



Metro

Urban growth management: Draft Urban Growth Report

UGR Roundtable
July 26, 2024

Context of the UGR

Where does the UGR fit into the context of Metro's policy documents?

- Point-in-time collection of data and analyses to act as a resource, for as long as it is relevant
- The basis for a policy decision about the UGB; not a policy document itself

Critical topics and actions

- Housing
- DEI & Justice
- Economic development
- Development barriers
- Demands on agricultural land
- Access to nature and climate adaptation
- Role of Metro and local governments
- Regional vision for the future

Other ongoing and **future** Metro work

Planning, Development & Research

Regional
Housing
Coordination
Strategy

Brownfields
program

Small site
industrial
readiness

Cooling
Corridor Study

2040 Planning
and
Development
grants

2040 Future
Vision/Growth
Concept

Other Metro Departments

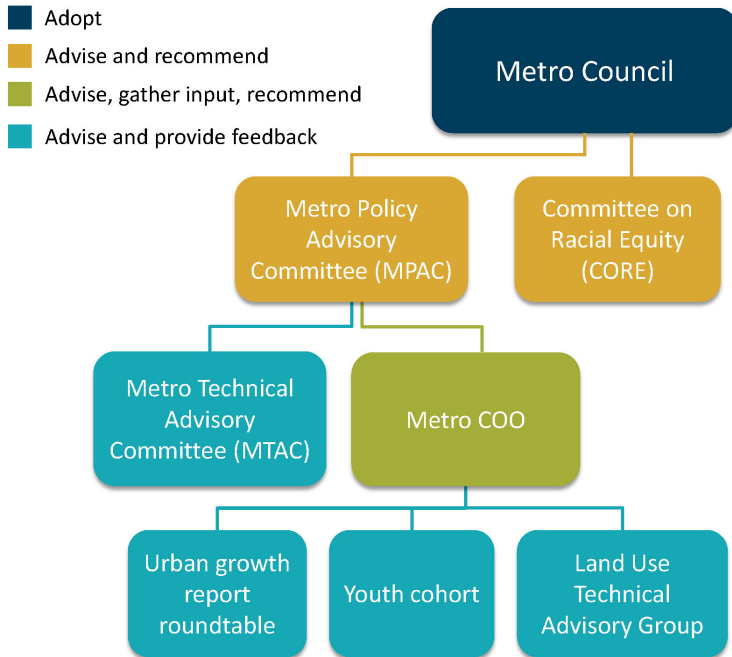
Parks System
Plan

Affordable
Housing Bond
and Supportive
Housing
Services

&
more

Engagement

Committee engagement



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
- NAIOP

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)

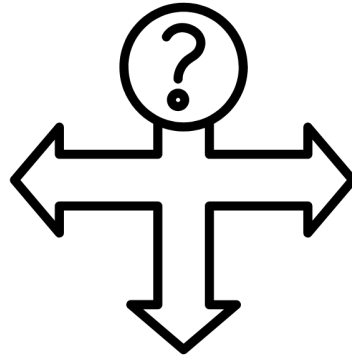
Housing

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.



