



CITY OF MILWAUKIE

## Milwaukie Housing Affordability Strategy (MHAS): 2018–2023 Action Plan





# Acknowledgements

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# Introduction

## Context

On May 2, 2017, the Milwaukie City Council identified housing affordability as its number one priority for the 2017–2018 biennium. The Council directed City staff to “take every opportunity to address this housing crisis, including finding and working with partners to add new affordable units, and to encourage the private market to develop housing options that are affordable for Milwaukians at every income level and stage of life.” The City subsequently adopted a Community Vision in September 2017 that identifies availability of affordable housing as an integral component of an equitable, livable, and sustainable City.

Reflecting patterns seen across the region, housing prices in Milwaukie have risen sharply in recent years. Between April 2012 and April 2018, the median sale price for single-family homes in Milwaukie increased 92 percent. During the same period, the median sale price of small multifamily units increased 24 percent. Milwaukie homeowners and renters are increasingly housing cost burdened. The most recent Census numbers show that 32 percent of homeowners and 51 percent of renters are spending more than 30 percent of their income on housing.<sup>1</sup>

Cost-burdened households often find themselves without sufficient funds for other necessities such as food, health care, transportation, childcare, clothing, and proximity to jobs (living wage and retail/services). Being able to afford quality housing close to quality schools, grocery stores, and parks is a struggle for many low-income families.

The high cost of housing also leads to housing instability and limits housing choice. Frequent moves, particularly between school districts, negatively affect children's academic success. Moving can be stressful and expensive. Families who are upsizing or downsizing are sometimes unable to find housing they can afford in the community they have called home for decades. Seniors and people with disabilities are disproportionately impacted.



## Work To-Date

Milwaukie has taken steps toward increasing the amount of affordable housing in the City. In November 2017, the City approved a Construction Excise Tax (CET). The 1 percent tax on new construction or additions to residential, commercial, and industrial development over \$100,000 in permit value will be used to fund affordable housing programs. Milwaukie is also exploring ways to increase the amount of missing-middle housing in the City. Missing middle housing is generally two to fourteen units and includes duplexes, row houses, cottage clusters, and garden apartments. These dwellings can be more affordable than single-family homes and can be built at the same scale as large single-family homes so that they fit into established neighborhoods. Milwaukie is using a \$65,000 grant from Metro to explore cottage cluster feasibility.

In 2016, the City completed a Statewide Planning Goal 10, Housing and Residential Land Needs Assessment (also known as the HNA), in preparation for an update to the housing element of its comprehensive plan. The HNA outlines the supply of housing units by unit size, tenure, and price point that Milwaukie will need between 2016 and 2036 to meet projected demand. The HNA shows a need for over 800 homeownership units (which includes single family, middle housing options, and executive level housing) and 330 units of rental housing. The need for affordable housing is especially evident, as the HNA shows an existing deficit of units that is affordable for households making \$35,000 or less. It shows even more units needed for these income ranges over the next 20 years. Based on an affordability quotient of 30 percent, monthly housing costs higher than \$1,395 would make a household earning Milwaukie's median household income (\$55,800) cost burdened. Increased availability of housing for residents earning less than \$50,000 will be instrumental to the success of this plan. The HNA also identifies buildable parcels (vacant parcels and parcels suitable for redevelopment) that can help accommodate the city's projected housing needs.

As part of its Goal 10 work, the city also completed a Housing Strategies Report, which recommends code changes that aim to expand the range of permissible housing types in Milwaukie. The update to the housing element of the City's Comprehensive Plan (Goal 10)<sup>2</sup> will provide additional goal and policy language related to housing and housing affordability.<sup>2</sup> The relationships between these technical background reports, the Comprehensive Plan, the Community Vision, and the Milwaukie Housing Affordability Strategy (MHAS) are illustrated in Figure 1.

## Planning Process

Over the course of eight months, the community development department worked with a group of subject matter experts in the housing, tenant, and economic development arena to identify strategies to improve housing affordability in Milwaukie. The housing affordability working group (HAWG) met nine times to brainstorm ideas/solutions/issues, developed a strength, weakness, opportunities, and threats (SWOT) matrix, and shared programs, financing tools, and resources currently available to the community. This group helped frame the issues and potential solutions across multiple disciplines and brought a positive attitude toward this all-too-important need. Midway, the community development director hired Portland State University's Institute of Metropolitan Studies (IMS) to provide guidance in the development of this plan. The result was a comprehensive look at peer cities and their policies, an

understanding of our current policies and constraints (mainly as identified in a recent Housing Strategies Report), and a series of focus groups with tenants, landlords, property managers, developers, and home owners. (One tenant focus group was developed for Spanish speakers.) The result is a strategy that will meet three main goals: **increase the housing supply, prevent displacement of existing residents, and connect people to existing resources.**

The MHAS is a blueprint for providing equitable affordable housing opportunities and is intended to help increase the amount of affordable housing in the City. It serves as an overarching framework, combining existing land uses, needs assessments, housing policy analysis, and an analysis of best practices from peer cities. The MHAS will be used to support the work in the Milwaukie Housing Strategies Report, a document created as background to the Comprehensive Plan Update and the HNA, and to create an Action Plan that prioritizes the policy changes recommended in the Milwaukie Housing Strategies Report.

In order to achieve this objective, the Council-approved actions identified in the MHAS will be implemented over the next five years. Progress of the MHAS will be monitored and actions adjusted periodically based on performance measures, new information, and established review timelines.

## Milwaukie's Main Housing Goals

1. Develop new units
2. Prevent Displacement and Keep Affordable Units Affordable
3. Connect People to Existing Affordable Housing



# The Community Vision and Housing

In September 2017, the City Council adopted a new Community Vision Statement and Action Plan following a year-long process called *Milwaukie All Aboard*. The intent of this Vision Statement and Action Plan is twofold: to describe what Milwaukie stakeholders want the community to be like in the year 2040, and to help guide City priorities and investments in the years to come.

The Community Vision was developed based on a quadruple bottom line approach to sustainability, with a focus on People, Place, Planet, and Prosperity. The vision statement is supported by a set of twelve goal statements, which were further synthesized into a set of five “super actions” for the purposes of organizing the Action Plan. The Action Plan provides a vehicle for translating the Vision Statement and Goal Statements into actions, which will be implemented through strategies such as the MHAS. Several action items specifically deal with housing affordability across a variety of housing types and income ranges.

The City of Milwaukie's Vision for 2040 is as follows:

*In 2040, Milwaukie is a flourishing City that is entirely equitable, delightfully livable, and completely sustainable. It is a safe and welcoming community whose residents enjoy secure and meaningful work, a comprehensive educational system, and affordable housing. A complete network of sidewalks, bike lanes, and paths along with well-maintained streets and a robust transit system connect our neighborhood centers. Art and creativity are woven into the fabric of the City.*

*Milwaukie's neighborhoods are the centers of daily life, with each containing amenities and community-minded local businesses that meet residents' needs. Our industrial areas are magnets for innovation, and models for environmentally-sensitive manufacturing and high wage jobs. Our residents can easily access the training and education needed to win those jobs.*

*Milwaukie nurtures a verdant canopy of beneficial trees, promotes sustainable development, and is a net-zero-energy City. The Willamette River, Johnson Creek, and Kellogg Creek are free flowing, and accessible. Their ecosystems are protected by a robust stormwater treatment system and enhanced by appropriate riparian vegetation. Milwaukie is a resilient community, adaptive to the realities of a changing climate, and prepared for emergencies, such as the Cascadia Event.*

*Milwaukie's government is transparent and accessible, and is committed to promoting tolerance and inclusion and eliminating disparities. It strongly encourages engagement and participation by all and nurtures a deep sense of community through celebrations and collective action. Residents have the resources necessary to access the help they need. In this great City, we strive to reach our full potential in the areas of education, environmental stewardship, commerce, culture, and recreation; and are proud to call it home.*



# The Comprehensive Plan and the Housing Needs Strategies Policy Work

The Comprehensive Plan is a 20-year policy document that directs the city's growth. The city is underway with a Comprehensive Plan update and has solicited background reports. The Housing Strategies Report, for example, made several recommendations that will be made to align with the updates to the comprehensive plan.

Many of the code amendments will need to follow the comprehensive planning update track, but efforts within the community development department will be made to expedite amendments once that process is complete. Within the MHAS, there are several actions that relate to the Housing Strategies Report. For example, consider waiving or reducing system development charges (SDCs) for accessory dwelling units (ADUs). The city also passed a construction excise tax for affordable housing to help offset SDCs so programming will occur within the MHAS timeframe.

The Milwaukie Housing Strategies Report outlines 11 “recommended code amendments” to ensure a

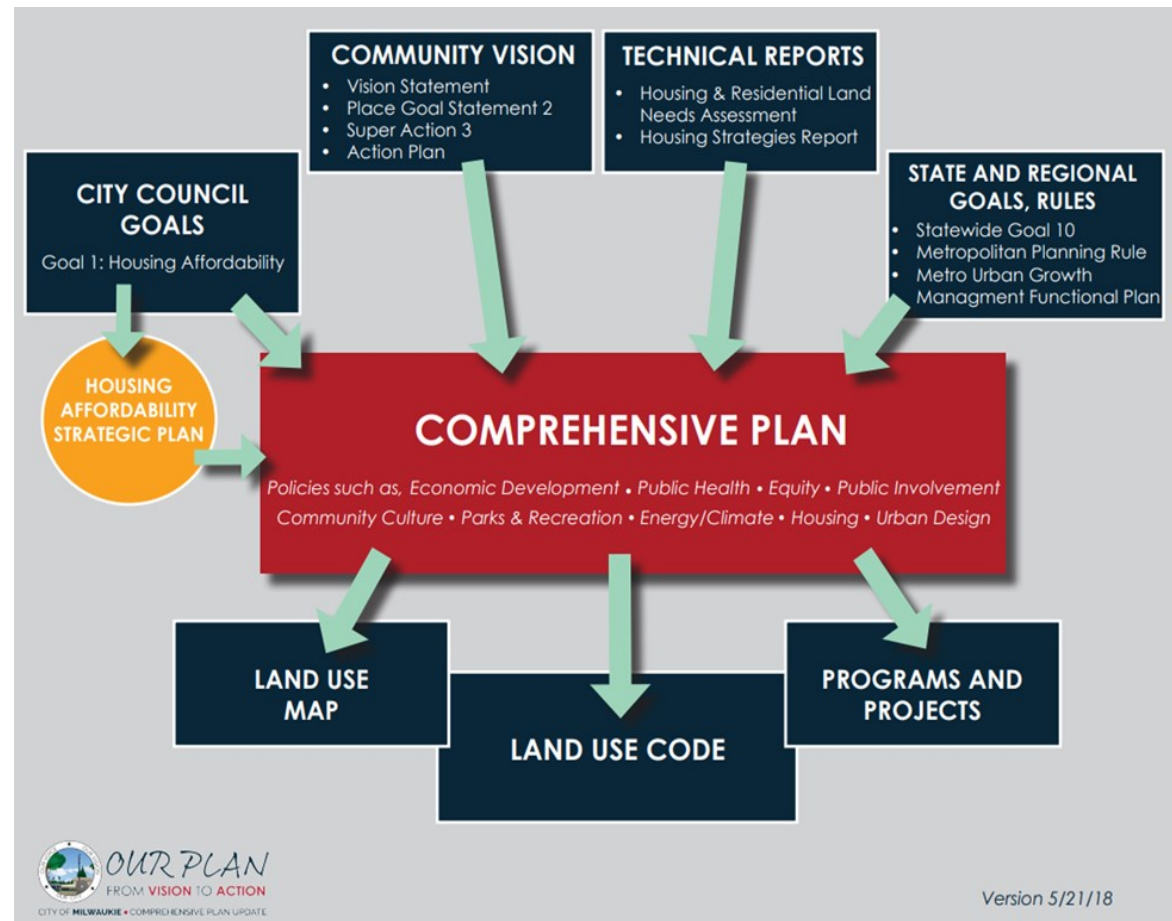


Figure 1. The intersections of the Comprehensive Plan and the MHAS

variety of housing types at different price ranges. Some of these identified code amendments emerged through the MHAS process, while others will require additional policy discussion during the Comprehensive Plan update process. Recommendations from the Milwaukie Housing Strategies Report align with the MHAS and future planning processes:

### Strategies reinforced by the MHAS:

- Middle housing options like Cottage Cluster Housing: the Cottage Cluster Feasibility Analysis and code audit will further define the amendments that will be undertaken to encourage cottage cluster development along with appropriate incentives. The Analysis will begin in the summer of 2018 and is further supported by this Strategy.
- Accessory Dwelling Units: The MHAS also recommends revising development standards to facilitate ADU development, including right-sizing parking requirements and creating financial incentives and support.
- Parking Requirements: The MHAS supports the Strategies Report's recommendation to right-size off-street minimum parking requirements to encourage desired housing types, incentivize development in priority locations, and establish parking maximums in certain areas.
- Clear and Objective Standards for Needed Housing: The MHAS broadly recommends creating predictable, clear development standards, review procedures, and fee structures to support housing production, supporting the intent of the Strategies Report's specific recommendations.

### Strategies best addressed through Comprehensive Plan policy setting:

- Live/Work Units: The MHAS does not address the appropriate locations and standards for Live/Work units, and the Strategies Report recommends expanding locations where they are currently permitted. The Comprehensive Plan may provide further direction to lead to implementation.
- Rowhouses (Single-Family Attached Housing): The MHAS recommends allowing and encouraging a variety of housing types, but does not address rowhouses specifically. The Comprehensive Plan could identify the types of housing units appropriate in Milwaukie's neighborhoods, to include attached products
- Co-Housing: The MHAS does not address co-housing models that provide for community living in homes and clusters of homes with shared spaces. Cottage cluster development may lend itself to co-housing living, but additional community conversations through the Comprehensive Plan will be necessary to provide adequate direction.



