



Metro  
600 NE Grand Ave.  
Portland, OR 97232-2736

# Metro Policy Advisory Committee (MPAC)

## agenda

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Wednesday, July 24, 2024

5:00 PM

<https://zoom.us/j/95889916633> (Webinar

ID: 958 8991 6633)

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### 1. Call To Order, Declaration of a Quorum & Introductions (5:00PM)

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### 2. Public Communication on Agenda Items (5:05PM)

Public comment may be submitted in writing and will also be heard by electronic communication (video conference or telephone). Written comments should be submitted electronically by mailing [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Written comments received by 4:00 pm on the Wednesday before the meeting will be provided to the committee prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the item on which you wish to testify; or (b) registering by email by sending your name and the item on which you wish to testify to [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov).

Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Individuals will have three minutes to testify unless otherwise stated at the meeting.

### 3. Council Update (5:10PM)

### 4. Consent Agenda (5:20PM)

4.1 Consideration of the June 26, 2024 MPAC Minutes

[24-6100](#)

Attachments: [062624 MPAC Minutes](#)

4.2 Consideration of the May 22, 2024 MPAC Minutes

[24-6084](#)

Attachments: [052224 MPAC Minutes](#)

### 5. Action Items (5:25PM)

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5.1 Functional Plan Amendment Recommendation

[COM](#)  
[24-0828](#)

Presenter(s): Glen Hamburg, Metro, he/his

Attachments: [MPAC Worksheet](#)  
[Attachment A](#)  
[Attachment B](#)

**6. Information/Discussion Items (5:40PM)**

6.1 2024 Draft Urban Growth Report (6:00PM)

[COM](#)  
[24-0825](#)

Presenter(s): Eryn Kehe, she/her, Metro  
Ted Reid, he/him, Metro

Attachments: [MPAC Worksheet](#)  
[Draft 2024 UGR](#)

**7. Adjourn (7:00PM)**

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## សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ១ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។

បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃច្រើនការ) ប្រាំពីរថ្ងៃ ថ្ងៃច្រើនការ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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## 2024 MPAC Work Program

**As of 07/02/24**

*Items in italics are tentative*

<p><b>July 24, 2024</b> (online only)</p> <ul style="list-style-type: none"> <li>• Functional Plan Amendment Recommendation (<b>Action</b>) (Glen Hamburg, Metro, he/his, 15 min)</li> <li>• 2024 Draft Urban Growth Boundary Report Eryn Kehe, she/her, Ted Reid, he/him, Metro; 60 min)</li> <li>• WPES: System Facilities Plan Update (included in packet)</li> </ul>	<p><b>August 28, 2024- CANCELLED</b></p> <p><i>COO recommendation UGM Decision released and emailed to MPAC members</i></p>
<p><b>September 11, 2024</b> (<i>virtual</i>)</p> <ul style="list-style-type: none"> <li>• UGM COO recommendation review and public comment feedback</li> </ul>	
<p><b>September 25, 2024</b> (in person)</p> <ul style="list-style-type: none"> <li>• UGB Expansion Recommendation to Metro Council (<b>action</b>)</li> <li>• <i>WPES: System Facilities Plan Update (Marta McGuire (she/her), Metro, Estee Segal (she/her), Metro; 45 min)</i></li> </ul>	<p><b>October 23, 2024</b> (online)</p>
<p><b>November 13, 2024</b> (in person)</p>	<p><b>December 11, 2024</b> (online)</p> <ul style="list-style-type: none"> <li>• Follow up on UGM process (Ted Reid, he/him, Metro; 45 min)</li> </ul>

**4.1 Consideration of the June 26, 2024 MPAC Minutes**

*Consent Agenda*

Metro Policy Advisory Committee  
Wednesday, July 24th, 2024



**METRO POLICY ADVISORY COMMITTEE (MPAC)**

Meeting Minutes

June 26, 2024

MEMBERS PRESENT

Vince Jones-Dixon  
Tim Rosener  
Mary Nolan  
Brett Sherman  
Kirstin Greene  
Omar Qutub  
Gerritt Rosenthal  
Allison Tivnon  
Denyse McGriff  
Luis Nava  
Joe Buck  
Duncan Hwang  
Ty Stober  
Thomas Kim  
Keith Kudrna  
Miles Palacios  
Steve Callaway

AFFILIATION

City of Gresham, Second Largest City in Multnomah County  
Other Cities in Washington County  
Metro Council  
City of Happy Valley, Other Cities in Clackamas County  
Oregon Department of Land Conservation and Development  
Citizen of Multnomah County  
Metro Council  
Second Largest City in Washington County  
Largest City in Clackamas County  
Citizen of Washington County  
City of Lake Oswego, Largest City in Clackamas County  
Metro Council  
City of Vancouver  
Port of Portland  
Special Districts in Multnomah County  
Special Districts in Washington County  
Largest City in Washington County

MEMBERS EXCUSED

Ted Wheeler  
Brian Hodson  
James Fage  
Emerald Bogue  
Terri Preeg Riggsby  
Carmen Rubio  
Mark Shull  
Pam Treece (Chair)  
Sharon Meieran  
Sherry French  
Susan Greenberg  
Ed Gronke  
Glen Yung

AFFILIATION

City of Portland  
City in Clackamas County outside UGB  
City in Washington County outside UGB  
Clark County  
TriMet  
Other Cities in Multnomah County  
Clackamas County  
Washington County  
Multnomah County  
Special Districts in Clackamas County  
Governing Body of a School District  
Citizen of Clackamas County  
Clark County

ALTERNATES PRESENT

Laura Kelly  
Anthony Martin

AFFILIATION

Oregon Department of Land Conservation and Development  
Largest City in Washington County

OTHERS PRESENT: David Nemarnik, Emily de Hayr, Juliet Ponte, Steven A Gotter, Brian Fields Clayton Madey, Medha Pulla, Fritz Kaliszewski, Mariann Hyland, Marc Farrar, Cathy Bell, Brian Schimmel, Kathryn Harrington, Sandy Glantz, Tom Armstrong, Mesha, Laurie Thiel, Dorila Nava, Eric Rutledge, Stephen McWilliams

STAFF: Connor Ayers, Georgia Langer, Roger Alfred, Catherine Ciarlo, Malu Wilkinson, Marissa Madrigal, Val Galstad, Ted Reid, Jaye Cromwell, Liam Frost, Eryn Kehe, Yesenia Delgado, Emily Lieb, Alison Wicks, Valeria McWilliams, Serah Breakstone, Alice Hodge,

### **1. CALL TO ORDER, INTRODUCTIONS, CHAIR COMMUNICATIONS**

MPAC Vice Chair Brett Sherman meeting to order at 5:00 PM.

Metro staff Connor Ayers (he/they) called the role.

### **2. PUBLIC COMMUNICATION ON AGENDA ITEMS**

MPAC Vice Chair Brett Sherman read aloud the instructions for providing public testimony.

David Nemarnik, Sherwood, read testimony from Jeffert Kleinman, the attorney representing the West of Sherwood Farm alliance. They raised legal and policy questions for consideration by Metro Council. They shared that they were in opposition to the Sherwood West Concept Plan.

Emily de Hayr, Sherwood, shared that before they add employment lands to Sherwood, they should analyze what happened to the Tonkin employment area. She questioned why Sherwood needs more employment land.

Juliet Ponte, Sherwood, shared that her family owns a 50-acre winery in Sherwood, and stated that rural and agricultural jobs will be displaced because of development on farmland. Ponte expressed opposition for the Sherwood West Concept Plan.

Steven A Gotter, Sherwood Farm Alliance, expressed opposition for the Sherwood West Concept Plan, noting that he would like answers to who will be employed. He noted concern about traffic jams, asking which taxpayers will pay for the widening of roads.

Brian Fields, Sherwood, shared that they oppose the Sherwood West Concept Plan, requesting a taxpayer impact statement.

Clayton Madey shared support for the Sherwood West Concept Plan due to its ability to provide high paying jobs.

Seeing no further testimony, Vice Chair Sherman moved onto the next agenda item.

### **3. COUNCIL UPDATES**

06/26/2024 MPAC

Minutes 2



**COO Update:**

COO Marissa Madrigal provided a brief update, noting that since the last meeting, they have continued to meet with county partners and key stakeholders. She shared that they have been operating within a broad framework of alignment previously shared, focusing on detailed exploration to ensure feasibility before making any recommendations to the Metro Council. COO Madrigal emphasized the importance of maintaining stability in existing services and taking a reality-based approach. She highlighted the value of listening to implementers and providers to find the best path forward. Overall, COO Madrigal expressed a positive outlook, confident in achieving both service stability and progress in affordable housing.

With no further discussion, Vice Chair Sherman moved to the Council Update.

**Council Update:**

Councilor Duncan Hwang shared that Council Approved \$700,000 for regional ecological and cultural restoration projects. He shared that Blue Lake Regional Park is reopening after infrastructure updates, new watercraft launch, and improved fishing pier. He discussed the solicitation for innovative capital projects combining nature, job opportunities, housing, and transportation. Councilor Hwang discussed the ongoing placemaking series and doubling of community placemaking grants, as well as the regional transportation grant awards to projects promoting travel options. He also discussed the development of a systems facilities plan, Recycling Modernization Act implementation, and multifamily bulky waste collection study.

Councilor Gerritt Rosenthal discussed changes to the Recycling and Waste Advisory Committee (RWAC). Councilor Rosenthal mentioned a joint meeting between the MERC and Metro Council, where they discussed the potential repurposing of the Expo Center into a regional sports facility complex. He noted that there was no opposition to this idea, allowing the four options identified by the consultants, which included ice rinks, open fields, and volleyball courts, to move forward in the evaluation process.

MPAC Member Discussion:

Mayor Joe Buck asked for a status update on the riverwalk project for the Falls.

Malu Wilkinson shared that they will get an update for him on that.

Seeing no further discussion, Vice Chair Sherman moved onto the next agenda item.

**4. CONSENT AGENDA**

Due to lack of quorum, Vice Chair Brett Sherman moved the vote to approve the consent agenda to next month's meeting.

**5. COMMITTEE MEMBER COMMUNICATIONS**

There being no committee member communications, Vice Chair Sherman moved onto the next agenda

item.

## **6. INFORMATION/ DISCUSSION ITEMS**

### **6.1 Housing Update**

Vice Chair Brett Sherman introduced Liam Frost, Yesenia Delgado, Emily Lieb, Alison Wicks, Valeria McWilliams to present on the topic.

#### **Presentation Summary:**

The presenters shared the regional approach to housing and homelessness, noting that Metro leads equitable regional system and vision, invests funding to achieve shared goals, and ensures accountability to voters. They also outlined the roles of the counties and service providers. The presenters discussed the FY 2023-24 department investment process, and the affordable housing bond dashboard. They discussed the affordable housing bond project locations and the affordable housing bond pipeline. They shared the regional long-term rent assistance program snapshot, and the regional overview of population A and B. They shared the background, status, and next steps for the tri-county planning body update.

#### **MPAC Member Discussion:**

Vice Chair Brett Sherman mentioned that population B are differently dispersed than population A in Multnomah County versus the other counties. He asked why the population differs between counties.

Yesenia shared that counties are providing different resources. She noted that Permanent Supportive Housing (PSH) takes a longer time to ramp up, noting that Multnomah County has invested additional dollars for population B.

Liam Frost shared that Multnomah County has many different and significant resources in comparison to other counties.

Vice Chair Brett Sherman asked about the permanent placement and supportive housing in relation to the datapoints with this fiscal year.

Yesenia Delgado shared that PSH work with folks with higher levels of need and more support needed, noting that it takes a higher level of trust to build with folks who need PSH, so it takes longer to work with those households. Additionally, Delgado shared that PSH buildings need to build or find buildings and so that also takes longer. She noted that this is the most meaningful intervention.

Mayor Buck asked if Metro is implementing these coordinated efforts.

Valeria McWilliams shared that there are some initiatives that Metro is leading, some that the counties are leading, and ones that other folks are leading. She noted that she will share the information.

Frost shared that Multnomah County is creating a platform where housing navigators can see which beds are currently available in real-time. Everyone is heavily involved, as is house share of Oregon.

Mayor Joe Buck asked about the landlord certification process, asking if it is like Section 8's processes.

Frost shared that the goal is to recruit landlords, stating that it is difficult to build relationships with buildings to place folks into housing. He shared that it is similar, but they are working to institutionalize the system.

McWilliams shared that it provides a lot more flexibility to access those units and they have at-risk mitigation programs that supports landlords and ensures that any damages will be covered and insured.

Mayor Callaway noted that the document stated that about 4,000 households were put into housing and 14,000 were placed into housing, asking why the numbers were different in the slides.

Frost stated that the numbers in the report discussed the entirety of the program and the ones in the slides were just for the households.

Mayor Callaway asked if people were double counted.

Delgado noted that the audit found that when they are reporting people versus households, there can be some confusion. She noted that the 14,000 number that Mayor Callaway was referring to was people, rather than households, which can have multiple people in the households. She noted that they do not duplicate folks, but the number is smaller because of the change in the way they count.

Mayor Callaway asked what the long-term staffing plan is.

Emily Lieb responded that they collect data and there is a 5% cap on administrative funding. She added that they have had \$500,000 proposed for FY25, and the plan is to include a small general fund to cover the administrative costs for the program.

Mayor Callaway stated that if Metro is going to pursue federal or state funds, they should let them know because cities would be glad to sign on.

Seeing no further discussion, MPAC Vice Chair Sherman moved onto the next agenda item.

## **6.2 Assessment of City Employment Land UGB Expansion**

Vice Chair Sherman introduced Eryn Kehe, Ted Reid, and David Tetrick to present on the topic.

### **Presentation Summary:**

The presenters shared the project timeline, and shared maps of the vacant buildable land, infill buildable land, and redevelopable land as of 2024. They discussed the demand analysis methodology for employment land and shared the draft results from the industrial and commercial land gap analysis. The presenters discussed large industrial site inventory, and the Sherwood west employment analysis. They discussed their project question, approach, market supply, and site competitiveness.

MPAC Member Discussion:

Mayor Tim Rosener shared that they see the distance from I-5 is a positive thing because they do not want warehouses like Amazon to occupy that employment land, rather, they want other jobs.

Mayor Steve Callaway inquired about the commercial land deficit, asking if a deficit was projected in the previous Urban Growth Report (UGR) and what had changed since then. He requested an explanation in the final draft about the assumptions or predictions that had shifted from the last forecast to the current one. He expressed curiosity about the reasons for the current deficit.

Ted Reid explained that the commercial land deficit was largely due to the limited growth capacity in the commercial category, which made it easy to slip into a deficit. He emphasized that the deficit was a 20-year projection, starting with a low amount of land inside the urban growth boundary. He noted that commercial uses often overlap with industrial areas, meaning some commercial demand would be met by industrial land. This interaction between industrial and commercial categories, despite being analyzed separately, contributed to the perceived deficit.

Mayor Callaway asked if it is possible that some of the deficit could come out of the industrial land that they are projecting going forward.

Reid clarified that they do see commercial uses going into industrial areas. They also noted that commercial uses tend to want to go where people are, so if they saw demand for commercial space and potentially a deficit, they would expect more development to happen in their existing corridors downtown.

Mayor Callaway discussed developable land and ready land, asking if they are in proximity to where their manufacturers are, noting that that is important to consider.

Councilor Rosenthal inquired about the availability of tier three lands for large-scale logistics or transfer operations, noting Mayor Rosener's comment that Sherwood was not seeking such developments due to its location away from I-5. He asked if large-scale parcels were available in North Wilsonville, the basalt lands, and the Tonkin lands, and whether the proposed west Sherwood was considered part of the larger industrial job lands in the Tualatin, North Wilsonville, and Sherwood area, or viewed separately. Councilor Rosenthal highlighted the abundance of job lands in the area and the need to address transportation issues to facilitate access to these jobs, a problem that had not yet been fully resolved.

Reid responded that it depends on whether there is market demand for warehousing distribution for these sites.

David Tetrick shared that they are still seeing logistics warehousing distribution operations continue to expand in our region at a slower rate due to higher interest rates. He noted that those businesses remain very viable across the US and in the region, especially with the rate of pickup in the e-commerce around the world. He added that for some of those sites identified in the large lot inventory, they are active quarries other current cases like that aren't likely to move into a different use category. Tetrick noted that they will not be available anytime soon.

Councilor Rosenthal asked if West Sherwood would be part of the general industrial jobs triangle, or if it be a separate area.

Tetrick responded that there are arguments for and against doing that. He added that some that are against include the distance from I-5.

Councilor Nolan asked about the capture rate from the seven counties to the Metro region. They asked what historic timeframe they looked back to, noting that it appears to be shifting a little north of the Colombia River. They asked if that has been considered when they say they can capture 70-75% of that seven-county job growth.

Reid shared that the trend dates to 1979, sharing the trend that covers around 80 percent for many years, but has since declined to 75 percent.

Councilor Nolan noted that they should explore that more. They also asked about parcel size, asking if staff have looked at the specific ownership of land within the proposed expansion area to determine the personalization of that land.

Tetrick shared that there are currently three owners and three parcels.

Councilor Nolan asked what the purpose of that land is.

Tetrick shared that it is active farmland.

Mayor Rosener shared that he estimates that about 40% of the land is being used.

Councilor Nolan responded that they should look at the actual data there. They shared that they should consider that industrial land adjacent to active farmland as a serious conflict, noting that it could damage the work of the agricultural land. Councilor Nolan also asked if they looked at wage rates, noting that if there is low density industrial land, there may be fewer jobs available.

Tetrick shared that the industry is likely to grow in this area.

Councilor Nolan requested wage and employment density assumptions.

Mayor Rosener discussed the need for realistic assessments of industrial land based on market preferences, emphasizing that developers prefer sites with a 7% slope or less, while the current urban growth report uses a 25% slope guideline dictated by state formulas. He stressed the importance of revising these forecasts to reflect usable land to provide accurate recommendations to the Metro Council. He acknowledged that the urban reserves around Sherwood had been designated for growth years ago, with much of the land now owned or optioned by speculators, indicating site readiness. Mayor Rosener called for detailed analysis to verify potential conflicts, like having farmland next to industrial land, to ensure informed planning decisions. He criticized the urban growth report for relying on historical data and state formulas, which may not account for aspirational growth or strategies to reverse declining trends. He urged for a forward-looking approach to ensure regional prosperity and competitiveness.

Vice Chair Sherman thanked the MPAC members for the questions they asked.

**6.3 2040 Planning & Development Grants Program Updates**

Due to time restraints, Vice Chair Sherman postponed this agenda item.

**7. ADJOURN**

Vice Chair Brett Sherman adjourned the meeting at 7:06 pm.

Respectfully Submitted,

A handwritten signature in cursive script that reads "Georgia Langer".

Georgia Langer  
Recording Secretary

**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF MARCH 27, 2024**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT NO.</b>
6.1	Presentation	06/26/2024	Housing Update Presentation	062624m-01
6.3	Presentation	06/26/2024	Urban Growth Management: Employment Land Analysis Presentation	062624m-02





## **4.2 Consideration of the May 22, 2024 MPAC Minutes**

*Consent Agenda*

Metro Policy Advisory Committee  
Wednesday, July 24th, 2024



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

## **METRO POLICY ADVISORY COMMITTEE (MPAC)**

Meeting Minutes

May 22, 2024

### MEMBERS PRESENT

Vince Jones-Dixon  
Mark Shull  
Tim Rosener  
Pam Treece (Chair)  
Mary Nolan  
Brett Sherman  
Kirstin Greene  
Omar Qutub  
Gerritt Rosenthal  
Alison Tivnon  
Sharon Meieran  
Sherry French  
Denyse McGriff  
Ed Gronke  
Luis Nava  
Joe Buck  
Glen Yung  
Susan Greenberg

### AFFILIATION

City of Gresham, Second Largest City in Multnomah County  
Clackamas County  
Other Cities in Washington County  
Washington County  
Metro Council  
City of Happy Valley, Other Cities in Clackamas County  
Oregon Department of Land Conservation and Development  
Citizen of Multnomah County  
Metro Council  
Second Largest City in Washington County  
Multnomah County  
Special Districts in Clackamas County  
Largest City in Clackamas County  
Citizen of Clackamas County  
Citizen of Washington County  
City of Lake Oswego, Largest City in Clackamas County  
Clark County  
Governing Body of a School District

### MEMBERS EXCUSED

Ted Wheeler  
Brian Hodson  
James Fage  
Emerald Bogue  
Thomas Kim  
Terri Preeg Riggsby  
Keith Kudrna  
Carmen Rubio  
Gordon Hovies  
Duncan Hwang  
Ty Stober  
Steve Callaway

### AFFILIATION

City of Portland  
City in Clackamas County outside UGB  
City in Washington County outside UGB  
Clark County  
Port of Portland  
TriMet  
Special Districts in Multnomah County  
Other Cities in Multnomah County  
Special Districts in Washington County  
Metro Council  
City of Vancouver  
Largest City in Washington County

### ALTERNATES PRESENT

Laura Kelly  
Anthony Martin

### AFFILIATION

Oregon Department of Land Conservation and Development  
Largest City in Washington County

OTHERS PRESENT: Medha Pulla, Marc, Tracey Lam, Adam Barber, Jim Duggan, Robert Liberty, Tom Armstrong, Jeffery Kleinman, San Inouye, Jim Lodbell, Laurie Thiel, Mary Kyle McCurdy, Todd Christiansen, Stephen Roberts, Eric Rutledge, David Tetrick, Barbara Taylor, David Nemarnik, Sandy Glantz, Jena Hughes, Jessica Pelz, LEdeh, Anna Slatinsky, BK, COHV, Karen Gunson, J Stasny, Mariann Hyland, Nicole Stingh, Sean Edging, Al Pearson

STAFF: Connor Ayers, Georgia Langer, Andy Shaw, Roger Alfred, Catherine Ciarlo, Malu Wilkinson, Marissa Madrigal, Anne Buzzini, Val Galstad, Ina Zucker, Ted Reid, Jaye Cromwell,

## **1. CALL TO ORDER, INTRODUCTIONS, CHAIR COMMUNICATIONS**

MPAC Chair Pam Treece meeting to order at 5:00 PM.

Metro staff Connor Ayers (he/they) called the role.

## **2. PUBLIC COMMUNICATION ON AGENDA ITEMS**

MPAC Chair Pam Treece read aloud the instructions for providing public testimony.

Jeff Kleinman, attorney representing West of Sherwood Farm Allianace, shared that Sherwood's population in 2021 was projected that Sherwood's population would be 20,006 which is a 3% population increase. He noted that this land proposal has a 41% land increase, which is based on a minimum 30% increase in population. He shared that his clients want state law and Metro's practices to require that they make decisions based on regional needs.

David Nemarnik, Sherwood resident, shared that he lives across the street from the proposed land expansion area. He explained that he owns a vineyard and stated that the area west of Sherwood is the best place to grow pinot noir. He stated that the wine industry contributes \$8.6 billion to the state's economy, and that they have 19 employees with a payroll of almost \$1.5 million. Nemarnik shared that they are opposed to the Sherwood West concept plan due to their vineyard and the traffic, noting that the investments and businesses that they have made could be hurt with this plan. He shared his opposition to the expansion.

Mary Kyle McCurdy, 1000 friends of Oregon, shared that they are concerned about the use of the urban reserves. They shared that there will be costs related to infrastructure. They added that the Sherwood west proposal will not ameliorate the housing crisis in the region, noting that SB1537 would require higher densities and 30% affordable housing to that bill, significantly exceeding what is proposed in Sherwood west. They shared their opposition to the expansion.

Leif Hanson, resident of Sherwood, shared that he felt the citizen involvement process was inadequate and resulted in them being forced to be expanded. He shared his opposition to the expansion.

San Inouye, resident of Sherwood, shared that that High School enrollment is projected to decline in 3 years. He shared his opposition to the expansion.

Seeing no further testimony, Chair Treece moved onto the next agenda item.

### 3. **COUNCIL UPDATES**

#### **COO Update:**

Chair Pam Treece introduced Metro COO Marissa Madrigal to give an update on the Housing Stakeholder Advisory Table.

COO Madrigal discussed the path to a regional housing recommendation, explaining that the COO Recommendation to Metro Council will come this summer. She shared that they will ask voters for support for changing existing taxes or for new measures. COO Madrigal noted that 3/5 of people support adding affordable housing to the current tax. She added that they have worked with DEI and have worked on a wide array of possible investment strategies and the analysis will help them figure out what needs to be analyzed. She discussed oversight in government, and shared that they have an oversight committee that involves many community partners.

#### MPAC Member Discussion:

Sharon Meieran expressed concern for this plan, particularly for Population A. She noted that it should be a supportive housing measure for services for chronically homeless individuals, most who have major behavioral health issues. Meieran noted that there is not a mention of groups that involve people who are providers of behavioral health substance use disorder services.

COO Marissa Madrigal responded that they want to advance the commitments and desired outcomes of SHS, not work against it. She noted that the stakeholder table involved a large array of coalitions, including the groups that Meieran mentioned. She noted that the stakeholders have also shared that and share that they will continue to focus on that.

Meieran responded that she is concerned because it was mentioned in a meeting that there are six overarching goals that the SHS folks are focusing on. She noted that in that meeting, she asked if there was an overarching plan, and she was told that that was not the case. She recommended folks work together to build what people need and asked if there is a plan that puts all six of the goals together.

COO Madrigal shared that those six goals are being discussed as part of the Tri-County planning Body rather than in the process that they have been involved in. She added that the concern about coordination has been theme and Meieran's concerns are shared.

Anthony Martin asked if this will be reallocating things above the anticipated cash flow or if they will reallocate all resources from it in general.

COO Madrigal responded that the line for reallocation will be determined through conversations with counties and their partners, and that they want to ensure stability and ensure that they can fund services.

With no further discussion, Chair Pam Treece moved to the Council Update.

**Council Update:**

Councilor Gerritt Rosenthal shared that the 2040 Planning development Grants are open for applications. He added that for waste prevention and solid waste fees, the Council voted to move forward with a cost-of-service model and that would involve an 11.9% increase in the regional solid waste fees, which will go into effect July 1<sup>st</sup>. He also shared that Metro’s disaster debris management program just distributed their first grants, and they were just awarded \$1.5 million dollars for Brownfields grant. Councilor Rosenthal added that WPES is going to celebrate waste and recycling workers week to recognize and thank folks who have cleaned up waste downtown.

Seeing no further discussion, MPAC Chair Treece moved onto the next agenda item.

**4. CONSENT AGENDA**

Chair Treece noted that there were five items on the consent agenda: Consideration of the April 24, 2024 MPAC Minutes; Consideration of the March 27, 2024 MPAC Minutes; Consideration of the February 28, 2024 MPAC Minutes; Consideration of the January 24, 2024 MPAC Minutes, and Metro Technical Advisory Committee (MTAC) Nominations for Member/Alternate Member Positions.

**MOTION:** Moved by Commissioner Mark Shull and seconded by Mayor Tim Rosener

**ACTION:** With all in favor, the consent agenda passed.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

**5. COMMITTEE MEMBER COMMUNICATIONS**

There being no committee member communications, Chair Treece moved onto the next agenda item.

Seeing no further discussion, MPAC Chair Pam Treece moved onto the next agenda item.

**6. INFORMATION/ DISCUSSION ITEMS**

**6.1 Oregon Housing Needs Analysis: Housing Target Setting Methodology**

Chair Pam Treece introduced Sean Edging, Oregon Department of Land Conservation and Development, to present on the topic.

Presentation Summary:

The presenter shared the methodology process for determining the Oregon Housing Needs Analysis (OHNA) methodology and discussed House Bill 2001/2889. He shared that Metro has a different approach in state law and discussed the OHNA policy implications. The presenter discussed Goal 10 for Housing, which is to provide for the housing needs of citizens of the state. He also explained the Housing Acceleration Program and OHNA Rulemaking.

MPAC Member Discussion:

Councilor Brett Sherman mentioned that exterior influences appear to be an issue, asking how they navigate that. He also asked, if being referred into the housing acceleration program, what resources they would have available.

Sean Edging shared that those questions are a major consideration in the rulemaking process. Edging highlighted the complexity of operationalizing a regulatory framework, emphasizing the need to consider various market factors. He acknowledged the influence of external elements beyond control, such as market prices and government decisions. Edging emphasized the importance of analyzing barriers to housing production comprehensively, both within and beyond local and state jurisdictions. Edging underscored the intent to identify factors within their control to enhance production outcomes and address barriers effectively. Furthermore, he emphasized the necessity for the Department of Land Conservation and Development (DLCD) to provide resources for local implementation and facilitate collaboration with other state agencies affecting housing production.

Councilor Sherman followed up, asking what tools are available to them.

Edging emphasized the state's acknowledgment of its role in funding housing projects that wouldn't otherwise materialize in the market. He highlighted ongoing legislative discussions regarding state funding and infrastructure, encouraging community engagement in future dialogues. Additionally, Edging noted the directive given to the DLCD to develop practical tools and policies for local governments to facilitate housing production. Edging shared that these tools include ready-to-use building plans, accessible housing policies, model finance plans, and the establishment of Tax Increment Financing (TIF) districts. He stated that this initiative aims to provide not only technical assistance but also financial support from the state to bolster local housing production efforts.

Kristin Greene asked if Sean could mention the relationship of the housing production strategy toolkit. She requested that they send something out about that after the meeting.

Edging highlighted the development of the comprehensive toolkit comprising various policies, actions, tools, and investments aimed at supporting and facilitating housing production at the city level. He underscored the ongoing refinement of this toolkit, emphasizing the importance of providing tangible policies that local governments can readily implement. Edging stated that they would share these resources after the meeting.

Anthony Martin mentioned the target setting methodology, asking why the state isn't reconciling differences between the forecasting growth rates that Metro is using and the other forecasting growth rates that are out there. He also asked how the housing target is accounting for access to jobs.

Edging emphasized that the state does not produce growth estimates for the Metro Urban Growth Boundary (UGB). Edging shared that Metro produces the total estimate, which the Department of Administrative Services (DAS) utilizes for allocating housing needs to local governments within the region. Edging discussed the methodology for allocating jobs regionally, emphasizing the importance of equitable distribution and access to employment opportunities. He recommended watching the Metro allocation webinar for detailed insights into this process, which primarily considers proximity to jobs via walking or transit within the regional transit shed. Edging shared that this methodology aims to address factors like equitable distribution of housing and access to job opportunities across the region.