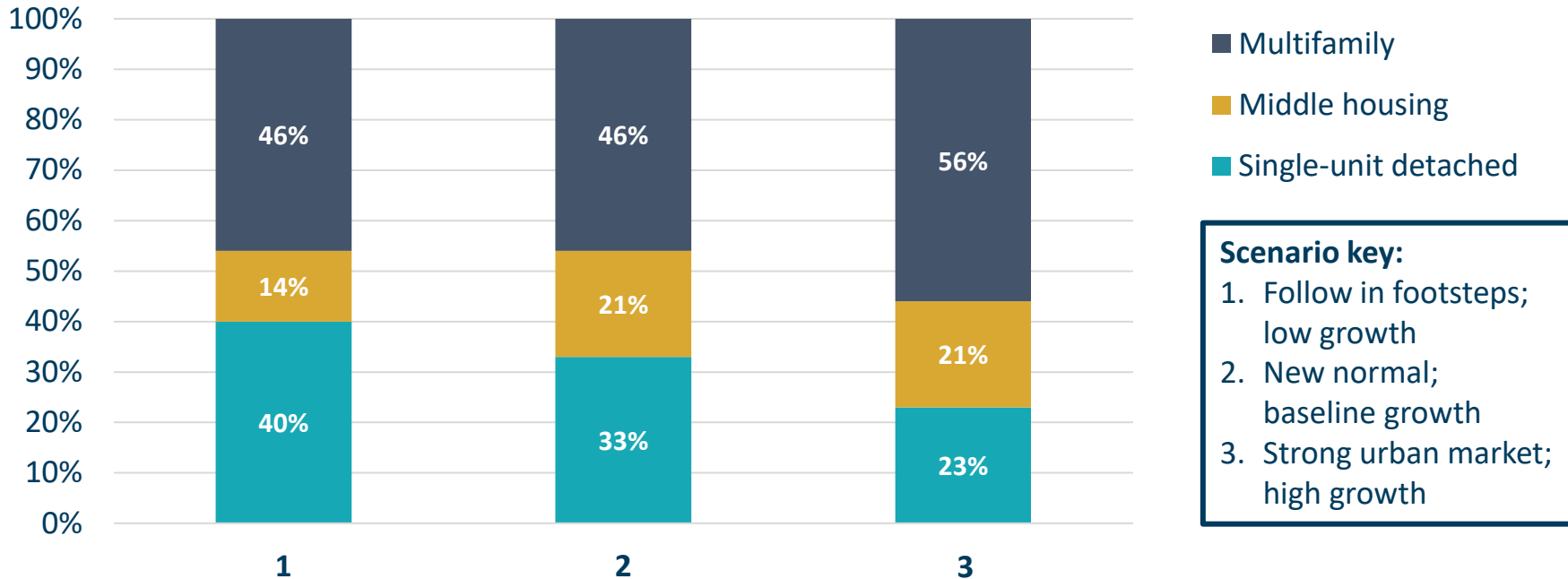
Strong urban markets: Housing trends like development of last decade; housing choices shift to attached housing based on affordability



