

Planning for jobs and economic prosperity

Commercial Association of Brokers

June 14, 2023

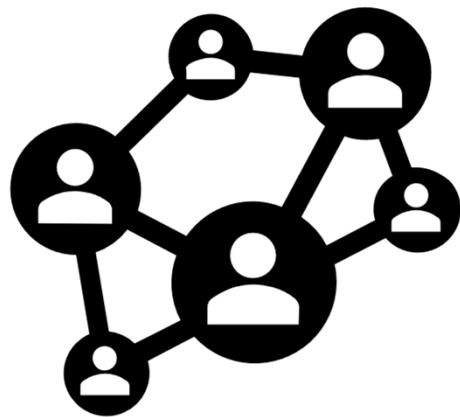


Metro



Big picture: Two truths and a lie

People move regionally



Freight moves regionally



We can solve our individual problems independently



People movement: Two truths and a lie

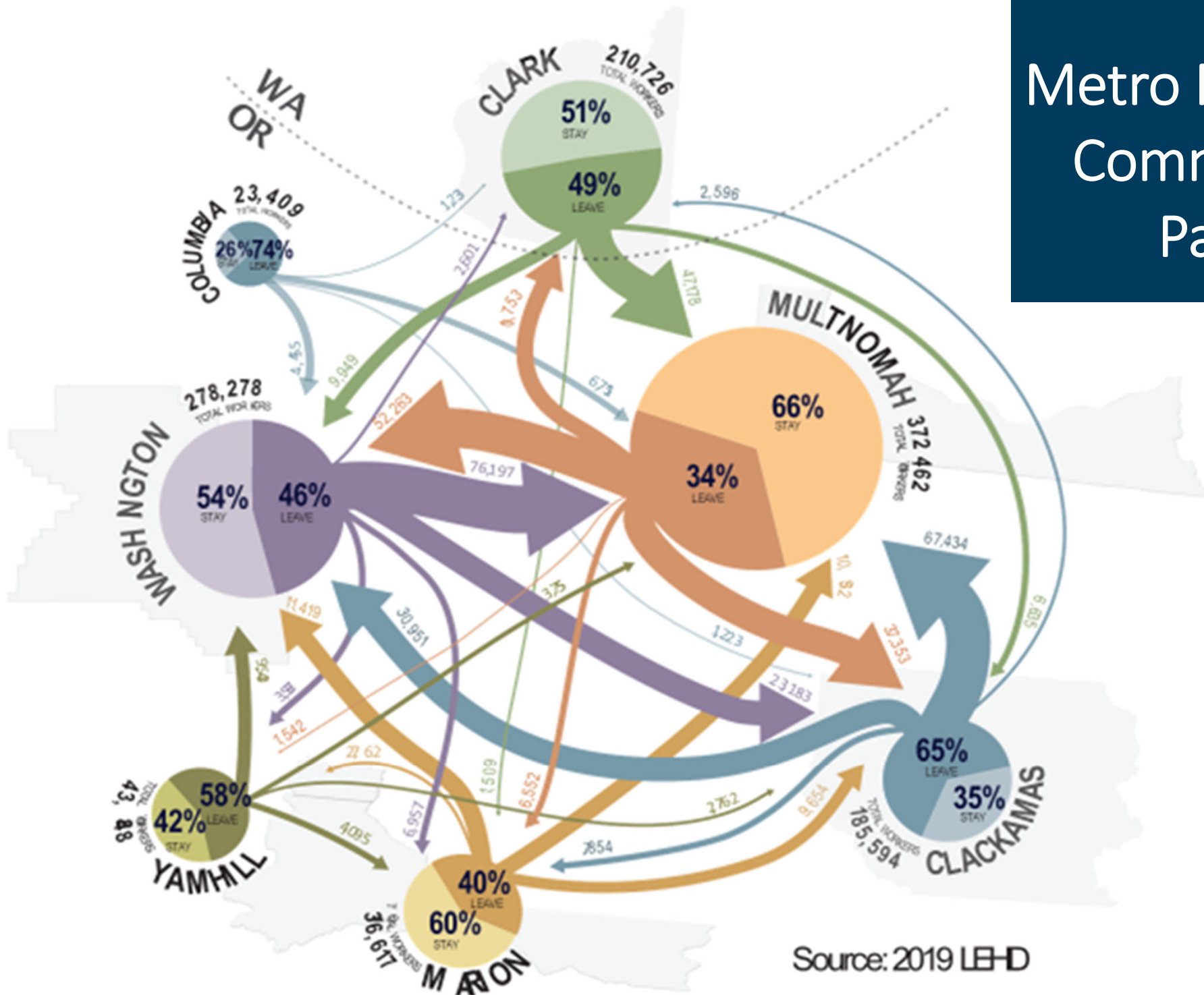
Commute patterns in 2019:

