

City Council Orientation Handbook

Milwaukie, Oregon



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Office of the City Recorder – Milwaukie Oregon

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Milwaukee

Housing

Affordability

Strategy (MHAS)

Action Plan



Milwaukie Housing Affordability Strategy 2018-2023 Action Plan

The **Milwaukie Housing Affordability Strategy (MHAS)** was adopted by the Milwaukie City Council on July 17th, 2018.

This **5-year-long** strategy contains **31 action items** for short, mid-term, and long-term implementation for providing and supporting equitable and affordable housing opportunities.



BACKGROUND

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. 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**. Seniors, people of color, and people with disabilities are disproportionately impacted by the housing situation.

Being able to afford quality housing close to quality schools, grocery stores, and parks is a struggle for many low-income families. Cost-burdened households often find themselves without sufficient funds for other necessities (ie. food, health care, child care, and transportation). The high cost of housing also leads to housing instability and limits housing choice. Many families end up moving frequently which has a financial, social and emotional impact, on them and their families.

MILWAUKIE HAS 3 MAIN HOUSING GOALS

1. **Develop New Units**
2. **Prevent Displacement and Retain Affordability**
3. **Connect People to Existing Affordable Housing**



GOAL 1: DEVELOP NEW UNITS

- Increase the amount of housing affordability to people across the income spectrum while factoring in supportive housing or resident services. These services will help relieve the pressure on housing costs, including rental costs, and minimizes the threat of homelessness.
- Increase the number of affordable units and the total amount of housing to better meet market demand through financing and direct development. Changing requirements (ie. building codes and land use) can reduce the cost of building housing, which in turn promotes more housing supply and long-term affordability.

GOAL 2: PREVENT DISPLACEMENT AND RETAIN AFFORDABILITY

- Stabilizing housing costs, including rents and property values can prevent displacement when residents are priced out of neighborhoods.
- Protect renters and homeowners by preserving existing affordable housing and increasing education and access to resources.

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.
- 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.

ADDITIONAL INFORMATION

To learn more about MHAS action plan, visit www.milwaukieoregon.gov/communitydevelopment/affordable-housing or contact:

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CITY OF MILWAUKIE

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



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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.¹

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)² will provide additional goal and policy language related to housing and housing affordability.² 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

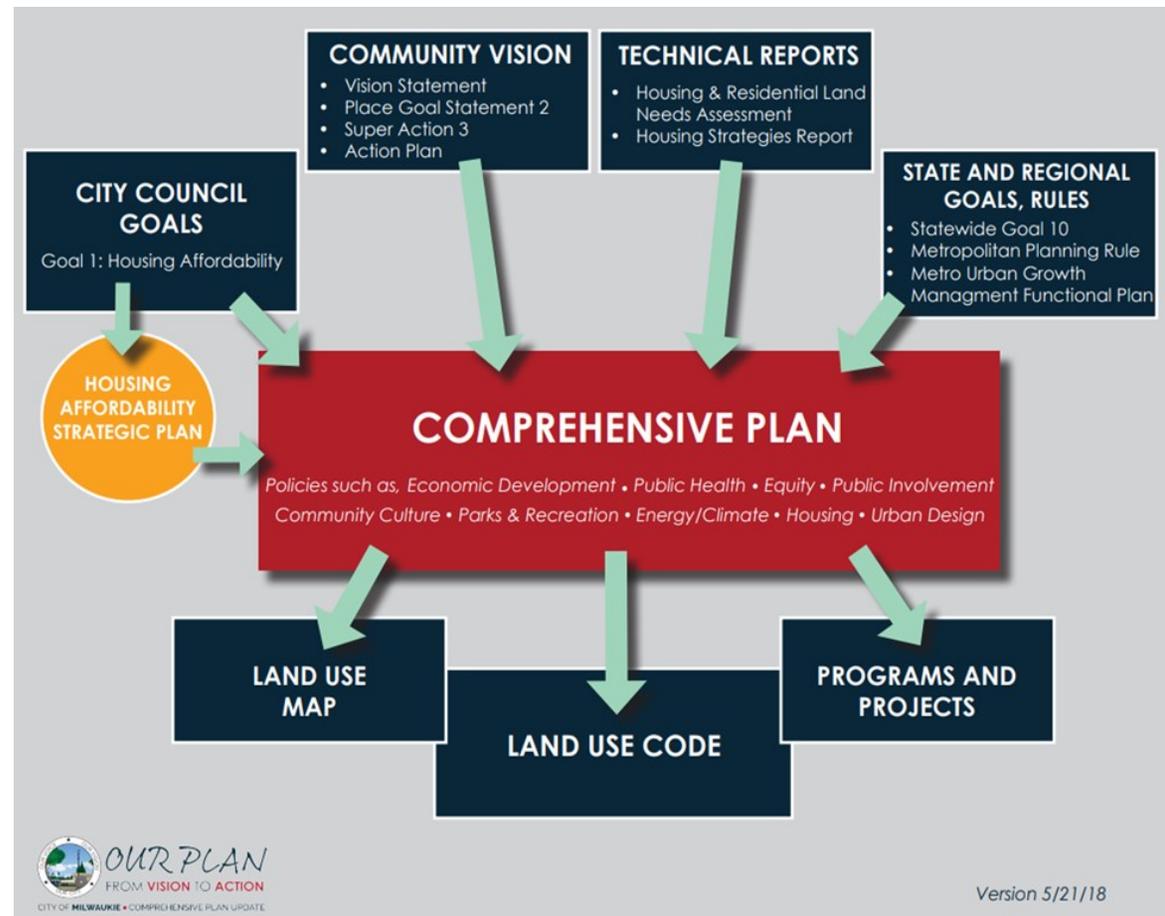


Figure 1. The intersections of the Comprehensive Plan and the MHAS

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.