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

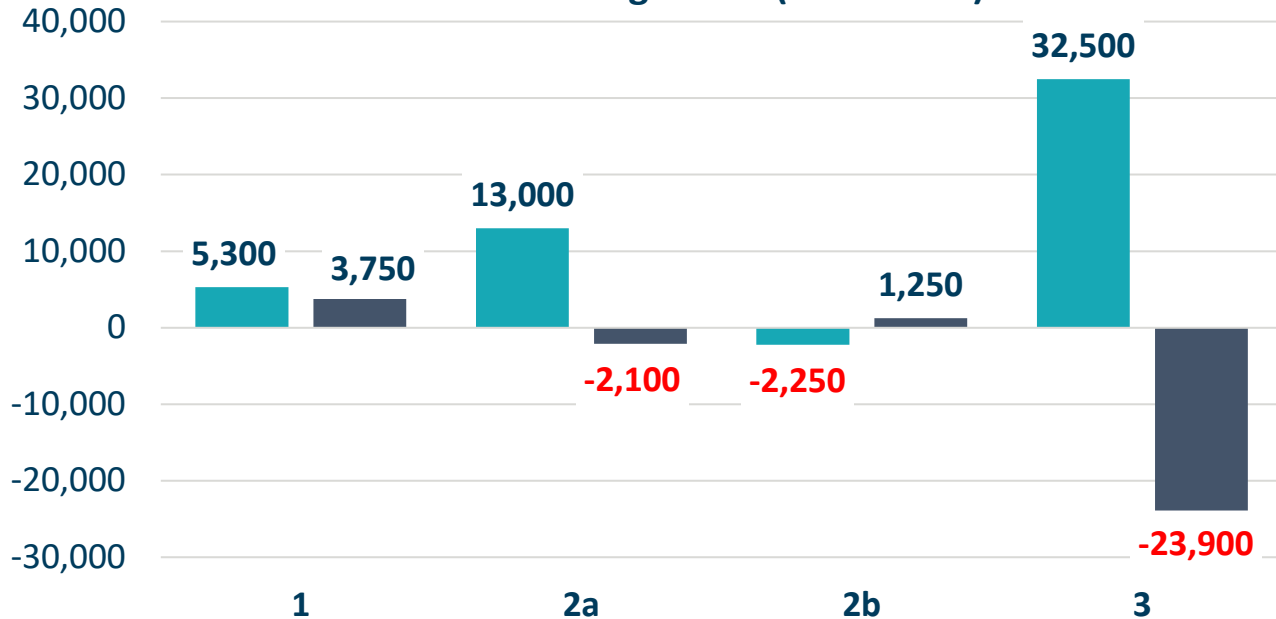
Results

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

Employment land

Converting jobs to acres

Regional (7-county MSA) employment forecast by sector

Apply historic UGB capture rate by sector

Deduct shares of work from home/hybrid by sector

Assign shares of each sector to 6 building types

Account for current excess office vacancies

Apply square feet per employee by building type

Apply floor-area ratios by building type

Acres demanded

Summarize two categories for results

Industrial

Gen. Industrial

Warehouse/Distribution

Flex/Business Park

Commercial

Office

Retail

Medical/Institution

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

Results: Industrial land gap analysis

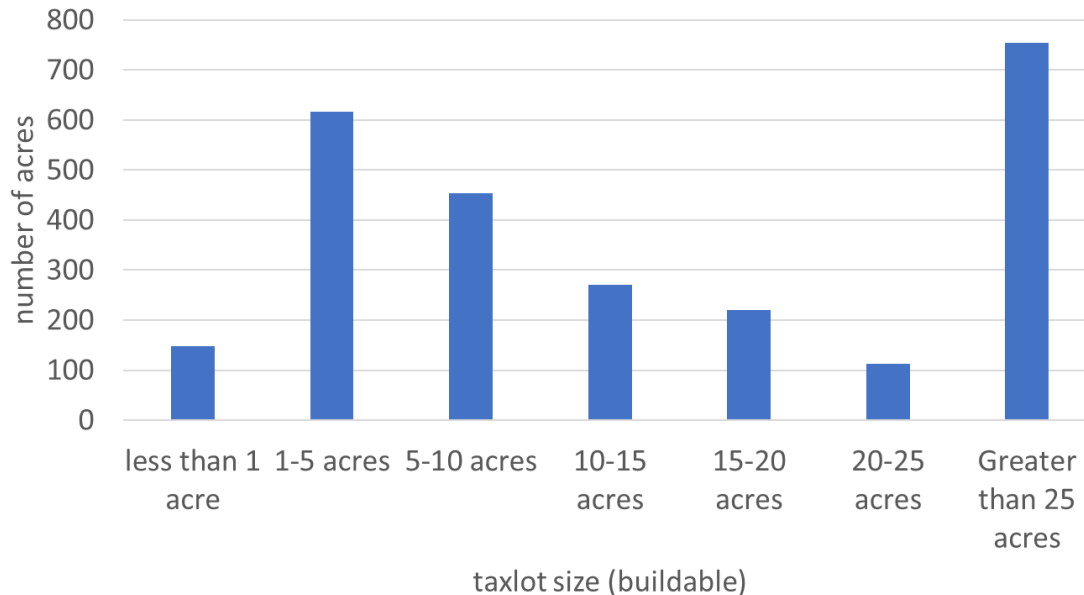
Industrial land capacity gap for Metro UGB, 2024 – 2044