65% of workers in Clackamas County **left** the county to work in another county

80% of workers in Washington County **stayed** in Washington County to work

49% of workers in Clark County **left** to go work in Multnomah and Washington Counties

2019 Metro Region Commuting Patterns



Source: 2019 LEHD

Oregon planning

Protecting what's special

Unique beauty

Sense of place

Preservation of natural areas and farmland

Carefully planning for the future



1990's: desire for unified vision

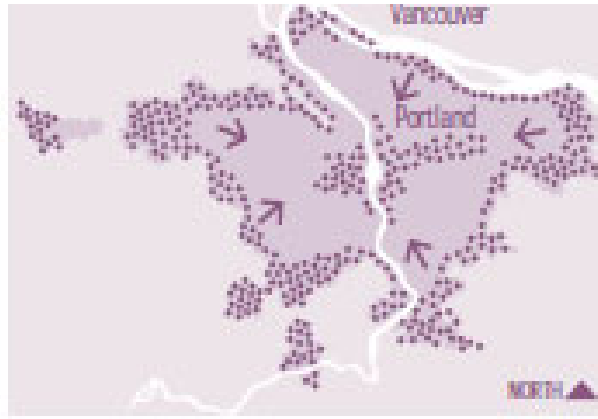
Concept A Growing out



Significant expansion of the UGB; new growth at urban edge develops mostly in the form of housing.

284,000 acres in UGB
(51,000 acres added to UGB)

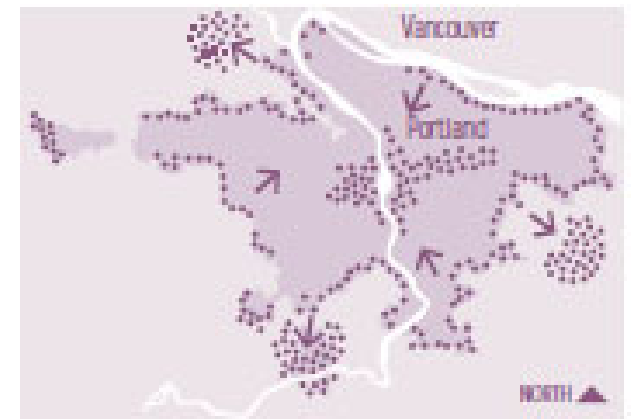
Concept B Growing up



No UGB expansion; growth accommodated through development of existing land within the urban growth boundary.

234,000 acres in UGB

Concept C Neighboring cities



Moderate expansion of the UGB; growth focused in centers, corridors and neighboring cities.

257,000 acres in UGB
(22,000 acres added to the UGB)