Seeing no further discussion, MPAC Chair Treece moved onto the next agenda item.

## **6.2 Small Site Industrial Readiness Toolkit**

Due to time restraints, Chair Treece decided to postpone this agenda item.

## **6.3 Presentation of City UGB Expansion Proposals**

Chair Treece introduced Metro staff Ted Reid and Eryn Kehe, and City of Sherwood Mayor Tim Rosener, Eric Rutledge, and Joy Chang to present on the topic.

### **Presentation Summary:**

The presenters shared their concept plan for Sherwood's expansion, which they called "Sherwood West". They discussed Sherwood's housing land, employment land, and regional large industrial site needs. The presenters explained their community engagement process as well as the goals of the proposed Sherwood West. They discussed that they will have different types of housing available in that area and shared the housing estimates. The presenters discussed the mixed employment zone area that they will have as well as employment estimates. They explained the transportation network, and the parks, trails, and habitats surrounding the area. The presenters discussed development readiness and the support they have received from partner agencies and the public.

### **MPAC Member Discussion:**

Councilor Brett Sherman noted that an area this size must be divided in parcels. He asked how they will work with that and get the coordination to make this work in the long term.

Eric Rutledge shared that they want to grow in an orderly way, so certain properties must go before others. He shared that as staff and elected people, there are perspective developers who have tied up properties for 10 years or more.

Mayor Tim Rosener shared that they are planning to do this in a compatible way, explaining that they will look at revamping the annexation rules, annexation agreement requirements, and development agreements to ensure that it is a system, and they have a strong plan. He added that they want strong agreements that are supporting the plan.

Anthony Martin asked how Metro will contextualize the decision beyond the 2024 Urban Growth Report

informing Sherwood's expansion proposal. Martin additionally asked how mid-cycle proposals in 2027 will be informed by the 23-24 growth report.

Ted Reid shared that in city proposals, cities need to demonstrate that there is a regional need for additional lands that they did not anticipate or that have arisen since the 2024 decision.

Mayor Joe Buck expressed his excitement about the Sherwood West concept plan. He asked how the plan is being received by the community.

Mayor Tim Rosener shared that they do not have overwhelming support, but they have over 50% of support for this concept. He noted that except for a few specific landowners, and a group of homes that are worried about a road, they have not seen any kind of organized opposition. He added that the most organized opposition they have seen was from the community members who testified today. He shared that he is eager to talk to anyone who wishes to discuss their concerns, noting that they are valid concerns.

Chair Pam Treece thanked the MPAC members for the questions they asked.

## 7. **ADJOURN**

Chair Pam Treece adjourned the meeting at 7:01 pm.

Respectfully Submitted,



Georgia Langer  
Recording Secretary



**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF MARCH 27, 2024**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT NO.</b>
6.1	Presentation	05/22/2024	Oregon Housing Needs Analysis Presentation	052224m-01
6.3	Presentation	05/22/2024	Sherwood West UGB Expansion Proposal Presentation	052224m-02

## **5.1 Functional Plan Amendment Recommendation**

*Action Items*

Metro Policy Advisory Committee  
Wednesday, July 24th, 2024

# MPAC Worksheet

**Agenda Item Title:** Draft Proposed Amendments to UGMFP Title 6, *Centers, Corridors, Station Communities, and Main Streets*

**Presenters:** Glen Hamburg (he/him), Associate Regional Planner, Metro

**Contact for this worksheet/presentation:** Glen Hamburg (glen.hamburg@oregonmetro.gov)

## Purpose/Objective

Seeking MPAC feedback and recommendation to Metro Council on Urban Growth Management Functional Plan (UGMFP) amendments required by the state's Climate-Friendly and Equitable Communities (CFEC) program for local adoption of boundaries for 2040 Growth Concept Centers

## Outcomes

1. MPAC briefed on state requirements for Metro to amend UGMFP Title 6 by December 31, 2024 to require local adoption of boundaries for regional and town centers; and
2. MPAC vote on recommendation to Metro Council on draft amendments to Title 6 needed to: comply with that state requirement; identify a timeframe for cities and counties to report their adopted boundaries to Metro; and make minor, non-substantive changes to clarify existing provisions, address formatting discrepancies, update citations, and correct typographic errors.

## Background

Metro's '2040 Growth Concept', including its 2040 Growth Concept Map (Attachment A), foresees numerous walkable, higher-density, mixed-use **centers** of employment, housing, cultural and recreational activities, and transit service across the region. Those centers are intended to grow the economy, provide affordable housing, and promote vibrant and distinctive communities that reduce the need for sprawl and minimize transportation costs and contributions to climate change. 2040 Growth Concept centers include the Central City, eight regional centers, and 32 town centers.

Metro does not currently mandate that cities and counties take specific actions (e.g., local regulatory strategies) to develop their centers in accordance with the vision of the 2040 Growth Concept. Rather, Title 6 of the UGMFP has employed an incentive approach, tying eligibility for optional regional investments in centers to: local adoption of defined center boundaries; assessment of the center's physical and market conditions and of barriers to and ways to encourage mixed-use, pedestrian-friendly, and transit-supportive development; and a local plan of actions and investments that will be taken to enhance centers consistent with the 2040 Growth Concept. To be sure, these measures only need to be taken when pursuing a regional investment in the center.

Nonetheless, roughly three-quarters of the centers in the 2040 Growth Concept already have locally adopted geographic boundaries that either originate from a time when the UGMFP did require such boundaries or were otherwise adopted by local choice. Many jurisdictions have also adopted land use policies and implementing regulations applicable to their centers that, while not necessarily required by the UGMFP, encourage development and activation of centers consistent with the 2040 vision. Less than a dozen 2040 centers lack locally adopted boundaries today.

The state's CFEC program aims to reduce greenhouse gas pollution and improve social equity in transportation services and community health, safety, and livability, in part by facilitating denser, transit-oriented development, active transportation, and the "greening" of Oregon's urban spaces. To those ends, CFEC includes measures intended to accelerate the development and transformation

of Metro's centers in ways that are consistent with the 2040 Growth Concept. Metro will continue to defer to Department of Land Conservation and Development (DLCD) on the specifics of those state measures, but they generally have obligations for cities and counties concerning the following in and near centers for which they have planning jurisdiction:

- Motor vehicle parking management (e.g., minimum off-street parking requirements, parking maximums, etc.);
- Provision of public bicycle parking;
- Design of streets to prioritize pedestrian, bicycle, and transit systems;
- Enhanced pedestrian crossings near transit stops;
- Improvements to tree canopies; and
- Reporting on housing production.

Implementing CFEC measures for centers necessitates defining a geographic area where those measures apply. OAR 660-012-0012(4)(d) therefore requires Metro to amend UGMFP Title 6 by the end of 2024 to include a mandate that cities and counties adopt boundaries of the regional and town centers for which they have land use planning authority and for which they have adopted urban land use designations. Cities and counties in the region then have until the end of 2025 to adopt those center boundaries. The locally adopted boundaries must be in the general location of the center as depicted on the 2040 Growth Concept Map.

The draft Title 6 amendments in Attachment B would implement the CFEC mandate. They would require adoption of boundaries for centers with urban land use designations and would not require adoption of boundaries for any center on the 2040 Growth Concept Map that still has only rural land use plan designations in the comprehensive plan of the responsible jurisdiction. CFEC and the draft amendments do not require multiple jurisdictions to adopt boundaries for portions of the same center; they only require that one jurisdiction adopt boundaries for each center with an urban land use plan designation.

While CFEC specifically mandates that Metro require local adoption of boundaries for regional and town centers, Metro staff supports applying the Title 6 boundary adoption requirement to the Central City as well, with the same expectation for all centers in the 2040 Growth Concept that have been planned for urban uses. The draft Title 6 amendments therefore would require adoption of boundaries for all centers, including the Central City.

The draft amendments would require cities and counties to report their adopted boundaries to Metro by February 1, 2026, so that Metro can reflect those boundaries in an updated 2040 Growth Concept Map and other relevant maps. Finally, the draft amendments propose a number of minor, non-substantive amendments to Title 6 that would clarify existing provisions, address formatting discrepancies, update citations, and correct typographic errors.

The Metro Technical Advisory Committee (MTAC) voted unanimously on June 26, 2024, to recommend that the draft amendments be recommended by MPAC for adoption by the Metro Council.

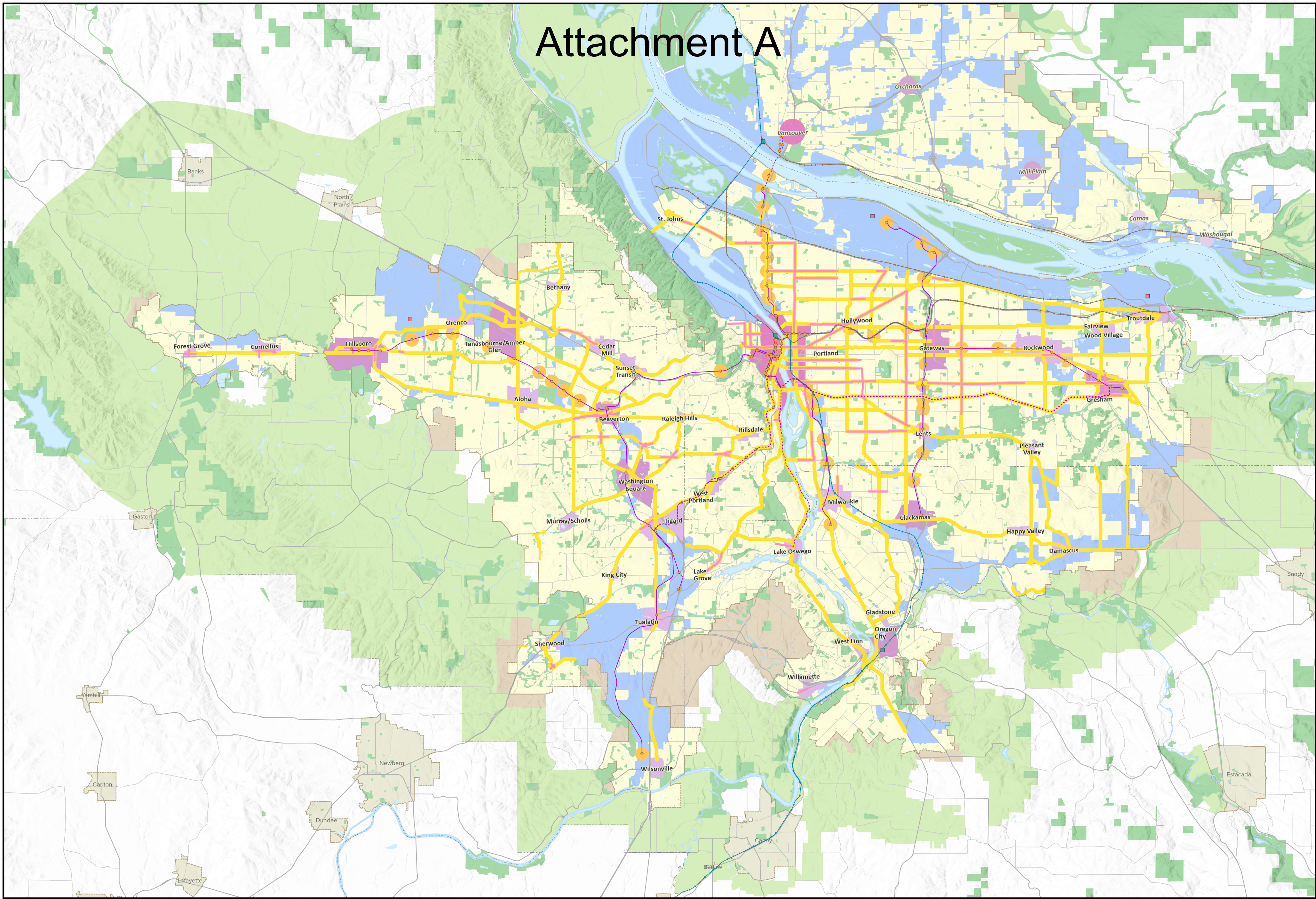
**What has changed since MPAC last considered this issue/item?**

The July 24 meeting will be the first occasion for MPAC to consider the draft proposed Title 6 amendments.

**What packet material do you plan to include?**

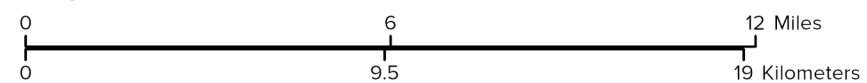
- Attachment A – 2040 Growth Concept Map
- Attachment B – Draft proposed Title 6 amendments

# Attachment A



## 2040 Growth Concept Map

May 2023



Metro cannot accept any responsibility for errors, omissions, or positional accuracy. There are no warranties, expressed or implied, including the warranty of merchantability or fitness for a particular purpose, accompanying this product.

The Metro 2040 Growth Concept defines the form of regional growth and development for the Portland metropolitan region. The Growth Concept was adopted in December 1995 through the Region 2040 planning and public involvement process. This concept is intended to provide long-term growth management of the region.

The map highlights elements of parallel planning efforts including: the 2018 Regional Transportation Plan that outlines investments in multiple modes of transportation, and a commitment to local policies and investments that will help the region better accommodate growth within its centers, corridors and employment areas.

- |                     |                         |                                       |                         |
|---------------------|-------------------------|---------------------------------------|-------------------------|
| Central city        | Employment land         | Existing high capacity transit        | Neighboring cities      |
| Regional center     | Parks and natural areas | Planned high capacity transit         | Airports                |
| Town center         | Neighborhood            | Proposed high capacity transit tier 1 | Intercity rail terminal |
| Station communities | Rural reserve           | Mainline freight                      |                         |
| Main streets        | Urban reserve           | High speed rail (proposed)            |                         |
| Corridors           | Urban growth boundaries | County boundaries                     |                         |

For more information on these initiatives, visit <http://www.oregonmetro.gov/2040>



# Attachment B

## Title 6: Centers, Corridors, Station Communities and Main Streets

### 3.07.610 Purpose

The Regional Framework Plan (RFP) identifies three types of Centers – the Central City, Regional Centers and Town Centers, – Corridors, Main Streets and Station Communities throughout the region on the 2040 Growth Concept Map and recognizes them as the principal centers of urban life in the region. Pursuant to OAR 660-012-0012(4)(d), cities and counties must define the boundaries of Centers for areas that have urban land use designations in their comprehensive plans. To enhance the intended role of the Centers, Corridors, Main Streets and Station Communities in the region, Title 6 also calls for voluntary actions and investments by cities and counties, complemented by regional investments, to enhance this role. A “regional investment” is: an investment in a new high-capacity transit line; or a designated a-regional investment in a grant or funding program that is either administered by Metro or subject to Metro’s approval. [Ord. 97-715B, Sec. 1. Ord. 98-721A, Sec. 1. Ord. 02-969B, Sec. 7. Ord. 10-1244B, Sec. 5.]

### 3.07.615 Adoption of Boundaries for Centers

- (a) By December 31, 2025, each city and county shall adopt boundaries for all Centers identified on the 2040 Growth Concept Map for which the city or county has adopted urban land use designations in their comprehensive plan, unless another city or county has already adopted a boundary for the portion of the Center within its jurisdiction.
- (b) Each city and county shall adopt boundaries for any other Center identified on Metro’s 2040 Growth Concept Map when the city or county designates the area of that Center for urban land uses in their comprehensive plan, unless portions of the Center have boundaries already adopted by another city or county with planning jurisdiction for the Center.
- (c) Identified boundaries for Centers that are adopted pursuant to Section 3.07.615 shall be located in the general area of the Center as identified on the 2040 Growth Concept Map.
- (d) By February 1, 2026, cities and counties shall identify to Metro the boundaries of each Center that they have adopted pursuant to Section 3.07.615 as of December 31, 2025. After December 31, 2025, cities and counties shall notify Metro of any new or revised Center boundaries within 31 days of adopting those new or revised Center boundaries.

### 3.07.620 Actions and Investments in Centers, Corridors, Station Communities and Main Streets

- (a) In order to be eligible for a regional investment in a Center, Corridor, Station Community or Main Street, or a portion thereof, a city or county shall take the following actions:

## Attachment B

- (1) Establish a boundary for the Center, Corridor, Station Community or Main Street, or portion thereof, pursuant to ~~subsection~~ Subsection 3.07.620(b);
  - (2) Perform an assessment of the Center, Corridor, Station Community or Main Street, or portion thereof, pursuant to ~~subsection~~ Subsection 3.07.620(c); and
  - (3) Adopt a plan of actions and investments to enhance the Center, Corridor, Station Community or Main Street, or portion thereof, pursuant to ~~sub~~Subsection 3.07.620(d).
- (b) The boundary of a Center, Corridor, Station Community or Main Street, or portion thereof, shall:
- (1) Be consistent with the general location shown in the RFP-2040 Growth Concept Map except, for a proposed new Station Community, be consistent with Metro's land use final order for a light rail transit project;
  - (2) For a Corridor with existing high-capacity transit service, include at least those segments of the Corridor that pass through a Regional Center or Town Center;
  - (3) For a Corridor designated for future high-capacity transit in the RTP, include the area identified during the system expansion planning process in the RTP; and
  - (4) Be adopted and may be revised by the city council or county board following notice of the proposed boundary action to the Oregon Department of Transportation and to Metro in the manner set forth in ~~subsection~~ Subsection 3.07.820(a) ~~of section 3.07.820~~ of this chapter.
- (c) An assessment of a Center, Corridor, Station Community or Main Street, or portion thereof, shall analyze the following:
- (1) Physical and market conditions in the area;
  - (2) Physical and regulatory barriers to mixed-use, pedestrian-friendly and transit-supportive development in the area;
  - (3) The city or county development code that applies to the area to determine how the code might be revised to encourage mixed-use, pedestrian-friendly and transit-supportive development;
  - (4) Existing and potential incentives to encourage mixed-use pedestrian-friendly and transit-supportive development in the area; and
  - (5) For Corridors and Station Communities in areas shown as Industrial Area or Regionally Significant Industrial Area under Title 4 of this chapter, barriers to a mix and intensity of uses sufficient to support public transportation at the level prescribed in the RTP.
- (d) A plan of actions and investments to enhance the Center, Corridor, Station Community or Main Street shall consider the assessment completed under ~~subsection~~ Subsection 3.07.620(c) and include at least the following elements:

## Attachment B

- (1) Actions to eliminate, overcome or reduce regulatory and other barriers to mixed-use, pedestrian-friendly and transit-supportive development;
- (2) Revisions to its comprehensive plan and land use regulations, if necessary, to allow:
  - (A) In Regional Centers, Town Centers, Station Communities and Main Streets, the mix and intensity of uses specified in ~~section~~Section 3.07.640; and
  - (B) In Corridors and those Station Communities in areas shown as Industrial Area or Regionally Significant Industrial Area in Title 4 of this chapter, a mix and intensity of uses sufficient to support public transportation at the level prescribed in the RTP;
- (3) Public investments and incentives to support mixed-use pedestrian-friendly and transit-supportive development; and
- (4) A plan to achieve the non-SOV mode share targets, adopted by the city or county pursuant to ~~subsections~~Subsections 3.08.230(a) and (b) of the RTFP, that includes:
  - (A) The transportation system designs for streets, transit, bicycles and pedestrians consistent with Title 1 of the RTFP;
  - (B) A transportation system or demand management plan consistent with ~~section~~Section 3.08.160 of the RTFP; and
  - (C) A parking management program for the Center, Corridor, Station Community or Main Street, or portion thereof, consistent with ~~section~~Section 3.08.410 of the RTFP.
- (e) A city or county that has completed all or some of the requirements of ~~subsections~~Subsections 3.07.620(b), (c), and (d) may seek recognition of that compliance from Metro by written request to the COO.
- (f) Compliance with the requirements of this section is not a prerequisite to:
  - (1) Investments in Centers, Corridors, Station Communities or Main Streets that are not regional investments; or
  - (2) Investments in areas other than Centers, Corridors, Station Communities and Main Streets. [Ord. 97-715B, Sec. 1. Ord. 98-721A, Sec. 1. Ord. 02-969B, Sec. 7. Ord. 10-1244B, Sec. 5.]

### **3.07.630 Eligibility Actions for Lower Mobility Standards and Trip Generation Rates**

- (a) A city or county is eligible to use the higher volume-to-capacity standards in Table 7 of the 1999 Oregon Highway Plan when considering an amendment to its comprehensive plan or land use regulations in a Center, Corridor, Station Community or Main Street, or portion thereof, if it has taken the following actions:



## Attachment B

- (1) Established a boundary pursuant to ~~subsection (b) of Subsection~~ 3.07.620**(b)**; and
  - (2) Adopted land use regulations to allow the mix and intensity of uses specified in ~~section-Section~~ 3.07.640.
- (b) A city or county is eligible for an automatic reduction of 30 percent below the vehicular trip generation rates reported by the Institute of Traffic Engineers when analyzing the traffic impacts, pursuant to OAR 660-012-0060, of a plan amendment in a Center, Corridor, Main Street or Station Community, or portion thereof, if it has taken the following actions:
- (1) Established a boundary pursuant to ~~subsection (b) of Subsection~~ 3.07.620**(b)**;
  - (2) Revised its comprehensive plan and land use regulations, if necessary, to allow the mix and intensity of uses specified in ~~section-Section~~ 3.07.640 and to prohibit new auto-dependent uses that rely principally on auto trips, such as gas stations, car washes and auto sales lots; and
  - (3) Adopted a plan to achieve the non-SOV mode share targets adopted by the city or county pursuant to ~~subsections-Subsections~~ 3.08.230 (a) and (b) of the RTFP, that includes:
    - (A) Transportation system designs for streets, transit, bicycles and pedestrians consistent with Title 1 of the RTFP;
    - (B) A transportation system or demand management plan consistent with ~~section-Section~~ 3.08.160 of the RTFP; and
    - ~~(C)~~ **(C)** A parking management program for the Center, Corridor, Station Community or Main Street, or portion thereof, consistent with section 3.08.410 of the RTFP. [Ord. 97-715B, Sec. 1. Ord. 98-721A, Sec. 1. Ord. 02-969B, Sec. 7. Ord. 10-1244B, Sec. 5.]
- ~~(e)~~ **(C)**

### **3.07.640 Activity Levels for Centers, Corridors, Station Communities and Main Streets**

- (a) ~~A~~ Centers, Corridors, Station Communities and Main Streets need a critical number of residents and workers to be vibrant and successful. The following average number of residents and workers per acre is recommended for each:
- (1) Central City - 250 persons
  - (2) Regional Centers - 60 persons
  - (3) Station Communities - 45 persons
  - (4) Corridors - 45 persons
  - (5) Town Centers - 40 persons
  - (6) Main Streets - 39 persons

## Attachment B

- (b) Centers, Corridors, Station Communities and Main Streets need a mix of uses to be vibrant and walkable. The following mix of uses is recommended for each:
- (1) The amenities identified in the most current version of the *State of the Centers: Investing in Our Communities*, such as grocery stores and restaurants;
  - (2) Institutional uses, including schools, colleges, universities, hospitals, medical offices and facilities;
  - (3) Civic uses, including government offices open to and serving the general public, libraries, city halls and public spaces.
- (c) Centers, Corridors, Station Communities and Main Streets need a mix of housing types to be vibrant and successful. The following mix of housing types is recommended for each:
- (1) The types of housing ~~listed in the~~ identified as “needed housing” ~~statute, in~~ ORS 197.303(1) ~~(a)-(e)~~;
  - (2) The types of housing identified in the city’s or county’s housing need analysis ~~done-completed~~ pursuant to ORS 197.296 or ~~statewide~~ Statewide Planning Goal 10 (Housing); and
  - (3) Accessory dwellings pursuant to ~~section~~ Section 3.07.120 of this chapter. [Ord. 97-715B, Sec. 1. Ord. 98-721A, Sec. 1. Ord. 02-969B, Sec. 7. Ord. 10-1244B, Sec. 5. Ord. 15-1357.]

### 3.07.650 Centers, Corridors, Station Communities and Main Streets Map

- (a) The 2040 Growth Concept Map’s depiction of Centers, Corridors, Station Communities and Main Streets Map is incorporated in this title as the “Title 6 Centers, Corridors, Station Communities and Main Streets Map,” and is Metro’s official depiction of their which depicts the boundaries of those areas. The map shows the boundaries established pursuant to this title.
- (b) A city or county may revise the boundary of a Center, Corridor, Station Community or Main Street so long as the boundary is consistent with the general location on the 2040 Growth Concept Map in the RFP and the revision is made consistent with all other requirements of this title. The city or county shall provide notice of its proposed revision as prescribed in ~~subsection~~ Subsection (b) of section 3.07.620 ~~(b)~~.
- (c) The COO shall revise the Title 6 Centers, Corridors, Station Communities and Main Streets Map, as well as the 2040 Growth Concept Map and any other relevant maps, by order to conform the such maps to establishment or revision of a boundary under this title. [Ord. 02-969B, Sec. 7; Ord. 10-1244B, Sec. 5; Ord. 11-1264B, Sec. 1.]

### **Title 6 Centers, Corridors, Station Communities and Main Streets Map as of April 1, 2021** [COO Order 12-073. Ord. 14-1336. COO Order 21-001.]

## **6.1 2024 Draft Urban Growth Report**

*Information/Discussion Items*

Metro Policy Advisory Committee  
Wednesday, July 24th, 2024

# MPAC Worksheet

**Agenda Item Title:** 2024 Draft Urban Growth Report

**Presenters:** Eryn Kehe, she/her; Ted Reid, he/him

**Contact for this worksheet/presentation:** Laura Combs, she/her

## **Purpose/Objective**

The purpose of this item is to continue MPAC's engagement in growth management topics so that it is prepared to advise the Metro Council on its regional growth management decision in late 2024.

Under state law, Metro must assess – at least every six years – whether there is a regional need to expand the urban growth boundary (UGB) to ensure adequate room for 20 years of expected housing and job growth. UGB expansions are only allowed if there is a demonstrated regional need for more land.

To assess the growth capacity of the existing UGB, Metro worked with cities and counties to inventory buildable land and used a financial feasibility model to estimate how much housing or job development may occur on already developed lands over the next two decades. To assess future demand, Metro staff prepared the regional population, household, and employment forecast and discussed how those forecasts are used for a regional housing needs analysis and the employment land demand analysis. Additionally, Metro staff completed a supplemental employment analysis specific to the Sherwood West expansion proposal to understand if the proposed expansion area offers specific site characteristics to meet regional needs for large, flat industrial sites that cannot reasonably be met with other lands inside the UGB.

The focus of this meeting is the draft 2024 Urban Growth Report (UGR), which includes the collection of all the technical analyses presented to MPAC this year. The UGR was released to the public on July 9, 2024 along with a survey to gather feedback about the UGR and the Sherwood West expansion proposal. At this MPAC meeting, Metro staff will summarize the process for developing the draft UGR as well as its main findings. Staff will be available to answer questions about the analysis and next steps. The draft UGR serves as a basis for MPAC's recommendations to the Metro Council and for the Metro Council's growth management decision.

## **Outcome**

MPAC members are aware of the technical analyses and review processes that will inform their recommendation to the Metro Council for the 2024 urban growth management decision. MPAC members can ask questions of Metro staff regarding the development and outcomes of the Urban Growth Report and their role in the next steps of the decision-making process.

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

At the June 26, 2024 meeting, MPAC learned about and discussed the approach to completing the employment land demand analysis. Additionally, staff presented a supplemental employment analysis specific to the Sherwood West UGB expansion proposal. Since this meeting, Metro staff has compiled the technical work and summarized the high-level key takeaways from these analyses in the draft Urban Growth Report.

## **What packet material do you plan to include?**

2024 Draft Urban Growth Report Summary



# **Draft 2024**

# **Urban Growth Report**

July 9, 2024



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## LIST OF ACRONYMS

The following is a list of acronyms used throughout this document.

- BLI:** buildable land inventory
- CEDS:** Comprehensive Economic Development Strategy
- CORE:** Committee on Racial Equity
- MPAC:** Metro Policy Advisory Committee
- MSA:** Metropolitan Statistical Area (7-county area)
- MTAC:** Metro Technical Advisory Committee
- OEA:** Oregon Office of Economic Analysis
- UGB:** urban growth boundary
- UGR:** urban growth report

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## EXECUTIVE SUMMARY

Oregonians have a long tradition of taking a thoughtful approach to growth that protects farms and forests and helps shape vibrant, sustainable urban communities. Tools like the urban growth boundary (UGB) enable us to make the most of the land we have as we work toward achieving our region’s shared goals. Over the past four decades the urban growth boundary has helped the Portland metro region minimize our carbon footprint and focus development in town centers and along transportation corridors, providing easier access to destinations where people live, work, play and study.

Under Oregon state land use law, urban growth management decisions focus on whether there is an identified regional need to add land to the UGB for forecasted housing and jobs growth. But a decision about whether to expand the boundary goes beyond that requirement. It also provides a chance to check in on how the region is changing, highlight successes, and draw attention to areas of concern. In the coming months, the Metro Council will make their 2024 growth management decision against a backdrop of new regional challenges and opportunities, informed by a shared desire to improve housing affordability, community stability, downtown revitalization, and equitable economic growth.

Metro and its partners are prepared to confront the challenges faced by our region with policies and investments that extend beyond managing the region’s UGB. Examples include investing in supportive housing services, affordable housing, parks and nature. Together we are building regional transit connections along 82<sup>nd</sup> Avenue in east Portland and Clackamas County and along the Tualatin Valley Highway; and these new connections are leveraged by Comprehensive Economic Development Strategy (CEDS) plans and investments.

We also understand that collectively, we must do more to broaden the availability of affordable housing and economic prosperity. In this context, if a need is identified to provide more land for housing and job creation, Metro's charge is to work with cities seeking proposed UGB expansions that meet certain conditions. For the 2024 growth management decision, only one city – Sherwood – has requested an expansion. The request includes a completed concept plan for a proposed expansion within a designated urban reserve area.

