



Metro

# Urban Growth Report Roundtable

November 2023

## 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



## Engagement

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

# 2024 urban growth management decision timeline

# Upcoming Roundtable meetings

- December 15: Regional housing demand analysis methods
- January 12\*: State/Regional demographic and economic trends professional panel
- February 23: Regional population, household, and employment forecast results

\* = New date

# Bureaucratic wayfinding

## **Exclusive Farm Use (EFU)**

zoning intended to  
preserve and maintain  
agricultural lands for farm  
use

Applied in areas with high-  
value farm soils



# Bureaucratic wayfinding

## Land Use Technical Advisory group (LUTAG)

All cities/counties invited

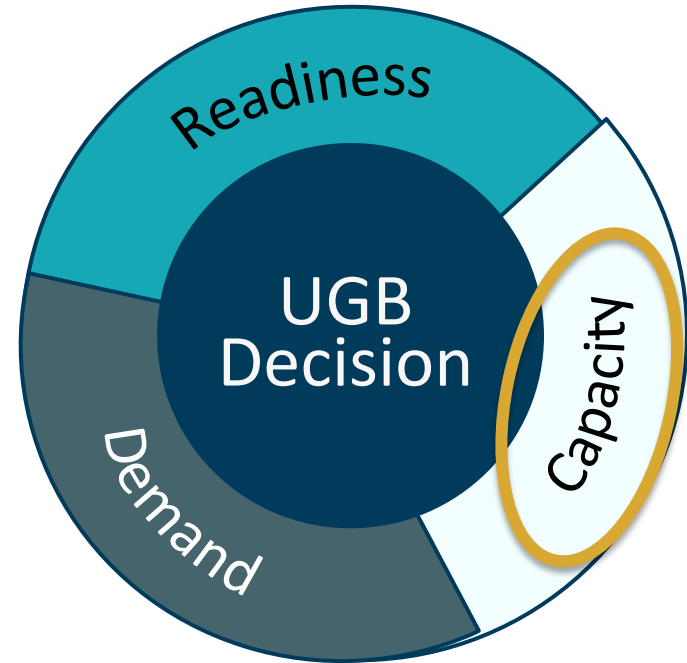
Advise on methods

Review technical analysis  
with local knowledge

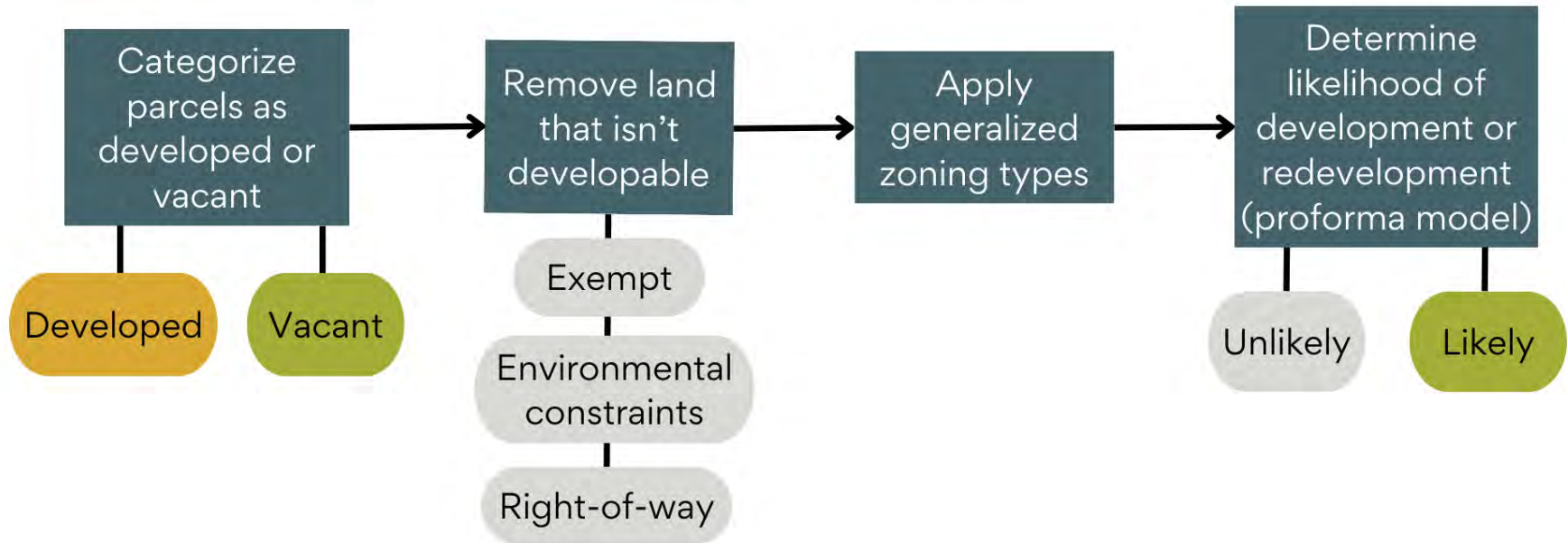


# A decision support tool

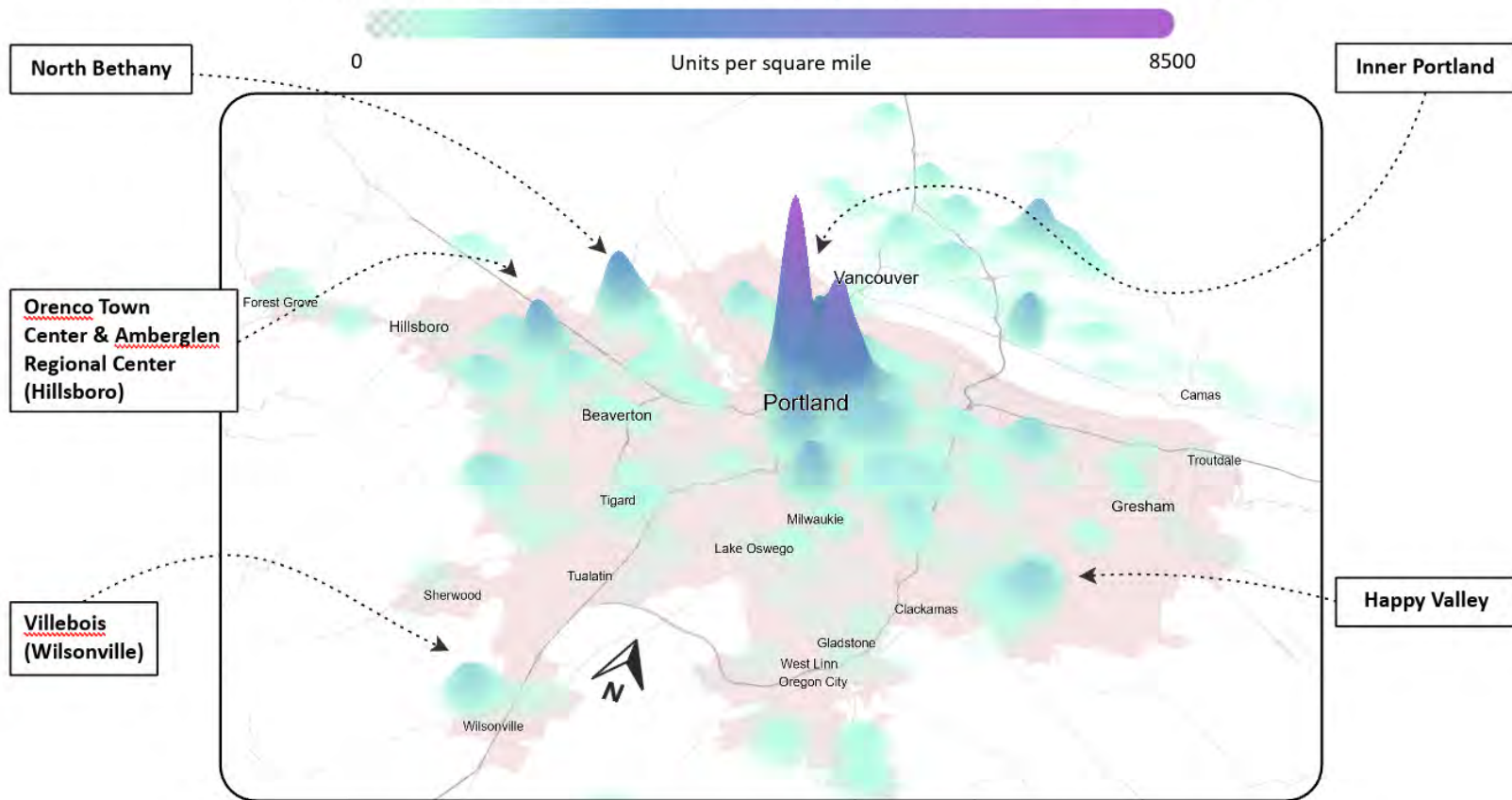
The Urban Growth Report (UGR) is a decision-making tool for the Metro Council.