2040 Growth Vision

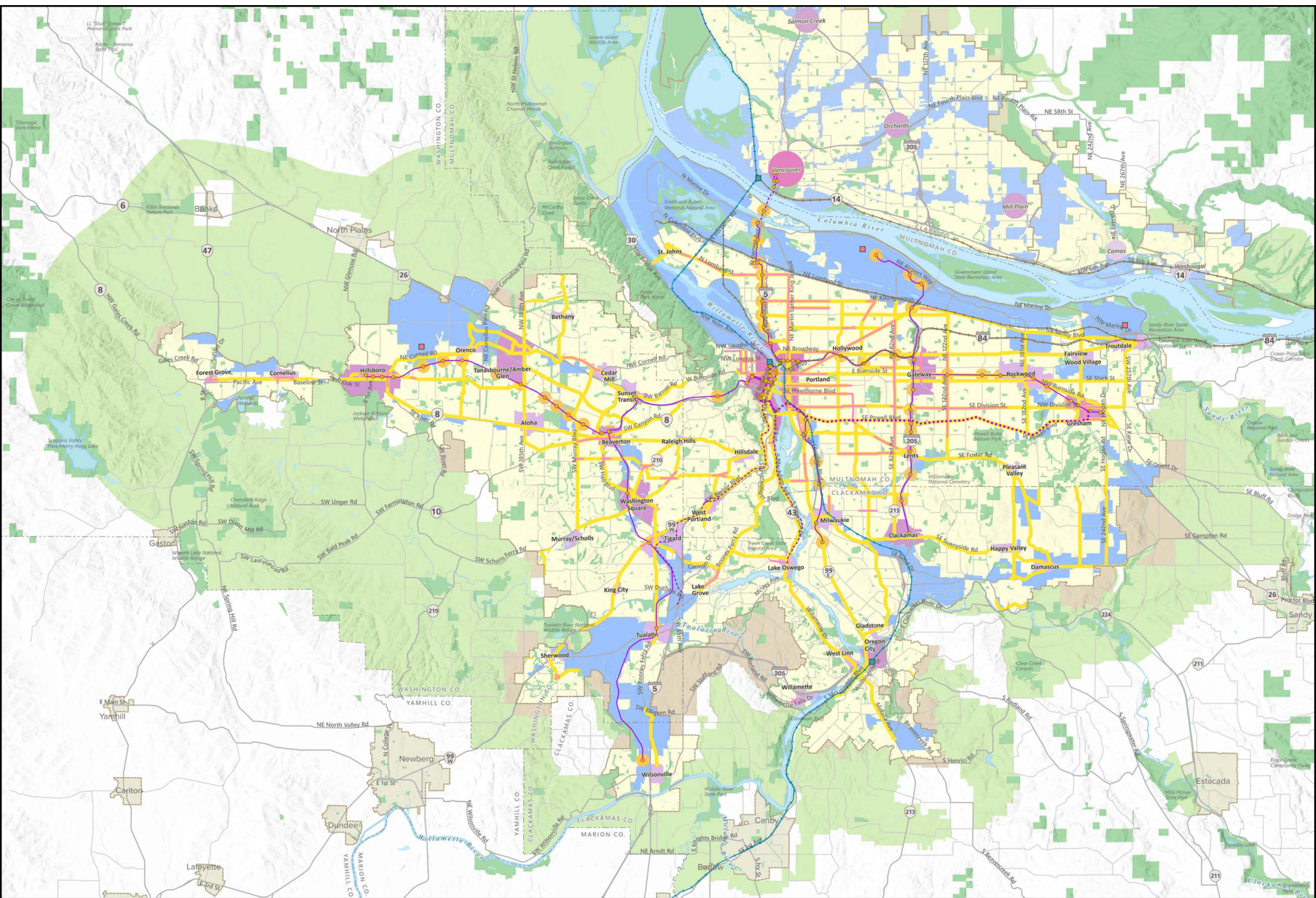
2040 recommended alternative



Growth is encouraged in centers and corridors with increased emphasis on redevelopment within the urban growth boundary.



River Terrace 2.0



2040 Growth Concept Map

December 2018



The information on this map was derived from digital databases on Metro's GIS. Care was taken in the creation of this map. 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. However, notification of any errors are appreciated.

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.