This Urban Growth Report (UGR) sets out data and analysis to inform the Metro Council’s decision whether to expand the UGB as proposed by the City of Sherwood.

### Planning amid uncertainty

#### Slower population and employment growth

Several factors shape the context for the decision whether to expand the UGB. Among them, regional population growth is slowing. This reflects a nationwide trend where people are

choosing to have fewer children (U.S. Department of Health and Human Services, 2024) - and Oregon's birth rates are among the nation's lowest. This means that in coming years our region is likely to see population growth only from net in-migration. Consequently, regional population growth rates are projected to be lower over the next 20 years.

The relatively high cost of living on the West Coast may be an additional headwind for regional population growth from migration, which historically has been highly variable from year to year.

Slowing population growth also means slower job growth. Sectors expected to grow the most are those that serve the existing population, such as health care and professional services.

### **Holding our ground in semiconductor manufacturing**

Despite long-term declines at the national level, the greater Portland region is expected to maintain its historic strength in high-tech manufacturing thanks in part to assistance from the CHIPS Act. Computer and electronic manufacturing jobs are holding steady with modest gains due to our region's advantages in semiconductor research and development rather than large-scale production, which is more vulnerable to offshoring to countries with lower costs.

### **Underproduction of housing, particularly for people with the fewest resources**

Our nation's housing markets continue to struggle to produce enough housing to match household growth, particularly for households with lower incomes. This backlog of housing production became evident in the aftermath of the 2008 housing bubble and recession – and its effects are still felt today. Those who experience this housing shortage most acutely are people with the fewest resources. Housing instability and houselessness disproportionately impact people of color.

For developers and builders, the cost of labor, materials and lending remain a burden on housing production. Nationwide, access to buildable lots is a challenge in part because of lower numbers of land development companies. In our region, as elsewhere, the cost of serving raw lands with needed infrastructure is a significant barrier to housing development.

On a positive note, jurisdictions around the state have removed regulatory barriers to producing a greater variety of housing types. “Middle housing” options that include townhouses, duplexes, triplexes, quadplexes and cottage clusters hold promise for providing additional housing types for people of varying incomes – particularly ownership options in smaller formats. In fact, in the future middle housing may well be more profitable to build than single unit detached housing.

### **Pandemic impacts on work**

Though many aspects of life have returned to normal after the COVID-19 pandemic in 2020 and 2021, it has had lasting impacts on what that “normal” looks like. After peaking in 2021, the share of employees working from home full time or hybrid remained at 24 percent in 2022 for the greater Portland metropolitan area. While offering more flexibility for office workers and

some cost savings for businesses, this persistent trend has led to high office vacancy rates and has long-term implications for demand for office space.

## **Housing capacity needs**

While there is a housing crisis nationally and in our region, it is not clear that shortage is caused by a sheer lack of space for additional housing to be built. Metro’s UGB housing need analysis shows that within the Metro area UGB, there is an existing need for approximately 24,000 homes to address historic underproduction and its impacts, including houselessness.

Additionally, under the baseline population forecast conducted for this Urban Growth Report, approximately 150,000 additional homes are needed to meet expected population growth over the next 20 years.

Trends projecting more one-person households and an aging population (often on fixed incomes) predict that the need for more affordable, smaller homes will increase. To meet these housing needs, we must continue to focus on public investment and removing barriers to housing production in existing urban locations.

## **Housing capacity gap analysis**

Baseline analysis conducted for this Urban Growth Report reveals that there is likely room to accommodate most, if not all, of the region’s existing and future housing needs inside the existing UGB for the next 20 years. Growth projections vary, however - and based on the range of those projections the Metro Council has latitude to determine there is a need to add the Sherwood West urban reserve to the UGB or to take other measures to encourage redevelopment. This latitude derives from several factors described in more detail in this report. Generally, those factors relate to uncertainty around future migration rates, redevelopment potential and middle housing potential. As a result of different growth projections, the UGB capacity deficit, or “gap,” for accommodating housing needs can vary within the following ranges:

- For single unit detached and middle housing capacity, the gap ranges from a potential deficit of approximately 2,250 homes to a potential surplus of approximately 32,500 homes.
- For multi-family housing capacity, the gap ranges from a potential deficit of 23,900 homes to a potential surplus of 3,750 homes.

## **Housing capacity options**

If the Metro Council determines that there is a need for additional capacity to address housing needs, it may take measures to increase the likelihood of developing housing on land already inside the UGB and/or expand the UGB to add the Sherwood West urban reserve area as proposed by the City of Sherwood. If the Council elects to expand the UGB, it may wish to consider conditions of approval to help achieve a certain housing mix or number of housing units to best meet the region’s housing needs.

## Employment land needs

### Industrial land needs

Although analysis shows a surplus of industrial land in aggregate throughout the region, individual businesses seeking specific development-ready properties for sale or lease may struggle to find options.

Metro, with review by cities and counties, identified almost 6,000 acres of industrial land inside the UGB that meets the legal definition of being buildable. The Urban Growth Report analysis shows a regional surplus of 4,550 acres of industrial land to accommodate expected industrial job growth under the baseline forecast. There is a surplus even under a high growth employment forecast.

However, the available acres of industrial land may not have the location and site characteristics that will lead to industrial development. The Sherwood West employment area offers the potential for business growth because of unique characteristics that are in short supply on lands already in the UGB, including the potential for assembling larger sites, relatively flat parcels, and relative proximity to existing job clusters.

### Industrial land options

Informed by this analysis, the Metro Council has the discretion to do one of the following:

- Based on regional employment forecasts and the aggregate inventory of industrial lands, decide that there is no need for additional land for industrial uses.
- Add the mixed employment portion of the Sherwood West urban reserve to the UGB based on a determination that the area offers unique site characteristics for industrial and flex uses that are in demand and that cannot be found elsewhere in the UGB.

If the Council determines that there is a need to expand the UGB to provide industrial sites with specific characteristics, it may wish to consider conditions of approval to protect those sites from other uses.

### Commercial land needs

Depending on the amount of employment growth anticipated, this analysis identifies a potential surplus of 800 buildable acres of commercial land (low growth forecast) to a potential deficit of 1,800 buildable acres (high growth forecast). Under the baseline growth forecast, there is a deficit of 320 buildable acres.

### Commercial land options

Informed by this analysis, the Metro Council has the discretion to decide one or more of the following:

- Plan for the low growth forecast and find no need for additional land.
- Plan for the baseline forecast:

- Assume that 320 acres or more of the region’s industrial land surplus is functionally available for commercial employment uses, thereby addressing the commercial capacity gap; or,
- Assume that additional commercial redevelopment would occur if there is demand for commercial space.
- Plan for the baseline forecast and find a need for a UGB expansion.
  - Add the commercial employment portions of Sherwood West urban reserve to the UGB.
  - Consistent with observed development trends, assume that a small portion of the region’s industrial land surplus will be available for commercial employment uses, thereby addressing the remaining commercial capacity gap.
- Plan for the high employment growth forecast and find a need for UGB expansion.
  - Add the 135-net-acre commercial employment portions of the Sherwood West urban reserve to the UGB.
  - Add approximately 1,665 additional net acres of urban reserves that lack a concept plan or city support to the UGB.

## Engagement

Metro staff have shared information from this report and explained the methods used to collect and analyze the data during its production. An Urban Growth Report Roundtable started meeting in September 2023 and met eleven times to discuss approaches used to collect data and share early information.

Staff from cities, counties and local experts were invited to review data during the process to ensure accuracy. Thank you to everyone who participated in the production of this plan.

## Next steps

The release of this draft 2024 Urban Growth Report kicks off policy discussions, leading to recommendations and a Metro Council decision by the end of 2024. This Urban Growth Report is intended to provide the best available information to support those discussions without implying more precision or certainty than is warranted in a 20-year planning effort.

Tentative milestones:

Now-August 4, 2024 Public comment period on draft UGR and Sherwood expansion proposal

August 14, 2024 Release Chief Operating Officer recommendation

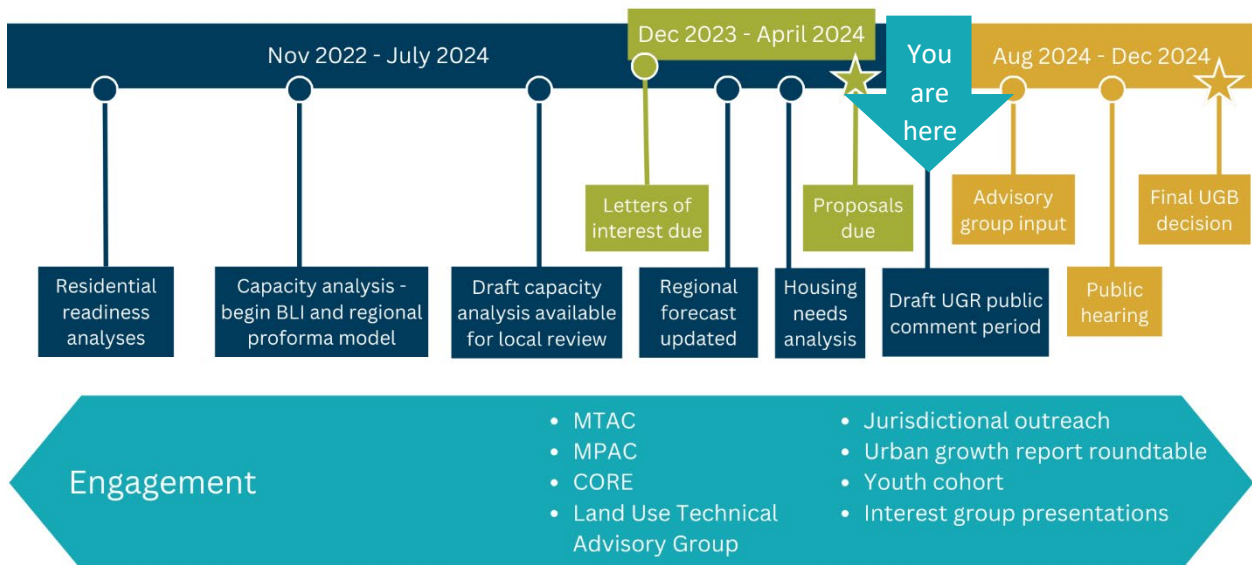
September 18, 2024 Metro Technical Advisory Committee recommendations to MPAC

September 19, 2024 Committee on Racial Equity recommendations to Metro Council

September 25, 2024 Metro Policy Advisory Committee recommendations to Metro Council

- September 26, 2024 Metro Council public hearing on Chief Operating Officer recommendation
- October 1, 2024 Metro Council direction to staff
- November 21, 2024 Metro Council public hearing
- December 5, 2024 Metro Council decision

Technical work and analysis: Developing the urban growth report	City expansion proposals	Metro Council decision
<ul style="list-style-type: none"> <li>• Buildable land inventory (BLI)</li> <li>• Regional forecast</li> <li>• Capacity analysis</li> <li>• Employment trends and site characteristics</li> <li>• Housing needs analysis</li> <li>• Residential readiness analyses</li> <li>• Draft urban growth report (UGR)</li> </ul>	<ul style="list-style-type: none"> <li>• Letters of interest</li> <li>• Expansion proposals</li> </ul> <p><i>2040 planning and development grants available</i></p>	<ul style="list-style-type: none"> <li>• Consider Metro staff and advisory group recommendations</li> <li>• Public hearings</li> <li>• Policy direction</li> <li>• Final decision</li> </ul>







# Draft 2024 Urban Growth Report

## Urban Growth Report Roundtable and Youth Cohort perspectives

For the 2024 urban growth management decision, Metro’s Chief Operating Officer convened an Urban Growth Report Roundtable with the goal of having additional transparency around how Metro conducts its analyses.

Metro also convened a Youth Cohort with the goals of developing future leadership in urban planning and providing avenues for youth to share their perspectives in this decision process.

Youth Cohort and Roundtable perspectives are summarized in sidebars throughout this document.

## LAND READINESS, NOT JUST LAND SUPPLY

Our region has learned that growth management decisions need to focus on at least two major factors:

- Whether there is a long-term regional need for more land inside the UGB. State laws establish this expectation to which Metro’s analyses respond.
- Whether there is a plan for making UGB expansions ready for development of housing and businesses. Metro, as a matter of adopted policy, orients its decision making around city readiness for UGB expansions.

Before the adoption of urban and rural reserves in 2010, growth management decisions focused solely on the first factor, establishing whether there was a regional need for land. While we continue to strive for objective analyses of land need, we also have learned that we must pay attention to the readiness of potential UGB expansion areas. This was based on multiple instances of expanding the UGB only to see the land sit for years or decades before developing as intended. Figure 1 illustrates this point, showing the slow production of housing in older UGB expansion areas that did not answer the question of readiness before UGB expansion.

## UGR Roundtable perspectives: Development barriers

**Development barriers** and the feasibility of future development was another recurring topic in the group. The discussions included barrier to housing, commercial and industrial development. During an activity where participants identified development barriers, the list included:

- Price of property
- Zoning and market mismatch
- Market conditions outweigh subsidies
- Property owner motivations
- Cost of infrastructure to serve site
- Parcel assembly
- Site constraints
- Environmental challenges – brownfields, floodplains
- Absentee landowner
- Land banking
- Political challenges
- Public ownership
- Easements
- Regulatory requirements – frontage, trees, stormwater, fees
- Transportation infrastructure not well maintained and difficult site access

Members seek creative solutions and collaboration between the development community, local jurisdictions, Metro, and the State of Oregon. Some roundtable members specifically called out the long timeline from the beginning of the concept planning process to the start of construction and suggested reducing the amount of detail and procedures required to complete these steps. Others mentioned that their biggest barriers are expensive infrastructure and cost prohibitive development code requirements, especially on infill sites.

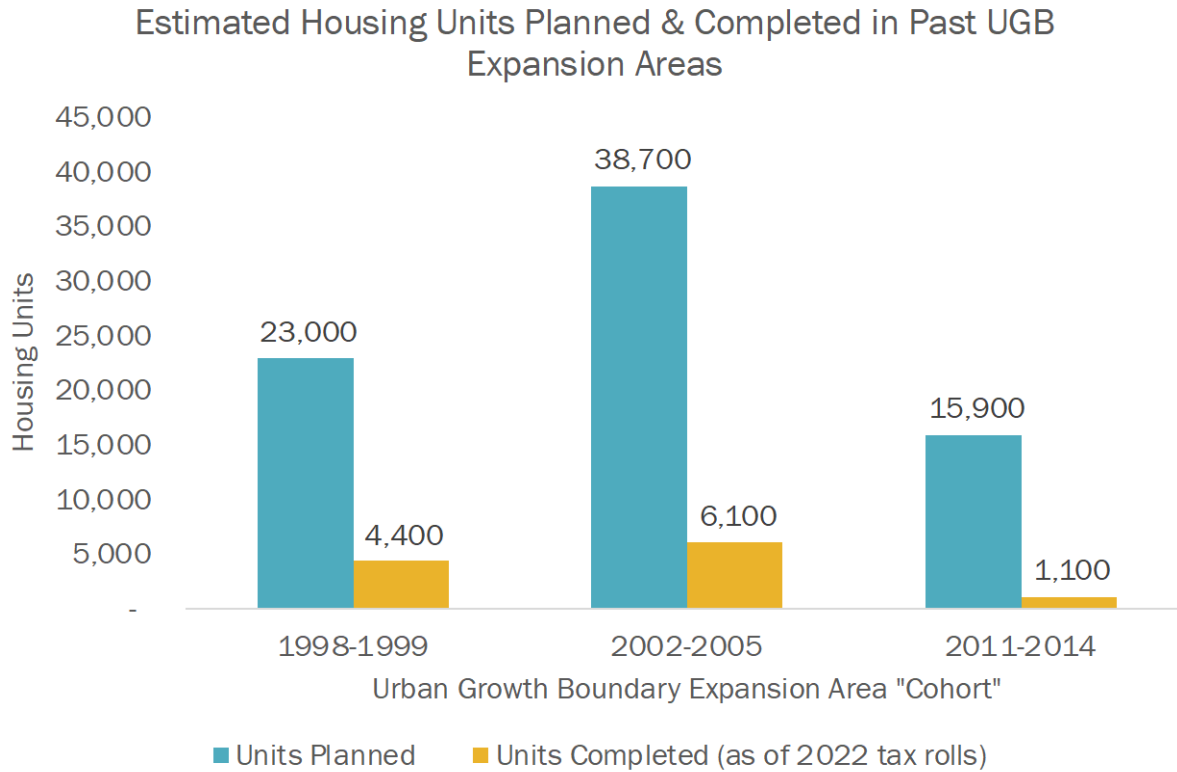


Figure 1: housing units planned and built to date in older UGB expansion areas

Since 2010, it is the Metro Council’s policy to only expand the UGB into urban reserves that have been concept planned by a local jurisdiction. Metro provides grant funding for cities seeking to complete concept plans for urban reserves. Title 11 of Metro code lays out concept planning requirements.

In 2017, on advice from the City Readiness Advisory Group, the Metro Technical Advisory Committee (MTAC), and the Metro Policy Advisory Committee (MPAC), the Metro Council adopted additional policies that provide more clarity for cities regarding what needs to be addressed in their UGB expansion proposals. Title 14 of the Metro code describes those factors, including, for example, demonstrating that the city has worked to remove barriers to mixed-use development and has implemented best practices for preserving and increasing the supply and diversity of affordable housing in its existing urban areas.

The 2018 growth management decision was the first full implementation of this readiness-focused approach. In 2018, four cities proposed UGB expansions and the Metro Council approved all four. Today, these cities have completed or are working to complete comprehensive planning for these areas. However, even with a focus on city readiness, development can take time. To date, no housing development has occurred in these four expansion areas.

For the 2024 growth management decision, one city, Sherwood, has proposed a UGB expansion in the Sherwood West urban reserve. The City of Sherwood’s concept plan includes a mix of housing and employment uses as well as protection of habitat and open space areas.

## UNDERSTANDING THE IMPACT OF THE URBAN GROWTH DECISION

### Who benefits and who is burdened?

The UGB helps us make the most of public resources by focusing on development that supports building and maintaining streets, pipes, schools and parks that every community needs. However, not everyone benefits equally from these investments.

The greater Portland area has a history of inequitable and racist land use and development such as redlining, destruction of neighborhoods through the misuse of urban renewal, exclusionary covenants, and zoning codes that only allowed single-unit detached housing on larger lots, which has led to gentrification and displacement.

Displacement has disproportionately affected communities of color, leading to a shift in the racial geography of the region over the last decade. Displacement is a geographic consequence of a series of systemic inequities and racist policies and can have wide-ranging impacts on health and well-being – impacts that can span generations.

## Youth Cohort perspectives: Equity and engagement

As the youth cohort learned about the urban growth management decision, a primary focus of their feedback was ensuring that the process centered on **equity and meaningful community engagement**. Many participants wanted the Metro Council to make sure that they were hearing a broad variety of perspectives, especially those that are not always heard in this process. When learning about the Sherwood West proposal, the group wanted to consider how people living in surrounding areas may be affected and wanted the plan to reflect racial equity considerations when discussing access to future homes and job opportunities. The group emphasized the importance of local participation and education, and underlined the role of young people in this process as the primary source for understanding the priorities and challenges that the next generation will face as they will grow up to inherit the outcomes of the plans that are made today.

Understanding the impacts of planning decisions is critical in building a more equitable region where all people have access to the places and resources they need to flourish. Continued work at all levels of government is needed to affirmatively further fair housing and to ensure that affordable housing is available in all communities.

To better understand the wide-ranging impacts of urban growth management decisions, Metro examined previous expansion areas ahead of the 2024 growth decision to determine who has benefited and who has been harmed in expansions of the boundary.

These case studies focus specifically on population demographics, housing type, and home values to measure how the urban growth boundary might impact affordability, housing type, and displacement in greater Portland, and how we can build thriving communities for all in UGB expansion areas and beyond.

### **A Snapshot of Bethany and Happy Valley**

Metro gathered housing and census and housing data for two past expansion areas: Bethany in 2002 and Happy Valley in 1998.

Metro examined this data to understand who has moved to expansion areas as well as how many houses have been built, the types of housing available (townhome, single-unit detached home, etc.), as well as median home value.

These case studies provide a snapshot of two communities that have developed the land within the expanded UGB. Metro focused on assessing these two areas because many other past expansion areas have not yet developed or have been slow to develop.

### **Happy Valley**

In 1998, Metro expanded the UGB near Happy Valley to include an additional 660 acres of land. The city has further expanded their city limits into a portion of the 13,000-acre expansion of the Damascus area approved in 2002. Since this time, more than 6,200 housing units (source: RLIS Housing Inventory) have been built or permitted in the expansion areas, and the expanded UGB is now home to more than 20,000 people.

## UGR Roundtable perspectives: Diversity, equity and justice

Diversity, equity, inclusion, and justice topics were woven throughout the UGR roundtable discussions. Staff heard from some members that it is important to center community in our conversation and remember the people that are represented in the technical analysis, elevating qualitative data to the same importance and value as quantitative data.

Participants suggested connecting the data related to race, ethnicity with personal stories of lived experiences. This is a way to understand how different demographic groups have different needs and unique positions in the community.

Table 1: Race and ethnicity of people living in Happy Valley (2020 Census)

Race/Ethnicity Census Categories	Happy Valley expansion only	Happy Valley total
White	62%	64%
Black	2%	2%
AIAN (Amer. Indian/Alaskan Native)	0%	0%
Asian	21%	20%
NHPI (Native Hawaiian/Pacific Islander)	0%	0%
Other	0%	0%
Multiple	6%	6%
Hispanic	8%	7%
BIPOC (total non-white)	38%	36%

**Analysis:** There is no significant difference in the demographics of residents within the expanded UGB area and the total Happy Valley population.

Table 2: Housing types in Happy Valley (Source: RLIS Housing Inventory)

% of homes built that are middle housing	Happy Valley expansion only	Happy Valley total
Middle housing		7%
Multifamily	31%	20%
Other	6%	5%
Single-unit detached housing	58%	68%

**Analysis:** A higher percentage of middle family and multifamily housing was developed in Happy Valley’s UGB expansion areas than in Happy Valley overall.

Implication for affordability: Middle family and multifamily housing types support denser communities where you live closer to places you work, live, play, etc.

Table 3: Affordability & assessed home values in Happy Valley (Source: County Tax Assessor data)

Median home assessed value by home type	Happy Valley expansion only	Happy Valley total
Single-unit detached housing	\$695,786	\$733,856
Townhouse	\$438,329	\$431,854

**Analysis:** Townhouses in the UGB are slightly more affordable than those in the other areas of Happy Valley, in which single-unit detached homes are slightly less expensive. All housing types in Happy Valley are, on average, above the regional average home value. High housing production costs contribute to the overall regional supply shortage and can have a long-term impact on housing costs.

## Bethany

In 2002, the Metro Council brought 716 acres into the UGB in Washington County's North Bethany area. More than 5,000 homes are planned for the area.

Since then, 573 homes have been built or approved for construction in the area. As of mid-February, [the least expensive home in the area was for sale for \\$405,995](#).

Table 4: Race and ethnicity of people living in Bathany (2020 Census)

Race/Ethnicity Census Categories	Bethany expansion	Bethany total
White	27%	40%
Black	3%	2%
AIAN (Amer. Indian/Alaskan Native)	0%	0%
Asian	58%	44%
NHPI (Native Hawaiian/Pacific Islander)	0%	0%
Other	1%	1%
Multiple	4%	5%
Hispanic	6%	7%
BIPOC (total non-white)	73%	60%

**Analysis:** The Bethany expansion area is home to significantly more residents who identify as Asian than the Bethany population overall.

Table 5: Housing types in Bethany (source: Metro Land Development Monitoring System)

% of homes built that are middle housing	Bethany expansion	Bethany total
Middle housing	11%	8%
Multifamily	20%	20%
Other	0%	2%
Single-unit detached housing	69%	70%

**Analysis:** A slightly higher percentage of middle family and multifamily housing was developed in the UGB expansion area than in Bethany overall.

Implication for affordability: These housing types are supportive of denser communities where you live closer to places you work, live, play, etc.

Table 6: Affordability & assessed home values in Bethany (source: Metro Land Development Monitoring System)

Median home assessed value by home type	Bethany expansion	Bethany total
Single-unit detached housing	\$784,740	\$761,170
Townhouse	\$474,310	\$481,895

**Analysis:** Townhouses in the UGB are slightly more affordable than those in Bethany overall which Single-unit detached homes were slightly less expensive. All housing in Bethany is above the regional average home value. High housing production costs contribute to the overall regional supply shortage and can have a long-term impact on housing costs.

## Limitations of census data and data collection

While the data in this report is accurate and reliable, it relies heavily on census data. Different communities have different levels of comfort engaging with government censuses and surveys. Additionally, smaller demographic segments of the population are harder to count in the census.

These longstanding cultural and statistical issues can result in undercounts, especially for marginalized communities, such as immigrants and refugees, people of color, people who speak limited English, people who are unhoused and people with disabilities. Comparing and making sense of decennial censuses in the United States can be difficult for other reasons, as well.

Additionally, the size and shape of the UGB expansion areas limit the amount of reliable demographic data available. Expansion areas are often small portions of larger geographies used by the census. For example, there is census data about race and ethnicity available at a geographic scale that more closely aligns with expansion areas but the census does not provide data about income for the same geographic scale.

## Lessons learned

Metro's analysis of these case studies did not provide conclusive results. This process highlights the need for more and different data to understand equity impacts.

This initial attempt at understanding the impact of UGB expansions paves the way to continue exploring affordability, equity areas, the social consequences, how people move and why, and what it means to benefit from and be impacted by expansion decisions.

Urban growth boundary expansion areas are sparsely populated when added to boundary. The number of people living and working in these areas who are directly affected by UGB expansions is relatively small, but they are important to consider. People with direct connections to expansion areas include property owners (who will likely profit from the sale and development of their land), renters (who are at risk of displacement), as well as farm and forest workers (whose jobs are at risk of displacement). It is worth noting that land that is considered most important for commercial agriculture and forestry use is in rural reserves and not eligible for urban expansion.

It is difficult to draw conclusions about the impact of urban growth decisions on the affordability or livability of existing urban areas because there are many economic and social factors at play. One way of examining the potential impact of the UGB on housing affordability is



to compare the greater Portland region to similar metro regions without urban growth boundaries. Austin, Denver and Atlanta have similar housing prices to greater Portland, which could indicate that the UGB does not have a significant impact on affordability in greater Portland.

## **Looking forward**

While it is not possible to predict who will move into newly urbanized areas, there are many ways to help make newly developed areas welcoming to a diversity of community members. These strategies include, but are not limited to, local zoning policies that encourage a diversity of housing types and mixed-use developments, fostering strong communities that include access to nature and community spaces, as well as building affordable housing and transportation infrastructure. Strategies could also include a racial equity assessment and deep community engagement that inform expansion proposals.

Metro can evolve this process to better understand how the urban growth management decision impacts communities and reduces racial disparities in the greater Portland region. Future urban growth management decisions must prioritize community engagement with community members early and often and improve the agency’s approach to involving community members in this technical and long-term process.

If community members are not working alongside Metro, there is a risk of perpetuating the inequities in this region. With a commitment to building a more equitable region, Metro will set the tables for continued conversations and collaboration to advance the region’s understanding of how urban growth management impacts marginalized communities—particularly people of color.

## **HOW MUCH POPULATION GROWTH IS EXPECTED?**

A core aspect of making growth management decisions is determining the rate of population, household, and job growth in the Metro UGB over the next 20 years. Metro accomplishes this by first conducting a forecast for the seven-county Metropolitan Statistical Area (MSA). As described in appendices 1 and 1A, this forecast is based on the best available data sources and uses accepted practices for forecasting. To ensure the quality of the forecast, external economists and demographers review it for its reasonableness.

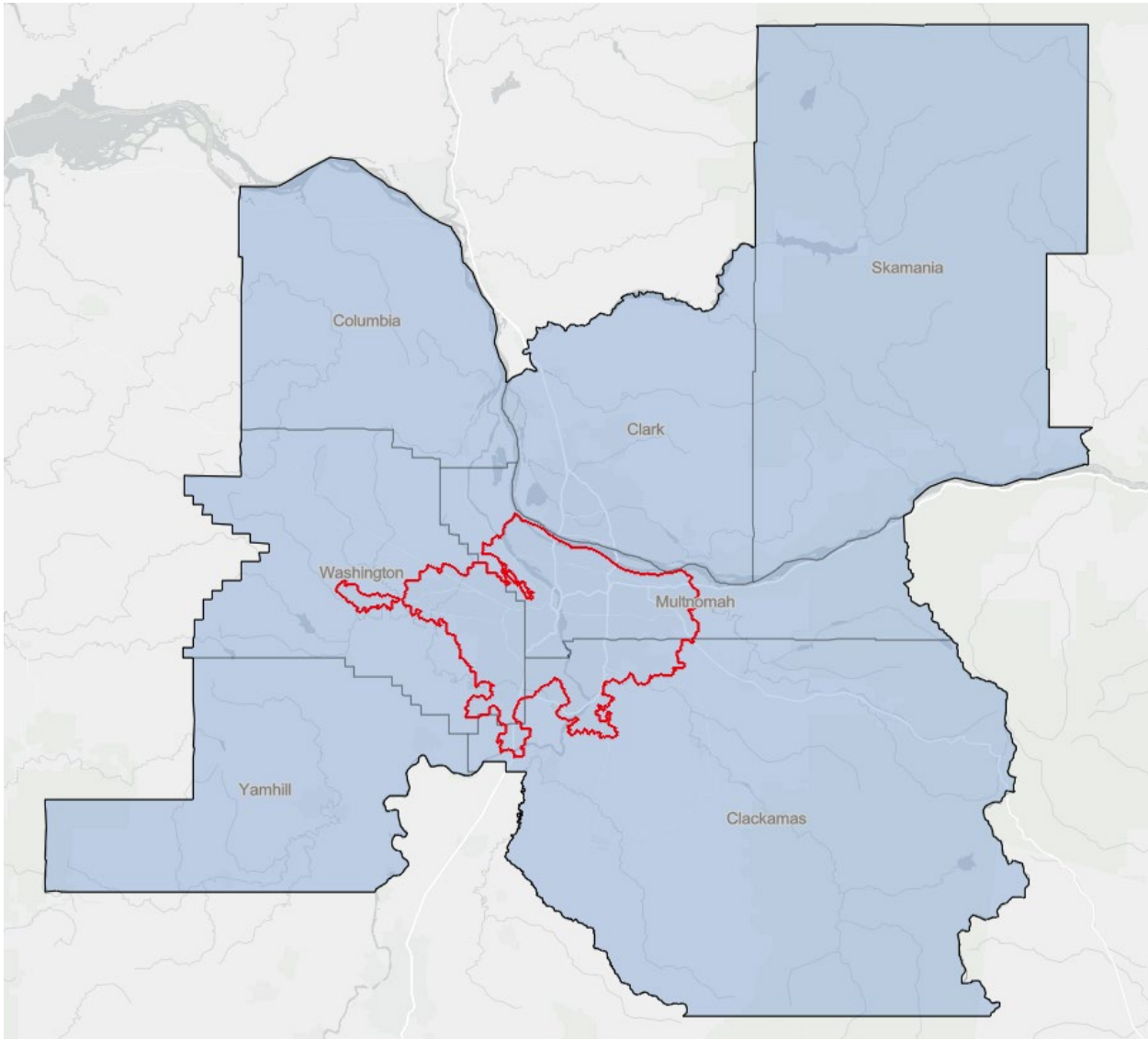


Figure 2: 7-county Metropolitan Statistical Area (MSA) and Metro UGB (shown in red)

## People are choosing to have fewer children

In previous population forecasts, the long-term decline in birth rates in the U.S. and the Metro region was expected to plateau. However, birth rates have continued to decline and it is now a widely held view that the population in our nation, state, and region will decline without migration.