Cottage Cluster



Accessory Dwelling Unit



Multifamily Housing

- **Neighborhood Compatibility Standards:** The Strategies Report recommends reviewing and amending the zoning code to ensure appropriate infill development that is compatible with existing neighborhoods. The Strategies Report identifies some examples of amendments, but the Comprehensive Plan process will be an ideal time to define desired characteristics to inform subsequent amendments.

### Strategies not addressed by the MHAS:

- **Transitional Housing and Residential Homes:** The MHAS does not address this recommendation, but specific actions are included in the Strategies Report. These amendments could be bundled with other zoning code amendments related to housing choice.
- **Inclusionary Housing:** The MHAS does not recommend inclusionary housing requirements.

## Housing in Milwaukie Community Vision

Goal Statement, Place 2: Milwaukie invests in housing options that provide affordability, high quality development and good design, promoting quality living environments. It maintains the small neighborhood feel through creative use of space with housing options that embrace community inclusion and promote stability.

Super Action 3: Create Complete Neighborhoods that Offer a Range of Housing Types and Amenities and Enhance Local Identity and Character

### Actions

Place 2.1: Aim to provide improved housing affordability and stability for all City residents, with a variety of housing types, price ranges, and subsidized units available in all neighborhoods

Place 2.2: Streamline permitting and examine ways to adjust system development charges to encourage creative uses of space such as Accessory Dwelling Units, Tiny Homes, and Cottage Clusters

Place 2.5: Create neighborhood plans that define neighborhood character, identify community needs and priorities, and develop strategies for better integrating infill housing into neighborhoods

Place 2.7: Update the Development Code to allow more “missing middle” housing types (duplexes, triplexes and cottage clusters, tiny houses) in established neighborhoods, and permit mixed-use buildings in neighborhood hubs

# Goals

## Goal 1: Develop New Units

Increase the amount of housing affordable to people across the income spectrum. Increase the number of affordable units and the total amount of housing to better meet market demand through financing and direct development.

### Why is this important?

Families and individuals across the income spectrum want to call Milwaukie home. Households at lower and moderate incomes will benefit from new affordable units. Building market rate housing is an important part of the overall housing affordability strategy. New market rate units will not immediately increase the stock of existing units but they will help to keep existing affordable units affordable. When housing demand is high and the supply of for-rent to homeownership housing does not keep pace, prices increase. Decreased affordability is the result. Adding new units and potentially factoring in supportive housing or resident services helps to relieve the pressure on housing costs, including rental costs, and minimizes the threat of homelessness.

Financing, construction costs, local and state programs, building codes and land use regulation requirements can make it costlier to build housing of all types and can limit the supply.<sup>3</sup> Changing requirements can reduce the cost of building housing, which in turn promotes more housing supply and long-term affordability.

## Goal 2: Prevent Displacement and Keep Affordable Units Affordable

Stabilize and protect renters and homeowners by preserving existing affordable housing and increasing education and access to resources.

### Why is this important?

Whether they are renters or homeowners, Milwaukians are deeply invested in the community. Increasing housing costs, including rents and property values, can cause displacement when





residents are priced out of neighborhoods. While some homeowners may choose to leave and profit from the sale of their property, others are involuntarily displaced. Actions that preserve existing affordable housing and help those who want to stay in their homes are an important part of the City's affordable housing strategy.

### Goal 3: Connect People to Existing Affordable Housing

Help existing and potential residents find, qualify for, and access housing that is affordable and appropriate for their needs.

#### **Why is this important?**

Households who are ready to move into homeownership will benefit from education and support. Renters who need help overcoming barriers will also benefit from programs that help them overcome rental barriers.



# Goals at a Glance

## Goal 1: Develop New Affordable Units

- 1.1 Develop incentives/funding program(s) for affordable housing through the existing construction excise tax.
- 1.2 Explore the development of a community land trust (CLT) or another model that supports creative financing for a project (e.g., co-op model, communal living, etc.)
- 1.3 Explore incentivizing the development of affordable units through a local property tax exemption or other form of tax alleviation.
- 1.4 Create an internal culture that is friendly to developers by exploring ways to streamline permitting and planning; for example, hold more pre-development conferences.
- 1.5 Explore creative methods for leveraging fees (permits, system development charges infrastructure costs, etc.) to help incentivize affordable housing development.
- 1.6 Develop public lands policy to increase affordable housing development and workforce development opportunities for construction workers. Explore ways to leverage the Climate Action Plan elements that may impact the built form.
- 1.7 Partner with architects and builders to create base development plans to streamline the development process and reduce development costs.
- 1.8 Explore right-sizing parking requirements for ADUs, cottage clusters, tiny homes, etc.
- 1.9 Explore incentivizing/encouraging ADU and cottage cluster development.
- 1.10 Explore lean construction methods to bring down the cost of housing development and market those cost reducing methods to developers.<sup>4</sup>
- 1.11 Engage with Metro's Equitable Housing Program's pursuit of a general obligation bond for affordable housing and advocate for a Milwaukie project.
- 1.12 Develop and maintain a database of available properties (all zones) to market to developers.
- 1.13 Partner and support Clackamas County's affordable housing development and rehabilitation projects in Milwaukie.
- 1.14 Seek to adopt or modify existing land use policies to meet developer and community needs.

## Goal 2: Prevent Displacement & Keep Affordable Units Affordable

- 2.1 Hire a Housing Coordinator to act as a dedicated liaison between homeowners, renters, and rental housing providers. The Coordinator will compile a database of information about existing resources and tools.
- 2.2 Partner with nonprofit organizations and housing agencies to fund the purchase of existing affordable multi-family housing to preserve it long term.
- 2.3 Consider developing an affordable housing trust fund or partnering with the County's efforts to do so.
- 2.4 Support and promote programs that provide financial assistance for seniors and low-income homeowners to remain in their homes.
- 2.5 Adopt policies to mitigate the impact of rental displacement. Explore a relocation assistance ordinance or similar type of tenant assistance policy.
- 2.6 Partner with the county mediation services to connect landlords to tenant mediation services.
- 2.7 Research and market low-cost loans to property owners for maintenance, weatherization, and seismic upgrades.
- 2.8 Partner with Clackamas Housing Authority to support new affordable units for Milwaukie renters.
- 2.9 Build community among rental housing providers.
- 2.10 Create an internal culture that is friendly to rental housing providers.
- 2.11 Build stronger alignment with the workforce development system.

## Goal 3: Connect People to Existing Affordable Housing

- 3.1 Partner with nonprofits and employers to provide first-time homebuyer education and support.
- 3.2 Support and promote programs to certify renters and reduce their move-in costs.
- 3.3 Support and promote programs that streamline the rental application process and reduce application fees.
- 3.4 Develop a marketing campaign to educate and engage the community on housing affordability, density, and development realities in order to develop community capacity.
- 3.5 Develop a financing and resource database.
- 3.6 Partner with the Oregon IDA Initiative to help Milwaukie residents build financial management skills and build assets.

# Goals and Actions: Implementation

## Goal 1: Develop New Affordable Units

### 1.1 Explore program(s) for affordable housing through the existing construction excise tax (CET).<sup>5</sup>

- 1.1.1 Create an oversight committee for the establishment of the CET programming and create criteria for distributing the funds.
- 1.1.2 Develop a work plan for the programming and establish criteria for distribution (keep in mind regional initiatives and leverage opportunities).
- 1.1.3 Develop the marketing plan for the CET fund distribution.

#### Advantages

- Creates certainty in the process.
- Provides transparency.
- No cost to low cost option (\$) - mainly staff time.

#### Disadvantages

- May slow the use of funds if not properly designed.
- May not allow discretion to evolve if narrowly defined.

### 1.2 Explore the development of a community land trust (CLT) or another model that supports creative financing for a project (e.g., co-op model, communal living, etc.).<sup>6</sup>

- 1.2.1 In addition to other actions, partner with banks to have rent payments demonstrate responsibility that supports qualification for down payment loan assistance. (Community reinvestment act points could be leveraged.)

- 1.2.2 Further explore the co-op model or one that allows a first right of refusal for renters, and look at policies or incentives that the City could implement to encourage this action.<sup>7</sup>

- 1.2.3 Establish an inventory of foreclosed, short-sale homes and multi-family development to encourage the CLT platform or other model and market to mission-driven developers as a pilot project.

#### Advantages

- Permanent affordability addresses the "leaky bucket" concern where affordable units may be lost when their subsidies expire.
- The model makes homeownership available to families who would likely never be eligible in the private market.
- The model offers security for owners and the ability to generate equity.
- A flexible model can be scalable and tailored to the needs of the community, and can facilitate partnerships.
- Low to mid cost option (\$-\$) - staff time plus consultants.

#### Disadvantages

- Resale provisions that capture a portion of a home's appreciation to maintain affordability must be balanced to ensure that homeowners grow a reasonable amount of equity.
- Legal agreements may be complicated for homeowners and partners, and will require additional counseling and coordination with lenders.



### 1.3 Explore incentivizing the development of affordable units through a local property tax exemption or other form of tax alleviation.<sup>8</sup>

1.3.1 Explore a partnership with the Clackamas County Housing and Homelessness Task force.

1.3.2 Hold education sessions with other taxing districts to leverage their support.

1.3.3 Study the revenue impact and evaluate creative ways to replace the foregone revenue.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Tax exemptions are a common operating subsidy for affordable housing units, and many providers are familiar with them.</li> <li>• A local tax exemption is within local control and is not an up-front expenditure.</li> </ul>	<ul style="list-style-type: none"> <li>• Tax exemptions are foregone future revenue and will reduce funding available for public purposes.</li> <li>• County and other taxing districts control over 70 percent of the taxes.</li> <li>• Potentially high cost (loss of tax revenue for 10 years or more depending on program details (\$\$\$))</li> </ul>

### 1.4 Create an internal culture that is friendly to developers by exploring ways to streamline permitting and planning. Developers need to know that Milwaukie understands and values their contribution to the City. Milwaukie should nurture a development-friendly culture and treat developers as partners in providing housing, not as adversaries.

1.4.1 Assign project managers to provide a consistent point of contact to coordinate among internal and external agencies, and to take ownership of a project to facilitate the development process.

1.4.2 Charge consistent and predictable permit fees. Public-accessible information helps housing providers

make informed decisions about their projects, while unforeseen changes can interrupt financing and delay the process.

1.4.3. Provide a predictable review process with early feedback to avoid costly delays and duplication, for City staff and housing providers. Predictability also provides transparency for community members and assists them in engaging and providing input.

1.4.4. Identify zoning code fixes that could alleviate the time and cost of development.

1.4.5. Explore how other cities in the region are streamlining their processes.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Process improvements can save staff time and money through increased efficiency.</li> <li>• Milwaukie can gain a reputation as a business-friendly community.</li> <li>• Increased and faster delivery of housing units</li> <li>• No cost to Low cost (\$)—staff time</li> </ul>	<ul style="list-style-type: none"> <li>• Regulatory streamlining can only go so far to improve the affordability of market-rate and regulated affordable units.</li> <li>• Time and resources will be needed to align departments and potentially hire new staff.</li> </ul>

### 1.5 Engage with the development community to model the potential impact of incentives, such as changes to zoning or the structure of development fees.<sup>9</sup>

1.5.1 Continue to develop public-private partnerships to reduce the impact of development fees with the expectation of additional affordable housing development (e.g., development agreements for shared cost).

1.5.2 Structure incentives to encourage universal design

and age-friendly housing.

1.5.3 Incentivize sustainable design (energy efficiency measures) to reduce the cost of utilities to the tenants.

1.5.4 Explore a transportation impact fee exemption. Exempting or reducing affordable housing units from transportation impact fees can reduce the cost of development.<sup>10</sup>

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Implementing policy goals with fee structures is within local control.</li> <li>• There is the potential to impact the cost of housing by reducing development costs.</li> <li>• No to low cost option (\$)—staff time</li> </ul>	<ul style="list-style-type: none"> <li>• Lower fees may result in less revenue for public purposes.</li> <li>• An appropriate incentive system may be complicated, but must ensure predictability.</li> <li>• Over 70 percent of the SDCs are controlled by the county.</li> <li>• Bancrofting is a high cost to city to cover.</li> </ul>

**1.6 Develop public lands policy that supports the goal of increasing affordable housing while improving workforce development opportunities for construction workers. A predictable public lands policy that supports affordable housing preservation and creation is an effective way to leverage land as a city-owned resource. Public lands policies can establish a minimum percentage of sales revenues to be dedicated to affordable housing programs, minimum percentage of affordable units to be created on formerly publicly-owned lands, and other public interest objectives like wage standards and diversity goals.<sup>11</sup>**

1.6.1 Partner with Clackamas Workforce Partnership to leverage employees and recent high school graduates to explore the field of construction and the trades.

1.6.2. When negotiating public-private lands, consider

developing a policy to reach a certain percentage of units of varying sizes that are affordable.

1.6.3 Continue to find opportunities to land bank and perform necessary due diligence in property negotiations.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Provides flexibility to reduce the cost of land and donate or sell land for revenue, where appropriate.</li> <li>• A lower land price can result in lower cost units.</li> <li>• Allowing increased density tied to provision of affordable housing could reduce the cost per unit.</li> <li>• No cost to low cost option (\$)—staff time</li> </ul>	<ul style="list-style-type: none"> <li>• There are a limited number of public properties.</li> <li>• Not all sites will be appropriate for housing.</li> <li>• Assessing the appropriate selling price or discount may be complex and will have tradeoffs for other public interests.</li> </ul>

**1.7 Partner with architects and builders to create base development plans. Develop template and pre-approved development plans that reflect the community's housing vision and reduce the time, expense, and risk of building housing. Milwaukie can work with architects and builders to create base plans that an owner can use to get a head start on the design process or replicate easily with less time-spent designing and less time for City staff to review.**

1.7.1 Market/promote the designs of the Cottage Cluster Feasibility Analysis.

1.7.2 Research the Portland infill program and the design templates they created for skinny homes; consider a competition to encourage the design fields to develop prototypes specific to the character of Milwaukie neighborhoods.<sup>12</sup>

#### Advantages

- Preapproved plans reduce time and expense resulting in lowered housing costs.
- Preapproved plans will reduce staff review time.