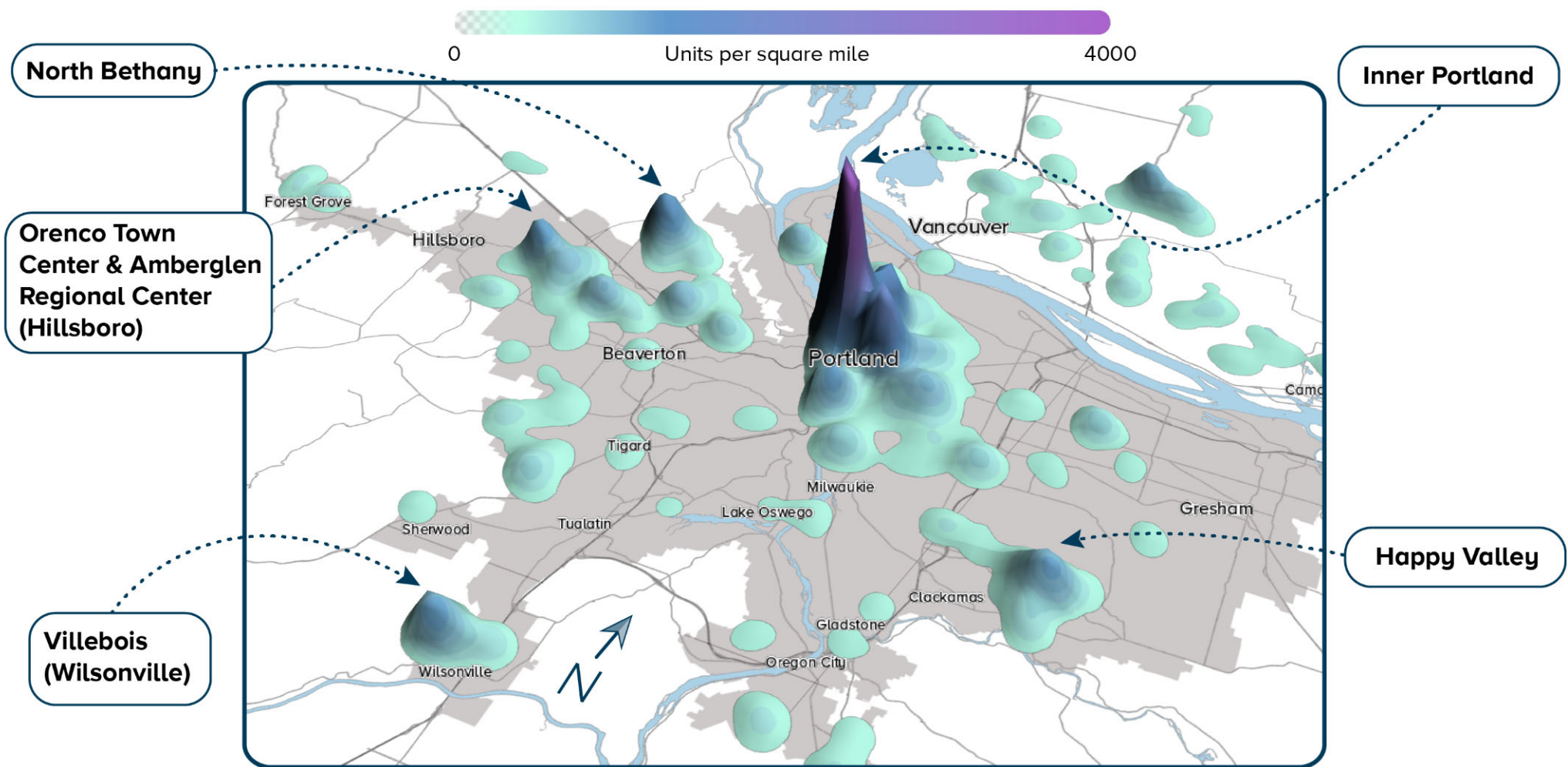
- Central city
- Regional center
- Town center
- Station communities
- Main streets
- Corridors
- Employment land
- Parks and natural areas
- Neighborhood
- Rural reserve
- Urban reserve
- Urban growth boundaries
- Existing high capacity transit
- - - Planned high capacity transit
- - - - Proposed high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