Our region is not alone. A recent study published in the British medical journal, *The Lancet*, estimates that by the year 2100, 97 percent of countries will see population declines without net positive migration.<sup>i</sup> Figure 3 depicts the greater Portland MSA's history and forecast for annual natural change (live births minus deaths). After a near-term increase, natural change is expected to be negative after the year 2033.

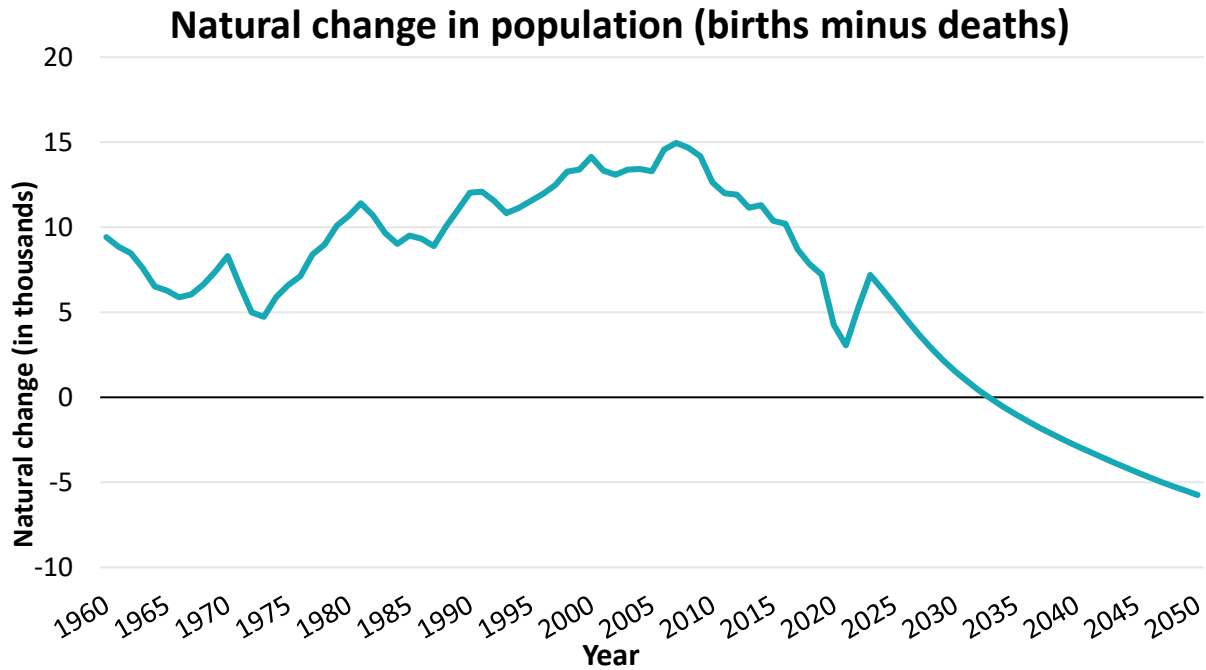


Figure 3: Natural change (live births minus deaths) for the Portland MSA

### Future migration levels are a source of uncertainty

The baseline draft regional forecast assumes that net migration will be sustained at the historic average level, which would result in regional population growth, albeit at a slower rate because of negative natural change (deaths will outnumber births). Under the baseline forecast, net migration is expected to add 15,000 people per year to the MSA population.

Expert reviewers of the regional forecast emphasized that, while it is a reasonable assumption, there is uncertainty around maintaining this historic average net migration rate. Reviewers saw potential for lower net migration rates due to affordability issues on the West Coast, including greater Portland.

Reviewers also indicated that, though it makes intuitive sense that the Pacific Northwest will attract migrants from areas with higher climate risk, there is no data to support this assumption. The variation in historic net migration rates illustrates this lack of a trend (see Figure 4). Metropolitan areas that have higher climate risk in the desert, southwest, coastal areas, and the Sunbelt continue to see some of the highest rates of growth in the country. A 2016 symposium on the topic also emphasized these points (Binder, 2016).

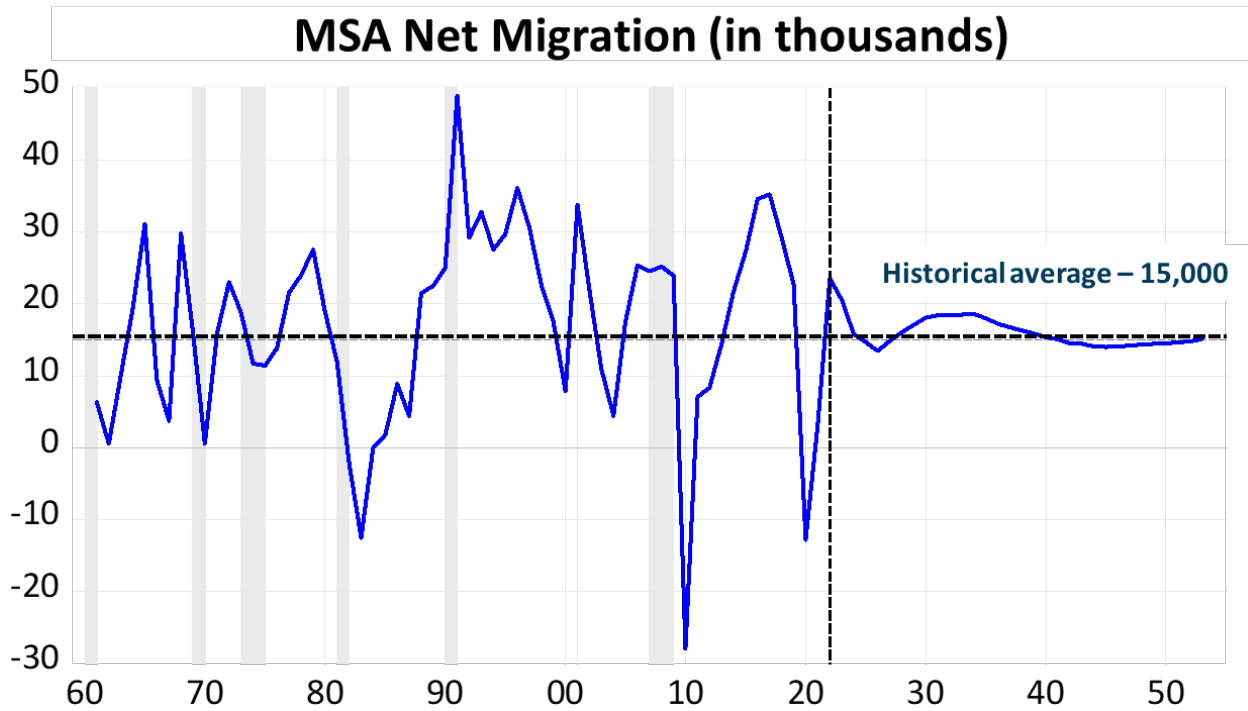


Figure 4: Net migration (in 1000s of people) for the Portland MSA: 1960-2050

### Population forecast results

The baseline forecast estimates approximately 315,000 more people in the Portland region between 2024 and 2044 for a total population of 2,901,000 by 2044. The baseline forecast is the most likely forecast. However, as noted, there is uncertainty surrounding population growth, particularly for future migration trends. To recognize that uncertainty, Metro has also completed low and high growth forecasts. While these alternative forecasts are both possible, they are not as likely as they would require sustained and sizable decreases or increases in net migration.

Table 7: Population range forecast for the Portland MSA: 2024-2044

	Low	Baseline	High
<b>2024</b>	2,529,000	2,586,000	2,644,000
<b>2044</b>	2,521,000	2,901,000	3,281,000
<b>Difference</b>	-8,000	315,000	637,000

Note: 2024 population numbers are estimates and therefore vary between low and high forecasts

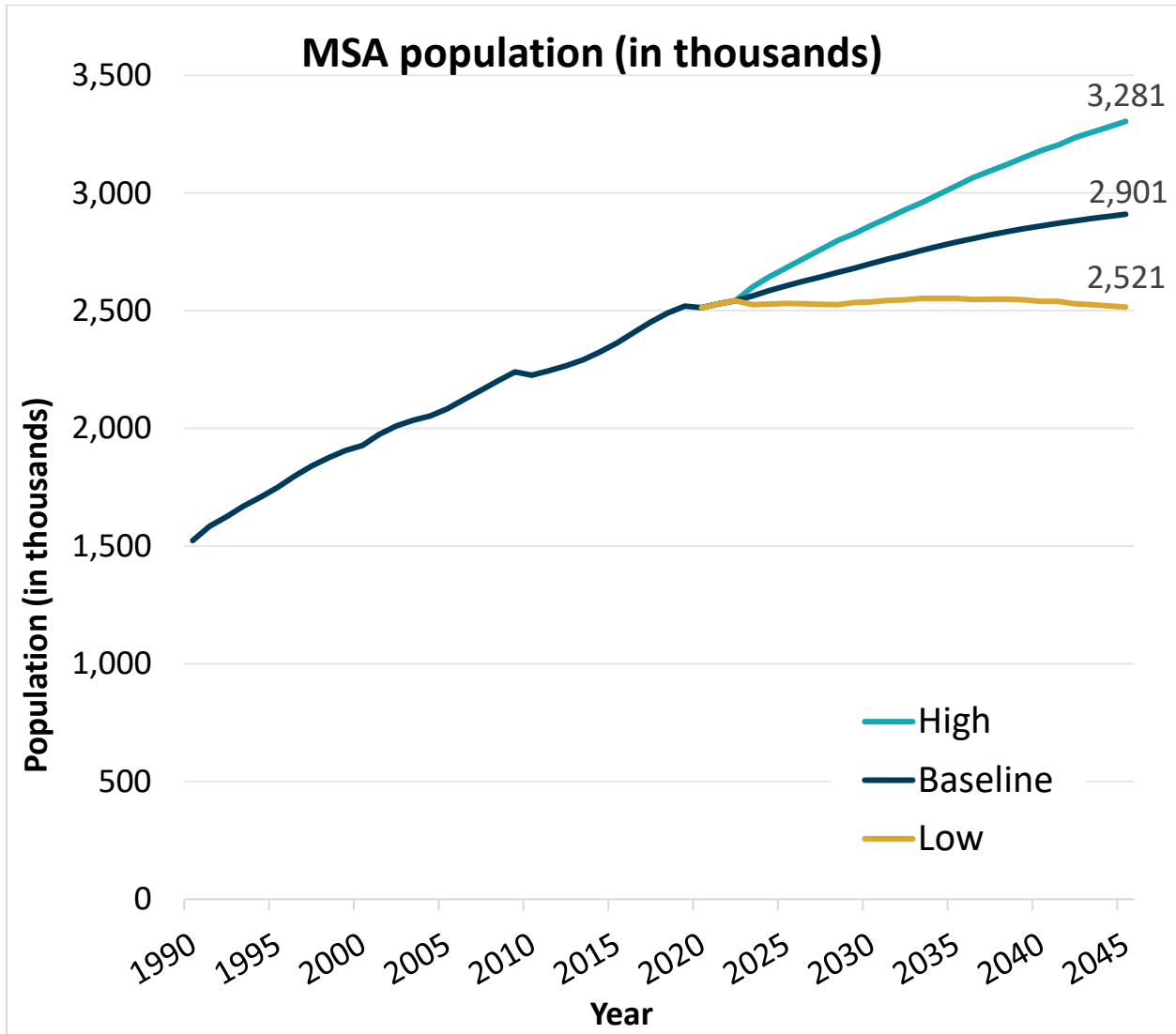


Figure 5: Portland MSA population history and forecast: 2024-2044

## REGIONAL HOUSING NEEDS ANALYSIS

Even with a population growing at a slower rate, the region needs to remain focused on people’s housing needs. Demographic shifts related to this slower growth rate provide insights into the region’s future housing needs for the 2024-2044 period.

### Demographic trends

#### People are choosing to have fewer children:

- In our region, the average household will have fewer people, dropping from 2.41 people today to 2.27 people in 2044.
- Today, approximately two-thirds of households have two or fewer people. That share is expected to increase.

- With fewer people choosing to have children, the median householder age will increase. Households headed by someone over 65 years will constitute the greatest share – almost two-thirds – of the change in households.

**As the Millennial generation ages, Gen Z follows in its wake as a smaller generation:**

- Compared to today, there will be a slight decrease in the number of families with children with a householder 25-44 years old (instead of Millennials, the smaller Gen Z will be in this age cohort in the year 2044).
- About a quarter of new households will be aged 45 to 64 with children (this will be the Millennial generation in the year 2044).

**Smaller, older households mean, on average, fewer wage earners per household:**

- With an older population, more people will be retired and on fixed incomes. 41 percent of new households will be seniors with lower (below \$60,000) household incomes.
- Over 60 percent of new households will have household incomes less than \$60,000, contributing to additional need for housing affordable to households earning 30 to 80 percent of area median income.
- 85 percent of new renter households will have incomes less than \$60,000.

Figure 6: 2024-2044 household change (UGB) by life stage (source: ECONorthwest analysis of Metro baseline regional forecast)

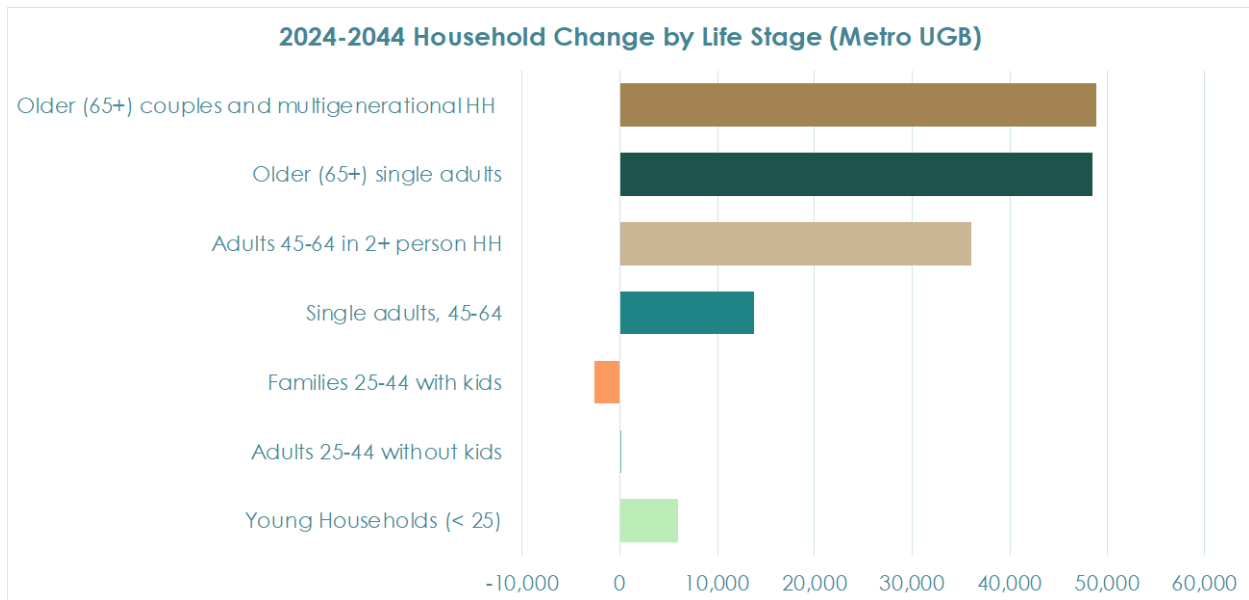
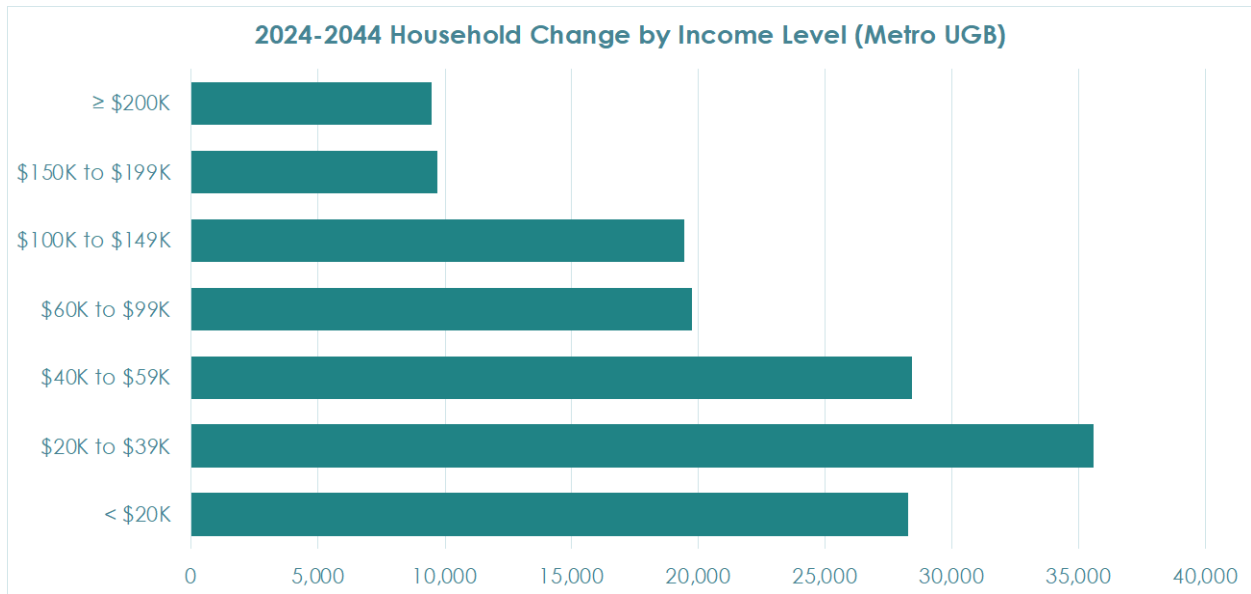


Figure 7: 2024-2044 household change (UGB) by income level (source: ECONorthwest analysis of Metro baseline forecast)



## Residential trends

### Underproduction of housing

Our nation's housing markets continue to struggle to produce enough housing to match household growth, particularly for people earning lower incomes. This backlog of housing production became clear in the aftermath of the 2008 housing bubble and is still with us today.

More recently, higher interest rates have caused many homeowners who might otherwise move to stay put since they cannot afford to take on a new mortgage at higher rates. This contributes to low inventory of houses for sale. In the end, those that feel the housing shortage most acutely are people with the fewest resources.

For developers and builders, the costs of labor, materials and lending remain a drag on housing production. Nationwide, access to buildable lots is a challenge in part because of lower numbers of land development companies and the costs of serving raw lands with needed infrastructure.

### Regional housing production, gentrification, and displacement

The interaction between housing supply and demand influences affordability. While new market rate housing is rarely "affordable," housing production contributes to the overall regional supply and can have a long-term impact on housing costs. Metro, seeking to better understand the role of regional housing supply in affordability, contracted with ECONorthwest to provide an overview of these regional housing market dynamics.

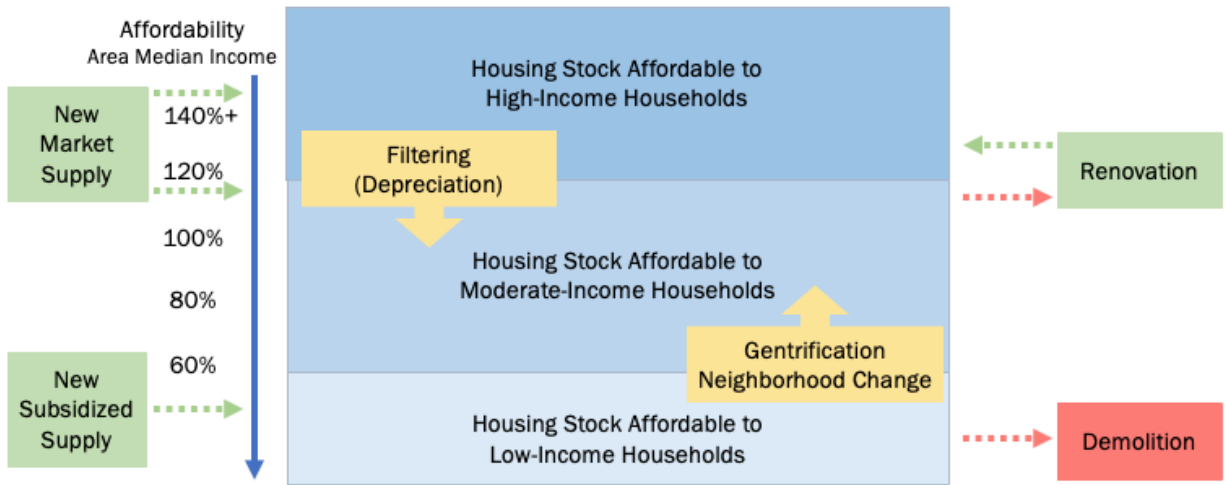
## UGR Roundtable perspectives: Housing production and affordability

### Housing production and affordability

was an important topic to UGR roundtable members. Participants expressed the need for renewing funding sources and establishing clear goals for affordable housing development to meet regional needs at various income levels. This affordable housing production should include units for both rent and ownership. Members mentioned that housing and land are resources for generational wealth building. Other roundtable members working in housing development cited the high infrastructure costs as a substantial barrier to housing affordability and production. This led to conversation about the need for policies to address historic underproduction and advocate for infrastructure funding. Some roundtable members advocated for workforce housing to support job growth in the region. By proactively planning for workforce housing at different income levels, including addressing the specific needs for farmworker housing, cost of living may become less of a barrier for workers here today and those considering moving in the future.



Figure 8: illustration of how new housing supply affects housing markets (source: ECONorthwest)



ECONorthwest’s work on this topic can be found in Appendix 10. Takeaways include:

- The supply of new market-rate housing is crucial for moderating price increases.
  - However, depreciation of housing (filtering) alone won’t meet the needs of lower-income households.
- Housing displacement risk should inform public policies and investments, but not necessarily inhibit them.
  - Creating affordability in high-opportunity areas with access to services and amenities is as important as maintaining affordability in areas at risk of displacement.
  - Investments in existing communities may increase property values and may need to be paired with investments in stability.
  - Households experiencing economic precarity face displacement risks wherever they live without appropriate support.
- Preventing and mitigating displacement is hard, but not impossible.
  - The UGB is just one policy tool. Many more interventions and partnerships are required to succeed.
- Data alone is not enough to understand gentrification and displacement.
  - Lived experiences and awareness of history can supplement data.

### Housing production by location

The 2040 Growth Concept, Greater Portland’s long-standing plan for growth, seeks to focus housing development in urban centers, corridors and main streets. This is typically achieved through redevelopment or infill. Approximately 93,000 homes were built inside the UGB from 2013 to 2022. A little more than half of that housing was built through redevelopment rather than vacant land development. Figure 9 depicts the intensity of residential development around the region for the 2009-2023 period. Many 2040 centers and corridors have contributed to this housing production.

Focusing growth in urban areas helps our region to minimize impacts on rural areas outside the UGB. Ongoing efforts are needed to ensure equitable access to nature in urban areas. Climate change brings with it additional urgency to enhance our urban tree canopy to protect people from extreme heat events.

## Youth Cohort perspectives: Building communities with access

A recurring theme throughout the youth cohort meetings was the importance of **building communities with access** to opportunities and a variety of community spaces, especially for access that was not car-dependent. This theme included the cohort priority that new neighborhoods should include spaces for everyone and that people should be able to meet their needs without having to rely on a car. Cohort participants emphasized priorities of walkability, public transit access, and accessibility in connections through new neighborhoods. The theme of access also included access to opportunity – jobs with livable wages, and opportunity to meet needs like buying nutritious foods and gathering with other community members.

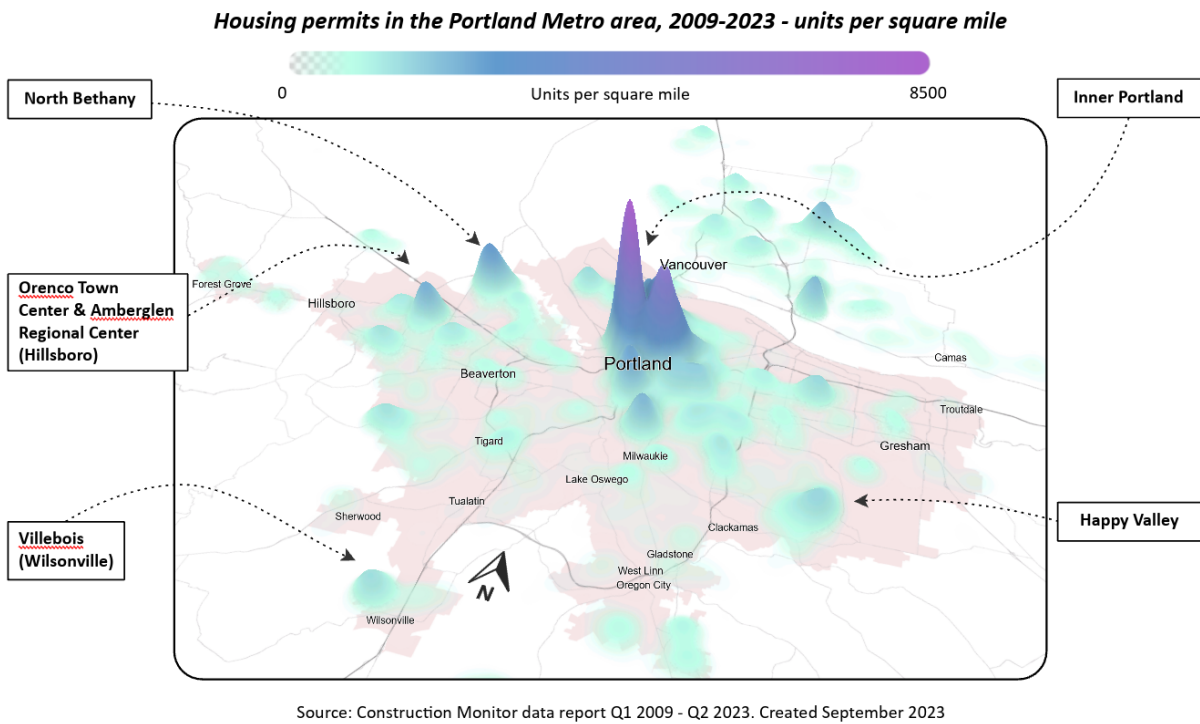


Figure 9: housing units permitted per square mile 2009-2023

### Housing type trends

Today’s housing mix is the result of decades of change. Though single-unit detached homes are the predominant housing type today (52 percent of housing inside the Metro UGB), as shown in Figure 10 they have represented a smaller share (30 percent) of new housing over the last decade.

## HOMES BUILT INSIDE THE METRO UGB FROM 2013-2022

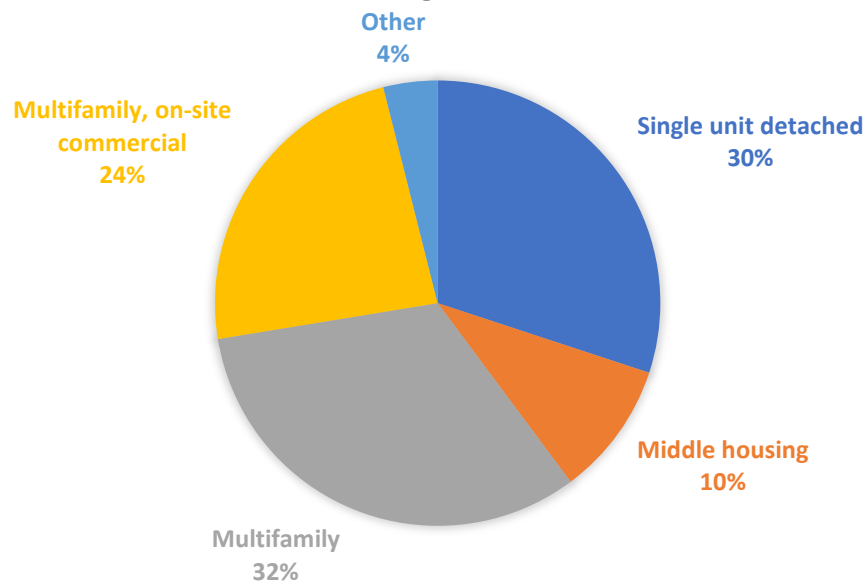


Figure 10: new housing built by type inside the Metro UGB from 2013-2022

Middle housing options such as townhouses, duplexes, triplexes, quadplexes, cottage clusters and accessory dwelling units are now allowed in zones that allow single-unit detached homes. This legalization of middle housing is recent for several of these housing types. Others, such as townhouses, duplexes and accessory dwelling units have a longer history. Over 9,000 middle housing units were built inside the UGB from 2013 through 2022 with townhouses and accessory dwelling units making up the majority. See Figure 11.