# UGB growth capacity estimation



## Housing permits in the Portland Metro area, 2009-2023 - units per square mile



Source: Construction Monitor data report Q1 2009 - Q2 2023. Created September 2023



# What has happened in existing urban areas?

SE Division St., Portland

**2007**



**2014**



# What has happened in existing urban areas?

N. Mississippi Ave., Portland

**2007**



**2014**



# What has happened in existing urban areas?

AmberGlen, Hillsboro

**2016**



**2021**



# What has happened in existing urban areas?

SE Portland

**2016**



**2021**



Images: Google

# What has happened in existing urban areas?

N. Mississippi Ave., Portland

**2016**



**2022**



# What has happened in existing urban areas?

SE Washington St., Milwaukie

**2016**



**2023**



# What has happened in existing urban areas?

SE Otty Rd., Clackamas

**2016**



**2023**



# What has happened in existing urban areas?

NW 16<sup>th</sup>, Gresham

**2016**



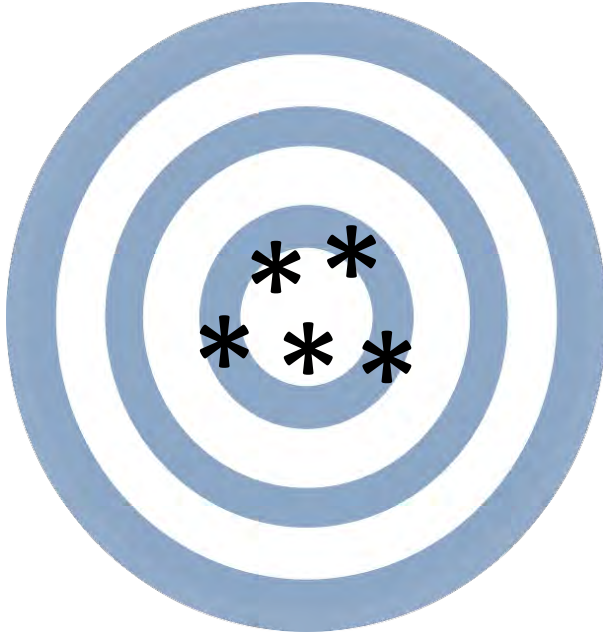