#### Disadvantages

- Similar designs may detract from unique neighborhood character if not developed appropriately.
- Template plans may not work on all lot layouts or provide enough personal design flexibility.
- Pre-approved plans may not always comply with public funding sources for affordable housing.
- Mid cost needed up front to

**1.8 Explore right-sizing parking requirements for ADUs, cottage clusters, tiny homes, etc. Thoughtful, right-sized off-street parking requirements for affordable housing can increase the financial feasibility of desired housing types. Parking maximums may also be appropriate in certain areas. Parking should be reduced for affordable units within the area of a major transit stop, to be defined based upon frequency of service, connectivity, and other factors.**

#### Advantages

- Rightsizing parking requirements may advance other City goals, like multimodal transportation, climate objectives, and walkability, if paired with other investments.
- Parking reductions do not require a City expenditure and can reduce the cost of housing production.
- Rightsizing parking requirements provides flexibility for unit sizes (studios and family units have varying demands).
- No cost to low cost (\$)—staff time.

#### Disadvantages

- Parking ratios that do not reflect user patterns may create parking spillover into surrounding areas; comprehensive parking management may be necessary.
- Parking reduction tied to affordability will require compliance monitoring.
- Parking ratios that do not reflect user patterns may create parking spillover into surrounding areas; comprehensive parking management may be necessary.
- Parking reduction tied to affordability will require compliance monitoring.

**1.9 Explore incentivizing/encouraging ADU and cottage cluster development. ADUs can provide an income stream for existing homeowners, increase the supply of affordable housing, and increase opportunities for residents to remain in their neighborhoods as their needs change. Milwaukee can reduce the barriers and costs associated with ADU development in exchange for provisions around use.**

*1.9.1 Implement the recommendations of the cottage cluster code audit (will be underway in the summer of 2018).*

*1.9.2 Explore what other cities have implemented and what our Housing Strategies Report (under the housing*

assessment) recommended for easing the development requirements for ADUs, etc.

1.9.3 Partner with community banks or credit unions to create a loan product with favorable terms, like lower interest rates and lower fees (e.g., Network for Oregon Affordable Housing).

1.9.4 Provide community-approved template plans (in Goal 1.7).

1.9.5 Waive SDC fees.

1.9.6 Revise the zoning code and other development standards to facilitate creation of ADUs.

1.9.7 Market the results of the Cottage Cluster Feasibility Study and seek to implement one or two cottage cluster developments.

#### Advantages

- Increases overall housing supply.
- Provides an additional source of income for homeowners.
- Provides option for seniors or people with special needs to remain in their homes.
- Increases housing choices.
- Allows for multi-generational living.
- Work is already in process through the Metro Equitable Housing grant—low cost \$

#### Disadvantages

- Increased density might change neighborhood character.
- New housing might not be affordable.

### 1.10 Explore lean construction methods to bring down the cost of housing development and market those cost reducing methods to developers.

1.10.1 Research traditional construction costs against adding additional elements and sustainability efforts (cross-reference with the Climate Action Plan results) and consider programming/incentives to assist.

#### Advantages

- Aligning city review and permitting processes with lean construction approaches can create efficiencies for development review of all types.
- Milwaukie may be able to incentivize lean construction practices for housing providers by developing proactive best practices and methodologies.

#### Disadvantages

- Milwaukie may need to engage the assistance of technical experts to complete this work.
- The city may find it difficult to control costs (if incentivized or the market manipulated—high cost potential (\$\$\$).

### 1.11 Engage with Metro's Equitable Housing program to pursue a general obligation bond for affordable housing.

1.11.1 Continue to attend committee meetings to discuss how Milwaukie could use funds from a general obligation bond.

1.11.2 Continue to communicate with Clackamas County Housing Authority to advocate for Milwaukie's needs.



#### Advantages

- Opportunity to participate in a regional housing approach and leverage Milwaukie's and Clackamas County's resources.
- Potential flexibility in use of funds.
- No cost

#### Disadvantages

- Complexity of joint development

### 1.12 Develop and maintain a database of available properties (all zones) to market to developers.

1.12.1 *Develop a website to promote the opportunity sites and explain the constraints and opportunities of the sites.*

#### Advantages

- Highlights opportunities in Milwaukie for site selectors, brokers, and housing developers.
- No cost to low cost (\$)—staff time

#### Disadvantages

- Will require resources and efforts to keep up to date.

### 1.13 Partner and support Clackamas County's affordable housing development and rehabilitation projects in Milwaukie.

1.13.1 *Attend the Clackamas County Housing and Houselessness Task force and advocate for Milwaukie needs.*

1.13.2 *Partner with Clackamas County on the rehabilitation of the Hillside Manor and the development of the master plan of the Hillside Manor.*

1.13.3 *Seek opportunities to leverage grants or programming to support additional resident services or*

supportive housing services.

#### Advantages

- Provides opportunity to leverage Clackamas county's efforts and combine resources for greater impact.
- No cost to low cost (\$)—staff time

#### Disadvantages

- Diverts staff and monetary resources from other Milwaukie initiatives.

### 1.14 Seek to adopt new or modify existing land use policies to meet developer and community needs (coincides with the development of the housing element of the comprehensive plan or the Housing Strategies Report).

1.14.1 *Be prepared to move forward with code/zoning changes that the housing element of the comprehensive plan will recommend in 2019.*

#### Advantages

- Provides ability to leverage momentum of planning process to implement recommendations quickly after plan's adoption.
- Demonstrate to housing providers and communities that Milwaukie is committed to housing affordability through prompt action.
- No cost to low cost (\$)—staff

#### Disadvantages

- Not all development standards necessary to achieve Milwaukie's housing goals are within local control.

## Goal 2: Prevent Displacement & Keep Affordable Units Affordable

**2.1 Hire Housing Coordinator to help implement this strategy and to serve as a liaison to homeowners, renters, and rental housing providers. Have the coordinator provide information about existing programs to ensure that people understand their rights and responsibilities and have access to resources.<sup>13</sup>**

### Advantages

- The Housing Coordinator will act as a centralized source of information. The Coordinator will users to connect community-wide resources and each other.
- Already funded

### Disadvantages

- To be successful, the Coordinator will require longevity and deep knowledge.

**2.2 Partner with nonprofit organizations and housing agencies to fund the purchase of existing, affordable multifamily housing to preserve it long term. (Leverage Clackamas County Housing Authority's existing program and develop a stronger relationship with financiers).**

### Advantages

- Purchasing and preserving existing affordable units may be a more cost-effective method of delivering affordable units than new construction.
- Provides potential to keep existing residents in place through acquisition and preservation.
- No cost to Low cost (\$)—existing staff time

### Disadvantages

- Existing units may not have all desired qualities to align with city goals.

**2.3 Consider developing an affordable housing trust fund or partnering with the County's efforts. Existing and potentially new impact fees or construction excise taxes on residential, commercial, and industrial development can capitalize a dedicated affordable housing trust fund to support housing affordability programs in a variety of ways depending on local need.**

### Advantages

- Dedicated funding offers a committed source for housing affordability efforts, insulated from annual budget allocations.
- Provides flexibility to design and modify program spending.

### Disadvantages

- Sources of funding will fluctuate with the strength of the economy and construction.
- Potentially high cost (\$\$\$) to seed the program.
- New fees must not be excessive and negatively impact housing production and cost.
- Dedication of revenue to trust fund precludes it from other

**2.4 Support and promote programs that provide financial assistance for seniors and low-income homeowners to remain in their homes. While homeownership may provide stability for many families, many residents may need additional support to ensure that their homes meet their needs over time and remain an affordable, safe option.<sup>14</sup>**

#### Advantages

- May be able to support the work of others and existing services for effective use of city resources.
- Low cost (\$)—leveraging existing programs.

#### Disadvantages

- New programs may need to be created by the city or in partnership with others where they do not exist, new territory for the city.

**2.5 Adopt policies to mitigate the impact of rental displacement. Explore a relocation assistance ordinance or similar type of tenant assistance policy. Involuntary displacement can be a traumatic, disruptive event for families, and additional information and support can ease the impact on Milwaukie households.**

*2.5.1 Research and make policy recommendations related to other city's relocation assistance policies or other similar tools.*

*2.5.2 Conduct more targeted policy outreach to impacted stakeholders.*

#### Advantages

- Relocation assistance paid by landlord may encourage other solutions and collaboration with tenants.
- No cost to low cost (\$)—staff time.

#### Disadvantages

- Additional requirements on housing providers may disincentive making housing available for rent.
- Potentially high cost for property owners, developers, etc.

**2.6 Assist in eviction prevention by promoting Clackamas County's landlord-tenant mediation services, which can help housing providers and tenants navigate confusing and contentious issues, saving time, money, and anxiety for all parties.<sup>15</sup>**

*2.6.1 Partner with the county mediation services to connect tenants and landlords through mediation services.*

*2.6.2 Connect with organizations that provide training and resources for landlords and tenants and help to market their programs.*

*2.6.3 Explore monitoring and developing habitability standards that will be enforced through a property-owner database.*

*2.6.4 Explore a rental database to monitor available rentals and market rents.*

#### Advantages

- Mediation may prevent long-lasting detriments to renter's records and substantial losses to landlords.
- Solutions may be developed without substantial legal fees and time.
- No cost

#### Disadvantages

- Mediation may be challenging for housing owners who are non-local.
- Successful mediation requires good faith participation by all parties and cannot be mandatory.

**2.7 Research and market low-cost loans to property owners for maintenance, weatherization, and seismic upgrades.**

*2.7.1 Support and promote rehab loans for multifamily buildings.<sup>16</sup>*

*2.7.2 Partner with agencies to provide low-income renters with emergency housing grants; leverage any*

existing programs at the county, regional, or state level.

2.7.3 Develop and market a financial resource guide for tenants and property owners.

2.7.4 Consider developing a renter emergency fund. For households without a financial cushion, unexpected expenses can be the difference between staying in their homes or missing rent payments or sacrificing other important things, like childcare, food, and medicine.

2.7.5 Promote, when possible, career and technical trades to property owners and residents to help them learn the trades to maintain their own homes and understand the employment landscape potential.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Encourages preservation of existing housing stock.</li> <li>• Can help keep tenants in their homes.</li> <li>• Relatively small amounts of funding can have substantial positive impacts on households.</li> <li>• Helping a household stay in their home with assistance will also benefit the housing provider who does not lose rental income.</li> <li>• Connects State workforce initiatives with the community.</li> <li>• Existing programs to leverage—Low cost (\$)</li> </ul>	<ul style="list-style-type: none"> <li>• Necessary funding allocations may be substantial, and creating a loan program will require staff and legal expertise.</li> <li>• Ensuring that units meet affordability goals after rehab will require compliance monitoring and may be challenging.</li> <li>• Compliance requirements will demand sensitivity.</li> <li>• Emergency assistance may help a limited number of circumstances and not underlying causes.</li> <li>• The fund will not reduce the cost of housing or create additional units.</li> <li>• Seed money may be needed (\$)</li> </ul>

## 2.8 Partner with Clackamas Housing Authority to support new affordable units for Milwaukie renters.<sup>17</sup>

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Leverages and supports existing voucher programs.</li> <li>• No cost</li> </ul>	<ul style="list-style-type: none"> <li>• Requires that case management services and housing production by another agency are tied together. As a result, program may not be able to work in isolation.</li> </ul>

## 2.9 Build community among rental housing providers. Renting out housing can be confusing, intimidating, and risky. Rental housing providers can build community among themselves, support each other, share information and best practices, and mentor new and small rental property providers to provide better services to the community and maintain the supply of rental units. Milwaukie can connect housing providers to existing networks and services, and provide support for these groups to enhance their efforts.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Increase in information sharing may result in higher standards of service for tenants.</li> </ul>	<ul style="list-style-type: none"> <li>• Building community among rental housing providers won't result in the creation of new affordable units.</li> <li>• Will require seed money (\$-\$\$) to provide networking opportunities.</li> </ul>



**2.10 Create an internal culture that is friendly to rental housing providers. Rental-housing providers need to know that Milwaukie understands and values their contribution to the city.**

2.10.1 *Provide consistent and reliable permit and license fees that are predictable.*

2.10.2 Send packets of information to rental housing providers who receive or renew a business license or permit.

Advantages	Disadvantages
<ul style="list-style-type: none"><li>• Public, accessible information helps housing providers make informed decisions about their investments.</li><li>• Can leverage existing communication avenues, like license renewals.</li><li>• Low cost (\$)</li></ul>	<ul style="list-style-type: none"><li>• May eliminate some discretion and flexibility in city standards and fees.</li><li>• May not result in the creation of new housing units.</li></ul>

**2.11 Build stronger alignment with the workforce development system. Through partnerships with Clackamas Workforce Partnership, WorkSource Clackamas, and the greater workforce system, community members will have access to both appropriate job placement and opportunities for skill building reinforcing the goal of stabilizing households living in Milwaukie to prevent displacement.**

Advantages	Disadvantages
<ul style="list-style-type: none"><li>• Creates continuum of support with changing economy and job opportunities.</li><li>• Provides opportunity for existing residents to advance in in-demand careers and pathways.</li><li>• Financially stabilizing families will help mitigate the impact of rental displacement.</li></ul>	<ul style="list-style-type: none"><li>• Public funding is fairly volatile and will impact sustainability of services and resources.</li><li>• Public housing residents may need resource-intensive wrap-around supports as they transition to market rate housing to ensure on-going success.</li></ul>

## Goal 3: Connect People to Existing Affordable Housing

**3.1 Partner with nonprofits and employers to provide information and support for prospective homebuyers as they navigate the home-buying process.<sup>18</sup>**

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Can leverage existing resources and foster connections.</li> <li>• Low cost (\$)</li> </ul>	<ul style="list-style-type: none"> <li>• Will not increase the supply of housing or decrease housing expenses.</li> </ul>

**3.2 Support and promote programs to certify renters and reduce their move-in costs.**

3.2.1 Promote the County's Rent Well program. Rent Well provides tenant education to give residents the support, knowledge, and expertise they need to become successful tenants.