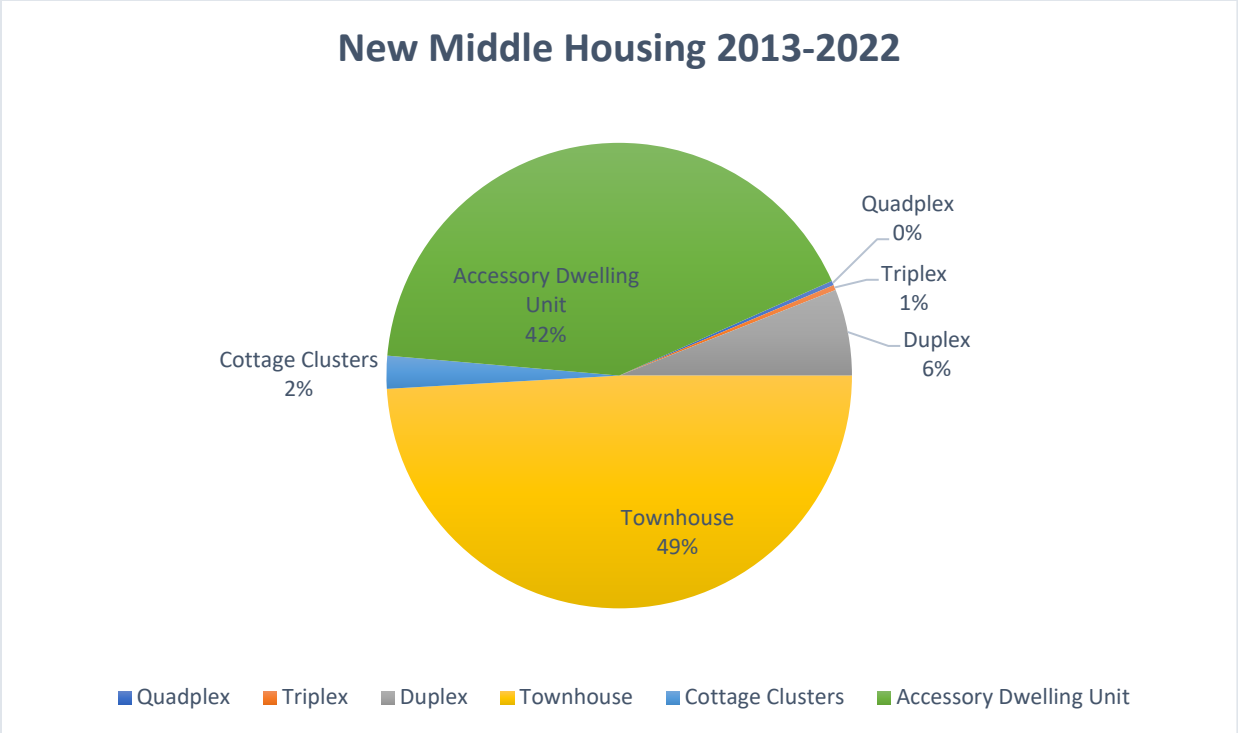


Figure 11: Middle housing developed in the Metro UGB from 2013-2022

**Housing density trends**

The region has adopted policies to encourage efficient use of land inside the UGB. On average, higher density has been achieved through redevelopment rather than vacant land consumption. However, there are exceptions such as single-unit detached and middle housing, which have achieved higher densities on vacant land.

Table 8: housing density for new housing (units per acre) by housing type and land source (Metro UGB, 2013-2022)

Housing type	Infill/ Redevelopment	Vacant land consumption	Total
Single-unit detached	5.4	7.5	6.6
Middle housing	17.1	21.3	19.8
Multifamily	71.9	35.1	49.7
Multifamily, on-site commercial	148.0	67.4	101.2
Other	28.9	26.9	27.7
<b>Total</b>	<b>18.8</b>	<b>14.4</b>	<b>16.3</b>

Note: "other" housing includes, for instance, dormitories, retirement facilities, and floating homes

The 2040 Growth Concept seeks to focus housing growth in urban centers and corridors. Figure 12 summarizes where housing has been built in relation to the 2040 Growth Concept over the last decade. The largest shares of housing have been built in non-center areas (neighborhoods) in Multnomah and Washington counties, followed by Multnomah County corridors.

## UGR Roundtable perspectives: Regional vision for the future

Many of the topics brought to the roundtable inspired broader conversations about the **regional vision for the future**. As challenges and solutions grew beyond land use interventions, members felt that it was important to be proactive about change rather than reacting. Some participants felt that the reputation of our region is at risk, and that bold, optimistic visions are needed to create a different future for the region. This will might involve a messy process to bring many different voices, perspectives, and priorities to the table. Many of the challenges and concerns mentioned throughout this process go beyond the urban growth management decision itself and require continued leadership and collaboration to find new solutions and commitment to see them through.

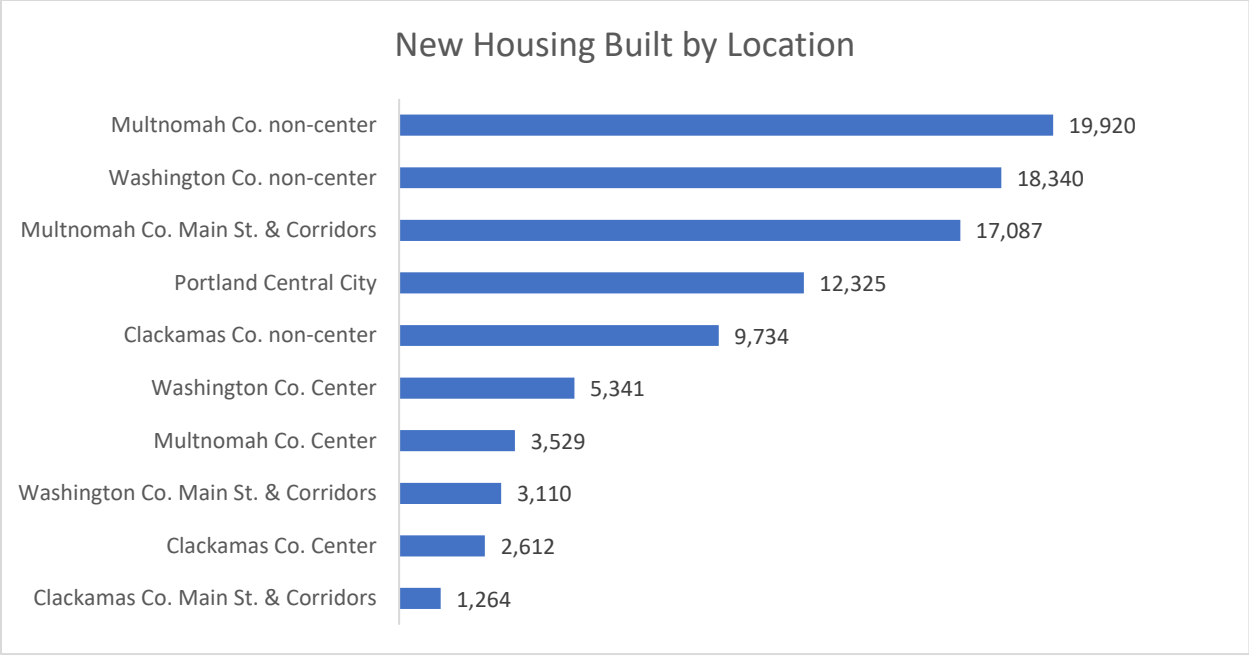


Figure 12: housing units built inside the Metro UGB by location 2013-2022

The highest densities of new housing have been built in the Portland Central City (average 235 units per acre) and Multnomah County corridors and main streets (56 units per acre). The lowest densities of new housing have been built in Clackamas County non-centers (6 units per acre) and Washington County non-centers (10 units per acre).

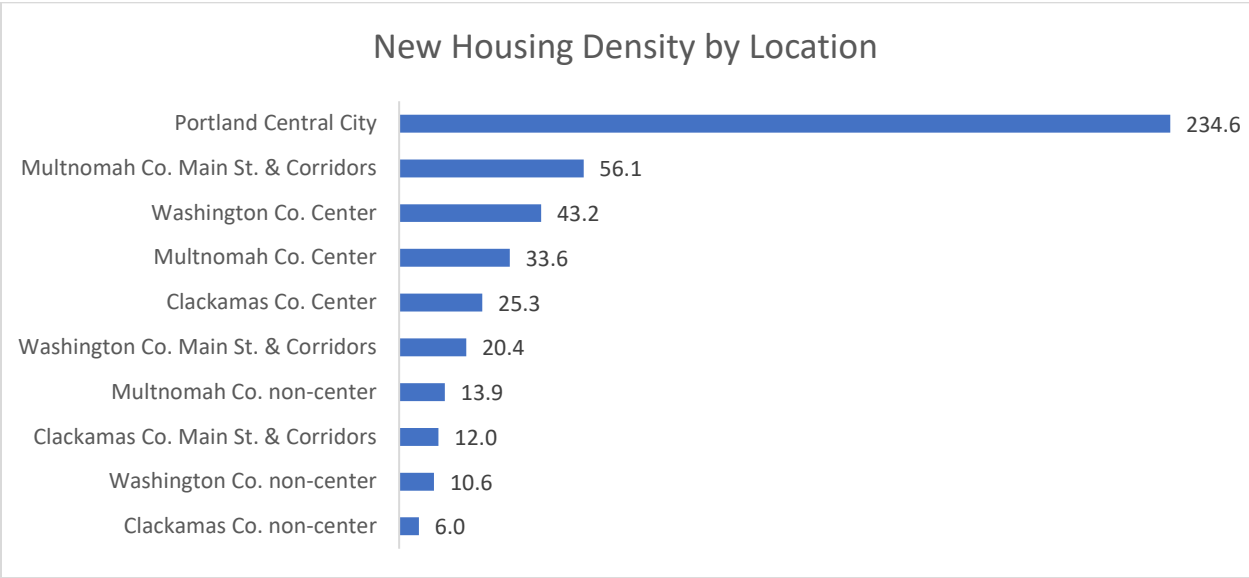


Figure 13: housing densities (units per acre) by location for new housing built from 2013-2022 inside the Metro UGB

## Housing growth capacity

In addition to forecasting household growth and reviewing housing development trends, a core aspect of the UGR is determining how much capacity there is inside the current UGB for additional housing growth. Using methods discussed by the Land Use Technical Advisory Group (LUTAG)<sup>1</sup>, Metro identifies three main categories of capacity that are described in more detail in Appendix 2:

- Vacant and partially vacant land
- Land that may be usable for redevelopment over the next 20 years
- New urban areas, which are areas that have been added to the UGB in recent years that do not yet have urban level zoning.

Because of long-standing challenges with city governance, planning or infrastructure costs, Metro does not count growth capacity on approximately 3,000 acres in the eastern portion of the former City of Damascus, where Happy Valley has not indicated an intention to annex.

All cities and counties in the region were provided opportunities to review and suggest edits to the buildable land inventory and capacity estimates for those lands.

### **New methods for estimating potential housing production on existing lands**

Because most of the region's housing growth occurs through redevelopment of already-developed lands, Metro has sought to improve how it estimates growth capacity from redevelopment in each UGR. Additionally, recent allowances for middle housing necessitate new methods of estimating potential market responses. While we seek to improve the accuracy of our capacity estimates, we also need to be clear about uncertainty

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<sup>1</sup> LUTAG is a special purpose group that is periodically convened by Metro to provide advice on how we estimate growth capacity. The group met six times for the draft 2024 UGR.

## UGR Roundtable perspectives: Access to nature and climate

### **Access to nature and climate**

**adaptation** was a high priority for some of the roundtable members. More broadly, some participants voiced the need to prioritize environmental conservation during land use decisions and that these decisions should reflect adaptation for climate change. The conversations about infill and redevelopment sparked comments about the need to support a healthy urban tree canopy and to ensure equitable access to parks and publicly accessible green spaces.

As the climate continues to change and result in warmer summers and increased fire seasons, some members urged the group to consider tradeoffs between density, livability, and climate resilience. There was interest in how housing built in different parts of the region will result in different climate impacts based on access to transit, density levels, and reliance on cars.



when forecasting future market feasibility. This is why Metro expresses capacity estimates as a range.

For the 2024 UGR, Metro worked with Johnson Economics to develop a pro forma model that estimates future development for individual properties, creating a regional estimate of growth capacity. The underlying assumption is that if the value of a property with new development is high relative to the current value of the property, it will be more likely to see development or redevelopment. Essentially, development or redevelopment is more likely if it is profitable. Documentation of the model can be found in Appendix 2.

The model identifies one of 43 possible building prototypes that represents the most profitable use. Even when the model indicates that properties are financially feasible for redevelopment, not all properties are counted as redevelopment capacity. Instead, the model uses backcasting to estimate the smaller share of properties that may actually redevelop. This is intended to make sure that housing production estimates are reliable. Likewise, it addresses the legal requirement that capacity estimates are based on what has historically been built and market factors that may influence future development.

Of note, modeling indicates that middle housing – which has only recently been extensively allowed under zoning codes– will often be more profitable to develop than single-unit detached housing. This housing type presents opportunities to better match the changing needs of smaller households.

The pro forma model and other methods provide the means of estimating a range of potential growth capacity inside the UGB. Capacity is summarized in three categories:

- Single-unit detached housing
- Middle housing
- Multifamily housing

## Youth Cohort perspectives: Housing crisis and affordability

The youth cohort learned about the statewide housing crisis and the role of local and regional government in helping to address the needs of today's population and future incoming residents and felt strongly that **housing affordability** was a strong value that should guide the UGB process. Cohort members wanted to see plans that included housing options that would work for many different people – including options for different housing types and price points. They group wanted to see that an expansion would help with the housing crisis and also that any expansion would be using the land available wisely to provide the most options to the most amount of people.

The methods used to establish a range of capacity for these three housing categories include:

- Pro forma scenarios that assume baseline market conditions as well as market erosion and market recovery
- An “expected density” approach that is based on observed development of vacant land
- A range for future accessory dwelling unit production and middle housing conversion/infill. This includes internal conversions of existing homes into multiple units as well as infill development where the original structure is retained and additional housing units are added to the lot.
- A range for possible office-to-residential conversion. See Appendix 2 for more details about how conversion potential was estimated
- Capacity scenarios that include residential zones skewing more towards single-unit detached housing or middle housing.<sup>2</sup>

Table 9: Summary of residential growth capacity inside the UGB by housing type

<b>UGB Residential Capacity</b>			
	<b>Single-unit detached</b>	<b>Middle housing</b>	<b>Multifamily</b>
<b>Low</b>	25,200	31,400	62,600
<b>Mid</b>	47,700	60,700	73,700
<b>High</b>	60,300	79,800	95,800

*Note: these sources of capacity should not be totaled (for instance, adding up high capacity for each housing type) since, for instance, higher middle housing capacity would necessarily mean lower single-unit detached since they rely on the same lands.*

## Housing needs

State law instructs Metro to estimate existing and future housing needs. Methods for estimating current housing needs are described in more detail in Appendix 8A.

As described in state law, existing housing needs include addressing:

- Historic underproduction of housing, essentially the backlog of homes that ideally would have been built to keep up with household growth. Underproduction of housing has been a nationwide phenomenon since the 2007/2008 Housing Bubble

<sup>2</sup> In their review of capacity estimates, some jurisdictions noted that preliminary estimates skewed more towards middle housing than they would expect. Since middle housing is allowed in zones that allow single-unit detached homes, there is a tradeoff that occurs. Assuming more single-unit detached housing capacity results in lower middle housing capacity. Conversely, assuming more middle housing capacity results in lower single-unit detached housing capacity. Because middle housing develops at higher densities, this is not a one-for-one tradeoff.

- Housing for people experiencing houselessness. Houselessness is caused by underproduction of housing, particularly affordable housing.
- Homes lost to second homes and vacation rentals.

People experiencing houselessness are not counted by the census, so additional data sources are necessary. Methods for estimating current housing needs are described in more detail in Appendix 8A. To estimate the number of homes needed to house people experiencing houselessness, this analysis relies on an April 2024 Portland State University (PSU) report on findings on the 2023 Point in Time Count for the three-county area (Zapata, 2024). As noted in the report, point in time counts have limitations and are an undercount for several reasons:

1. It is impossible to find and count everyone sleeping outside.
2. The count is conducted on a single night so does not capture every experience or episode of houselessness.
3. The U.S. Department of Housing and Urban Development definition of houselessness does not include people who are “doubled up” with other households.

The PSU report attempts to address the second issue by including administrative data about people in need of homeless services, which has been deduplicated with the point in time count. However, the administrative data are uneven across the three counties.

The report attempts to adjust for the third issue by using McKinney-Vinto data on students experiencing houselessness.

Table 10: Existing housing needs by income group (Metro UGB)

Percent area median income	Historic underproduction	For people experiencing homelessness
0-30%	4,200	7,750
30-60%	5,300	700
60-80%	2,700	250
80-120%	2,200	-
120%+	700	-
<b>Total</b>	<b>15,000</b>	<b>8,700</b>

Note: housing for households earning less than 80 percent area median income is generally understood to require government assistance. Numbers are rounded and may not add exactly to the total shown.

Using methods like those under development for the Oregon Housing Needs Analysis (OHNA) program, ECONorthwest assigned these housing needs by income group to housing types as depicted in Table 11. Multifamily housing is the predominant housing type needed because of the affordability required to match household incomes described in Table 10. Table 11 also

summarizes housing “lost” to second and vacation homes. These homes are included because they are not available for housing the region’s residents.

Table 11: existing housing needs by housing type (Metro UGB)

	<b>Historic underproduction</b>	<b>For people experiencing homelessness</b>	<b>Second and vacation homes</b>
Single-Unit Detached	700	-	1,100
Middle Housing	2,100	50	1,800
Multifamily	12,200	8,650	400
<b>Total</b>	<b>15,000</b>	<b>8,700</b>	<b>3,300</b>

Note: numbers are rounded to avoid implying too much precision

### Future housing needs

Estimating future housing needs entails several steps:

1. Forecast household growth for 7-county MSA (low, baseline, high) for the 2024-2044 period.
2. Apply an assumed UGB capture rate to determine housing need in the Metro UGB (based on history, 70% of MSA household growth captured in Metro UGB).
3. Apply a vacancy rate of 5 percent to allow household moves within the UGB and to convert households into housing units.
4. Express total housing unit needed in the UGB for 2024-2044 for low, baseline, and high growth.

Table 12 depicts these first four steps.

Table 12: Steps for translating 7-county MSA household growth into Metro UGB housing units needed (2024-2044)

	<b>High</b>	<b>Baseline</b>	<b>Low</b>
7-county total HH Growth 2024-2044	244,200	203,500	162,800
UGB capture rate	70%	70%	70%
UGB total household growth 2024-2044	171,000	142,500	114,000
Housing units needed per new household (vacancy rate)	1.05	1.05	1.05
UGB total housing units needed 2024-2044	179,500	149,600	119,700

Note: the low and high forecasts shown here for the 7-county area are a narrowed range (20% less or more than the baseline); to simplify comparisons, a 70% capture rate is assumed here across scenarios. Numbers are rounded and may not total as shown.

The next step is to assign housing types based on household life stage (age, income, size, presence of kids). This step is handled through several different scenarios intended to model different possibilities. These scenarios pair housing choices with forecasts (low, baseline, high) that follow internal logic. For instance, high growth has historically manifested itself as heightened demand for urban development since growth tends to come from younger households migrating to the region. These scenarios are described in more detail in Appendix 8.

- a. High growth, strong urban market: high growth forecast; housing trends like development over the last decade with high demand for housing in urban locations; market uptake of middle housing.
- b. Baseline growth, new normal: baseline (most likely) growth forecast; as households age, their housing choices shift towards those of older households today, but not to same extent as past generations. More households choose middle housing than have historically.
- c. Low growth, following in footsteps: housing choices at each life-stage remain constant – as current households age, their housing choices look the same as those of older households today. This is accompanied by slower household growth, an aging population, and weaker market conditions as these would likely be necessary conditions for households to continue making these housing choices.

Figure 14 depicts the mix of housing in these three scenarios. The share of single-unit detached housing is highest in the “following in footsteps” scenario, followed by “new normal,” and “strong urban market.” The shares of middle housing and multifamily housing are highest in the “strong urban market” scenario, followed by “new normal,” and “following in footsteps.”

Figure 14: 2024-2044 housing mix scenarios (source: ECONorthwest)

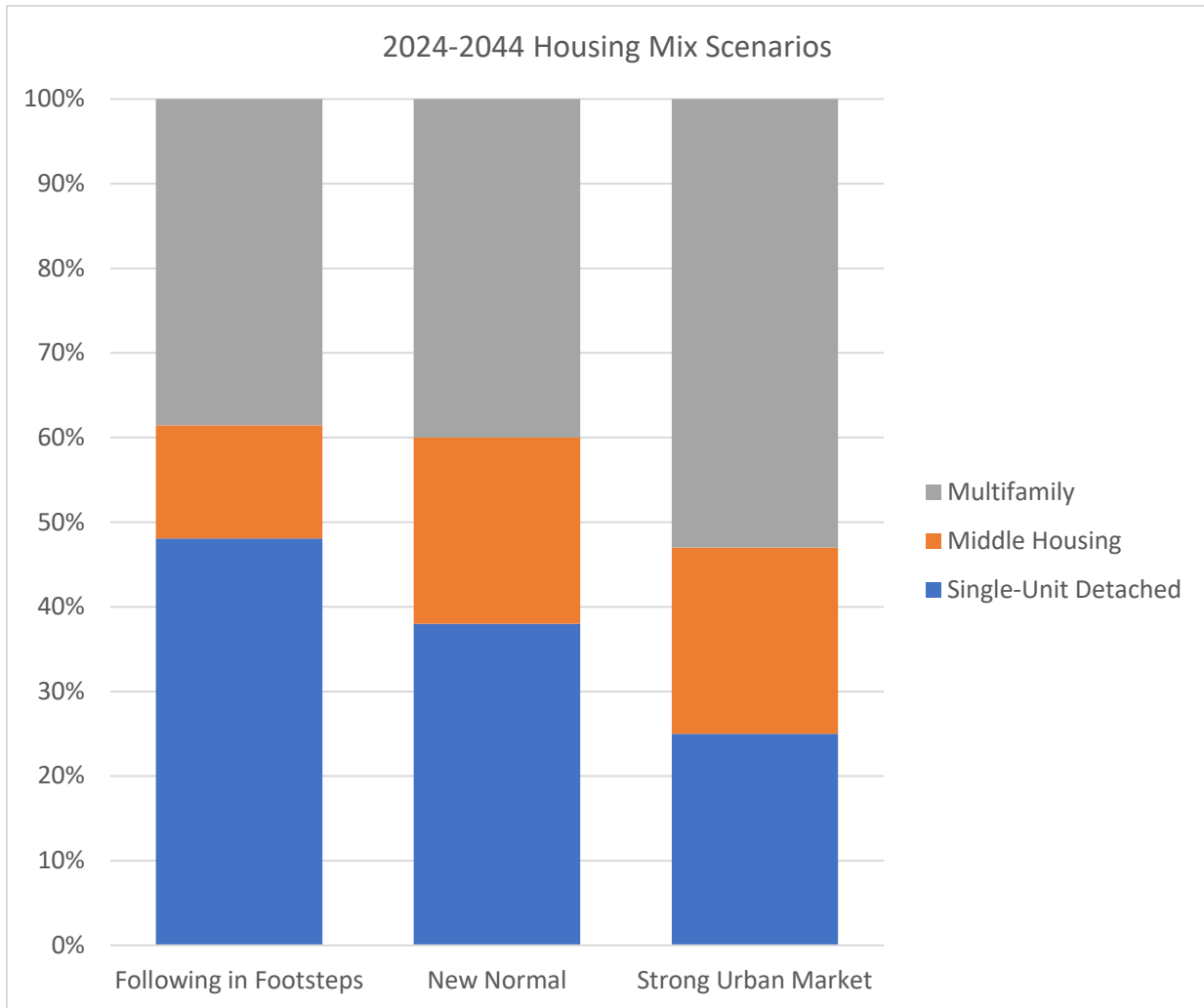


Table 13: Future housing need scenarios (Metro UGB, 2024-2044)

Housing type	High growth, strong urban market	Baseline growth, new normal	Low growth, following in footsteps
Single-Unit Detached	44,900	56,800	57,500
Middle Housing	39,500	32,900	16,000
Multifamily	95,100	59,800	46,100
Total	179,500	149,500	119,600

## Total housing needs

Existing and future housing needs by housing type are added together as summarized in Table 14.

Table 14: current and future housing needs for the Metro UGB (2024-2044)

<b>Total Housing Need</b>	<b>High</b>	<b>Baseline</b>	<b>Low</b>
Future Growth Needs	179,500	149,500	119,600
Existing Housing Needs	23,700	23,700	23,700
<b>Total New Units Needed in Metro UGB</b>	<b>203,200</b>	<b>173,200</b>	<b>143,300</b>
<b>Total new units needed in Metro UGB by housing type</b>			
Single-Unit Detached	45,600	57,600	58,300
Middle Housing	41,600	35,000	18,100
Multifamily	116,000	80,700	66,900
<b>Total new units needed in Metro UGB</b>	<b>203,200</b>	<b>173,300</b>	<b>143,300</b>

Note: numbers are rounded to the nearest 100 to avoid implying too much precision

## Housing capacity gap analysis

This analysis indicates that the Metro Council has the latitude to determine whether additional housing capacity is needed to accommodate potential household growth. This latitude derives from several factors.

- Uncertainty regarding the amount of future household growth from future migration into and out of the Metro region.
  - Increased migration would likely come from younger households who typically seek multifamily housing.
  - Decreased migration would amplify the trend of an aging population, which will tend to age in place.
- Uncertainty regarding the potential redevelopment of lands inside the UGB, depending on market conditions.
  - Even for properties that are financially feasible for redevelopment, there is uncertainty regarding which ones of them may redevelop over the twenty-year time horizon.
  - Redevelopment capacity is not static. Additional population/household growth would likely increase redevelopment potential as more developers respond to demand. This would increase multi-family and middle housing production (capacity), which corresponds to the housing needs of the younger households that are more likely to migrate to our region.
- The extent to which future housing choices are influenced by smaller household sizes and affordability concerns vs. the persistence of past trends.

- Whether households perceive middle housing as a relatively lower cost ownership alternative to single-unit detached homes or condos.
- The degree to which builders shift from single-unit detached to middle housing to achieve higher profitability.<sup>3</sup>

Depending on the above factors, the UGB capacity gaps for accommodating existing and future housing needs vary. These ranges were developed using several illustrative demand and capacity scenarios that sought to apply consistent economic reasoning in any given scenario. The three demand scenarios are as previously described, now paired with four capacity scenarios. See Appendix 8 for more detail.

**Scenario 1: following in footsteps, low growth, lower redevelopment, and less middle housing**

Housing choices at each life-stage remain constant – as current households age, their housing choices look the same as those of older households today. This is accompanied by slower household growth, an aging population, and weaker market conditions as these would likely be necessary conditions for households to continue making these housing choices. Redevelopment potential is lower and housing capacity on vacant land skews towards detached single-unit housing.

**Scenario 2: new normal with baseline assumptions about growth and capacity**

As households age, their housing choices shift towards those of older households today, but not to same extent as past generations. More households choose middle housing than in scenario 1. This is accompanied by baseline (most likely) household growth. Capacity assumptions tend towards baseline with middle housing slightly more likely on vacant lands than detached single-unit housing.

**Scenario 3: new normal with baseline assumptions about growth and capacity, except vacant land capacity skews towards single-unit detached**

As households age, their housing choices shift towards those of older households today, but not to same extent as past generations. More households choose middle housing than in scenario 1. This is accompanied by baseline (most likely) household growth. Capacity assumptions tend towards baseline with single-unit detached housing more likely on vacant lands than middle housing.<sup>4</sup> This scenario also assumes less accessory dwelling unit production and middle housing conversion as sources of capacity.

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<sup>3</sup> Pro forma modeling shows that middle housing is often more profitable than single-family housing. However, some suburban jurisdictions indicated in their review of capacity estimates that they would expect a bigger share of single-unit detached housing than middle housing. This feedback is reflected in scenario 3 with a heavier mix of single-unit detached housing expected on vacant lands.

<sup>4</sup> This increased mix of single-unit detached housing (as opposed to middle housing) reflects feedback received from some suburban jurisdictions in their review of capacity estimates.



#### **Scenario 4: strong urban market with fast growth, higher redevelopment potential, and more middle housing**

Consistent with historic migration dynamics, faster household growth comes from increased in-migration of younger households who are more apt to relocate than older households.<sup>5</sup> This influences the types of housing that are most in demand. Specifically, consistent with their life stage and incomes, these younger households typically will seek multifamily and middle housing. Redevelopment potential increases with stronger market demand for urban residential options. Consistent with development trends over the last decade, multifamily housing makes up a majority share.

#### **Housing capacity gap results**

Table 15 summarizes these four scenarios and the resulting housing mix and capacity surpluses or deficits. The above scenarios are not the only ones that could be considered plausible. Instead, these scenarios are intended to provide information to support decision making. Slight changes to assumptions about demand, capacity, or housing mix would produce different results.

At this calculation stage, middle housing and single-unit detached housing capacity surpluses or deficits are combined because both are allowed in the same residential zones. It will be the market, not Metro's UGR calculations, that determine what mix of middle housing and single-unit detached housing gets built on those residentially zoned lands. Importantly, Metro has no recourse for specifically addressing a single-unit detached housing deficit since any UGB expansion area would have to also allow middle housing and multifamily housing in order that the city can remain in compliance with HB 2001 and the Metropolitan Housing Rule. However, the capacity deficit estimated for scenario three is largely attributable to single-detached housing. Scenario three is also the only scenario in which there is a total deficit of housing capacity for all housing types combined.