	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

Buildable industrial acreage – by tax lot size

Buildable industrial acreage by taxlot size in UGB

note: does not account for adjacent taxlots that may be in common ownership

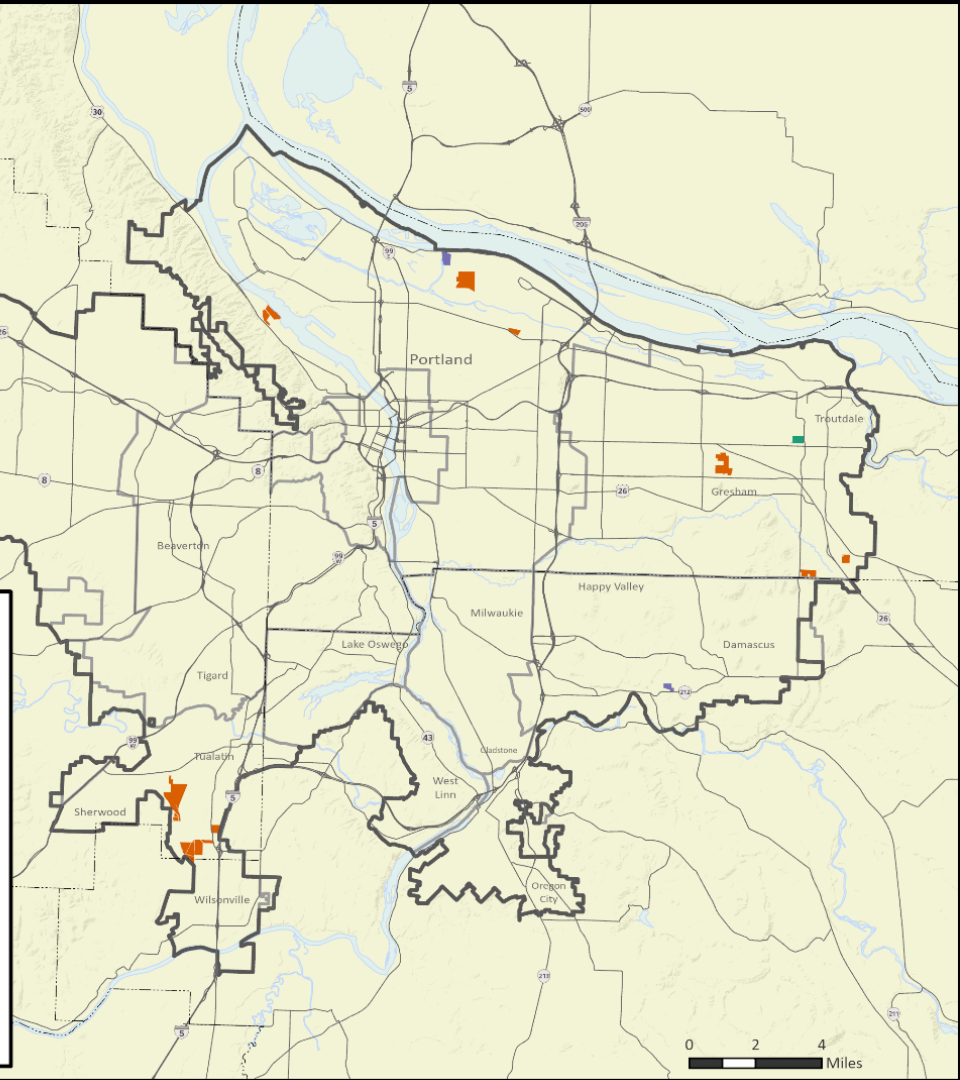


2024 Buildable Land Inventory

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.

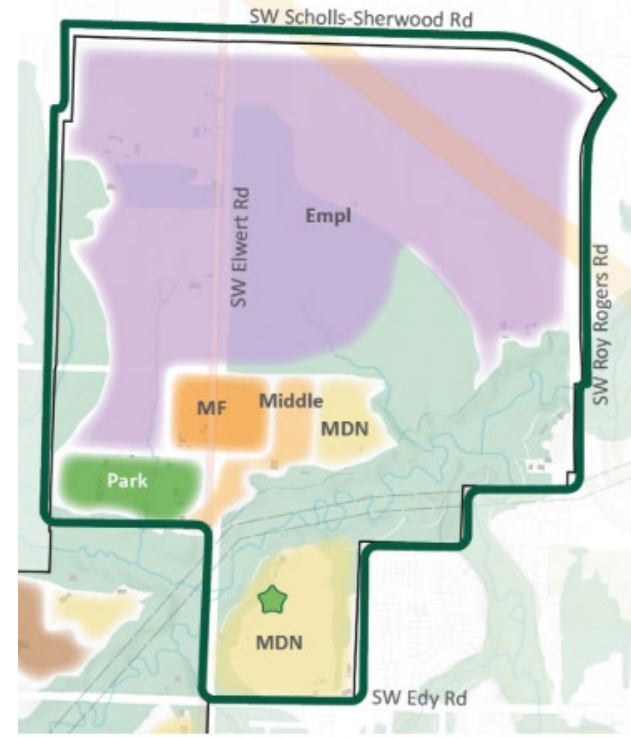
Sherwood West employment land analysis

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

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)