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Renters who are not able to access appropriate housing will gain options.</li> <li>• Leverages existing program.</li> <li>• Both renters and landlords can benefit from the program.</li> </ul>	<ul style="list-style-type: none"> <li>• Does not create new affordable units or keep people in existing affordable units.</li> </ul>

**3.3 Support and promote programs that streamline the rental application process. The high cost of rental applications is a barrier to many households. Encouraging the use of programs that streamline the application process by matching prospective tenants to all appropriate and**

**available housing options using a single application and fee reduces the cost for tenants.**

3.3.1 Research and promote program(s) that provide a one-stop application and fee process for renters (e.g. OneApp fee).

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• With less time and expense, helps renters access appropriate housing and helps landlords find tenants.</li> <li>• Low cost-high impact option (\$)</li> </ul>	<ul style="list-style-type: none"> <li>• Does not create new affordable units or keep people in existing affordable units.</li> <li>• May need seed money (\$)</li> </ul>

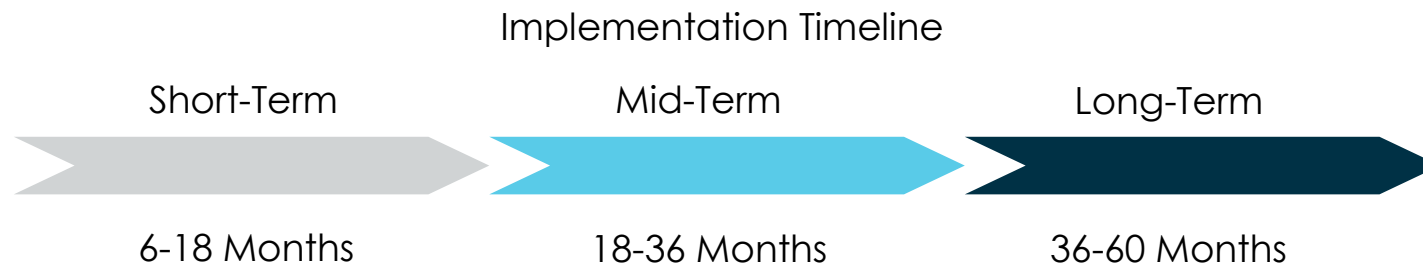
**3.4 Develop a marketing campaign to educate and engage the community on housing affordability, density, and development realities in order to develop community capacity. (\$0)**

**3.5 Develop a financing and resource database. (\$0)**

**3.6 Partner with Oregon IDA Initiative to help Milwaukie residents build financial management skills and build assets. (\$0)**

# Implementation

The city will implement the MHAS over the next five years. City staff will work with the city council to prioritize the recommendations in MHAS. During implementation, the city will align efforts with existing programs, build new partnerships, and strengthen those already in place.



Action		Term	Cost	Partners
1.1	Develop incentives/funding program(s) for affordable housing through the existing construction excise tax.	Short	\$0-\$	
1.2	Explore the development of a community land trust or another model that supports creative financing for a project (e.g., co-op model, communal living, etc.)	Long	\$-\$	Existing nonprofit housing providers, philanthropic entities
1.3	Explore incentivizing the development of affordable units through a local property tax exemption or other form of tax alleviation.	Short	\$-\$ \$\$\$	Housing providers, Clackamas County
1.4	Create an internal culture that is friendly to developers.	Short-Mid	\$0-\$	
1.5	Explore creative methods for leveraging fees (permits, system development charges, infrastructure costs, etc.) to help incentivize affordable housing development.	Near	\$0-\$	Urban Land Institute, NAIOP Commercial Real Estate Development Association, Oregon LOCUS, individual housing providers

Action		Term	Cost	Partners
1.6	Develop public lands policy.	Long	\$0-\$	
1.7	Partner with architects and builders to create base development plans.	Long	\$\$	American Institute of Architects, Home Builders Association
1.8	Explore rightsizing parking requirements for ADUs, cottage clusters, tiny homes, etc.	Mid	\$	
1.9	Explore incentivizing/encouraging ADU and cottage cluster development.	Mid	\$	
1.10	Explore lean construction methods to bring down the cost of housing development and market those cost reducing methods to developers.	Long	\$\$\$	Association of General Contractors, university researchers
1.11	Engage with Metro's Equitable Housing Program's pursuit of a general obligation bond for affordable housing and advocate for a Milwaukie project.	Short	\$0	Metro
1.12	Develop and maintain a database of available properties (all zones) to market to developers.	Short	\$0	
1.13	Partner and support Clackamas County's affordable housing development and rehabilitation projects in Milwaukie.	Short-Mid	\$0-\$	Clackamas County
1.14	Seek to adopt or modify existing land use policies to meet developer and community needs.	Mid-Long	\$0-\$	
2.1	Hire a Housing Coordinator	Short	Funded	
2.2	Partner with nonprofit organizations and housing agencies to fund the purchase of existing, affordable multifamily housing to preserve it long term.	Long	\$0-\$	Clackamas County Housing Authority
2.3	Consider developing an affordable housing trust fund or partnering with the County's efforts.	Long	\$\$\$	Clackamas County
2.4	Support and promote programs that provide financial assistance for seniors and low-income homeowners to remain in their homes.	Short-Mid	\$	Clackamas County
2.5	Adopt policies to mitigate the impact of rental displacement. Explore a relocation assistance ordinance or similar type of tenant assistance policy.	Short-Mid	0-\$	

Action	Term	Cost	Partners
2.6 Assist in eviction prevention by supporting Clackamas County's landlord-tenant mediation services.	Short	\$0-\$	Clackamas County
2.7 Research and market low-cost loans to property owners for maintenance, weatherization, and seismic upgrades.	Short	\$0-\$	
2.8 Partner with Clackamas Housing Authority to support new affordable units for Milwaukie renters.	Long	\$0	Clackamas County Housing Authority
2.9 Build community among rental housing providers.	Mid	\$-\$	
2.10 Create an internal culture that is friendly to rental housing providers.	Mid	\$	
2.11 Build stronger alignment with the workforce development system.	Mid	\$0	Clackamas Workforce Development
3.1 Partner with nonprofits and employers to provide first-time homebuyer education and support.	Short	\$	Nonprofits
3.2 Support and promote programs to certify renters and reduce their move-in costs.	Short	\$	Clackamas County
3.3 Support and promote programs that streamline the rental application process and reduce application fees.	Short	\$	Nonprofits
3.4 Develop a marketing campaign to educate and engage the community on housing affordability, density, and development realities in order to develop community capacity.	Short-Mid	\$0	
3.5 Develop a financing and resource database.	Short	\$0	
3.6 Partner with Oregon IDA Initiative to help Milwaukie residents build financial management skills and build assets.	Short	\$0	Oregon IDA Initiative



# Existing Programs

Support and promotion of existing programs is integral to the success of the MHAS. The City of Milwaukie and Clackamas County currently offer a variety of programs to help residents find and maintain an affordable place to live.

Program	Income Level Served	Administrator
<b>Assistance to Residents</b>		
<i>Affordable Housing Preservation</i> Preserves the long-term affordability of existing multifamily rental units. Under the program, HACC acquires large multifamily housing projects.		Housing Authority of Clackamas County (HACC)
<i>Assistance for Rental Modifications and Home Repairs</i>		Clackamas County Community Development
<i>Energy Assistance</i> Emergency energy assistance for low-income residents.	60% of area median income	Clackamas County
<i>Home Repair Loans</i> Home repair loans help low-income homeowners pay for needed and critical repairs. Our goal is to eliminate unhealthy or hazardous conditions, eliminate barriers to accessibility, improve safety for persons with physical disabilities and incorporate energy conservation measures that reduce energy costs and usage.	80% of area median income	Clackamas County Community Development
<i>Homebuyer Assistance Program</i> Loans provide cash for down payment and closing costs.	<i>Homebuyer Assistance Program</i> Loans provide cash for down payment and closing costs.	<i>Homebuyer Assistance Program</i> Loans provide cash for down payment and closing costs.

Program	Income Level Served	Administrator
<p><i>Landlord-Tenant Mediation</i></p> <p>Eviction notices, noise complaints</p>		
<p><i>Oregon IDA Initiative</i></p> <p>Individual Development Accounts, or IDAs, are matched savings accounts that build the financial management skills of qualifying Oregonians with lower incomes while they save towards a defined goal. IDAs build pathways of opportunity and create models of economic success in Oregon communities.</p>	Low income and modest net worth	
<p><i>Public Housing</i></p> <p>Owns and maintains more than 545 units of public housing, ranging from single-family homes to multifamily apartments.</p>	80% of area median income	Clackamas County Housing Authority
<p><i>Rent Well</i></p> <p>Rent Well is a tenant readiness program that helps people who are homeless or at risk of homelessness find and keep housing.</p>	No income requirements	Clackamas County Social Services
<p><i>Utility Assistance Program</i></p> <p>The City of Milwaukie offers residential customers a low-income utility assistance program, which provides a reduced monthly charge for water, sewer, storm, and street utility charges.</p>	50% of area median income	City of Milwaukie
<p><i>Voucher Program</i></p> <p>The Housing Choice Voucher program (formerly Section 8) assists families that rent units in the private rental housing market.</p>	50% of area median income	Clackamas County Housing Authority
<p><i>Weatherization and Energy Education</i></p> <p>Weatherization program works throughout Clackamas County, helping residents to reduce their heating and cooling costs, and make their homes safer and more comfortable. The program provides free weatherization and energy education to</p>		

Program	Income Level Served	Administrator
<b>City Regulations and Incentives</b>		
<i>Accessory Dwelling Units</i> ADUs are allowed in all residential zones except the downtown residential zone.		
<b>City Regulations and Incentives</b>		
<i>Accessory Dwelling Units</i> ADUs are allowed in all residential zones except the downtown residential zone.	No income restrictions	Milwaukie Planning Department
<i>Cottage Clusters</i> The City is working with a consultant to conduct a financial feasibility analysis and preliminary site design work for up to four sites to assess their potential to provide a cottage cluster development.		Milwaukie Community Development
<b>Direct and Indirect Support</b>		
<i>Construction Excise Tax</i> One percent construction tax on new or additions of residential, commercial, and industrial developments over \$100,000 in permit value to fund affordable housing initiatives.		Milwaukie Planning Department

# Crosscutting Views

To achieve its goal of housing affordability, MHAS includes recommendations for the adoption of tools, programs, and policies that will affect developers, employers, homeowners, rental property developers, tenants, and potential landlords. The following chart shows the recommendations under each goal and which of these groups it will impact.

		Developers	Employers	Homeowners	Rental Property Providers	Tenants	Potential Landlords
	<b>Goal 1: Develop New Units</b>						
1.1	Develop incentives/funding program(s) for affordable housing through the existing construction excise tax.	X					
1.2	Explore the development of a community land trust or another model that supports creative financing for a project (e.g., co-op model, communal living, etc.)					X	
1.3	Explore incentivizing the development of affordable units through a local property tax exemption or other form of tax alleviation.	X					
1.4	Create an internal culture that is friendly to developers.	x					
1.5	Explore creative ways fees could be leveraged/reduced.	x					
1.6	Develop public lands policy.	x					
1.7	Partner with architects and builders to create base development plans.	x		x			

		Developers	Employers	Homeowners	Rental Property Providers	Tenants	Potential Landlords
	<b>Goal 1: Develop New Units</b>						
1.8	Explore rightsizing parking requirements for ADUs, cottage clusters, tiny homes, etc.	x		x			
1.9	Explore incentivizing/encouraging ADU and cottage cluster development.	x		x			
1.10	Explore lean construction methods to bring down the cost of housing development and market those cost reducing methods to developers.	x					
1.11	Engage with Metro's Equitable Housing program's to pursue a bond for affordable housing and advocate for a Milwaukie project.	x					
1.12	Develop and maintain a database of available properties (all zones) to market to developers.	x					
1.13	Partner with and support Clackamas County's affordable housing development and rehabilitation projects in Milwaukie.	x			x		
1.14	Seek to adopt or modify existing land use policies to meet developer and community needs.	x					
	<b>Goal 2. Prevent Displacement and Keep Affordable Units Affordable</b>						
2.1	Hire a Housing Coordinator.	x	x	x	x	x	X
2.2	Partner with nonprofit organizations and housing agencies to fund the purchase of existing affordable multifamily housing to preserve it long term.				x	x	
2.3	Consider developing an affordable housing trust fund or partnering with the County's efforts.	x			x		
2.4	Support and promote programs that provide financial assistance for seniors and low-income homeowners to remain in their homes.			x		x	
2.5	Adopt policies to mitigate the impact of rental displacement. Explore a relocation assistance ordinance or similar type of tenant assistance policy.				x	x	



		Developers	Employers	Homeowners	Rental Property Providers	Tenants	Potential Landlords
2.6	Partner with the county mediation services.				x	x	
2.7	Research and market low-cost loans to property owners for maintenance, weatherization, and seismic upgrades.			x	x		
2.8	Partner with the Housing Authority of Clackamas County to support new affordable units for Milwaukie renters.					x	
2.9	Build community among rental housing providers.				x		
2.10	Create an internal culture that is friendly to rental housing providers.				x		
2.11	Build stronger alignment with the workforce development system.	x	x				
	<b>Goal 3. Connect People to Existing Affordable Housing</b>						
3.1	Partner with nonprofits and employers to provide first-time homebuyer education and support.		x				
3.2	Support and promote programs to certify renters and reduce their move-in costs.				x	x	
3.3	Support and promote programs that streamline the rental application process and reduce application fees.				x	x	
3.4	Develop a marketing campaign to educate and engage the community on housing affordability, density, and development realities in order to develop community capacity.	x	x	x	x	x	X
3.5	Develop a financing and resource database.	x	x	x	x	x	X
3.6	Partner with Oregon IDA Initiative to help Milwaukie residents build financial management skills and build assets.					x	

# Measuring Success

The City will monitor and evaluate outcomes tied to the MHAS. Monitoring acts as an early warning system if goals are not being met. It will help the City make decisions on where to allocate time and resources. Targets have not been set, but the plan aims to address the units needed to meet the Housing Needs Analysis, at minimum. Implementation monitoring will track the MHAS actions that have been completed and the extent to which the City is successful in building partnerships.

