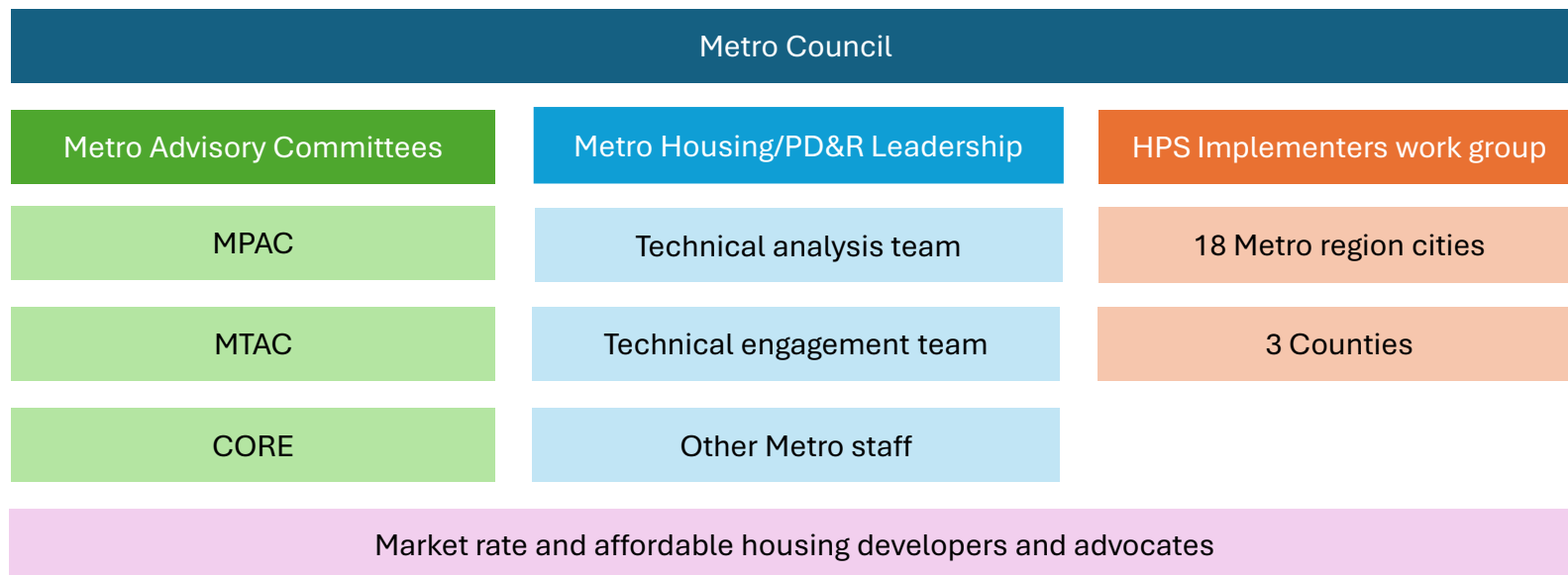
The potential list of strategies is assessed through the evaluation framework

Final RHCS

Scoping activities

- **Research** – summary of existing local Housing Production Strategies (HPS) and recent engagement
- **Metro staff interviews**—DEI staff & department equity managers
- **External interviews**—staff of jurisdictions that have completed HPSs; key subject matter experts

Decision-making



Engagement approach

- **Implementers work group**
 - Cities
 - Counties
 - Housing authorities/divisions
- **External focus groups**
 - Home Builders Association and multi-family developers
 - Housing Oregon and affordable housing developers
 - Housing advocacy organizations and service providers

Standing committees & Council

MTAC – approximately 5 more meetings

MPAC – approximately 4 more meetings

CORE – 2-4 meetings

Metro Council – approximately 4 work sessions
and one meeting to consider a resolution

Racial equity framework – four reviews









- Engagement plan and scope of work (Winter 2025)
- Preliminary engagement themes and data justice goals (Spring 2025)
- Evaluation framework (Summer 2025)
- Final RHCS (Fall 2025)

Racial equity check-in #1:

Example actions

- Develop racial equity goals for the project
- Evaluate data sources, be transparent and identify limitations and gaps
- Ensure evaluation framework includes metrics that represent Fair Housing impact

Schedule

2024	2025											
Dec	Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
Scoping 												
		Draft strategies				Continued engagement						
		Analysis										
				Evaluation								
									Review + approval 			



Equity framework check-in



Council briefings

oregonmetro.gov