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<sup>5</sup> Per the U.S. Census, a majority of the people that moved to the Portland MSA from 2000-2010 are between the ages of 25 to 34. Using U.S. Census 2022 Current Population Survey data, we calculate that the odds of changing homes in 2022 were highest for the 20-25 age cohort (5.5% odds), followed by those aged 25-44 (3.75% odds), 45-64 (1.75% odds), and 65+ (1% odds).

Table 15: Capacity deficits or surpluses for existing and future housing needs (2024-2044)

Scenario	Shares of housing by type			Capacity deficit or surplus	
	Single-unit detached	Middle housing	Multifamily	Single-unit detached and middle housing	Multifamily housing
<b>1: follow in footsteps; low growth</b>	40%	14%	46%	+5,300	+3,750
<b>2: new normal; baseline growth; baseline capacity</b>	33%	21%	46%	+13,000	-2,100
<b>3: new normal; baseline growth; heavier use of vacant land for single-unit detached</b>	33%	21%	46%	-2,250	+1,250
<b>4: strong urban market; fast growth</b>	23%	21%	56%	+32,500	-23,900 <sup>6</sup>

Note: numbers are rounded to avoid implying too much precision

For comparison, Table 16 depicts the current housing mix as well as the mix of new housing built from 2013 through 2022. See also Figure 8.

Table 16: current housing mix and mix of new housing developed 2013-2022 (Metro UGB)

	Single-unit detached	Middle housing	Multifamily
<b>Current total housing mix</b>	52%	7%	35%
<b>New housing built 2013-2022</b>	30%	10%	57%

Note: housing shares don't total 100% because Metro also tracks "other" housing types that are not listed here, for instance dormitories, floating homes, and retirement facilities.

<sup>6</sup> This multifamily capacity deficit is likely overstated but is included here for transparency. If multifamily demand were as high as contemplated in this scenario, it is likely that rising property values would cause additional redevelopment to occur, thereby eliminating this capacity deficit. However, the pro forma does not include pricing feedback. This capacity deficit assumes that only 20% of the most feasible properties redevelop. If 40% of the most feasible properties redeveloped, this deficit would be eliminated.

## Housing capacity options

If the Metro Council determines that there is a need for additional capacity to address housing needs, there are two approaches it may pursue. The Metro Council may take measures to increase the likelihood of housing development on land already inside the UGB and/or expand the UGB to add the Sherwood West urban reserve area as proposed by the City of Sherwood. If the Council elects to expand the UGB, it may wish to consider conditions of approval to help achieve a certain housing mix or number of housing units that will best meet the region's housing needs. Regardless of the Council's growth management decision, there is a need for ongoing work to spur the production of housing, particularly for households with the fewest resources.

## REGIONAL EMPLOYMENT ANALYSIS

### Employment trends

Much has changed in the economy in recent years and more change appears to be on the way. Drivers of change include:

- Persistence of working from home for many office workers
- High office vacancy rates
- Automation and artificial intelligence
- Slowing population growth
- An aging workforce
- Domestic manufacturing policies such as the CHIPS Act

### Pandemic impacts on work

Though many aspects of life have returned to normal after the coronavirus pandemic, it has had lasting effects on what that "normal" looks like. After peaking in 2021, the share of workers working from home either full time or hybrid remained at 24 percent in 2022 for the greater Portland metropolitan area. This persistent trend has led to high office vacancy rates and has long-term implications for demand for office space.

## UGR Roundtable perspectives: Infrastructure funding

The need for **infrastructure funding** came up frequently in roundtable discussions. It was mentioned as a necessary solution in discussions of housing production and affordability, development barriers and the role of Metro and local governments. This is an area where many roundtable participants advocated for regional partnership in advocating for infrastructure funding at the State and with the Federal government.

Greater Portland is among the top 10 metro areas in the country for the highest shares of people working from home. As shown in Figure 15, rates increased drastically after 2019 and have persisted as of 2022. For office workers, hybrid and remote work is expected to endure. This has implications for future demand for office space.

In the last few years, there was early enthusiasm about the potential for converting vacant office buildings into housing. That enthusiasm has been tempered by recognition that many office buildings do not lend themselves to these conversions because of issues related to inadequate access to exterior windows and complications related to replumbing buildings for kitchens and bathrooms in individual apartments. Metro worked with ECONorthwest to develop estimates for conversion potential over the 20-year planning period. Those estimates, modest as they are, are included in the residential capacity estimates. ECONorthwest’s analysis can be found in Appendix 2.

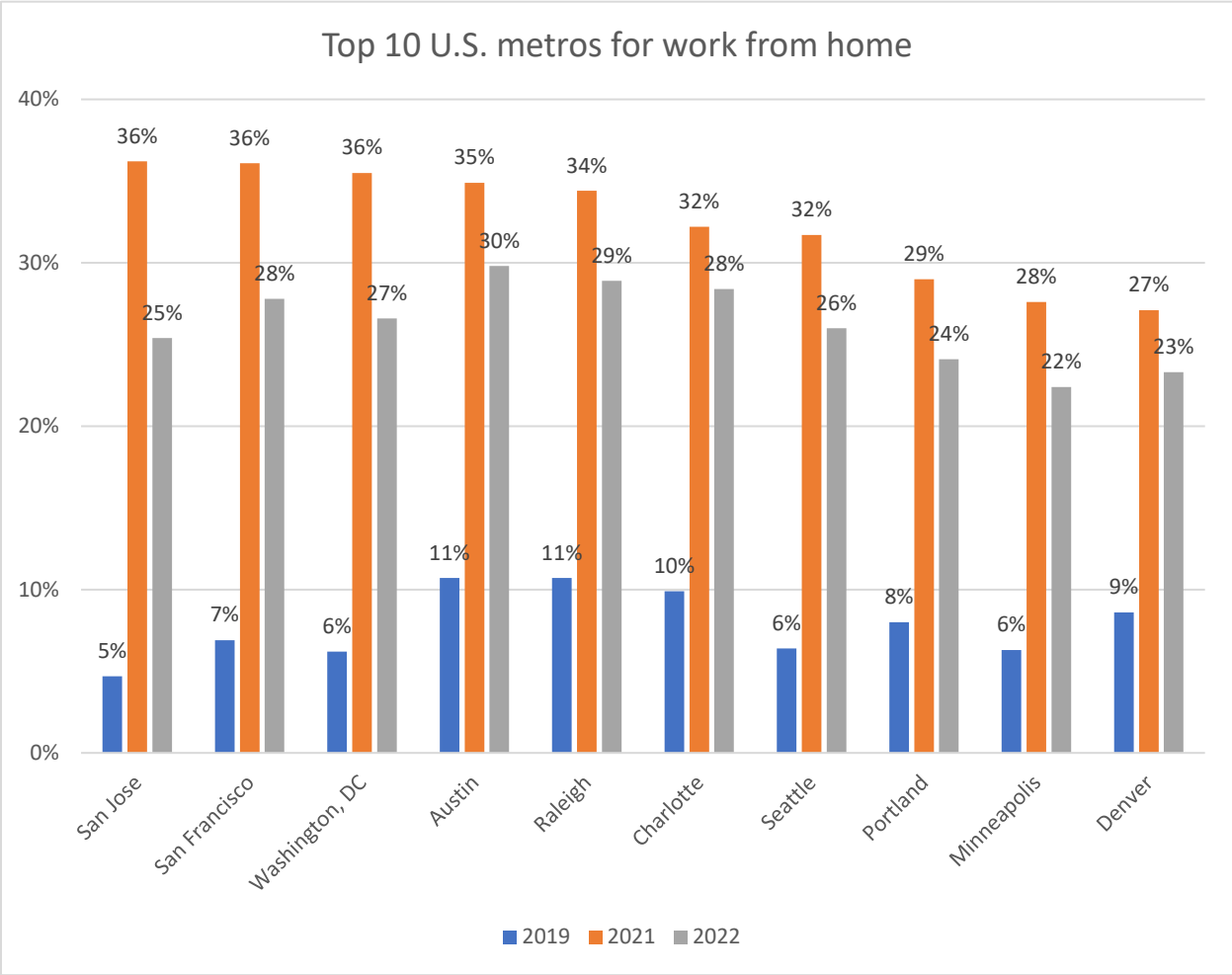


Figure 15: share of all workers that report working from home by MSA (ACS 1-year estimates)

Greater Portland’s economy is regional. People’s lives span city, county and state boundaries. As shown in Figure 16, many workers live in one county and work in another. This is a product of the complex decisions that people make about where to live and work, including consideration of community and housing preferences, quality of local schools, proximity to friends and family, budget, their career choices, and career choices of a partner or spouse.

This is one reason why Metro is tasked with having a regional perspective in its growth management decisions. Keeping the region compact is the best way to keep commutes as short as possible. The outward growth of metropolitan areas elsewhere in the U.S. has not resulted in their residents living and working in the same community. In fact, their average vehicle miles travelled per capita tend to be higher than those in greater Portland.

More recently, there is evidence that the increased prevalence of working from home has fundamentally shifted these commute patterns, sometimes reducing the share of commuters that live in one county and work in another by half. For instance, in 2021, the share of workers that live in Clark County, but work in Multnomah County and vice versa had been cut roughly in half compared to 2019.

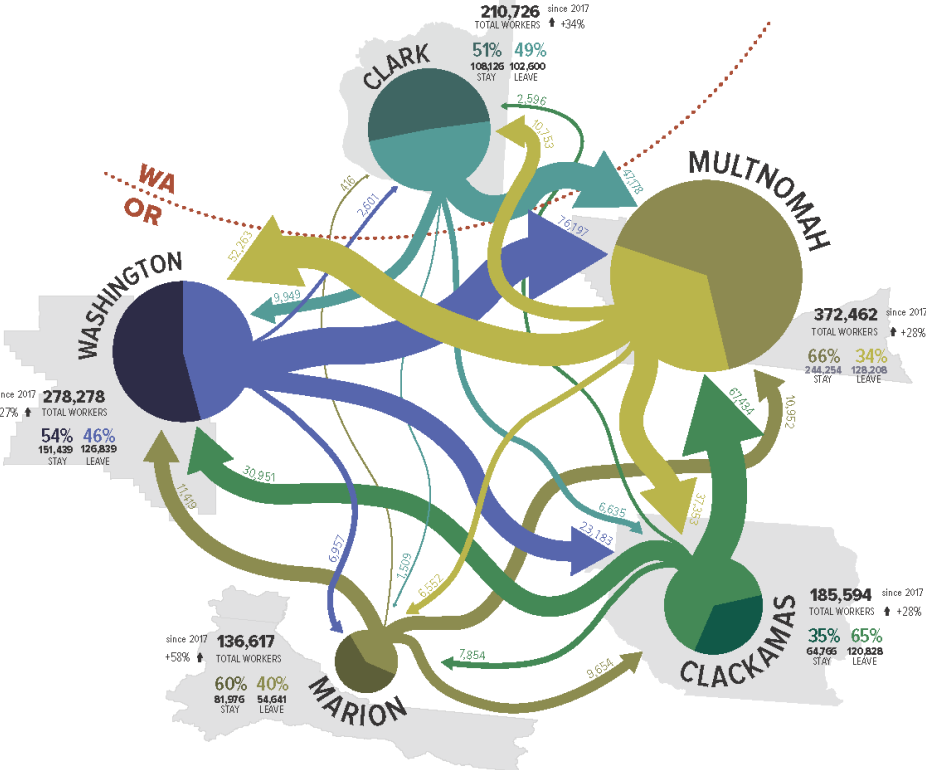


Figure 16: regional commute patterns in 2019 (source U.S. Census, LEHD)

## **Automation and artificial intelligence**

Automation of tasks is typically done with the goal of lowering costs and increasing productivity. Automation can complement human labor, allowing workers to focus on other tasks. For example, voice mail has freed businesses from writing down phone messages. This does not mean that automation will entirely replace occupations, but it may replace repetitive tasks once completed by workers. According to the Brookings Institution, occupations that are most susceptible to having a high share (70-100 percent) of tasks automated include production, food service and transportation. More recently, artificial intelligence has made inroads into tasks like software coding.

Given the mix of occupations in the greater Portland region, 45 percent of tasks are susceptible to automation (Muro, 2019). This study also indicates that younger workers, and Hispanic, American Indian, and Black workers are most likely to be adversely impacted by automation. These trends will be monitored in years to come. For some sectors, automation may result in lower job growth rates or lower employment densities.

## **Slower population growth means slower workforce growth**

Job growth is expected to be closely tied to population growth, both in terms of the degree of growth and the types of sectors that are expected to grow the most. As with the population and household forecast, the employment forecast was reviewed by an external panel of economists and demographers. The panel found the regional employment forecast to be reasonable. A summary of that review is included as Appendix 1A.

With birth rates expected to decline, population growth will slow, and the workforce will age. Figure 17 depicts the current population pyramid for the region. Age cohorts that are younger than 25 are smaller than older age cohorts. This will mean that, without additional migration of young people into the region, there will be fewer people in their prime working years 20 years from now.

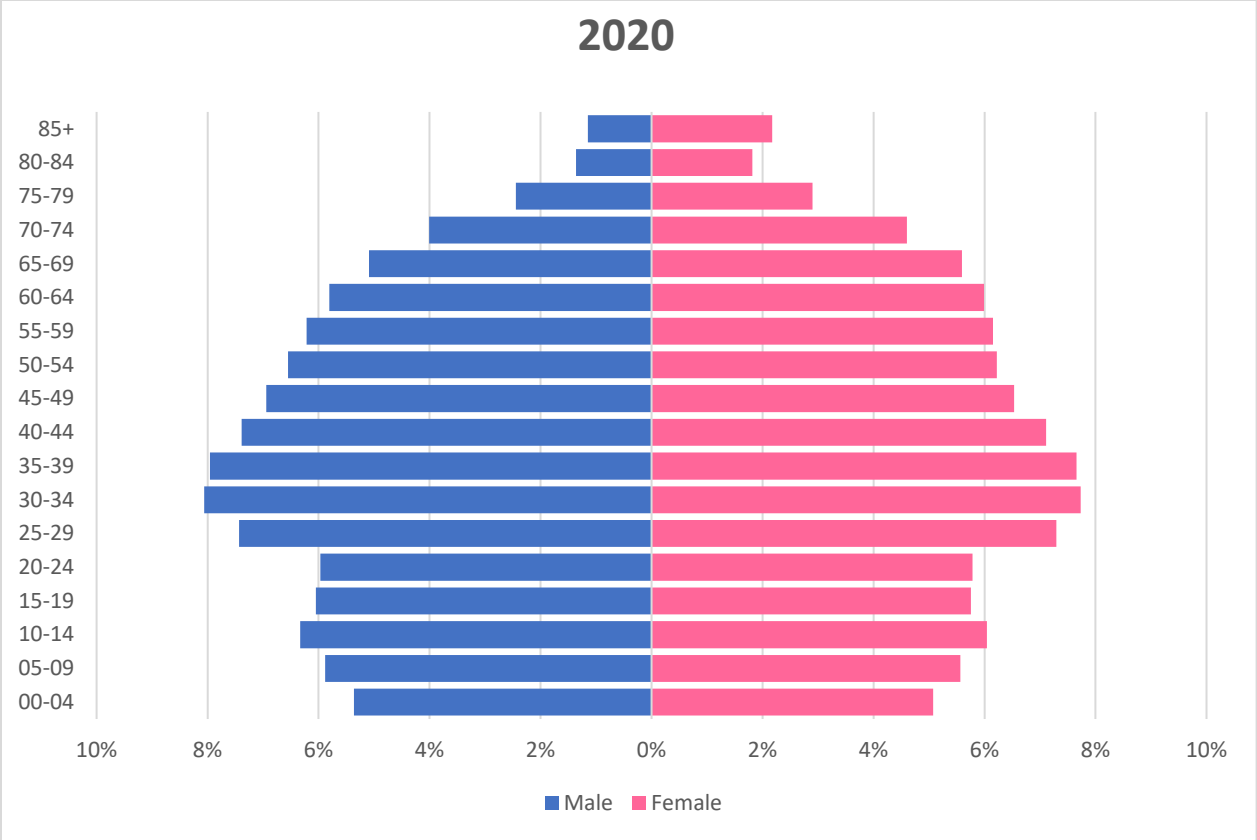


Figure 17: Portland MSA population pyramid in 2020 (source: U.S. Census)

With slower population growth, job growth will also be slower. Under the baseline forecast, 110,400 additional jobs are expected in the 7-county MSA between 2024 and 2044.

**Uncertainty in the employment forecast**

Even more so than with population growth, there is uncertainty surrounding employment growth. The regional economy is part of a global economy and is subject to current events as well as those that may come, but that cannot be predicted: pandemics, wars, innovations, new trade policies, federal investments, interest rates, recessions and rebounds. For these reasons, Metro uses a range forecast depicting possible growth (see Figure 18). While low and high growth are possible, they are not as likely to materialize as the baseline forecast. Higher job growth would require sustained increases in people moving to the region beyond historic rates of net migration.

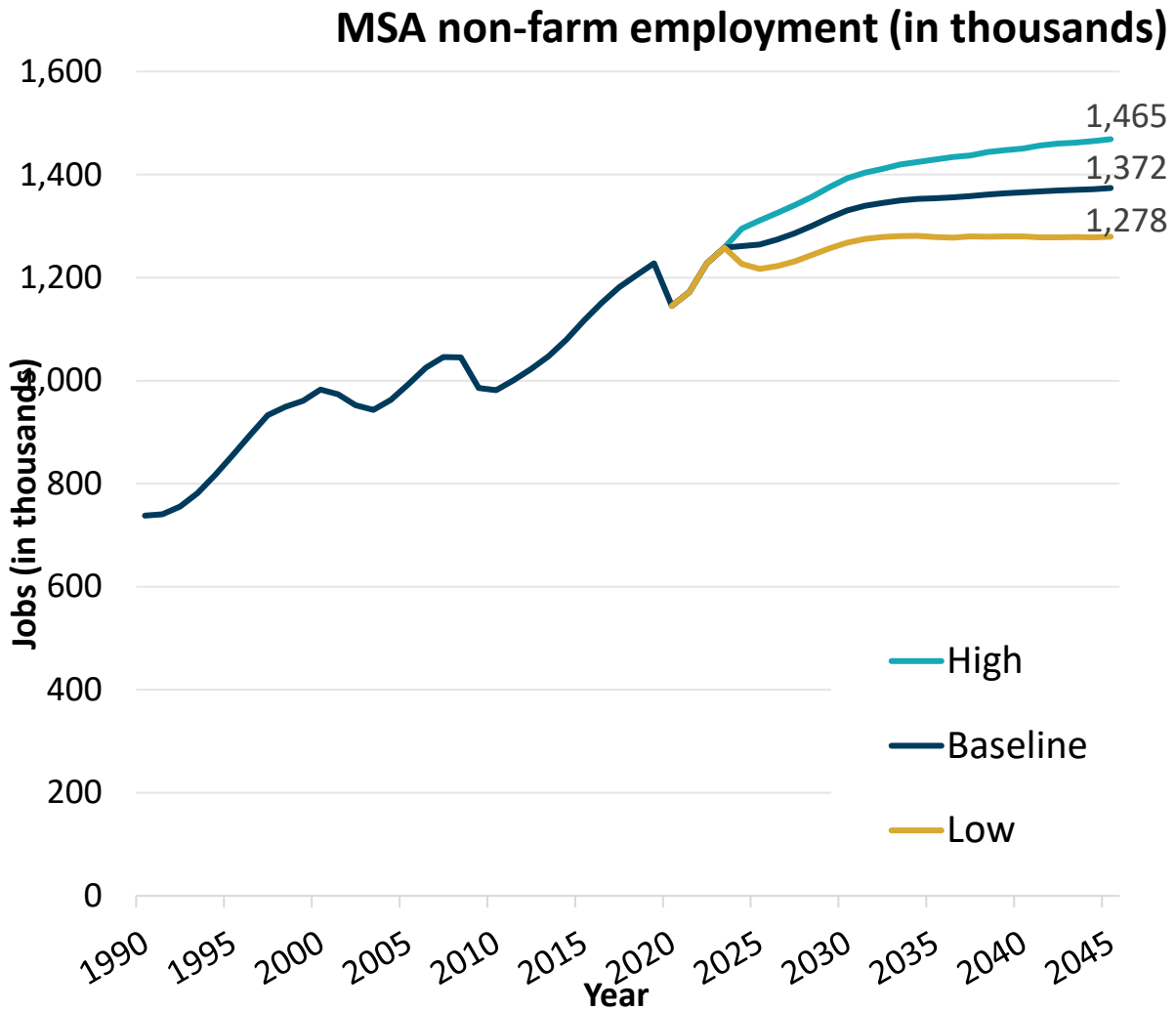


Figure 18: 7-county MSA non-farm employment forecast 2024-2044

Despite this uncertainty, Metro has a strong track record with its employment forecasts. Compared with actual employment numbers from 2019 (pre-pandemic), the three most recent regional forecasts have all been reliable. As shown in Table 17, forecasts for total non-farm employment are all within two percentage points of actuals. In the case of computer and electronic manufacturing – a sector of interest to the region – Metro overestimated jobs in two out of three of the most recent forecasts.



Table 17: Comparison of past Metro forecasts for the 7-county MSA with 2019 actual employment

	Past regional forecasts compared to 2019 actual employment		
	2009 forecast	2014 forecast	2018 forecast
Total non-farm employment	1.3%	-1.8%	-1.1%
Computer and electronics manufacturing employment	-2.3%	5.1%	0.8%

The fastest growing sectors are expected to be those that serve the population. As shown in Figure 19, sectors like professional and business services, healthcare, retail trade, and construction are forecast to have the most job growth. Because this forecast is intended to inform a decision about whether there is a need to expand the UGB for urban uses, it focuses on non-farm employment. However, it is important to note that agriculture continues to play a prominent role in Oregon’s economy. In 2022, the value of Oregon’s agricultural exports was \$2.37 billion (Oregon Department of Agriculture, 2024).

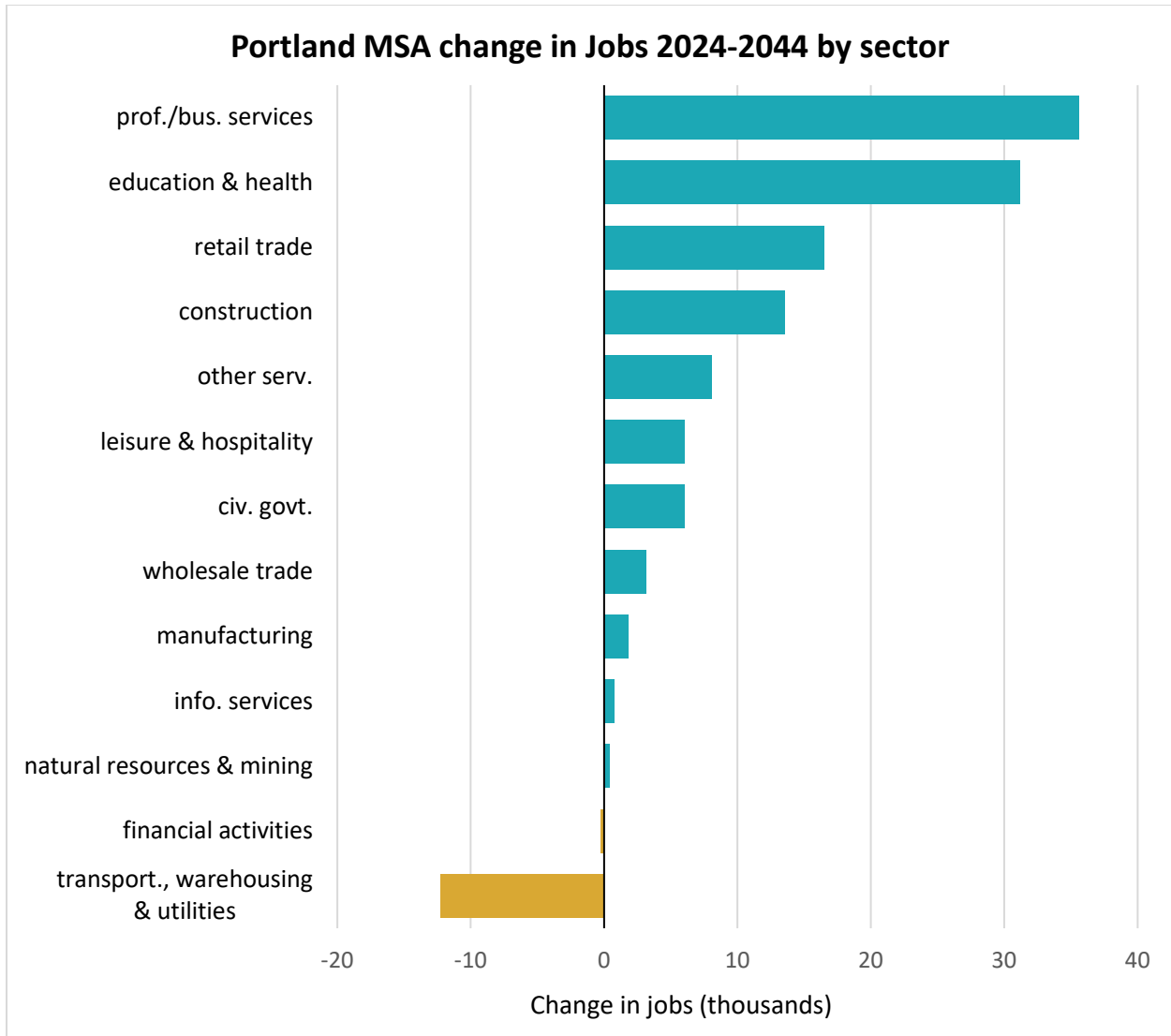


Figure 19: Metro employment forecast by sector (MSA, 2024-2044)

## High-tech manufacturing employment in the draft 2024 regional forecast

Because of greater Portland’s relative strengths in computer and electronic products manufacturing, there is long-standing interest in this sector. Consequently, Metro often fields questions about its forecast for this sector, including questions about how the CHIPS Act and its investments in semiconductor manufacturing influence Metro’s forecast.

Greater Portland has significant strength in engineering and design of semiconductors. CHIPS Act investments help maintain those competitive advantages, which have different implications for land use and land needs than the construction of new semiconductor fabrication facilities.

## National context for manufacturing employment

According to the U.S. Bureau of Labor Statistics (BLS), manufacturing employment reached its national peak four decades ago, in 1979. Since then, manufacturing employment has fallen in each of the five recessions and, in each case, never recovered to pre-recession levels. In the Metro region (7-county Metropolitan Statistical Area), the peak was reached in the late 1990s. Going forward, Metro's forecast shows more resilience for manufacturing employment at the regional scale than the S&P Global Insight forecast indicates for the nation. See Figure 20.

## UGR Roundtable perspectives

**Economic development** was a high priority topic for many roundtable participants they encourage Metro to think about how we stay competitive as a region. There were some conversations about the importance of desirable industrial land that will attract manufacturing and industrial businesses to the region to increase the number of high paying jobs for the region's residents. Others raised concern about what barriers are causing businesses to leave. Some participants pointed to zoning code as a barrier for mixed employment and industrial areas where allowed uses can be unclear. Some members mentioned land affordability as a barrier. Overall, many participants support recruitment efforts for high tech manufacturing.

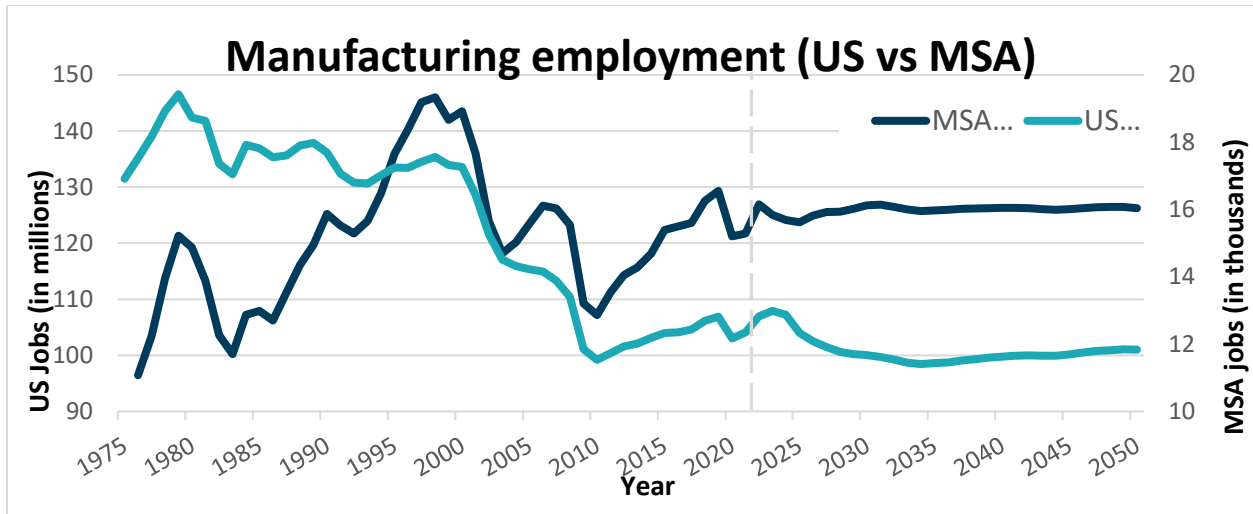


Figure 20: Manufacturing employment in the U.S. and the 7-county Portland Metropolitan Statistical Area (note different y axes)

Sources: Historic data: U.S. Bureau of Labor Statistics; National forecast: S&P Global Insight; MSA forecast: Metro

Nationally, durable goods manufacturing sectors, including the computer and electronics manufacturing sector, are all well below their 1979 job numbers. There are 55 percent the number of jobs in the computer and electronics manufacturing sector today as there were in 1979. The causes are well established and include offshoring and automation.

### State context for computer and electronic product manufacturing

For the state of Oregon, early 2001 marks the high point for employment in the computer and electronic manufacturing sector. For this sector, the state is currently at the same employment level as it was 20 years ago.