Performance monitoring will show whether MHAS actions are achieving the desired results. As part of the performance monitoring, IMS developed custom Community Profiles for eight of Milwaukee's nine neighborhoods. Using a combination of administrative and Census data, the Community Profiles focus on the existing housing stock and community demographics in each neighborhood. The profiles serve as a baseline to measure change moving forward and to support conversations with local residents, elected officials, developers, and City staff. Profiles are hosted on the Neighborhood Pulse website. See Appendix C. A biannual fiscal year report-out to council will be scheduled.

Strategy	Performance Indicator
Create more affordable units.	Number of new affordable units permitted and built.
Create more total units.	Number of total of new housing units permitted and built.
Prevent displacement.	Number of renters who avoid eviction through landlord-tenant mediation.
Keep affordable units affordable.	Total number of affordable housing units. Number of existing affordable apartments preserved. Number of households served by home repair, weatherization.
Connect people with existing affordable housing.	Number of Rent Well graduates who enter affordable housing.
Alleviate housing cost burden.	Number of households paying more than 30 percent of their income on housing.

# Legislative Agenda

Current city regulatory frameworks enable some of the strategies recommended in the MHAS, and others will require policy amendments at both the municipal and state levels. Accordingly, Milwaukie should explore amendments to local policies through the legislative process, ensuring sufficient community engagement and a thorough exploration of options, or state enabling legislation, as appropriate. Coordination with other communities on common policy agendas, or engaging with lobbyists or advocacy entities like the League of Oregon Cities can facilitate legislative changes at the state level.

The MHAS recommends exploring local legislative amendments to provide the following:

- Property tax reductions for affordable units: Several jurisdictions in the Portland metro area, including Clackamas County, offer a local property tax exemption for units available to income-qualifying households. These property tax exemptions reduce operating expenses for affordable units to make them more financially viable. Income limits, the minimum term of affordability, limit on exemption amount, ownership entity of units, and application criteria can all be calibrated to Milwaukie's needs. Like all tax reductions, an affordable housing property tax reduction is forgone future revenue, so careful consideration should be given.
- Provisions and incentives for small housing solutions: ADUs, cottage clusters, middle-housing, and tiny homes provide a broader range of affordable housing choices. Zoning code amendments, amendments to other regulations, and re-zonings will provide the regulatory framework for increasing these housing choices. Milwaukie should undertake an analysis of barriers to these housing types and propose changes to local legislation, where necessary. For examples, tiny homes are often required to meet certain structural safety and public health requirements. Some tiny homes are designed to be mobile and are equipped with wheels; however, local standards often require that structures are affixed to the ground with permanent foundations. Milwaukie should identify the barriers to safe, healthy residential living in mobile tiny homes and make amendments to zoning, building, and health code standards, as appropriate. Regulatory and financial incentives for these desired small housing types may also require legislative approvals, and can be undertaken concurrently for easier public understanding.



- Priority for use of public lands to benefit affordable housing: A predictable public lands policy that supports affordable housing preservation and creation is an effective way to leverage land as a city-owned resource. Public lands policies can establish a minimum percentage of sales revenues to be dedicated to affordable housing programs, minimum percentage of affordable units to be created on formerly publicly-owned lands, and other public interest objectives like wage standards and diversity goals. The policy would define depth of affordability, units created, and where flexibility is possible. Considering if the sale price of land should be reduced to facilitate affordable housing development is also important and may require additional policy amendments.
- Protections for renters: Providing increased notice and certain protections for tenants for rent increases and evictions can increase housing stability.
- Fee systems that incentivize desired housing types: Calibrating permit fees, SDCs, and other impact fees can incentivize certain housing types by reducing expenses while ensuring that impacts are appropriately accounted for. A careful consideration of fee structures and budgetary impacts will be important to ensure desired outcomes through the legislative process.
- Zoning incentives and flexibility for desired housing types: The Milwaukie Comprehensive Plan's housing element will identify Milwaukie's policy direction regarding housing, and there will likely be implementation items that result. Amendments to the zoning code, department policies, and other regulatory frameworks should be undertaken to implement the policy direction of the MHAS and upcoming Comprehensive Plan update.
- Funding sources to support desired housing: Creation of an affordable housing trust fund, use of existing revenue sources, like the construction excise tax, or partnership with Clackamas County could provide important financial tools to create and preserve affordable housing units. Legislative action to establish this framework will likely be necessary, along with prioritization for how to allocate the resources. The financial structure should be accompanied by a clear plan that articulates how the money will be spent, what the income or unit goals are, and how to monitor the investments over time.





# Developing the Housing Affordability Strategy

City Council guidance, the Housing and Residential Lands Needs Assessment, the Milwaukie Housing Strategies Report, public input, the community Vision, and the Housing Advisory Working Group informed development of the Milwaukie Housing Affordability Strategic Plan.

## Community Vision

City Council adopted the Community Vision, *Milwaukie All Aboard*, in September 2017. The community-wide engagement process resulted in a Vision and Action Plan that guided development of the Housing Affordability Strategic Plan.

## Housing Advisory Working Group (HAWG)

Milwaukie Community Development formed the Housing Affordability Working Group (HAWG) in 2017. In keeping with their role as technical experts, HAWG members were asked to serve based on their specific background and technical understanding of housing, financing, development and affordable housing issues. HAWG met nine times to review existing City of Milwaukie and Clackamas County affordable housing programs, identify and evaluate best practices from peer communities, strategize public outreach and input, review, refine, and prioritize potential actions, consider policy trade-offs and other issues for City Council to consider, and provide guidance on a final report for presentation to City Council.

## Technical Analysis

To support HAWG's work, City staff and IMS analyzed the range of actions for each strategy, including legal considerations, coordination with existing programs, administrative ease, fiscal considerations, public/stakeholder support, and consistency with Milwaukie's Community Vision.





## Public Engagement

Four groups were invited to share their experiences at focus groups: rental housing providers (landlords and property managers), housing developers, homeowners, and tenants. People who were unable to attend the focus groups were invited to share their thoughts and experiences through an online survey. For additional information about the focus groups see Appendix B.

## City Council

Staff and consultants provided Council briefings and received guidance on a regular basis. All meetings were open to the public.



# Notes

1. US Census, American Community Survey, Table DP04.
2. <http://www.oregon.gov/lcd/pages/goals.aspx>
3. See memo from Mike Steffan and Ed Sloop of Walsh Construction concerning "Current Market Conditions and Impacts on Construction Costs" dated June 2, 2017.
4. Milwaukie passed a CET in 2017 to provide incentives for affordable housing development.
5. CLTs can be established by cities, spun off from other affordable housing entities, or added to an existing entity. Depending on local needs, the CLT model could utilize tax-delinquent properties, vacant city-owned properties, or acquire sites for affordable housing development and preservation. CLTs also often partner with other development entities, nonprofits, or service providers to support their mission. This flexible model and others should be evaluated further, along with the City of Milwaukie's role in initiating, partnering with, or supporting a CLT.
6. The right of first offer or right of first refusal clause provides that, in the event that the landlord opts to sell the premises or lease an additional specified space, the tenant must be given the opportunity to purchase or lease the space.
7. A local property tax exemption could support the creation and preservation of affordable units in addition to the existing Clackamas County exemption by reducing expenses for housing providers.
8. Look for methods for structuring incentives, such as density bonuses and reduction in SDCs that will most likely result in desired housing types while ensuring that important public revenues are collected. The method for calculating fees—by unit, per square foot, by building, tiered by size—can influence the effectiveness of the incentive. A waiver or reduction of fees specifically for affordable units can also be considered. Bonuses for sustainable and affordable development of housing need to be explored further.
9. Such a fee reduction is often calculated on the number of affordable units in a building, regardless of the number of total units. A defined process for approval, as well as a procedure for enforcement will be important to ensure clarity and predictability over time.
10. The policy would define depth of affordability, units created, and where flexibility is possible. Considering if the sale price of land should be reduced to facilitate affordable housing development is also important and may require additional policy amendments.
11. Visit <https://www.portlandoregon.gov/bps/67728>
12. The coordinator could gather information, answer questions, connect people and groups, and disseminate important information to the public and other entities on an ongoing basis. For example, the role could provide rental-housing providers with information about social services and emergency support for tenants who are experiencing challenges, filling a critical gap in a tenant's ability to stay housed.
13. Milwaukie can support existing programs and services that promote housing stability for seniors and low-income homeowners to help them reach more residents, or encourage the creation of new and expanded services where they do not exist. For example, transportation assistance for those with mobility challenges, weatherization

upgrades to keep utility costs down, and home repair to provide accessibility and safety upgrades can be important tools to keep people in their homes. Property tax reductions and utility rate reductions for income-eligible residents are also helpful tools to make living in Milwaukie more affordable.

14. Disputes involving late payment of rent, evictions, deposits, repairs, damages, rental agreement violations, pets, noise, and neighbor relations are appropriate for mediation. Evictions and further legal actions can hopefully be avoided through such a service, keeping more Milwaukie families housed and more housing providers in business.
15. Low cost loans for maintenance and weatherization of qualifying multi-family units can ensure that the rental housing stock is safe and of good quality by assisting property owners with upgrades. The increasing cost of maintaining a building may lead to rent increases or encourage an owner to sell his or her building. Through lower cost financing, rental units may be preserved and enhanced and rents can remain attainable for area families.
16. Supportive services and case management are important for vulnerable households, and Milwaukie can help provide this support to keep people in their communities. Milwaukie and the Clackamas County Housing Authority can pilot a program where Milwaukie pays for case management in exchange for current Milwaukie residents receiving priority for preference of a Housing Choice Vouchers from the Housing Authority. Along with a new home, these residents will have better access to the tools they need to be successful in their community.
17. Services can include credit counseling.
18. Ibid.

# Appendix A: Peer Cities

Milwaukie can learn from best practices in other up market cities. A review of successful implementation of housing strategies, including those identified in the Milwaukie Housing Strategies Report helped to inform development of the MHAS. The following chart includes descriptions of housing affordability tools and strategies used by other cities and why they might be useful to Milwaukie.

## Bellevue, WA

Relevance to Milwaukie	Bellevue is a city in the booming Puget Sound region offering desirable amenities. Housing demand is growing regionally, while supply of affordable housing has not kept pace. Helping people "stay in affordable housing" is a major element of the 2016 plan along with the creation of new affordable housing and housing choices.
<i>Purchase and preservation of existing affordable multifamily units through partnerships</i> <ul style="list-style-type: none"> <li>• Recommend partnering with King County Housing Authority, nonprofit organizations, and/or state of Washington.</li> <li>• Work with partners to identify and prioritize properties at risk or redevelopment or loss of market affordability.</li> </ul>	<a href="https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89">https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</a>
<i>Property tax exemptions for affordable units</i> <ul style="list-style-type: none"> <li>• Existing voluntary local property tax exemption (12 years on all units) should be calibrated to increase participation/attractiveness.</li> <li>• Advocate to amend state tax exemption to include existing units, not just new units.</li> </ul>	<a href="https://planning.bellevuewa.gov/planning/planning-initiatives/affordable-housing-strategy/multifamily-property-tax-exemption/MFTE-requirements/">https://planning.bellevuewa.gov/planning/planning-initiatives/affordable-housing-strategy/multifamily-property-tax-exemption/MFTE-requirements/</a> <a href="https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89">https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</a>
<i>Support for seniors to remain in their homes</i> <ul style="list-style-type: none"> <li>• Support programs or provide technical assistance to services that support housing stability for seniors.</li> <li>• Transportation assistance, weatherization upgrades, virtual villages that create</li> </ul>	<a href="https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89">https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</a>

## Bellevue, WA (cont.)

<p><i>Home repair and weatherization programs</i></p> <ul style="list-style-type: none"> <li>•King County Housing Authority administers Bellevue Housing Repair program.</li> <li>•Provides loans for qualified low-income homeowners, often elderly and disabled.</li> <li>•Technical assistance for bids, supervision of work, and inspections.</li> <li>•King County has additional housing repair assistance for both owners and renters.</li> </ul>	<p><a href="https://www.kcha.org/wx/">https://www.kcha.org/wx/</a></p> <p><a href="https://www.kingcounty.gov/depts/community-human-services/housing/services/housing-repair.aspx">https://www.kingcounty.gov/depts/community-human-services/housing/services/housing-repair.aspx</a></p>
<p><i>Property tax, utility rate, and utility tax exemptions for income-eligible residents.</i></p> <ul style="list-style-type: none"> <li>•Program offers 75 percent off utility costs for low-income homeowners and renters. Includes rate reduction for those who pay directly or rebate if paid by others.</li> <li>•End of year rebate of portion of utility tax for low-income households.</li> </ul>	<p><a href="https://utilities.bellevuewa.gov/pay-your-utility-bill/utility-rate-and-tax-relief">https://utilities.bellevuewa.gov/pay-your-utility-bill/utility-rate-and-tax-relief</a></p>
<p><i>Transportation Impact Fee Exemption</i></p> <ul style="list-style-type: none"> <li>•Exemption of transportation impact fees for low and moderate-income housing.</li> <li>•Units affordable in perpetuity.</li> <li>•Created in the 1990s, and has been used in the production of 104 units.</li> </ul>	<p><a href="https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89">https://bellevue.legistar.com/View.ashx?M=F&amp;ID=5201317&amp;GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</a></p> <p><a href="http://www.codepublishing.com/WA/Bellevue/html/Bellevue22/">http://www.codepublishing.com/WA/Bellevue/html/Bellevue22/</a></p>

## Durham and Chapel Hill, NC

<p>Relevance to Milwaukie</p>	<p>Durham has been a traditionally working-class city in the Triangle Region, and is now experiencing rapid increases in housing costs. Land trusts have a long history in North Carolina, and Durham Community Land Trust (DCLT) was founded in 1987. The Orange Community Home Trust was founded in 2000 and serves working families in a university community.</p>
<p><i>Durham Community Land Trustees</i></p> <ul style="list-style-type: none"> <li>•DCLT acquires existing homes and preserves them as affordable housing and develops new, permanently affordable housing.</li> <li>•Fifty-two single-family homes where DCLT retains ownership of the land on a ninety-nine-year ground lease. Owner pays small lease fee monthly.</li> <li>•Upon sale, DCLT retains an option to repurchase the home or assist finding another income-eligible buyer. Homeowner receives a portion of the appreciation based upon appraisal and formula.</li> </ul>	<p><a href="https://www.dclt.org/">https://www.dclt.org/</a></p>



## Durham and Chapel Hill, NC (cont.)

- DCLT owns and manages portfolio of 230 rental properties available to residents 60 percent AML, paying no more than 30 percent of income to rent.
- Funding from pass-through Community Development Block Grant and HOME grants and multiple partnerships.