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



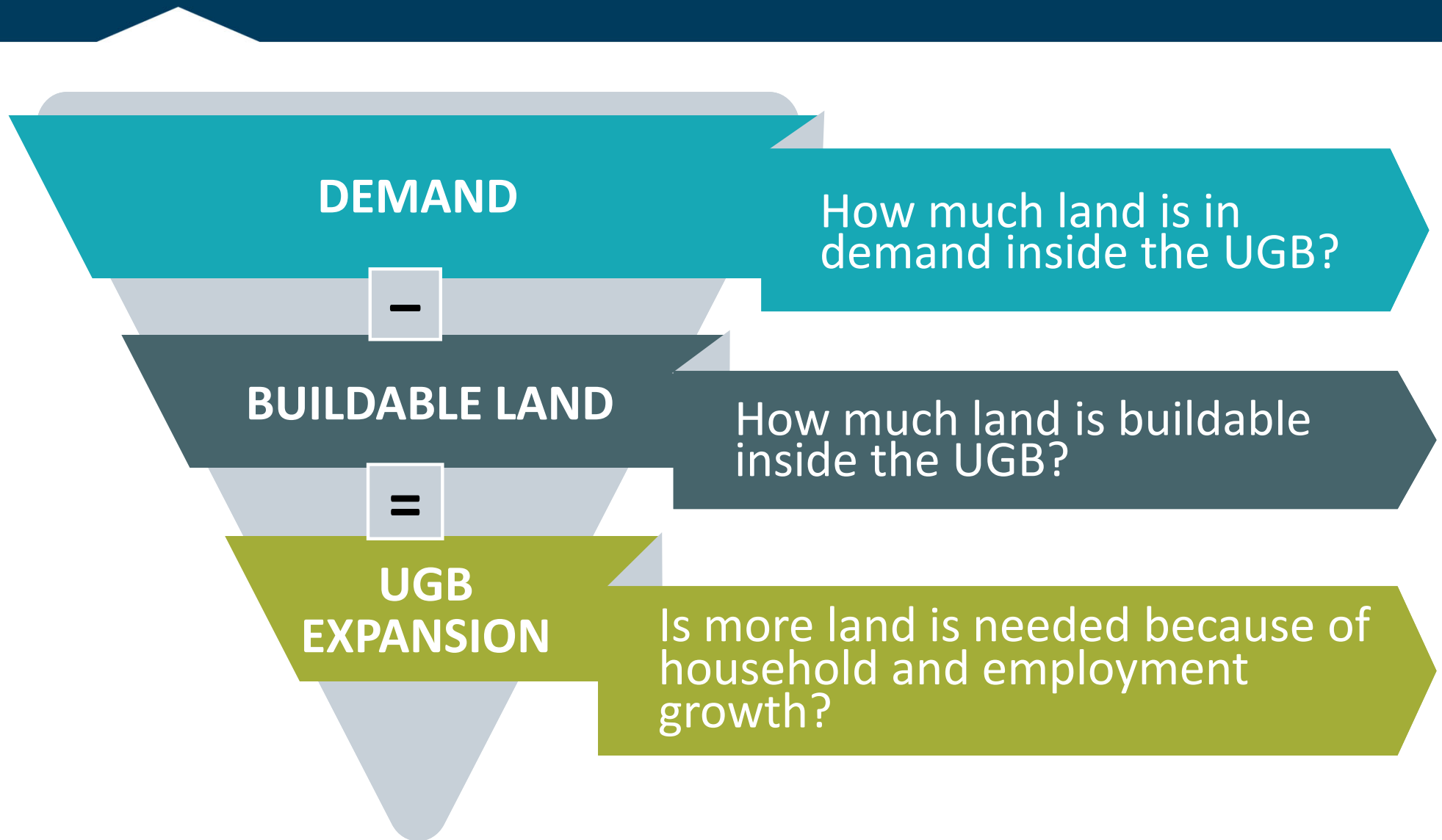
Growth is happening where intended

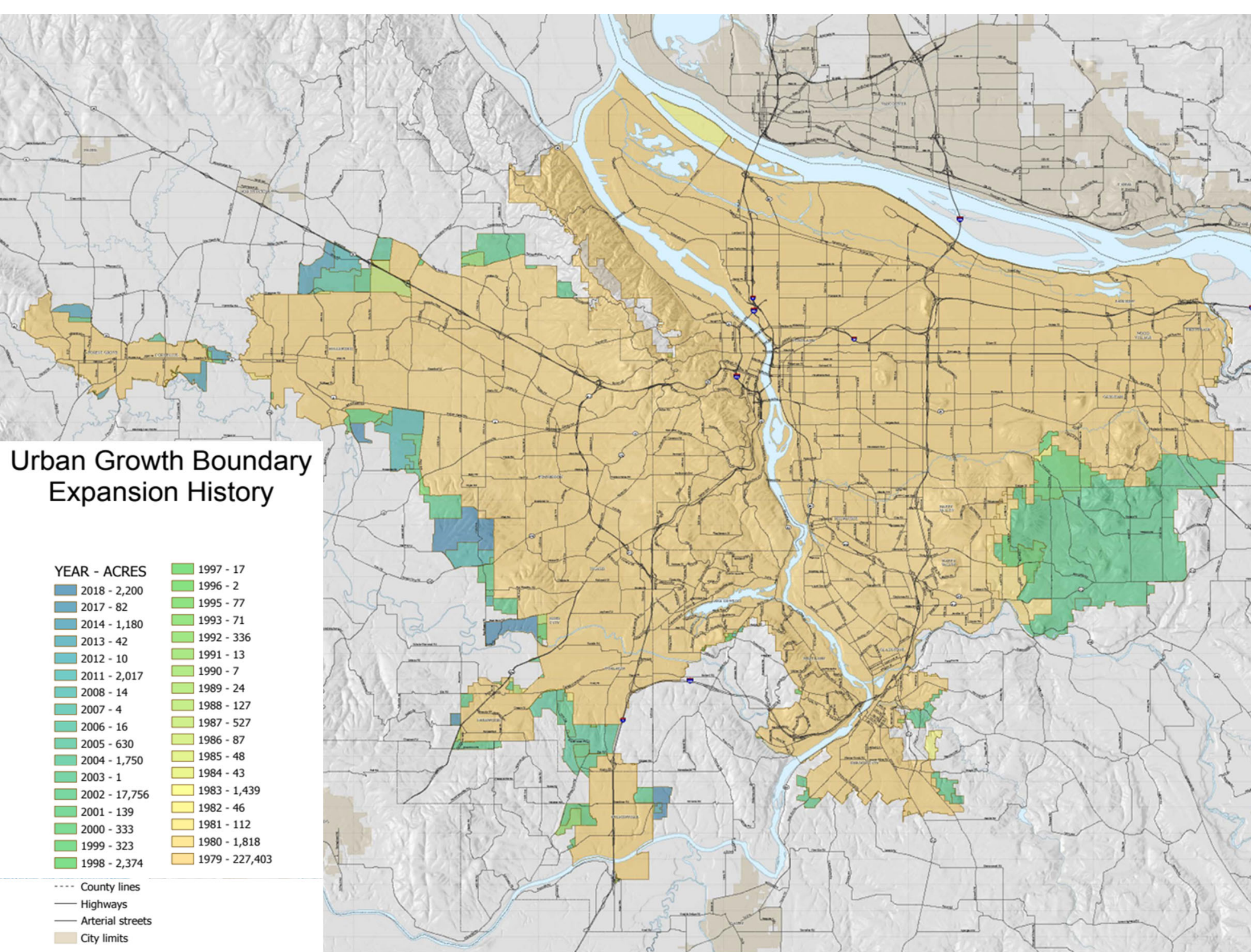
Housing permits in the Portland Metro area, 2009-2017 - units per square mile



Source: Construction Monitor data report Q1 2009 - Q2 2017. Created October 2017

Oregon growth management basics





Urban Growth Boundary Expansion History

YEAR - ACRES	Color
2018 - 2,200	Dark Blue
2017 - 82	Blue
2014 - 1,180	Light Blue
2013 - 42	Teal
2012 - 10	Light Teal
2011 - 2,017	Greenish Teal
2008 - 14	Green
2007 - 4	Light Green
2006 - 16	Yellow Green
2005 - 630	Light Yellow Green
2004 - 1,750	Yellow
2003 - 1	Light Yellow
2002 - 17,756	Yellow-Gold
2001 - 139	Gold
2000 - 333	Light Gold
1999 - 323	Yellow-Gold
1998 - 2,374	Gold
1997 - 17	Light Yellow
1996 - 2	Yellow
1995 - 77	Light Yellow
1993 - 71	Yellow
1992 - 336	Light Yellow
1991 - 13	Yellow
1990 - 7	Light Yellow
1989 - 24	Yellow
1988 - 127	Light Yellow
1987 - 527	Yellow
1986 - 87	Light Yellow
1985 - 48	Yellow
1984 - 43	Light Yellow
1983 - 1,439	Yellow
1982 - 46	Light Yellow
1981 - 112	Yellow
1980 - 1,818	Light Yellow
1979 - 227,403	Dark Blue