The Oregon Office of Economic Analysis (OEA) forecasts that the CHIPS Act will result in an additional 3,000 computer and electronic product manufacturing jobs statewide over the next five years (Oregon Office of Economic Analysis, 2023) before flattening for the duration of the 10-year forecast.

### Regional forecast for computer and electronic product manufacturing

Metro’s draft regional forecast for computer and electronic manufacturing is consistent with the forecast from the OEA. As shown in Figure 20, Metro’s forecast indicates short-term impacts of the CHIPS Act. The average annual growth rates for the computer and electronics manufacturing sector are 0.5% (statewide jobs) in the OEA forecast and 0.4% (MSA jobs) in the Metro forecast. Metro’s expert forecast review panel indicated that job increases from the CHIPS Act will be in the nearer term, followed by a longer-term slide, resulting in a slight net increase from 2024 to 2044. Panelists indicated that a second or third CHIPS Act or similarly scaled public subsidies would be necessary for computer and electronic product manufacturing job gains persist in the longer term.

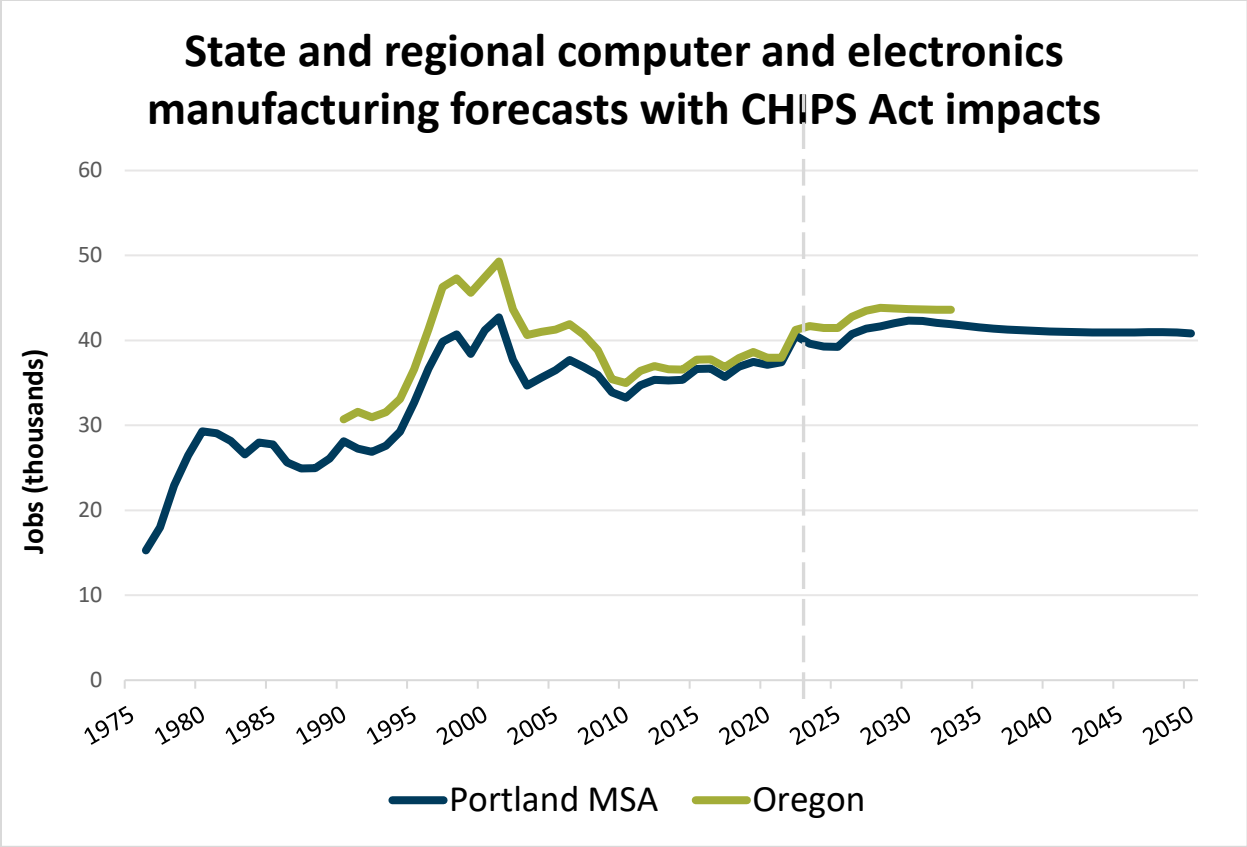


Figure 21: comparison of state and regional forecast for computer and electronics manufacturing with CHIPS Act impacts; State forecast; OEA; MSA forecast: Metro

The positive effects of the CHIPS Act in the computer electronics manufacturing sector are incorporated into the regional forecast model as an exogenous assumption (added from outside the forecast model framework). The model has inter-industry demand variables which estimate indirect and induced effects of computer and electronics manufacturing job increases on other sectors such as the construction or professional and business services sectors.<sup>7</sup> In other words, each new high-tech manufacturing job will have a multiplier effect in other sectors. Those multiplier effects are implicit in the forecast results.

### Employment growth capacity

Employment land is sorted into two categories: industrial and commercial. The commercial category includes a portion of lands zoned for mixed uses. Appendix 2 has more details about the methods and results of this capacity analysis. As described earlier in this report, the pro forma model was also used to estimate redevelopment potential on employment lands. Unlike

<sup>7</sup> Metro staff has not specifically calculated these impacts in other sectors with and without the CHIPS Act, but an increase in the manufacturing sector will generally lead to increases in some other sectors. Economic literature indicates that each high-tech manufacturing job has a multiplier effect of 3.5 to 4 jobs in other sectors in regional economies with an existing high-tech cluster.

with residential lands, the model identified minimal redevelopment potential on employment lands. As shown in Table 18, the region’s employment growth capacity comes almost entirely from vacant land and infill potential.

Relatively low redevelopment capacity for commercial employment uses can, in part, be explained by the fact that the pro forma model used for estimating redevelopment chooses the most profitable development option. This can produce skewed results in mixed-use zones. In many cases, the model identifies multifamily residential as the most profitable use on lands zoned for mixed-use. In reality, demand for commercial space would lead to more redevelopment for that use, potentially with ground-floor commercial and residential uses above. Consequently, redevelopment capacity for commercial uses as depicted in Table 18 may be an underestimate.

Jurisdiction-level capacity estimates were provided for review by local jurisdictions and reflect suggested edits. Buildable lands are part of the region’s long-term land supply but are not necessarily development ready or for sale today. Of note, employment growth capacity is not counted on West Hayden Island and the eastern portion of the former City of Damascus. This is because of long-standing planning, governance, or infrastructure provision challenges.

*Table 18: employment capacity in the Metro UGB as reviewed by local jurisdictions*

<b>Capacity type</b>	<b>Industrial buildable acres</b>	<b>Commercial buildable acres</b>
Vacant	2,574	288
Infill	3,252	147
Redevelopment	124	46
<b>Total</b>	<b>5,950</b>	<b>481</b>

Appendix 6 includes a description of the site characteristics of these employment lands.

## **Employment land needs analysis**

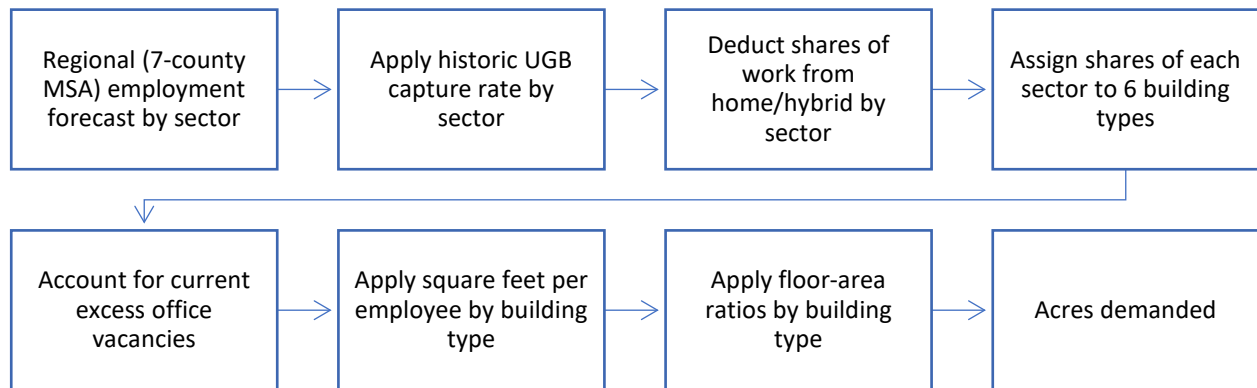
The regional employment forecast is a primary source of information for estimating the region’s future employment land needs. Several steps are taken to convert those forecast jobs into demand for land and are summarized in Figure 23. These methods are like those typically used by cities when completing Economic Opportunities Analyses. Additional details about these steps can be found in Appendix 3.

Generally, these steps are intended to address three issues:

- Not all the larger 7-county MSA employment growth will occur inside the Metro UGB. We use a UGB “capture rate” based on historic rates to estimate UGB employment growth.
- There are factors impacting future employment land need that must be accounted for:

- Work from home and hybrid work have become more widely accepted and reduce demand for commercial office space.
- Current high office vacancies provide an additional source of commercial office capacity that has not been accounted for in employment capacity estimates because it cannot be characterized as vacant land, redevelopment, or infill.
- Distinct types of jobs have different building and space requirements. For instance, office buildings can be multi-story and have higher employment densities while warehouses tend to be single-story and have lower employment densities because of automation. A group of public and private sector experts was convened on two occasions to provide input on these assumptions.

Figure 22: overview of steps for translating forecast jobs into 20-year demand for land



Applying these steps, results in an estimated baseline regional demand from 2024 to 2044 for the following:

- 1,400 buildable acres needed for industrial employment
- 800 buildable acres needed for commercial employment

## Employment lands gap analysis results

### Industrial land gap analysis results

Industrial lands support uses like industrial, flex/business parks, and warehousing. This analysis found that, in aggregate, there is a surplus of industrial lands inside the UGB for meeting expected industrial employment growth. This is true even under the high growth forecast.

Table 19: Industrial land capacity gap for Metro UGB 2024-2044

	Capacity (acres)	Demand (acres)	Surplus or deficit (acres)
<b>Low growth forecast</b>	5,950	-1,500	+7,450
<b>Baseline growth forecast</b>	5,950	1,400	+4,550
<b>High growth forecast</b>	5,950	5,200	+750

Though, in aggregate, there is a regional surplus of industrial land, those acres of land may not have the location and site characteristics that will lead to industrial development. Over the years, Metro has partnered on several updates of the Regional Industrial Site Readiness inventory. Those analyses consistently find that many of the region’s large industrial sites (25+ buildable acres) are not ready for development and need action or investment to address:

- Transportation improvements
- Wetland mitigation
- Brownfield cleanup
- Site assembly
- City annexation and zoning

The inventory of large industrial sites was updated for the Oregon Semiconductor Taskforce in 2022. The portion of the inventory for the Metro UGB is shown in Figure 24. Tier One sites could be development ready within six months. Tier Two sites would likely take 7 to 30 months to become development ready. Tier Three sites would likely take over 30 months to become development ready.



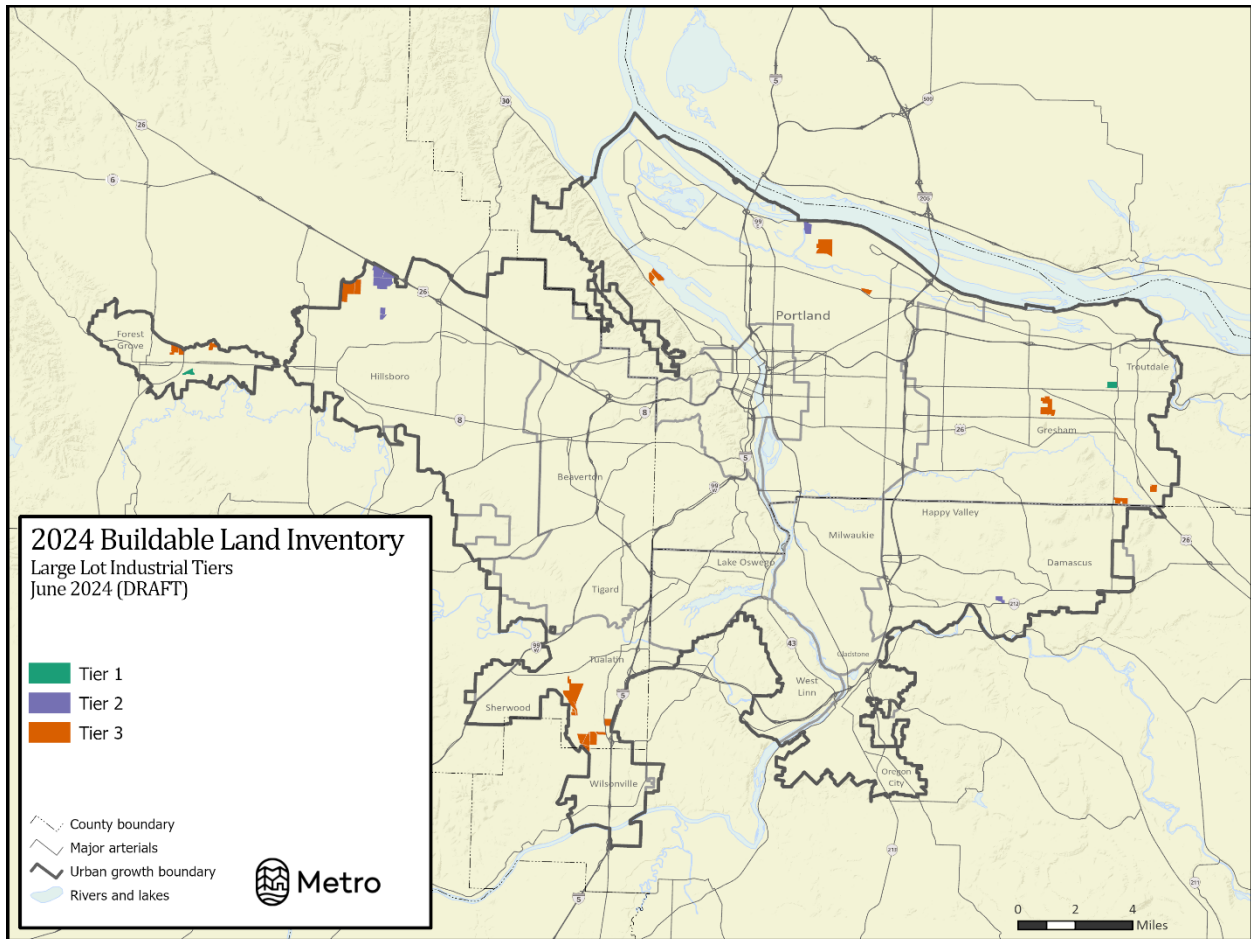


Figure 23: Inventory of large industrial sites (25+ buildable acres) in the Metro UGB

While a site-by-site review of development challenges is not possible for the thousands of acres of smaller industrial sites in the UGB, it is likely that many smaller sites are also held back by similar challenges. A more general assessment of the characteristics of these employment lands is included in Appendix 6. Much of the region’s industrial land supply consists of smaller parcels with an average lot size of 3.8 acres and a median lot size of 1.7 acres.<sup>8</sup> Metro’s 2023 Small Site Industrial Readiness report found that small industrial spaces are in high demand and have lower vacancy rates than the overall industrial space vacancy rate. These small spaces and parcels that can accommodate them serve an important role for new or smaller businesses, which are often woman or minority owned.

However, smaller industrial spaces and smaller parcels can’t serve the entire industrial market. In particular, larger sites are in demand for expansion of existing businesses and recruitment of businesses from outside of the region. For that reason, the Metro Council established the following policy in the Regional Framework Plan:

<sup>8</sup> These statistics are for vacant and infill lands and do not include redevelopment lands.

*"1.4.6 Consistent with policies promoting a compact urban form, ensure that the region maintains a sufficient supply of tracts 50 acres and larger to meet demand by traded-sector industries for large sites and protect those sites from conversion to non-industrial uses."*

Since the 2017 update of the Regional Industrial Site Readiness inventory of large industrial sites, 15 large industrial sites have developed. Six of the sites that developed are over 50 acres in size. There are ten remaining sites over 50 acres inside the UGB. Of those, two sites have marine or airport use restrictions, leaving eight sites over 50 buildable acres inside the UGB that are available to the general industrial market.

It is not possible to precisely forecast long-term demand for individual sites since development of these sites depends on individual business decisions. Firms have idiosyncratic site needs or preferences such as access to skilled workers, specialized infrastructure, proximity to existing economic clusters, availability of financial incentives, and tax climate.

The August 2022 Oregon Semiconductor Taskforce report identified short term statewide needs for the following:

- Two sites of 500+ acres each to accommodate large-scale semiconductor R&D and/or production fabrication operations.
- Four sites of 50-100 acres suitable for integrated device manufacturers or major semiconductor equipment manufacturers.
- At least eight sites of 15-35 acres to enable key suppliers to the semiconductor cluster to locate and expand.

### **Analysis of the specific site characteristics in the proposed Sherwood West employment area**

The Sherwood West Concept Plan includes land for housing, schools and civic facilities, park space and 265 net acres<sup>9</sup> for employment uses that would support about 4,500 new jobs. Though there is, in aggregate, a surplus of industrial acreage inside the UGB, there are still valid reasons that support adding the Sherwood West urban reserve to the UGB. ECONorthwest explored regional and local data trends to assess whether the sites identified for future employment growth in Sherwood West have characteristics that make them more suitable for meeting the employment needs of the Metro region.

ECONorthwest’s analysis is included in Appendix 9 and finds that the land within the North District Mixed Employment Area of the Sherwood West urban reserve has specific characteristics that meet a regional need for large 40 to 50-acre parcels with minimal need for site aggregation, slopes under seven percent, and proximity to the highway. This assessment indicates that Sherwood West would be more suitable to meet identified needs for industrial growth than other lands inside the existing UGB.

### **Industrial land options**

Informed by this analysis, the Metro Council has the discretion to decide one or more of the following:

- Based on regional forecasts, find no need for additional land for industrial uses.
- Add the 130net-acre mixed employment portion of the Sherwood West urban reserve to the UGB based on a determination that the area offers unique site characteristics for

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<sup>9</sup> Includes employment lands in the southern “hospitality zone” as well as lands in the northern mixed employment area.

## UGR Roundtable perspectives: Agricultural land demand

The discussions around future growth and urbanization prompted some members to express concern about **competing demands on agricultural land**.

Participants expressed that agriculture land is employment land pointing out that industrial or commercial zoned uses are not the only way to support job growth in the region. It was important to some roundtable participants that as urban reserves come into the growth boundary and develop, that there is an understanding of the transportation needs for both rural and residential uses – and that those transportation needs are addressed in a compatible way. Other participants noted the link between environmental policy goals and preserving agricultural land, including mentioning that there is an increased cost and carbon footprint of pushing food production outside of Oregon.

industrial and flex uses that are in demand and that cannot be found elsewhere in the UGB. This decision would be supported in part by the land needs identified by the state Semiconductor Taskforce.

### Commercial land gap analysis results

Commercial lands support all other non-industrial employment uses like offices, retail, and medical. To some extent, commercial demand also gets met on industrial lands, for example through retail uses on industrially zoned lands. However, this analysis has not estimated that potential crossover. The binary classification of employment capacity as industrial or commercial may have the effect of overstating the deficit for commercial land. A similar issue may be present for mixed use zones since the pro forma model appears to “choose” residential redevelopment over commercial redevelopment. In reality, demand for commercial space would lead to more redevelopment for that use, potentially in combination with residential uses above.

Table 20: commercial land capacity gap for Metro UGB 2024-2044

	Capacity (acres)	Demand (acres)	Surplus or deficit (acres)
<b>Low growth forecast</b>	480	-300	+780
<b>Baseline growth forecast</b>	480	800	-320
<b>High growth forecast</b>	480	2,300	-1,820

Given the current nationwide challenge of there being excess vacant office buildings, this finding of a potential capacity deficit creates some dissonance. However, it is important to remember that the commercial category includes uses that go beyond office uses (for instance, retail and medical) and this is a long-term demand forecast.

## Commercial land options

Informed by this analysis, the Metro Council has the discretion to decide one or more of the following:

- Plan for the low growth forecast and find no need for additional land.
- Plan for the baseline forecast:
  - Assume that 320 acres or more of the region’s industrial land surplus is functionally available for commercial employment uses, thereby addressing the commercial capacity gap; or,
  - Assume that additional commercial redevelopment would occur if there is demand for commercial space.
- Plan for the baseline forecast and find a need for a UGB expansion:
  - Add the 135-net-acre commercial employment portions of Sherwood West urban reserve to the UGB; and,
  - Consistent with observed development trends, assume that a small portion (185 acres) of the region’s industrial land surplus will be available for commercial employment uses, thereby addressing the remaining commercial capacity gap.
- Plan for the high employment growth forecast and add the 135-net-acre commercial employment portions of the Sherwood West urban reserve to the UGB; and,
  - Add approximately 1,665 additional net acres of urban reserves that lack a city proposal the UGB; or
  - Work with local jurisdictions to rezone industrial lands to allow a greater variety of commercial employment uses.

### Youth Cohort perspectives: Sustainability

As we discussed planning for new homes and jobs in the region, youth cohort members felt that **sustainability, environmental preservation, and climate justice**, was a top priority for Metro Council to consider. The group wanted to see natural resource preservation in any proposed expansion area and cautioned against creating urban heat islands. Some members of the group spoke of the importance of a healthy tree canopy and planting native species that would be resilient to changing climates. Overall, the group wanted to see Metro incentivizing a balance within new developments where new housing and jobs could be created while still protecting important natural resources and biodiversity.

## CONCLUSION

The 2024 urban growth management decision, like growth management decisions before it, has surfaced people’s thoughts on many topics. Some of those topics relate directly to long-term land supply while others relate more generally to land use planning. Others require collaboration across sectors.

The Metro Chief Operating Officer recommendations to be released in mid-August will provide more suggested responses to a number of these topics.

## UGR Roundtable perspectives: Summary

Discussing the variety of regional challenges and concerns led to conversations about the **role of Metro and local governments** in finding solutions. Roundtable members highlighted primary roles of Metro as listening to local concerns, partnering with cities to find infrastructure funding, advocating at the state level, and being nimble and flexible to change. Some of the local jurisdiction representatives mentioned the increasing need for fiscal balance in their community to continue to fund their local services.

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

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<sup>i</sup> (Washington University Institute for Health Metrics and Evaluation, 2024)



## **6.2 WPES: System Facilities Plan Update**

*Information/Discussion Items*

Metro Policy Advisory Committee  
Wednesday, July 24th, 2024

## MPAC Worksheet

**Agenda Item Title:** Garbage and Recycling System Facilities Plan – Phase 3 Proposed Investments

**Presenters:** Marta McGuire, Estee Segal, Luis Sandoval

**Contact for this worksheet/presentation:** Estee Segal

### **Purpose/Objective**

Share an update on the Garbage & Recycling System Facilities Plan, including a preview of specific options for the facility and program investments to include in a draft plan, based on input and policy direction Metro Council provided at a workshop in May.

### **Outcome**

This item is informational for MPAC members to understand how stakeholder input and Council direction has led to the facility and program investment options to be presented to Council on July 30.

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

Staff presented the results of stakeholder engagement completed in Phase 3 to MPAC in February 2024. This engagement was focused largely on [four scenarios](#) to address gaps and modernize the system through different combinations of regulation, facilities and investments. Comparing the scenarios brought forth larger questions about Metro's role and how different policies could address gaps in the system.

In May, Metro Council met to explore these underlying policy areas and provide direction on a set of investments. This workshop allowed Metro Council to explore their preferences in six policy areas that were embedded in the scenarios: community drop-off depots, reuse and repair, organics, commercial transfer stations, wet waste tonnage flow, and private facility regulation.

Councilors agreed that Metro should increase its role in filling gaps in the solid waste system by focusing on providing accessible services in the region that are not widely supported by the private sector (such as reuse, recycling, self-haul and household hazardous waste).

Council also provided specific direction for six policy areas that can prioritize waste reduction and address geographic inequities while maintain affordable services:

- **Community drop-off depots:** Metro should build a network of accessible community drop-off depots for reuse, recycling, household hazardous waste and self-haul garbage.
- **Reuse and repair:** Metro should increase its financial support for the reuse sector and partner with reuse organizations to plan and operate new facilities.
- **Organics:** Metro should invest and partner with the private sector to increase access and capacity to transfer and process organics to end markets.

- **Commercial transfer stations:** Metro should consider reducing its role in processing and transferring commercial waste at its two existing transfer stations.
- **Wet waste tonnage flow:** Metro should assess the multiple impacts of reducing the amount of wet waste flowing to Metro facilities.
- **Private facility regulations:** Metro should assess wet waste regulation options.

At the July work session, staff will present options in the form of specific facility and program investments, along with their targets, outcomes, and costs, that reflect the direction and preferences Council provided in May.

**What packet material do you plan to include?**

1. SFP values and outcomes summary flyer



# Garbage and Recycling System Facilities Plan

## *Phase 1: Developing values and outcomes*

### **Overview**

Metro's 2030 Regional Waste Plan set a vision to reduce waste, protect the environment and human health and provide excellent services for everyone. Facilities such as transfer stations or repair, reuse and recycling centers play a key role in managing the things we all throw away.

As the greater Portland region grows, the Garbage and Recycling System Facilities Plan will look at where we can invest in public, private or non-profit facilities or services to make our system work better for everyone.

### **What is guiding the development of this plan?**

The values and racial equity principles of the 2030 Regional Waste Plan guide this work. The plan also includes a new value reflecting Metro's commitment to seek Tribal government consultation. From these values, staff created desired outcomes specific to this new plan. Together, the values and outcomes will steer the development of an investment plan that includes:

- a focus on reducing waste through infrastructure improvements
- improved quality and access to services
- affordable services for everyone

These values and outcomes will guide evaluation of service gaps and investment options and will be used to measure the overall success of the plan over the next 20 years.

The values and outcomes were shaped with input from multiple groups, including Metro Council and four advisory committees: Metro's Committee on Racial Equity, the Metro Policy Advisory Committee, the Regional Waste Advisory Committee and a newly formed community advisory group.

### **A focus on waste reduction**

This plan will outline the infrastructure investments necessary to help the region reuse, repair and recycle more materials in order to reduce the negative health and environmental impacts of waste.

New facilities could help the region recover more waste through recycling, composting or energy recovery, instead of sending it to the landfill.

We can have an even greater impact on health and the environment by building infrastructure to reuse and repair more. Reusing and repairing materials not only avoids the health and environmental impacts from landfilling, but helps reduce the need to manufacture new products.



# Garbage and Recycling System Facilities Plan

## Summarized Values and Outcomes:



### Healthy people and environment

- Minimize the negative health and environmental impacts of facilities by incorporating innovative sustainability practices as outlined in Metro's green building policy
- Develop good neighbor agreements between communities and facilities



### Resource conservation

- Identify the items the plan needs to target for reuse, repair, recycling or composting – and the infrastructure needed to manage them
- Increase access to donate and buy used items
- Provide workspace, reclaimed materials and other types of support to regional reuse and repair initiatives



### Environmental literacy

- Provide learning opportunities at facilities through tours, displays, exhibits, viewing rooms
- Develop programming with organizations focused on waste prevention and environmental justice



### Economic well-being

- Provide jobs with living wages, benefits, and safe work environments
- Recruit and retain workers who are underrepresented in the garbage and recycling industry
- Create opportunities within the garbage, recycling, reuse and repair sectors for people with barriers to employment



### Excellent service and equitable system access

- Develop a network of facilities to provide equitable system access
- Establish direction for Metro transfer stations and Metro solid waste facilities
- Keep facility-based services affordable for low-income customers
- Make public facilities accessible for people with disabilities and people who rely on transit
- Develop multilingual and culturally relevant communication tools for facilities



### Operational resilience

- Develop funding options that advance waste reduction and affordability goals
- Design efficient facilities to serve people quickly and recover useful materials
- Identify facility investment needs for natural hazard resilience
- Shape garbage and recycling system with key elements from regional transportation and land use planning efforts



### Community restoration

- Evaluate potential facility benefits and burdens using a climate justice lens
- Incorporate the needs of marginalized communities in the planning process



### Community partnerships

- Create a Community Advisory Group that works with staff to develop the plan
- Involve community-based organizations in decision-making of facility projects
- Partner with Black, Indigenous, People of Color Communities and immigrant-led organizations to support reuse and repair projects at new facilities



### Community investment

- Develop Community Benefits Agreements to ensure benefits are equitably shared and address community needs
- Provide community gathering spaces such as parks and meeting rooms at public facilities that serve residential customers



### Tribal consultation

- Seek to consult with Tribal governments to advance shared priorities such as cultural and historic resource protection, environmental protection and resources conservation.
- Establish partnerships with Tribes through government-to-government engagement

For more information, visit  
[oregonmetro.gov/  
systemfacilitiesplan](https://oregonmetro.gov/systemfacilitiesplan)

Materials following this page were distributed at the meeting.

Sherwood UGB expansion comments,  
Brian Fields  
Secretary, Eastview Road Neighborhood Association

I urge the Metro Council to scale back the Sherwood West Urban Growth expansion. We do not have the transportation infrastructure to support this growth. In addition, the City of Sherwood has not done any planning, not even “conceptual”, to expand the capacity of Elwert Road, the only viable north south connector.

The current plans for Elwert Road are inadequate for the future growth planned.

Elwert road is serving as a regional connector. Even without bringing in additional land in the Sherwood West Urban Reserve we can expect the traffic flow to increase. With the addition of large amounts of new housing the burden on the existing road will only increase. How has Sherwood planned for increased capacity? They have not.