*Orange Community Home Trust (OCHT) acquires/preserves and creates new affordable units*

- 255 homes in portfolio, including single-family, condo, and attached.
- Most homes are built by private developers as part of their inclusionary housing requirements and sold to OCHT for preservation and management.
- OCHT provides agent services at no commission, provides various subsidies to ensure no more than 30 percent of income goes towards housing. Provides low and no-interest financing.
- OCHT charges a ground lease and stewardship fee for capital improvements, coordinates sale of homes to qualified buyers. Appreciation to homeowner is based upon the median family income for a family of four.
- 58-unit rental property recently acquired

<https://communityhometrust.org/>

## Oakland, CA

Relevance to Milwaukie	Oakland is a traditionally working-class city in the Bay Area with a strong focus on remaining diverse and preventing displacement in the face of rapid cost increases, both for renters and owners. Oakland's housing strategy was developed through the Housing Equity Roadmap through Policylink.
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*Public lands policy being developed for the creation of new affordable housing and dedication of sales revenue. Details not finalized*

- Priority of public land sales to affordable housing development (as required by state law).
- Some percentage of affordable units required.
- Some portion of revenue from sale to the Affordable Housing Trust Fund.

<https://www.eastbaytimes.com/2018/02/23/oakland-advocates-to-offer-peoples-proposal-for-public-land-use/>

*Reduction of minimum parking requirements for affordable housing and overall rightsizing, including parking maximums in certain areas*

<http://www2.oaklandnet.com/government/o/PBN/OurOrganization/PlanningZoning/OAK030572>

## Oakland, CA (cont.)

<ul style="list-style-type: none"> <li>•Reduction to 0.5 spaces per unit for affordable units within one-half mile of a major transit stop.</li> <li>•Reduction to 0.75 spaces per unit for affordable units in other locations.</li> <li>•Parking must be unbundled from rent in all market-rate housing over ten units.</li> </ul>	<a href="http://www2.oaklandnet.com/government/o/PBN/OurOrganization/PlanningZoning/OAK030572">http://www2.oaklandnet.com/government/o/PBN/OurOrganization/PlanningZoning/OAK030572</a>
<p><i>Impact fees to create dedicated funding for the affordable housing trust fund</i></p> <ul style="list-style-type: none"> <li>•Impact fee on residential units or build off-site or in-site affordable units. Fee based on zones.</li> <li>•Impact fee on commercial development to account for increased demand of</li> </ul>	<a href="http://www2.oaklandnet.com/government/o/PBN/OurOrganization/PlanningZoning/s/ImpactFee/index.htm">http://www2.oaklandnet.com/government/o/PBN/OurOrganization/PlanningZoning/s/ImpactFee/index.htm</a>
<p><i>Pilot partnership with nonprofits and tax collector to acquire tax-delinquent and blighted properties for affordable housing creation</i></p> <ul style="list-style-type: none"> <li>•City and Alameda County mutually agree to release liens on properties to make them</li> </ul>	<a href="http://www2.oaklandnet.com/government/o/hcd/s/AffordableHousing/index.htm">http://www2.oaklandnet.com/government/o/hcd/s/AffordableHousing/index.htm</a>
<p><i>Multiple renter protection provisions passed in 2016 through Measure JJ</i></p> <ul style="list-style-type: none"> <li>•Extended existing just-cause eviction requirements to units created prior to 1995. Defined just causes.</li> <li>•Created process to require landlords to obtain approval before imposing rent increases exceeding cost of living adjustments.</li> <li>•Requires annual notice to all residents in applicable units of maximum permitted rent increases.</li> <li>•Amendments are being proposed.</li> </ul>	<a href="https://ballotpedia.org/Oakland,_California,_Just-Cause_Eviction_Requirements_and_Rent_Increase_Approval,_Measure_JJ_(November_2016)">https://ballotpedia.org/Oakland, California, Just-Cause Eviction Requirements and Rent Increase Approval, Measure JJ (November 2016)</a> <a href="https://www.eastbaytimes.com/2017/09/26/soaring-rents-evictions-tenants-rally-in-oakland-to-close-landlord-loopholes-in-">https://www.eastbaytimes.com/2017/09/26/soaring-rents-evictions-tenants-rally-in-oakland-to-close-landlord-loopholes-in-</a>
<p><i>Multiple affordable housing financing assistance tools</i></p> <ul style="list-style-type: none"> <li>•Loan program for new construction and substantial rehabilitation, maximum of 40 to 50 percent of total cost.</li> <li>•Short-term acquisition and pre-development loans through affordable housing bond proceeds.</li> <li>•Loans to owners of multifamily rental housing for rehab.</li> <li>•Loans for acquisition, rehabilitation, and preservation of naturally occurring affordable housing.</li> </ul>	<a href="http://www2.oaklandnet.com/government/o/hcd/s/AffordableHousing/index.htm">http://www2.oaklandnet.com/government/o/hcd/s/AffordableHousing/index.htm</a>

## Roxbury, MA

Relevance to Milwaukie	A traditionally working-class community in the Boston metro area with long-standing and active land trusts.
<p><i>Dudley Street Neighborhood Initiative</i></p> <ul style="list-style-type: none"> <li>•Community land trust that used the City's power of eminent domain to initially assemble and acquire sixty acres of vacant land in a neighborhood with redevelopment pressure.</li> <li>•Also acquires and operates land for commercial uses, urban farming, and preservation of open space.</li> </ul>	
<a href="https://www.dudleyneighbors.org/">https://www.dudleyneighbors.org/</a> <a href="http://www.yesmagazine.org/issues/cities-are-now/how-one-boston-neighborhood-stopped-gentrification-in-its-tracks">http://www.yesmagazine.org/issues/cities-are-now/how-one-boston-neighborhood-stopped-gentrification-in-its-tracks</a>	

## Arlington, VA

Relevance to Milwaukie	Arlington has been a relatively affordable location for DC metro households, but faces increasingly high costs and a strong housing market. Financial tools along with regulatory implementation and services
<p><i>Affordable housing density bonus and parking reductions</i></p> <ul style="list-style-type: none"> <li>•Bonus floor area ratio (FAR) and height available for creation of additional affordable units beyond code requirements.</li> <li>•Parking reduction for affordable units in form-based zone district.</li> </ul>	
<a href="https://housing.arlingtonva.us/development/land-use-zoning-tools/">https://housing.arlingtonva.us/development/land-use-zoning-tools/</a>	

## Portland, OR

Relevance to Milwaukie	Portland's population has grown rapidly in recent years, resulting in increasing housing costs. Residents who can no longer afford Portland's close-in neighborhoods are moving farther out and to surrounding cities, like Milwaukie. Portland's housing affordability initiatives are often viewed as the bellwether in the metro area, and conversely impact the regional housing market as investment and residents move around the area.
<p><i>Minimum notice to tenants</i></p> <ul style="list-style-type: none"> <li>•Minimum notice of ninety days when increasing rents more than 5 percent or when evicting tenants without cause.</li> <li>•Required relocation expenses to tenants in no-cause eviction or when rents increased</li> </ul>	
<a href="https://www.portlandoregon.gov/Citycode/28481">https://www.portlandoregon.gov/Citycode/28481</a>	

## Santa Cruz, CA

Relevance to Milwaukee	Santa Cruz has traditionally been a high-cost, smaller community in the Bay Area, but its lower scale density, town feel is relevant with incremental density increases.
<p><i>Loan program for the construction of new ADUs</i></p> <ul style="list-style-type: none"> <li>• Loans of up to \$100,000 at 4.5 percent interest for construction through Santa Cruz Community Credit Union.</li> <li>• ADU must be rented to low-income tenants for a minimum of 15 years.</li> </ul>	<a href="http://www.Cityofsantacruz.com/Home/ShowDocument?id=3700">http://www.Cityofsantacruz.com/Home/ShowDocument?id=3700</a>
<p><i>Manual and design prototypes</i></p> <ul style="list-style-type: none"> <li>• Seven conceptual prototype designs available through partnerships with local architects.</li> <li>• Not suitable for construction documents, but may reduce cost in design services for homeowners.</li> </ul>	<a href="http://www.Cityofsantacruz.com/government/city-departments/planning-and-community-development/programs/accessory-dwelling-unit-development-program/adu-prototype-architects">http://www.Cityofsantacruz.com/government/city-departments/planning-and-community-development/programs/accessory-dwelling-unit-development-program/adu-prototype-architects</a>
<p><i>Fee waivers for ADU in exchange for renting to a low or very-low income household in perpetuity</i></p> <ul style="list-style-type: none"> <li>• Requires recording covenants and restrictions on the property</li> <li>• Typical fee on a 500-square-foot unit is almost \$14,000, and fee reductions are</li> </ul>	<a href="http://www.cityofsantacruz.com/home/showdocument?id=53802">http://www.cityofsantacruz.com/home/showdocument?id=53802</a>
<p><i>Multiple revisions made to zoning code to facilitate creation of ADUs</i></p> <ul style="list-style-type: none"> <li>• Permitted on smaller minimum lots.</li> <li>• Setback flexibility for creation of ADU on existing garage.</li> <li>• No parking requirement for ADUs in certain areas.</li> <li>• Administrative review of ADU permits.</li> <li>• Building and environmental code flexibility for sprinklers and septic systems.</li> </ul>	<a href="http://www.cityofsantacruz.com/home/showdocument?id=59310">http://www.cityofsantacruz.com/home/showdocument?id=59310</a> <a href="http://sccoplanning.com/PlanningHome/SustainabilityPlanning/AccessoryDwellingUnits.aspx">http://sccoplanning.com/PlanningHome/SustainabilityPlanning/AccessoryDwellingUnits.aspx</a>

## Denver, CO

Relevance to Milwaukee	Denver's population has grown rapidly, and it led the nation in home price growth within the last few years. Formerly affordable areas have seen dramatic increases in prices, and close-in neighborhoods with increasing transit investment have experienced pronounced changes, including economic displacement of residents. Denver's approach to housing affordability includes both supply and demand solutions, advocacy, and the creation of new funding sources, and its zoning code is based
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## Denver, CO (cont.)

<p><i>Commercial and residential linkage fee and \$0.5 million dedicated property tax to support housing trust fund</i></p> <ul style="list-style-type: none"> <li>• former inclusionary housing program repealed and replaced with linkage fee on residential and commercial development.</li> <li>• Capitalize a \$150 million fund over ten years to be allocated according to housing strategies report.</li> </ul>	<p><a href="https://www.denvergov.org/content/denvergov/en/denver-office-of-economic-development/housing-neighborhoods/DenversPermanentFundforHousing.html">https://www.denvergov.org/content/denvergov/en/denver-office-of-economic-development/housing-neighborhoods/DenversPermanentFundforHousing.html</a></p>
<p><i>Potential local housing voucher program—Low Income Voucher Equity</i></p> <ul style="list-style-type: none"> <li>• Local program targeting households making 40 to 80 percent AML.</li> <li>• Proposed to calibrate rents based upon neighborhood.</li> <li>• Renter would pay maximum of 35 percent of income towards housing.</li> <li>• 400 households initially proposed partnerships with employers and foundations to match funds.</li> </ul>	<p><a href="https://www.denverite.com/denvers-live-program-faces-tough-questions-48994/">https://www.denverite.com/denvers-live-program-faces-tough-questions-48994/</a></p>
<p><i>Temporary Rental and Utility Assistance Program pilot</i></p> <ul style="list-style-type: none"> <li>• Six months of assistance to low- and moderate-income residents facing the loss of a home or eviction.</li> <li>• Pilot of \$865,000 from Affordable Housing Fund and all resources exhausted by February 2018.</li> </ul>	<p><a href="https://www.denvergov.org/content/denvergov/en/denver-office-of-economic-development/housing-neighborhoods.html">https://www.denvergov.org/content/denvergov/en/denver-office-of-economic-development/housing-neighborhoods.html</a>  <a href="https://www.denverpost.com/2017/10/10/denver-renters-facing-eviction-soon-could-receive-financial-aid-new-city-program/">https://www.denverpost.com/2017/10/10/denver-renters-facing-eviction-soon-could-receive-financial-aid-new-city-program/</a></p>
<p><i>Landlord-tenant mediation services pilot</i></p> <ul style="list-style-type: none"> <li>• Mediation before or after an eviction process is triggered.</li> <li>• Final outcome of mediation is binding on all parties.</li> <li>• New Landlord Tenant Guide provides additional information on rights and responsibilities.</li> </ul>	<p><a href="https://www.denvergov.org/content/denvergov/en/mayors-office/newsroom/2017/denver-launches-new-services-to-help-renters-facing-eviction.html">https://www.denvergov.org/content/denvergov/en/mayors-office/newsroom/2017/denver-launches-new-services-to-help-renters-facing-eviction.html</a></p>

## Denver, CO (cont.)

### *West Denver Renaissance Collaborative Single Family + Initiative*

- Nonprofit supported by City of Denver to align resources and support for homeowners to create wealth through ADU in traditionally working class and lower income minority neighborhoods.