- County lines
- Highways
- Arterial streets
- City limits

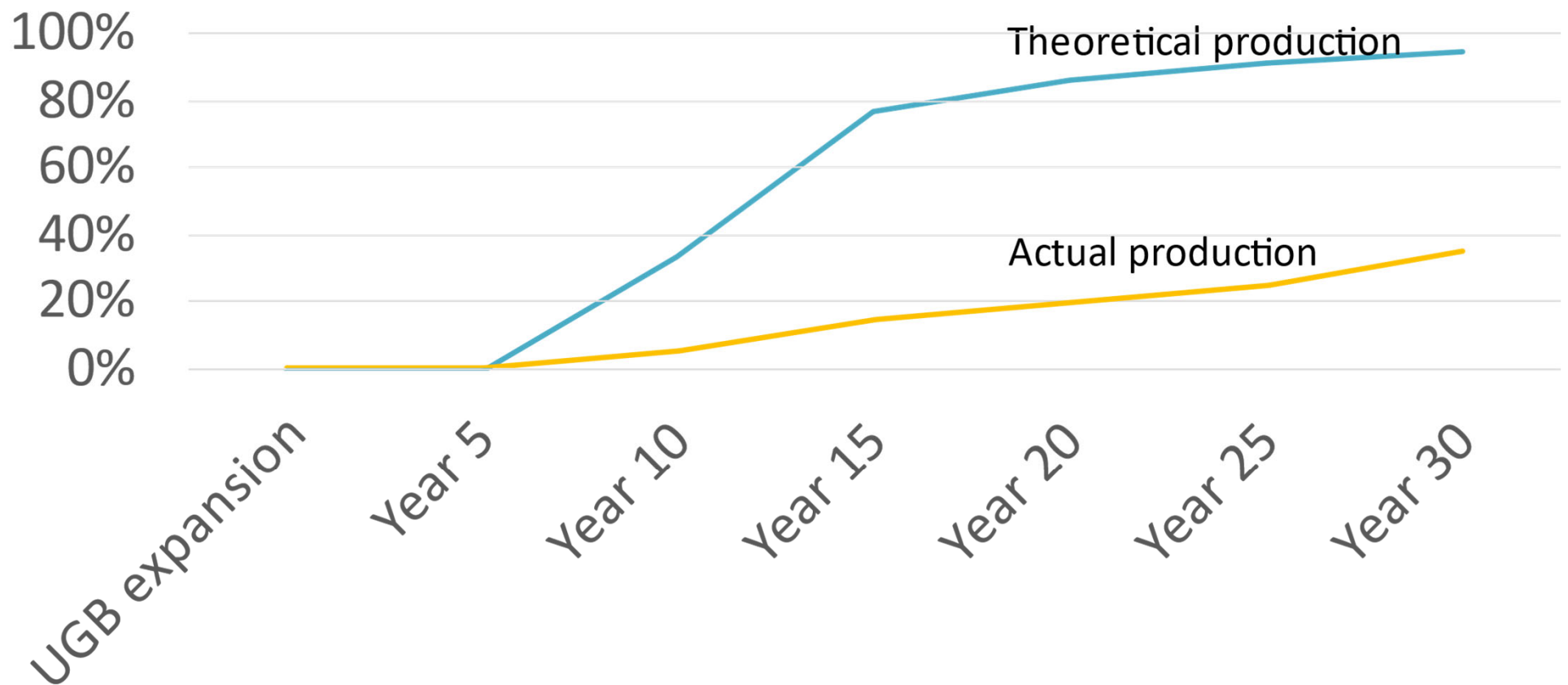
Land readiness is essential

UGB expansions only produce jobs or housing when governance, infrastructure and market are addressed.