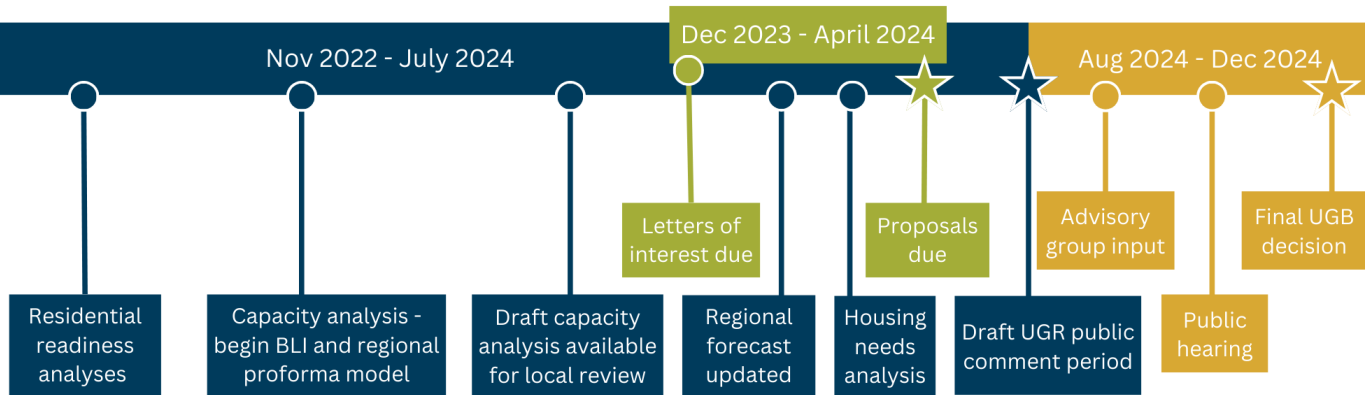
City expansion proposals

- 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



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

Final UGB decision

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

Engagement

Project timeline

STAKEHOLDER ROUNDTABLE Your Role in the UGB Process



MEMBERSHIP

- Range of stakeholders representing a variety of industries who work or live in different parts of the region.
- Appointed by Metro's COO.
- Forum is also open to the public.

YOUR ROLE

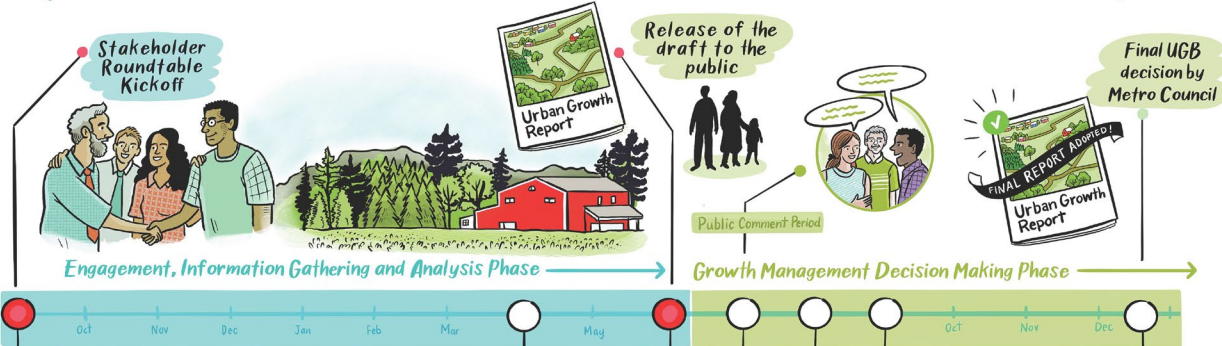
✓ **What's in scope.**
In this role you are:

- ✓ Developing shared understanding around the UGB process - including the underlying rationale (the "why") and the analytical aspects that inform the process (the "how").
- ✓ Sharing your lived experiences, perspectives and ideas with Metro staff to help shape thinking around the UGB.

✗ **What's out of scope.**
In this role, you are not:

- ✗ Making any growth management decisions.
- ✗ Making direct recommendations to the Metro Council.

UGB PROCESS TIMELINE AND KEY MILESTONES



September 29th, 2023 April 2024 End of June 2024 July 2024 August 2024 September 2024 End of December 2024

- Stakeholder roundtable will meet monthly to review and share perspectives on UG report components.
- Your insights will also inform other regional planning efforts.



City proposals for expansion submitted



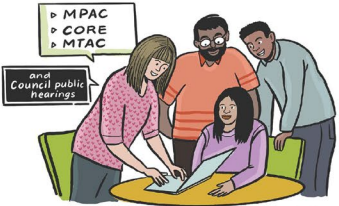
Stakeholder Roundtable: Conclusion of your role



Your official role on the Stakeholder Roundtable ends here, but you are well prepared to provide feedback as an individual during the 'Public input' touchpoints of the decision-making phase.

COO Recommendation

Advisory Group Recommendations



These formal, standing advisory committees have a direct role in making a growth management recommendation to the Council!

	July	August	September	October	November	December
Council	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; public hearing	Council second reading; final decision
MPAC			Discuss COO recommendation; <i>Recommendation to Council</i>			
MTAC			Discuss COO recommendation; <i>Recommendation to MPAC</i>			
CORE			Discuss COO recommendation; <i>Recommendation to Council</i>			

Questions?

oregonmetro.gov