<http://www.mywdrc.org/wdsf.html>

## Park City, UT

### Relevance to Milwaukie

Park City experiences housing shortages for seasonal workers, often employed in low-wage leisure and hospitality jobs. There are strong negative perceptions about affordable housing, however. The Mountainlands Community Housing Trust manages county-owned homes, which is a unique distinction,

### *Employer-assisted housing for Park City employees*

- Down payment assistance loans and a monthly housing allowance for City employees
- Affordable rentals to employees in transition.
- Providing seasonal rental housing for City transit employees

<http://www.parkcity.org/home/showdocument?id=17001>

### *Mountainlands Community Housing Trust*

- Manages deed-restricted homes on behalf of the county.
- Mutual Self Help Program takes sweat equity approach where future homeowners contribute labor to reduce the price of the home by 20 percent.

[http://www.housinghelp.org/own/mutual\\_self\\_help\\_program](http://www.housinghelp.org/own/mutual_self_help_program)



# Appendix B: Focus Group Summaries

IMS held five focus groups to understand the needs, concerns, and viewpoints of community members. The five groups were population specific. We met with rental property providers, homeowners, tenants, and developers. A Spanish-speaking rental focus group was set up and outreach occurred, but no one attended. The following is a summary of each group, including the questions we used to prompt discussion and the policies and programs, which most closely align with what we heard. The policy and programs are organized by short term, near term, and long term based on how long it would take City staff to implement them.

## Rental Home Providers (landlords and property managers) (4/3/2018)

The rental home providers focus group included 17 attendees from 16 properties within the city of Milwaukie boundaries. Attendees included landlords and rental property managers for a variety of buildings both large and small across Milwaukie. Two landlords in attendance rent out just one unit, one is a single family house and the other is half of a duplex. At the other end of the spectrum, several rental property managers in attendance manage buildings with hundreds of units. Both subsidized and market rate rentals were represented. Several rental property managers were not able to attend the focus group but did complete surveys.

### Focus Group Questions:

1. How long have you been a Milwaukie landlord?
2. Do you own or manage the properties?
3. How many properties do you operate? Are they single or multifamily?
4. Is being a landlord now different than it was when you started? Please elaborate.
5. Have the recent changes in the housing market affected your business? Increased rents?
6. Are you aware of new policies around rentals in surrounding communities?
7. How do you view your role as a landlord in the community? (Providing a service? Operating a business? Other?)
8. How do you get information about city or county programs?
9. Are you interested in expanding your business?
10. How long do you plan to continue to offer rentals?
11. What will make you stop? (Money, i.e. bring able to sell for a certain amount or decrease in profitability? Retirement? Other?)
12. What do you want the City of Milwaukie to know?

### Short Term

Create an internal culture that is friendly to rental housing providers. Rental housing providers need to know that

Milwaukie understands and values their contribution to the city.

**Build Community Among Rental Housing Providers:** Rental-housing providers expressed a desire to build community amongst themselves, including support, information sharing, and mentorship for new and small rental property providers.

**Rental Housing Provider Education and Resources:** Provide rental-housing providers with information about support services, including services like Legal Shield and training by the Clackamas County Housing Department and the Milwaukie Police Department. In addition to information provided by knowledgeable city staff, information should be maintained on a frequently updated website and distributed to rental property providers via email.

**Connect Rental Housing Providers with Social Services Support for Tenants:** Rental housing providers need resource in order to help struggling tenants. Could the city have a liaison and help rental housing providers connect tenants to support with nonprofits, what's available to help tenants?

**Provide Tenant Education:** Tenants could receive information about their rights and responsibilities as part of their move-in paperwork. Additionally, this information should be provided on a frequently updated website.

#### Mid Term

**Rental Housing Provider-Tenant Mediation:** Provide mediation for rental property providers and tenants who wish to resolve conflicts outside of the court system.

#### Long Term

**Emergency Rent Fund:** Establish an emergency rent fund for tenants who need just one or two months of rent.

**Local Housing Choice Voucher Grants:** Create a fund to provide low-income families with vouchers to help pay for housing in the private market.

**Legalize Bootleg Apartments:** Grandfather existing multifamily and illegal apartments make them legal. (Apartments would need to meet all fire, life, and safety codes.)

## Developers (4/5/2018)

The developer focus group included seven attendees from seven companies who are currently developing or are interested in developing properties within the city of Milwaukie boundaries. The developers present represented both large and small companies. One boutique developer is interested in expanding her business building duplexes and rowhouse to Milwaukie. Another was focused on a large, mixed-use buildings in the city center.

### Focus Group Questions:

1. What type of developments do you build?
2. Have you built in Milwaukie before?
3. How flexible are you as to your product? Would you change your business model if the city incentivized a particular development type?
4. What is a bigger barrier: regulatory uncertainty, process uncertainty, or financial uncertainty?
5. How can the city partner with developers to achieve the desired housing mix?
6. Where have you successfully worked with other cities and what did the cities do to facilitate the partnership?
7. Would you rather have additional costs upfront or restrictions on use over a number of years?
8. What opportunities could exist that haven't been leveraged yet?

9. What do you want the city to know about development in Milwaukie?
10. What should be on the city's legislative agenda?

### Short Term

- Create an internal culture that is friendly to developers. Developers need to know that Milwaukie understands and values their contribution to the city. Milwaukie should nurture a development- friendly culture where developers are treated as partners, not adversaries.
- Identify and Advertise Development Opportunities: Developers need to know what opportunities are available in Milwaukie. What are the city's development priorities? Large greenfield, smaller scale infill? Affordable housing? Once priorities are established, the city can tailor partnership and incentives to the project and find project specific developers.
- Consistent and Reliable Customer Service: Developers want to build a relationship with a single person at the city. They want a consistent project liaison to maintain institutional memory about their project. Feedback from city agencies should be consistent and non-contradictory when provided to the developer. When developers talked about success stories in other jurisdictions, consistent, warm, and reliable relationships with city staff were central to their experiences. Often, these relationships lasted for many years or even decades.

**Provide Information:** The city can help developers by researching and providing information about grants and assistance (i.e. energy efficiency). In addition to information from knowledgeable city staff, the information should be maintained on a frequently updated website.

**Facilitate Partnerships:** Help developers develop

partnerships with commercial real estate brokers and other professionals whose work aligns with future development. (In the future this may include employers interested in providing housing for their workers or land owners with developable land.)

### Mid Term

- Consistent and Reliable Permit Fees: Development and review fees should be clearly articulated. They should not change during the course of a project.
- Predictable Review Process with Early Feedback: A consistent, predictable, and transparent review process allows developers to move quickly and avoid costly redesign. Design requirements should be transparent and well documented and should not change during the course of a project.
- Priority for Preapproved Designs: Developers can save time and money using designs pre-approved by the city. (This might be particularly useful for ADU development.)
- Review Code Requirements for Alignment to Development Goals

### Long Term

- Pair Regulations with Incentives: Restrictions on development or building use should be paired with a bonus or benefit for developers. For example, developers subject to inclusionary zoning would receive vertical tax credits.
- Prepare Sites for Development: Supplying or partnering to provide utilities, sidewalks, landscaping, ROW improvements can be a good source of assistance.

## Homeowners (4/10/2018)

The homeowner focus group included 14 attendees from 12 properties within the city of Milwaukie boundaries. Many of the homeowners who attended have lived in Milwaukie for decades. They represented multiple neighborhoods in the city.

### Focus Group Questions:

1. How long have you lived in Milwaukie? What do you value about the city?
2. How long do you plan to stay in your current home?
3. What type of housing will you be looking for next? (upsizing, downsizing, apartment, etc.)
4. If you move, will you look for another home in Milwaukie? Why or why not?
5. Are you currently or do you anticipate feeling financial pressures associated with homeownership? Please elaborate.
6. What would help you remain in your current home?
7. Are you interested in building or converting part of your home to an ADU?
8. What would incentivize you to build one?
9. How do you get information about city or county programs?
10. Where do you get information about community or homeownership issues?
11. What do you want the City of Milwaukie to know about homeownership?

### Short Term

- Connect Home Owners with Information about existing

programs: Weatherization, foreclosure, etc.

### Mid Term

- Incentivize ADU Development: ADUs provide additional housing while providing additional income for existing homeowners. Design guidelines should allow for development of ADUs that do not detract from neighborhood character.

### Long Term

- Home Repair Loans: Offer no interest loans to fund home repairs (a leaky roof, electrical, plumbing, etc.). Eligible homeowners will meet guidelines, including income.

## Tenants (4/12/2018 & 4/17/2018)

There were two tenant focus groups, one in English and one in Spanish. No one attended the Spanish focus group. The English homeowner focus group included 13 attendees from 12 properties within the city of Milwaukie boundaries. Tenants represented both market rent and subsidized buildings.

### Focus Group questions:

1. How long have you lived in Milwaukie? What do you value about the city?
2. How long do you plan to stay in your current home?
3. What type of housing will you be looking for next? (Upsizing, downsizing, apartment, etc.)
4. If you move, will you look for another home in Milwaukie? Why or why not?
5. Are you currently or do you anticipate feeling financial pressures associated with being a renter? Please elaborate.
6. What would help you remain in your current home?

7. How do you get information about city or county programs?
8. Where do you get information about community or renter issues?
9. What do you want the City of Milwaukie to know about renting a home in Milwaukie?

#### Short Term

- Provide Tenant Education: Tenants could receive information about their rights and responsibilities and the rights and responsibilities of landlords as part of their move-in paperwork. Additionally, this information should be provided on a frequently updated website.

Encourage the use of OneApp: OneApp allows renters to see which units they qualify for with one refundable application fee. It covers Milwaukie.

#### Mid Term

Prioritize current Milwaukie Renters: Establish a database of current Milwaukie renters to use for future anti-gentrification assistance.

#### Long Term

Fund for Moving Costs: Moving costs are a large barrier to renters seeking to move into better or more appropriate housing. Many renters are able to pay rent but are unable to afford move-in costs. Income and residency requirements would apply.

# Appendix C: Affordable Housing Definitions

**AFFORDABLE HOUSING:** As defined by the US Department of Housing and Urban Development (HUD), this is any housing that costs an owner or renter no more than 30 percent of gross household income, including utilities.

**AREA MEDIAN INCOME:** Calculated by HUD annually for different communities. By definition, 50 percent of households within the specified geographic area earn less than Area Median Income (AMI), and 50 percent earn more. AMI is adjusted based on household size and used to determine the eligibility of applicants for federally and locally funded housing programs.

- Low-income: Describes households earning at or below 80 percent AMI.
- Very Low-income: Describes households earning at or below 50 percent AMI.
- Extremely low-income: Describes households earning at or below 30 percent AMI.

**COMMUNITY DEVELOPMENT BLOCK GRANTS (CDBG):** Federal funding to help entitled metropolitan cities and urban counties meet their housing and community development needs. The program provides annual grants on a formula basis to carry out a wide range of activities directed toward neighborhood revitalization, economic development, and improved community facilities and services for low and moderate-income people.

**COMMUNITY LAND TRUSTS (CLTS)** Independent, nonprofit corporations that provide permanently

affordable housing, both ownership and rental, and can take on a variety of tasks to advance that purpose. They often work within a specific geography, are governed by a board of directors, and supported by local governments through financial support or through property donations.

**CONSTRUCTION EXCISE TAX:** A tax collected on residential and commercial building projects that is used to help fund affordable housing programs; typically, a percentage of the permit value. Must be adopted and implemented at the local level.

**COST-BURDENED:** Describes households spending more than 30 percent of gross household income on monthly housing and utility expenses.

**DEVELOPMENT SUBSIDY:** A financial incentive provided to a housing developer for the construction, acquisition, or rehabilitation of housing, usually resulting in rents below market rate.

**ELDERLY OR SENIOR HOUSING:** Housing where (1) all the units in the property are restricted for occupancy by persons 62 years of age or older, or (2) at least 80 percent of the units in each building are restricted for occupancy by households where at least one household member is 55 years of age or older and the housing is designed with amenities and facilities designed to meet the needs of senior citizens.

**EVICTION:** The removal of a tenant from a rental unit due to a court order resulting from a landlord-initiated legal process.



**HOUSELESSNESS/HOMELESSNESS:** (1) Individuals and families who lack a fixed, regular, and adequate nighttime residence and includes a subset for an individual who is exiting an institution where he or she resided for ninety days or less and who resided in an emergency shelter or a place not meant for human habitation immediately before entering that institution; (2) Individuals and families who will imminently lose their primary nighttime residence; (3) Unaccompanied youth and families with children and youth who are defined as homeless under other federal statutes who do not otherwise qualify as homeless under this definition; or (4) Individuals and families who are fleeing, or are attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or a family member.

**HOUSING AND TRANSPORTATION INDEX:** Provides a comprehensive view of affordability that includes both the cost of housing and the cost of transportation at the neighborhood level.

**HOUSING AUTHORITY OF CLACKAMAS COUNTY**

**(HACC):** Provides affordable rental housing and housing assistance for residents of Clackamas County. HACC owns and manages nearly 625 rental units, is a tax partner for another 264 units, and administers 1,664 HUD (Section 8) vouchers.

**HOUSING CHOICE VOUCHER (SECTION 8):** The federal government's major program for assisting very low-income families, the elderly, and persons with disabilities to afford decent, safe housing in the private market. Eligible households may not have income exceeding 50 percent of AMI. Participants are free to choose any housing that meets the requirements of the program (i.e., they are not limited to units located in subsidized housing projects).

**HUD:** US Department of Housing and Urban Development.

**INCLUSIONARY ZONING:** A policy that requires developers to make a percentage of housing units in new residential developments available to low- and moderate-income households. Mandatory inclusionary zoning must be adopted and implemented at the local level, and jurisdictions are required to provide developer incentives to make projects financially feasible. As an alternative to mandatory inclusionary zoning, some jurisdictions provide incentives (e.g., density bonuses, zoning variances, or expedited permitting) to encourage developers to include affordable units in new developments.