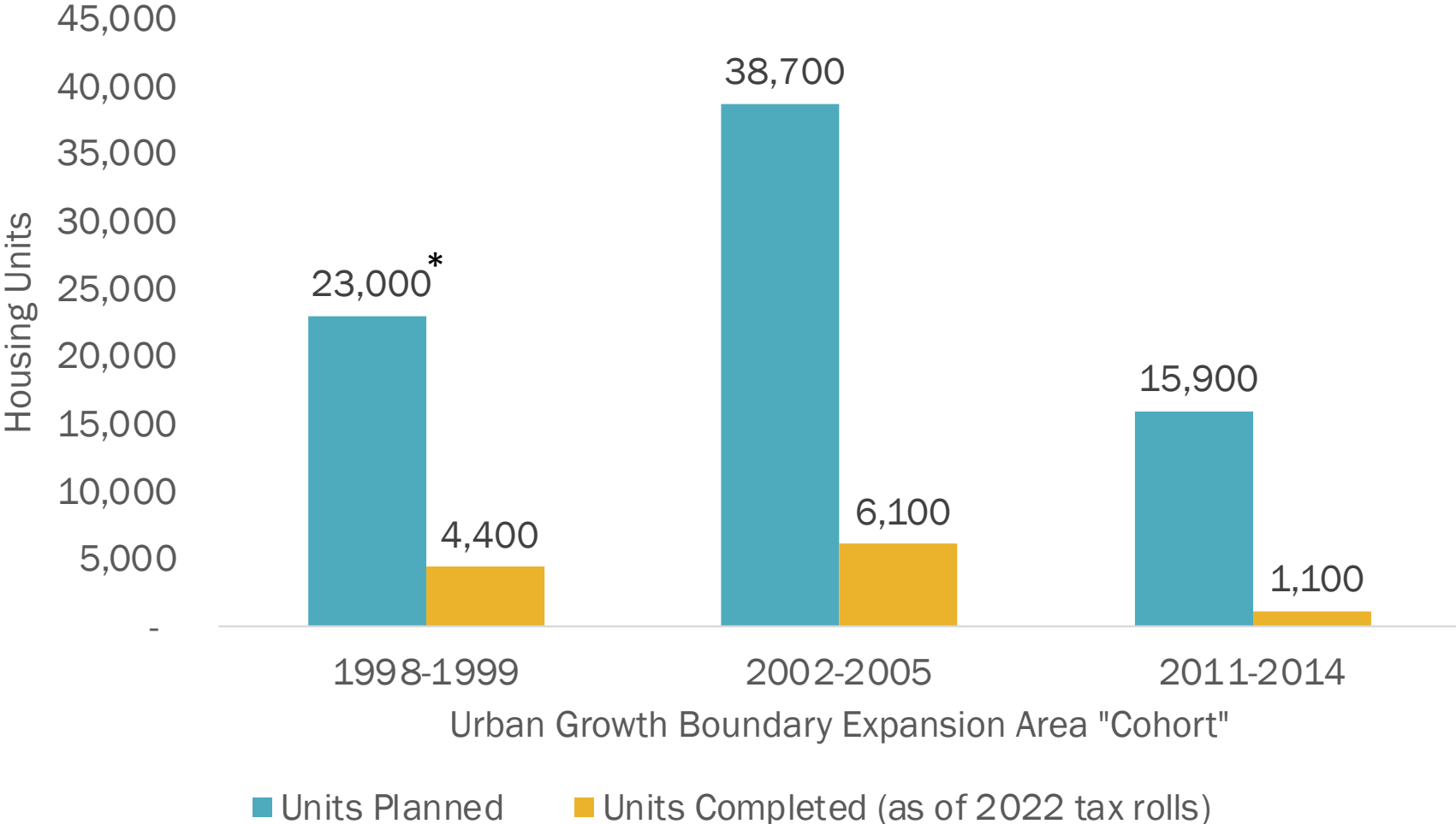
Past UGB expansions develop slowly when they weren't driven by city proposals

Share of expected homes built (illustrative)



Past UGB decisions that did not emphasize readiness have been slow to produce housing

Estimated Housing Units Planned & Completed in Past UGB Expansion Areas



Sources: Units planned: Metro UGB History; Deliveries: ECONorthwest analysis of 2022 RLIS tax lot data. Note that tax lot data tends to lag construction completions, sometimes by up to a year. *Units planned may include portions of Wilsonville's Villebois, which is not included in estimated units completed.

Metro improved its growth management process to focus on readiness

Old system



New system



Growth capacity: Two truths and a lie

Projected housing and job growth is determined solely through zoned capacity

The buildable land inventory is the foundation of the growth capacity estimates and uses aerial imagery and individual tax lot information

Redevelopment and infill potential is estimated using a regional proforma based land use model to provide a market-savvy analysis of projected growth

Factors that influence development outcomes



Parcel size and developability



Market alignment



Infrastructure serviceability, costs,
and funding plans



Governance & local leadership

Regional
employment
forecast

Assessment of
trends

Urban Growth
Report:
Employment

Employment site
inventory

Industrial land
readiness

Metro residential readiness project

Research and analysis to guide Metro's 2024 Urban Growth Management Decision



Development
Readiness



Population &
Development
Trends



Housing Filtering &
Market Functions



Gentrification &
Displacement
Risk



Office-to-Residential
Conversion Potential



Middle Housing
Potential



Existing Housing
Needs

2024 UGM decision

■ Technical work and analysis

Forecasts Trends analysis
Land inventories Modeling

■ Stakeholder engagement

Jurisdictional outreach
Stakeholder group
Youth cohort

■ City expansion proposals

Dec 2023: Letters of interest due

April 2024: Proposals due

2040 Planning & Development Grants available

■ Metro Council decision

Summer 2024: Draft UGR

Stakeholder group, COO recommendations

Fall 2024: MPAC, CORE recommendations

Council direction to staff

Public hearings

Dec 2024: Council decision



Questions?

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