**2022**



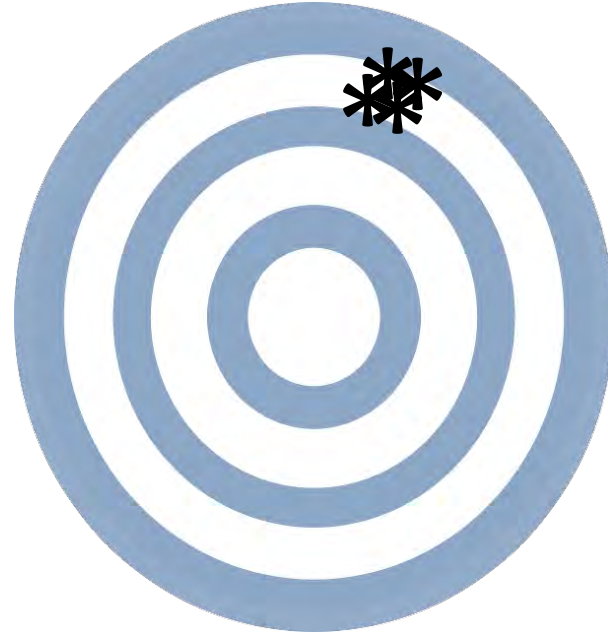


# Seeking accuracy in regional estimates

accuracy



precision

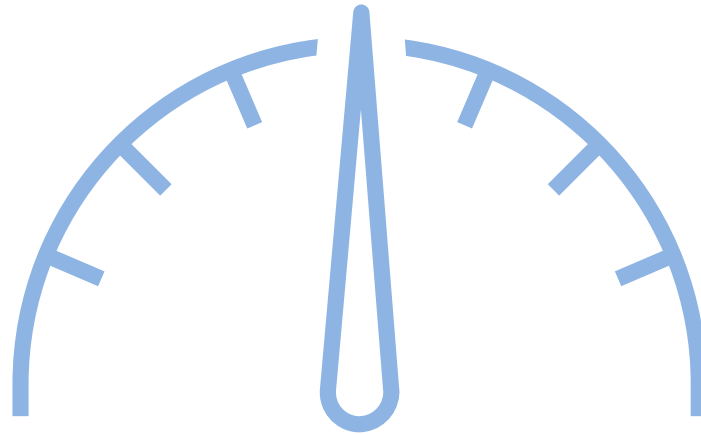


# 2018 UGR capacity range example

Room for additional homes:

320,000 (mid)

  
228,000 (low)



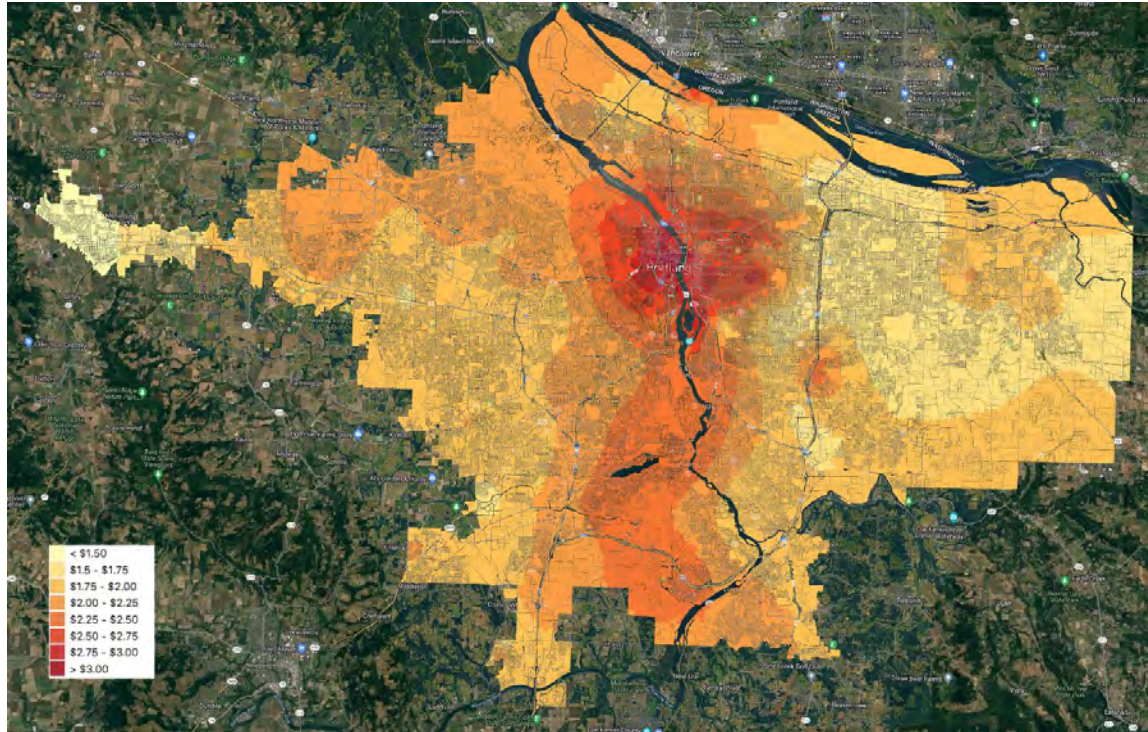
  
363,000 (high)

# Questions from previous meeting

1. What about specific properties like Lloyd Center and W. Hayden Island?
2. Do we consider brownfields?
3. Are tree codes considered?
4. Are interest rates considered?
5. Are varying market conditions around the region considered?
6. Does affordable housing factor into the model?
7. How sensitive is the model to market factors?

# Proforma model: pricing gradient

- Parcel level current pricing for rental and ownership residential
- Based on current market pricing, adjusted for age and condition of product



# Additional questions?

- About model assumptions?
- About model sensitivities?



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