**JUST CAUSE EVICTION:** A policy that lists allowed reasons for a landlord to terminate tenancy with or evict month-to-month tenants. Landlords must also state the reason in writing when serving a termination notice. Defined in ORS 90.392.

**LOW INCOME HOUSING TAX CREDIT:** Oregon Housing and Community Services allocates these credits to for-profit and nonprofit developers to build or rehabilitate low-income housing. Large corporations and financial institutions invest in the housing to gain tax credits and reduce their income tax obligations. Projects funded through this source must serve residents below 60 percent of AMI and must accept Section 8 vouchers.

**MARKET-RATE RENTAL HOUSING:** Privately-owned housing with rents determined by the owner or landlord.

**NO CAUSE EVICTION:** A termination of a rental agreement for any reason not listed as a cause for termination in the State of Oregon's Residential Landlord and Tenant Act. Per Milwaukie Municipal Code (MMC) Section 5.60, Milwaukie landlords must provide ninety days' notice prior to a no cause eviction.

**OREGON HOUSING DEVELOPMENT GRANT (“TRUST FUND”):**

Aims to expand Oregon's housing supply for low and very low income families and individuals by providing funds for new construction or to acquire and/or rehabilitate existing structures.

**PUBLIC HOUSING:** A specific category of rental housing for low-income households that is owned and managed by a local Public Housing Agency.

**SUBSIDIZED HOUSING:** Housing in which a publicly financed incentive is provided in the form of a direct payment, fee waiver, or tax relief to the housing developer, property owner, or individual renter to create affordable units. Subsidized housing may be publicly or privately owned.

**SUPPORTIVE HOUSING:** evidence-based housing intervention that combines non-time-limited affordable housing assistance with wrap-around supportive services for people experiencing homelessness, as well as people with disabilities.

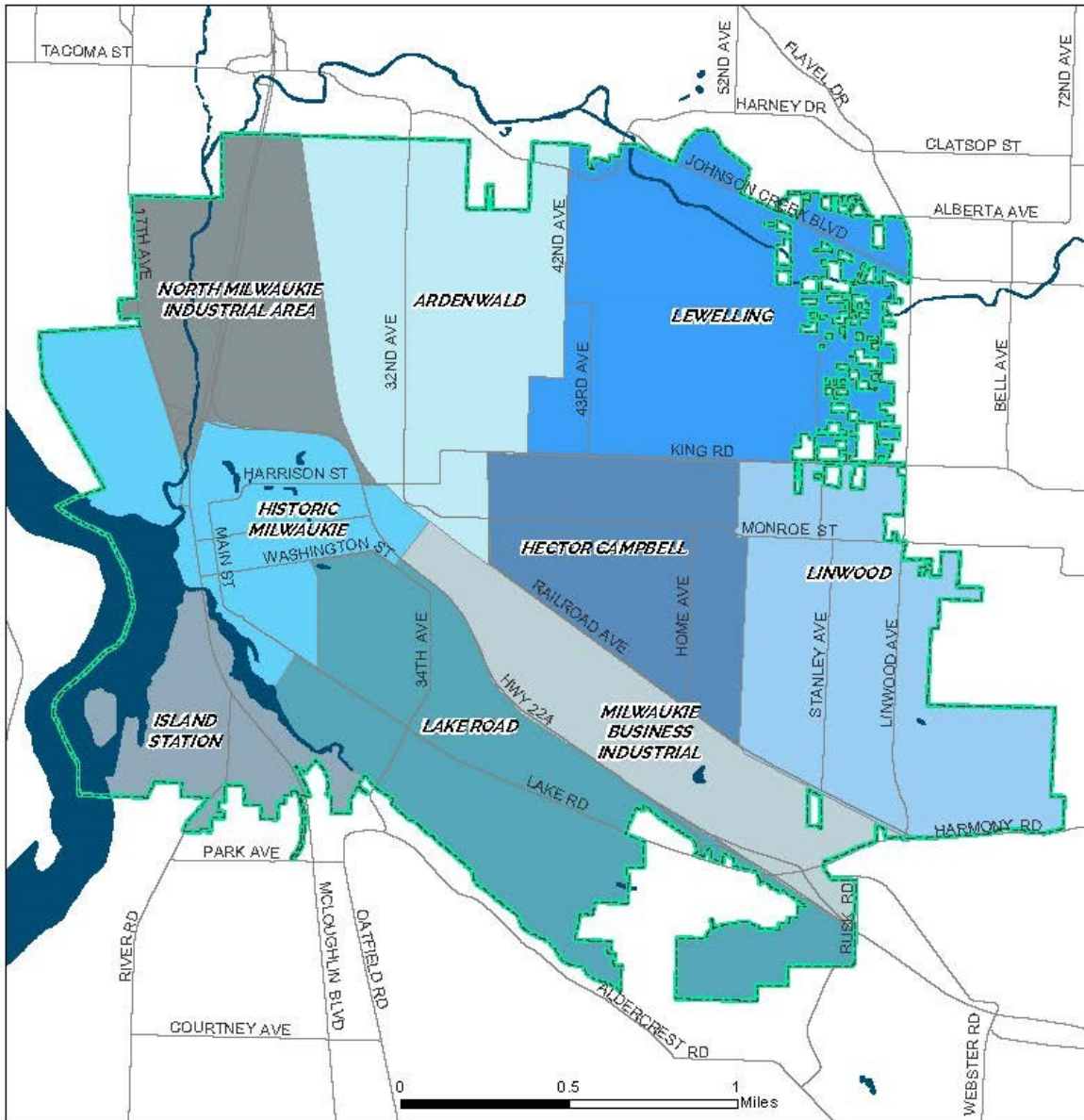
**RENTAL ASSISTANCE:** A subsidy provided to a property owner or low-income household to make the cost of renting affordable. Assistance is issued by a public entity such as a city, county, or local housing authority.

**SINGLE ROOM OCCUPANCY UNITS (SROs):** The traditional SRO unit is a single room, usually less than 100 square feet, designed to accommodate one person. Amenities such as a bathroom, kitchen or common areas are located outside the unit and are shared with other residents.

**SOURCE OF INCOME:** Lawful, verifiable income paid directly to a tenant or to a representative of the tenant.

**TENANCY TERMINATION:** Occurs when a landlord ends a rental agreement and asks the tenant to vacate the rental unit.

**WORKFORCE HOUSING:** Housing that is affordable to households earning between 60 percent and 120 percent of AMI. These households do not qualify for rental assistance subsidies, but their incomes are generally too low for market-rate rents to be affordable.



## Milwaukie Neighborhood Districts

- Milwaukie City Limits
- Ardenwald
- Hector Campbell
- Historic Milwaukie
- Island Station
- Lake Road
- Lewelling
- Linwood
- Milwaukie Business Industrial
- North Milwaukie Industrial Area



Data Sources: City of Milwaukie GIS,  
Metro Data Resource Center

Thursday, June 28, 2018

The information depicted on this map is for general reference only.  
The City of Milwaukie can not 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 errors would be appreciated.

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# Appendix D: Neighborhood Pulse Profiles

The Portland State University [Neighborhood Pulse](https://neighborhoodpulse.imspdx.org/neighborhood-resources/319-2) website showcases the Milwaukie neighborhoods. An example of the Ardenwald neighborhood is provided in this report.

Visit <https://neighborhoodpulse.imspdx.org/neighborhood-resources/319-2>

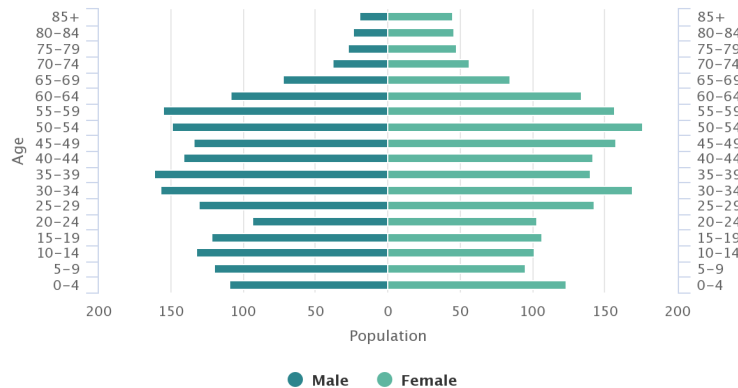
Neighborhood profiles will help City staff track change over time.

## Ardenwald

**Total Population:** 3,919  
**Housing Units:** 1,679  
**Employment:** Primary Jobs: 960  
 Residents: 1,837  
 Work/Residents ratio 0.52  
**Per Capita Wages** \$61,499.36

Population distribution by age and sex, Ardenwald, 2010

Source: Population Research Center



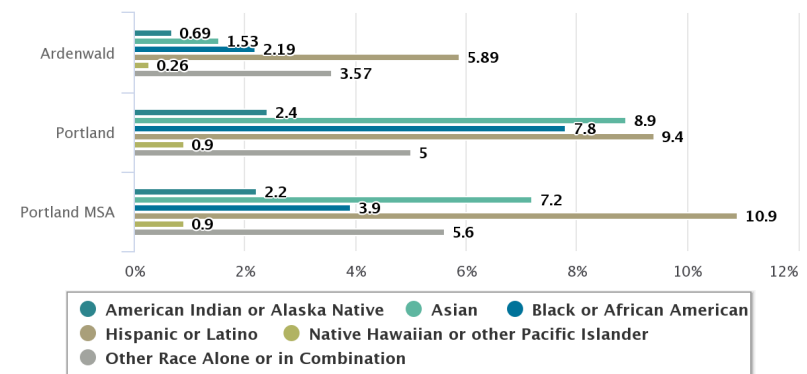
Percentage white (alone) and non-white population, Ardenwald, 2010

White alone refers to people who reported White and no other race group and did not report being of Hispanic Origin.  
 Source: Population Research Center

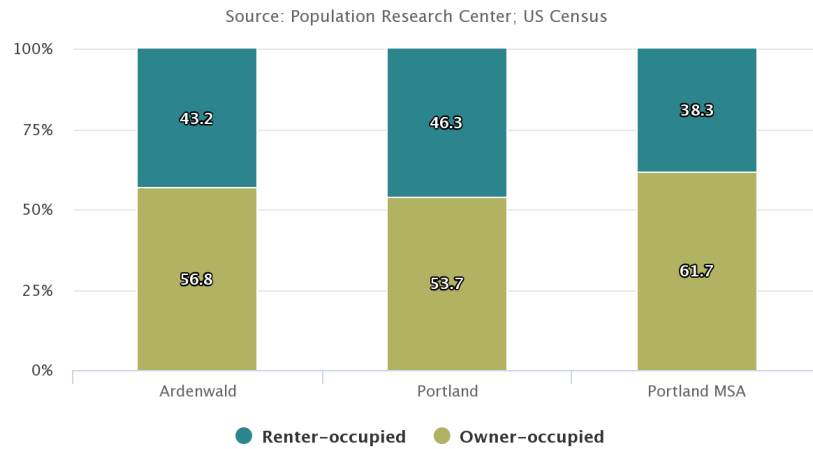


Non-white populations by race alone or in combination and Hispanic origin of any race, as a percent of the total population, Ardenwald, 2010

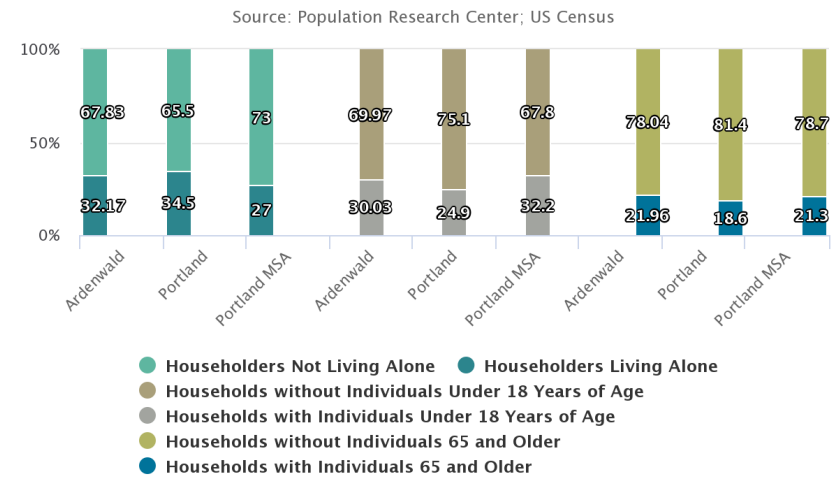
Source: Population Research Center; US Census



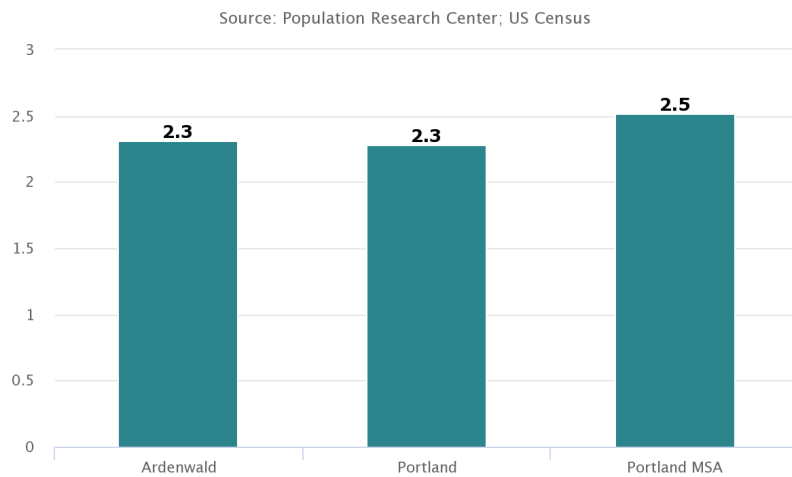
Percentage owner-occupied and renter-occupied housing units, Ardenwald, 2010



Household characteristics, Ardenwald, 2010



Average household size, Ardenwald, 2010



Population density, Ardenwald, 2010