The Sherwood West concept plan shows the vision that Elwert road remain one lane in either direction with the addition of turn lanes. The city has repeatedly said that their vision of Elwert is that of a neighborhood street. This flies in the face of the current reality of an already overburdened regional connector, let alone showing any sense of planning for the future to accommodate a greatly increased local population. The only mention in the Sherwood West concept plan of planning for future connectivity is vague mentions of conceptual connectors. You can reference the “Transportation and Infrastructure” Section on page 101 of part 1 of the Sherwood UGB expansion proposal.

“North-South Connectivity – The concept of adding a route to enhance regional north-south connectivity will require future study. Additional feasibility and cost analysis will be

necessary. This should be considered as a long-term strategy, rather than an essential component of early stage transportation planning in Sherwood West.”

But the truth is that the Sherwood West topography is not going to allow any new north south connectors. During the public outreach portion of the Sherwood West concept plan much feedback was provided to the city outlining specific complications for a north south connector west of Elwert Road. The City’s own traffic modelling demonstrated that regional traffic could not be diverted from Elwert Road to any significant degree. The land is riddled with steep slopes and is bisected by Chicken Creek. In addition, the border of Sherwood West veers sharply east when you go north of Edy Road. If this hypothetical connector were built, as it moved north it would run into Rural Reserve land. Due to this a connection to Scholl’s Sherwood Road to the north could not be completed. This means any road that was built would have to feed back onto Edy and Elwert, the existing transportation corridor.

There really is no choice but to improve the existing transportation corridor, but the City of Sherwood’s West Concept plan does the opposite. Sherwood is proposing to move portions Elwert Road off it’s current north south alignment and meander to the west, pass through two round-abouts, incur a new Chicken Creek crossing and then meander back to the Elwert Road current alignment in the north.

We have examples in the nearby region of what successful road planning would look like. The massive development to the north of Sherwood West, on Roy Rogers Road, has been accompanied by expansion of that road to 4 lanes. If you want to see aesthetically pleasing road expansion, we need only look to the improvements Lake Oswego has done on Boones Ferry Road. The road was both

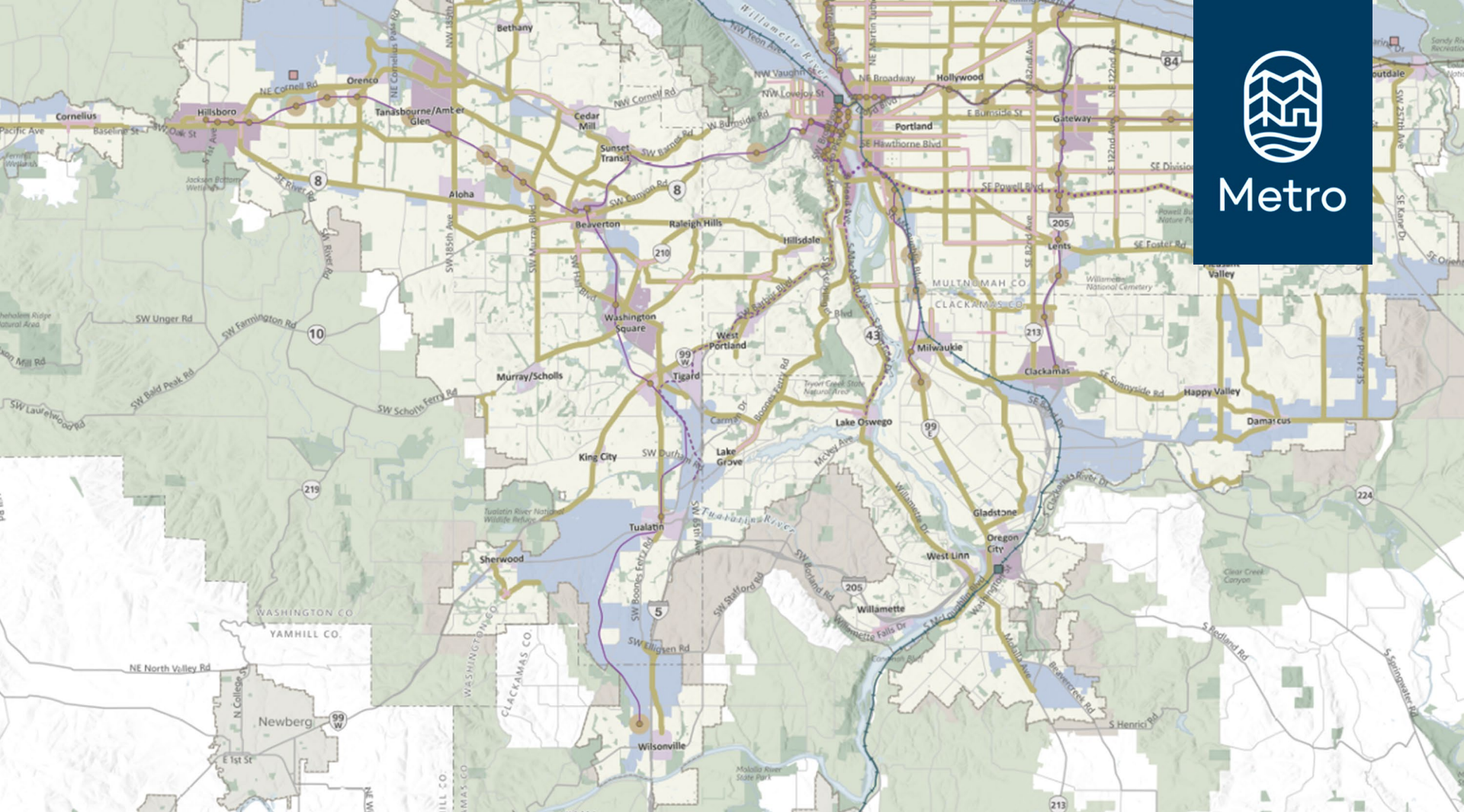


improved to 4 lanes with a turn lane, but also includes attractive landscaped dividers and sidewalks. This is much like Sherwood has proposed, but with a critical difference, Lake Oswego recognized the need to increase capacity while making attractiveness an important part of their road design. Both can be done.

To be clear my point is not that Sherwood has not already solved the capacity problem prior to asking for an Urban Growth Boundary expansion. The problem is that Sherwood is not even planning for increased capacity. In fact, their public statements during the West Concept Plan outreach process indicated they want to discourage regional traffic and keep Elwert as a neighborhood street. See the description on page 227 of the submittal, in the Section title “SW Elwert Road Design Concept”. Make note that the designation for much of Elwert Road is “Residential Boulevard”. There is much risk if Sherwood doubles down on this approach that near term development will forestall any future capacity improvements on Elwert Road.

Their proposal to bring in the entire Sherwood West Urban reserve should be scaled way back until the City actually provides realistic transportation planning. Bringing the entire 1200 acres of Sherwood West now into the UGB is only going to compound a local and regional transportation quagmire which already exists. Sherwood needs to confront the reality that topography and the Urban Reserve boundaries themselves prevent any alternate north south connector. I encourage Metro to not approve Sherwood’s ask to bring in the entire Sherwood West Urban Growth Reserve into the Urban Growth boundary.

Brian Fields  
Resident of Sherwood West

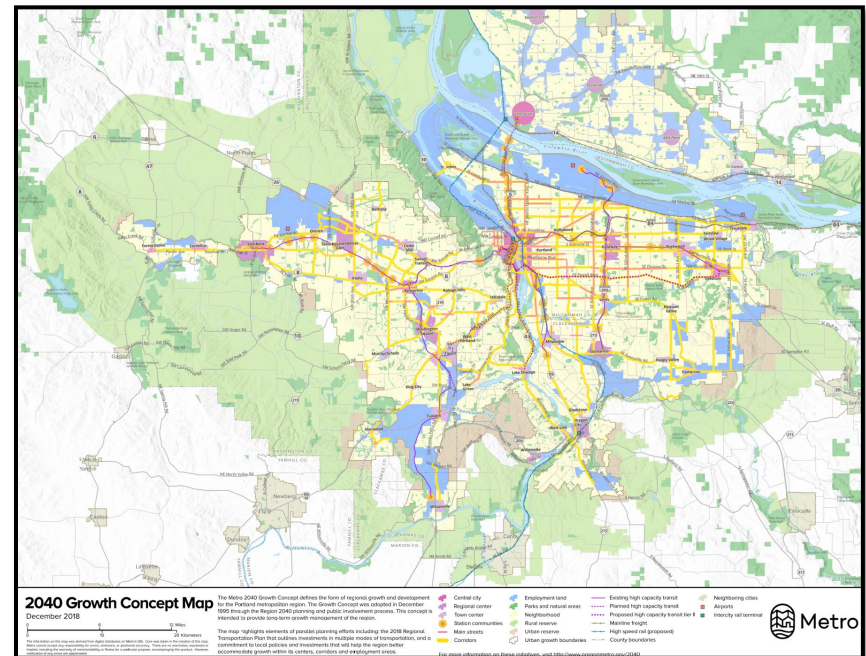


# Proposed Amendments to UGMFP Title 6

MPAC: July 24, 2024

# 2040 Growth Concept

- Long-range vision of regional urban form
- Growth Concept Map depicts that form
- Now part of the RFP
- Advanced by UGMFP

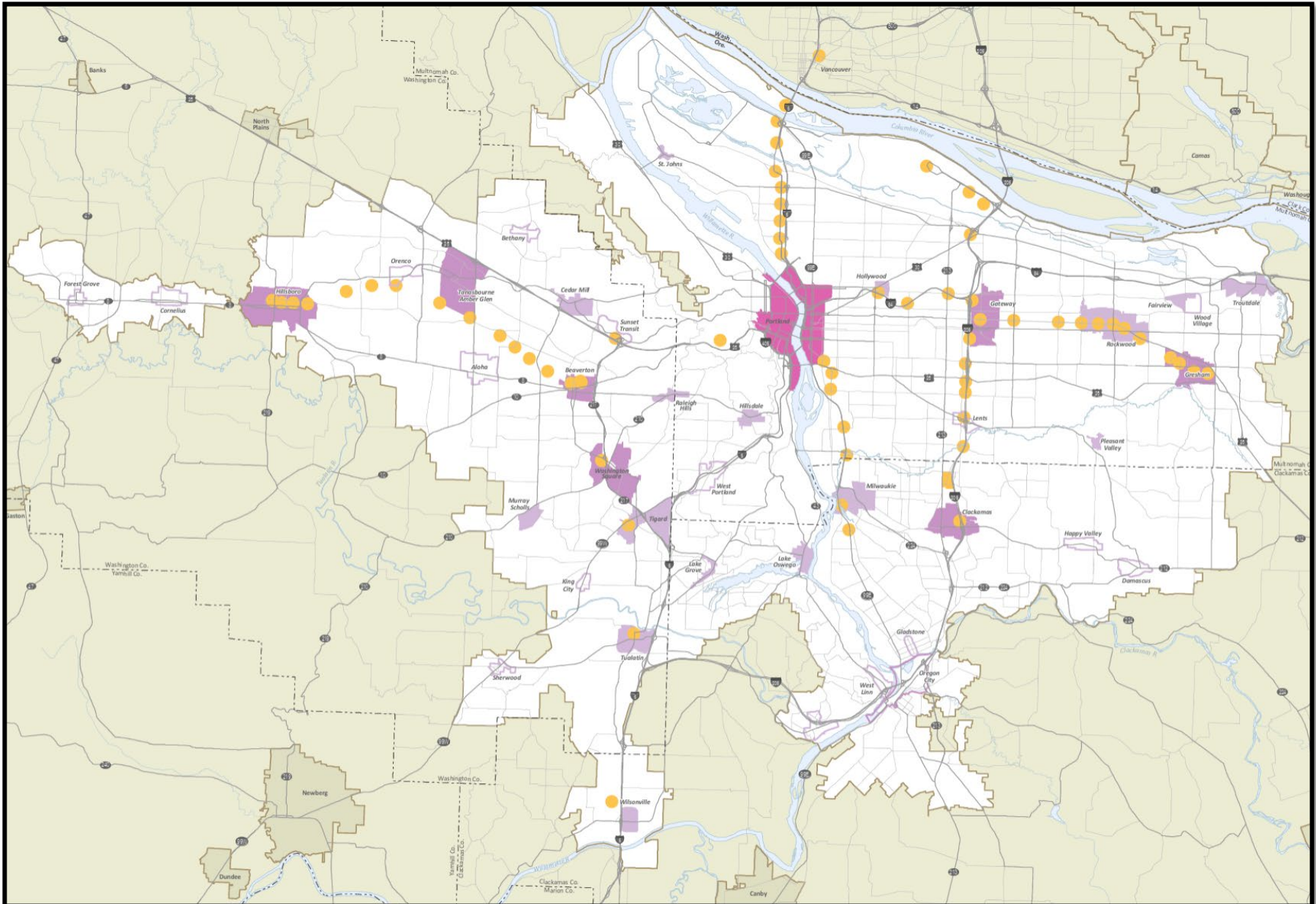


# 2040 Growth Concept

## *Three types of centers:*

- Central City
- Regional Centers (8)
- Town Centers (32)





# Title 6, Centers, Corridors, Station Communities and Main Streets, Adopted Boundaries

October 2014



- Central city, adopted boundary
- Regional center, adopted boundary
- Town center, adopted boundary
- Regional center, conceptual boundary
- Town center, conceptual boundary
- Station communities, adopted boundary
- Station communities, conceptual boundary
- County boundaries
- Urban growth boundaries
- Neighbor cities



The information on this map was derived from digital databases on March 9, 2014. Data was taken from the creation of this map. Metro cannot accept any responsibility for errors, omissions, or outdated accuracy. There are no warranties, expressed or implied, including the accuracy or completeness of these data in any particular jurisdiction, including this one. However, no liability shall be assumed for any errors or omissions.

# Changes under CFEC

## *Currently:*

- Title 6 incentive approach to centers
- Center boundaries not generally required

## *CFEC Mandate:*

- Title 6 requirement for boundaries of **urban-planned** centers
- General location in Growth Concept Map
- Boundaries to be adopted locally by end of 2025



# Draft Title 6 Amendments

- Address CFEC requirements
- Boundaries required for Central City, as well as Regional and Town Centers, **if planned for urban uses**
- Boundaries to be adopted by ordinance by 2025
- **One jurisdiction per center** is sufficient
- Timeframe for reporting to Metro
- Minor, non-substantive “clean up” amendments

# MPAC Recommendation

Do you recommend that the amendments to Title 6, as proposed in Attachment B, be adopted by the Metro Council?

(YES *or* NO)



Thank you!





Metro

# Urban growth management: Draft Urban Growth Report

MPAC

July 24, 2024

## Technical work and analysis: Developing the urban growth report

- Buildable land inventory (BLI)
- Regional forecast
- Capacity analysis
- Employment trends and site characteristics
- Housing needs analysis
- Residential readiness analyses
- Draft urban growth report (UGR)

## City expansion proposals

- Letters of interest
- Expansion proposals

*2040 planning and development grants available*

## Metro Council decision

- Consider Metro staff and advisory group recommendations
- Public hearings
- Policy direction
- Final decision

Nov 2022 - July 2024

Dec 2023 - April 2024

Aug 2024 - Dec 2024

Residential readiness analyses

Capacity analysis - begin BLI and regional proforma model

Draft capacity analysis available for local review

Regional forecast updated

Housing needs analysis

Draft UGR public comment period

Public hearing

Letters of interest due

Proposals due

Advisory group input

Final UGB decision

## Engagement

- MTAC
- MPAC
- CORE
- Land Use Technical Advisory Group
- Jurisdictional outreach
- Urban growth report roundtable
- Youth cohort
- Interest group presentations

# Project timeline

	July	August	September	October	November	December
<b>Council</b>	Discussion of draft Urban Growth Report released July 9	Public comment survey available until August 22  COO recommendation released August 26	Public hearing on COO recommendation	Council direction on intended decision	Council first reading; <b>public hearing</b>	Council second reading; <b>final decision</b>
<b>MPAC</b>			Discuss COO recommendation; <i>Recommendation to Council</i>			
<b>MTAC</b>			Discuss COO recommendation; <i>Recommendation to MPAC</i>			
<b>CORE</b>			Discuss COO recommendation; <i>Recommendation to Council</i>			

**Engagement**

# Committee engagement

- MTAC
- MPAC
- CORE
- UGR Roundtable
- Youth cohort



# Where have we been?

- Washington County Coordinating Committee
- Clackamas County Coordinating Committee
- Greater Portland Inc
- Westside Economic Alliance
- Portland Metropolitan Association of Realtors
- Home Building Association

**Economic and demographic trends**

**Draft regional forecast**

**Preliminary residential capacity**

**Preliminary housing needs analysis**

**Project and process overview**

**Sherwood West Concept Plan**

# Technical review

- Land Use Technical Advisory Group (LUTAG)
- Regional forecast review panel of economists and demographers
- Metro Technical Advisory Committee (MTAC)



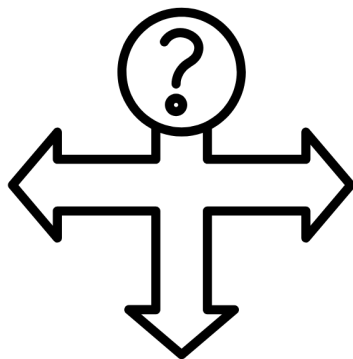
# Housing

# Results – demand scenarios

*More single-unit detached housing*

*More middle housing and multifamily*

**Following in footsteps:** Housing choices at each life-stage remain constant – as current households age, their housing choices look the same as those of older households today.



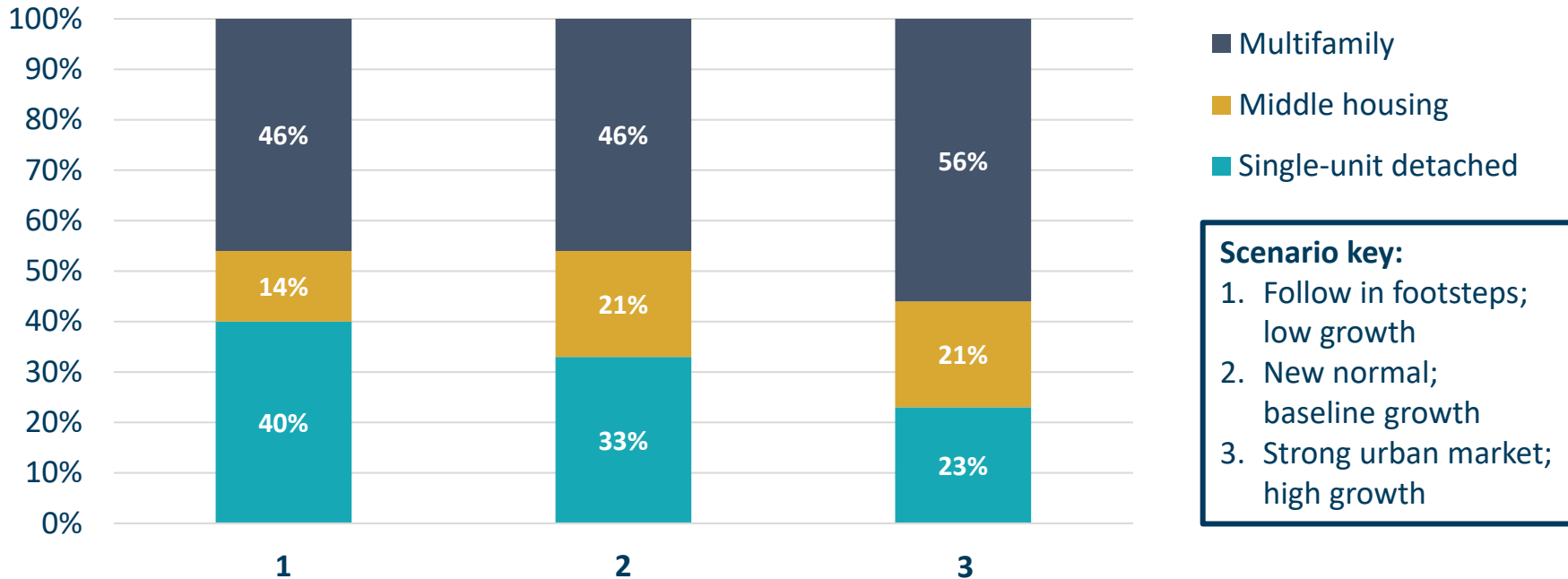
**Strong urban markets:** Housing trends like development of last decade; housing choices shift to attached housing based on affordability



**New normal:** As households age, their housing choices shift towards those of older households today, but not to same extent.

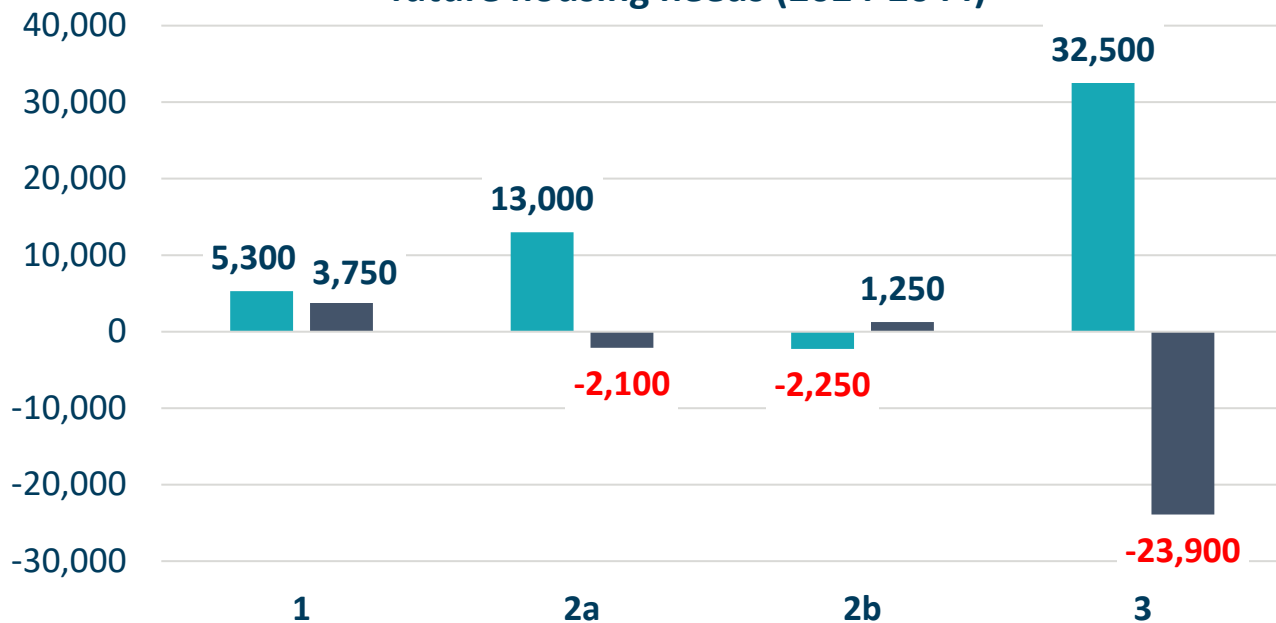
# Results

Existing and future needed housing by type and demand scenario (2024-2044)



# Results

Capacity deficits or surpluses for existing and future housing needs (2024-2044)



- Single-unit detached and middle housing
- Multifamily housing

**Scenario key:**

1. Follow in footsteps; low growth
- 2a. New normal; baseline growth; baseline capacity
- 2b. New normal; baseline growth; heavier use of vacant land for single-unit detached housing
3. Strong urban market; high growth

**Commercial land**

# Results: Commercial land gap analysis

## Commercial land capacity gap for Metro UGB, 2024 – 2044

	Capacity (acres)	Demand (acres)	Surplus or deficit (acres)
Low growth forecast	480	-300	+780
Baseline growth forecast	480	800	-320
High growth forecast	480	2,300	-1,820

**Industrial land**

# Results: Industrial land gap analysis

## Industrial land capacity gap for Metro UGB, 2024 – 2044

	Capacity (acres)	Demand (acres)	Surplus or deficit (acres)
Low growth forecast	5,950	-1,500	+7,450
Baseline growth forecast	5,950	1,400	+4,550
High growth forecast	5,950	5,200	+750

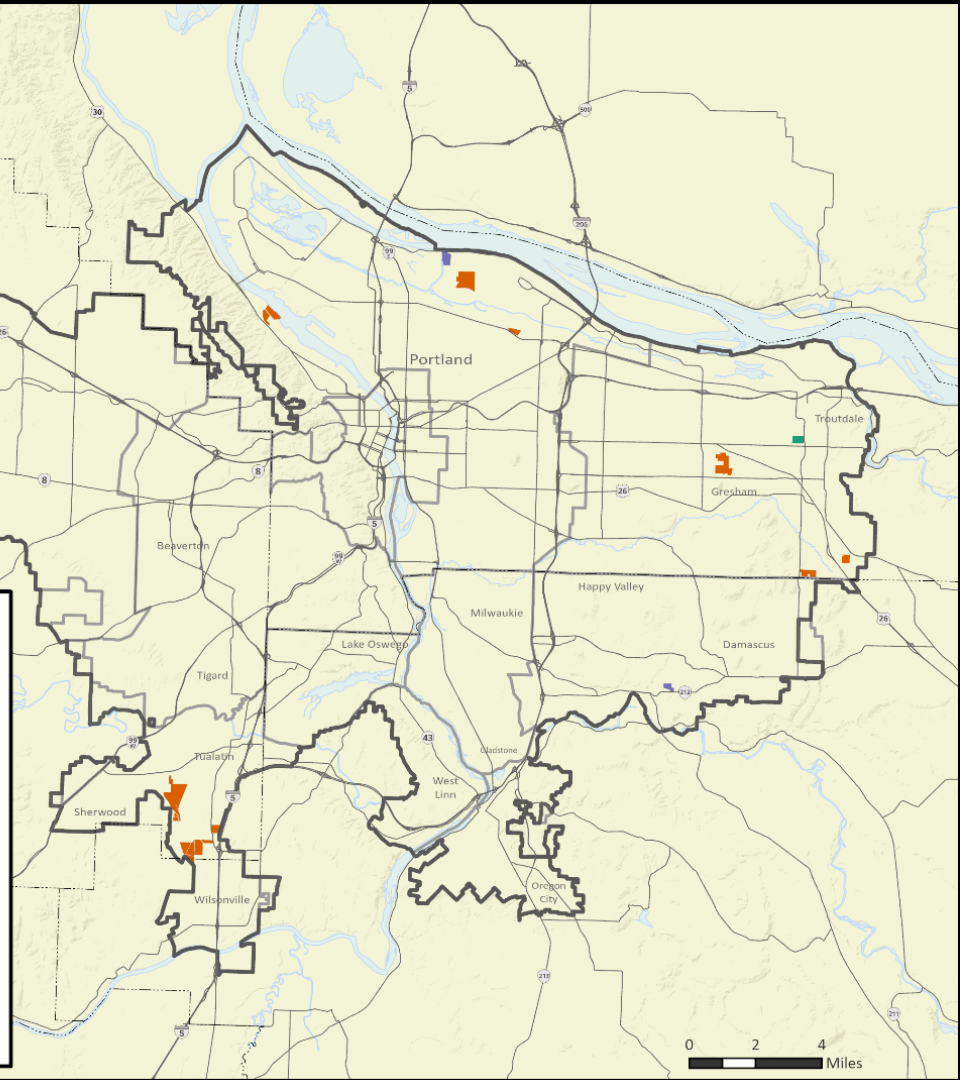


# 2024 Buildable Land Inventory

Large Lot Industrial Tiers  
June 2024 (DRAFT)

- Tier 1
- Tier 2
- Tier 3

- County boundary
- Major arterials
- Urban growth boundary
- Rivers and lakes



Large site  
industrial  
needs

# Statewide Semiconductor Taskforce

- **Two sites of 500+ acres** each to accommodate large-scale semiconductor R&D and/or production fabrication operations.
- **Four sites of 50-100 acres** suitable for integrated device manufacturers or major semiconductor equipment manufacturers.
- At least **eight sites of 15-35 acres** to enable key suppliers to the semiconductor cluster to locate and expand.

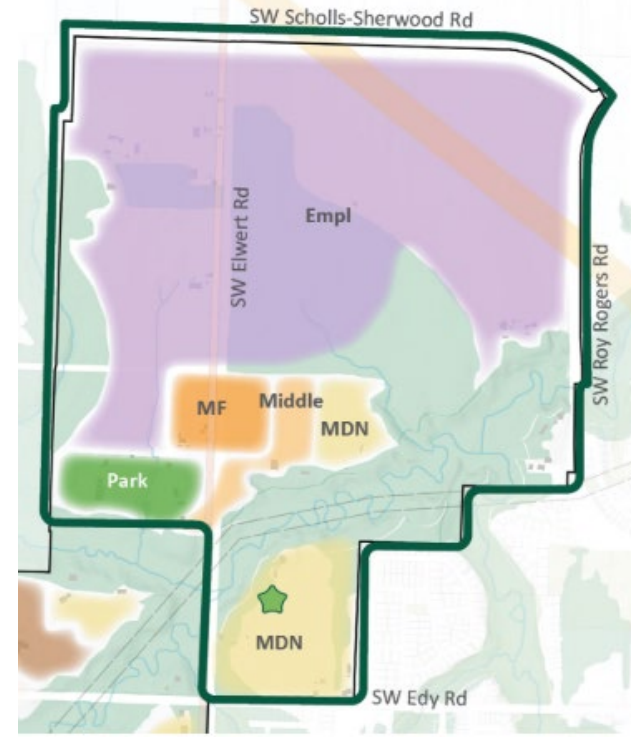
# Sherwood West employment land analysis

Sherwood West has specific site characteristics that may meet a regional need.

**50+ acre site options**

**Relative proximity to existing high-tech cluster**

**Flat sites**



# Policy options

# Policy options

## 1. No expansion

### Sufficient capacity inside the UGB

Conclude that there is adequate capacity inside the UGB for housing and jobs

## 2. Expansion

### Insufficient capacity inside the UGB

Expand the UGB to add the Sherwood West urban reserve area as proposed by the City of Sherwood

Consider conditions of approval:

- to help achieve a certain housing mix or number of housing units
- to preserve employment land with unique site characteristics for industrial and flex uses that cannot be found elsewhere in the UGB

**Next steps**

	July	August	September	October	November	December
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**Questions?**



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