Cottage Cluster



Accessory Dwelling Unit

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.



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.³ 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.⁴
- 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).⁵

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.)⁶

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.⁷

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.⁸

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

- Tax exemptions are a common operating subsidy for affordable housing units, and many providers are familiar with them.
- A local tax exemption is within local control and is not an up-front expenditure.

Disadvantages

- Tax exemptions are foregone future revenue and will reduce funding available for public purposes.
- County and other taxing districts control over 70 percent of the taxes.
- Potentially high cost (loss of tax revenue for 10 years or more depending on program details (\$\$\$))

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

- Process improvements can save staff time and money through increased efficiency.
- Milwaukie can gain a reputation as a business-friendly community.
- Increased and faster delivery of housing units
- No cost to Low cost (\$)—staff time

Disadvantages

- Regulatory streamlining can only go so far to improve the affordability of market-rate and regulated affordable units.
- Time and resources will be needed to align departments and potentially hire new staff.

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.⁹

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.¹⁰

Advantages

- Implementing policy goals with fee structures is within local control.
- There is the potential to impact the cost of housing by reducing development costs.
- No to low cost option (\$)—staff time

Disadvantages

- Lower fees may result in less revenue for public purposes.
- An appropriate incentive system may be complicated, but must ensure predictability.
- Over 70 percent of the SDCs are controlled by the county.
- Bancrofting is a high cost to city to cover.

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.¹¹

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

- Provides flexibility to reduce the cost of land and donate or sell land for revenue, where appropriate.
- A lower land price can result in lower cost units.
- Allowing increased density tied to provision of affordable housing could reduce the cost per unit.
- No cost to low cost option (\$)—staff time

Disadvantages

- There are a limited number of public properties.
- Not all sites will be appropriate for housing.
- Assessing the appropriate selling price or discount may be complex and will have tradeoffs for other public interests.

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.¹²

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.¹³

Advantages	Disadvantages
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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.¹⁴

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.¹⁵

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.¹⁶

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

2.8 Partner with Clackamas Housing Authority to support new affordable units for Milwaukie renters.¹⁷

Advantages	Disadvantages
<ul style="list-style-type: none"> • Leverages and supports existing voucher programs. • No cost 	<ul style="list-style-type: none"> • 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.

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

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

- Public, accessible information helps housing providers make informed decisions about their investments.
- Can leverage existing communication avenues, like license renewals.
- Low cost (\$)

Disadvantages

- May eliminate some discretion and flexibility in city standards and fees.
- May not result in the creation of new housing units.

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

- Creates continuum of support with changing economy and job opportunities.
- Provides opportunity for existing residents to advance in in-demand careers and pathways.
- Financially stabilizing families will help mitigate the impact of rental displacement.

Disadvantages

- Public funding is fairly volatile and will impact sustainability of services and resources.
- Public housing residents may need resource-intensive wrap-around supports as they transition to market rate housing to ensure on-going success.

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.¹⁸

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

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

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

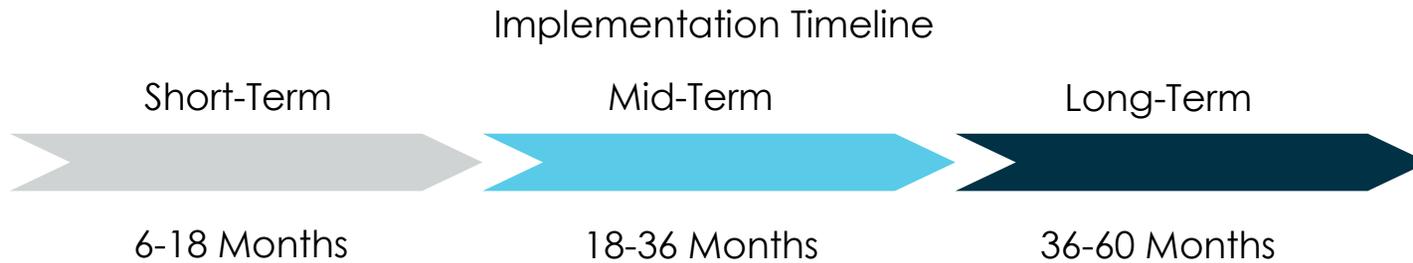
3.4 Develop a marketing campaign to educate and engage the community on housing affordability, density, and development realities in order to develop community capacity. (\$0)

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
Assistance to Residents		
<p><i>Affordable Housing Preservation</i> Preserves the long-term affordability of existing multifamily rental units. Under the program, HACC acquires large multifamily housing projects.</p>		Housing Authority of Clackamas County (HACC)
<p><i>Assistance for Rental Modifications and Home Repairs</i></p>		Clackamas County Community Development
<p><i>Energy Assistance</i> Emergency energy assistance for low-income residents.</p>	60% of area median income	Clackamas County
<p><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.</p>	80% of area median income	Clackamas County Community Development
<p><i>Homebuyer Assistance Program</i> Loans provide cash for down payment and closing costs.</p>	<p><i>Homebuyer Assistance Program</i> Loans provide cash for down payment and closing costs.</p>	<p><i>Homebuyer Assistance Program</i> Loans provide cash for down payment and closing costs.</p>

Program	Income Level Served	Administrator
<p><i>Landlord-Tenant Mediation</i> Eviction notices, noise complaints</p>		
<p><i>Oregon IDA Initiative</i> 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> 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> 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> 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> 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> 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
City Regulations and Incentives		
<p><i>Accessory Dwelling Units</i> ADUs are allowed in all residential zones except the downtown residential zone.</p>		
City Regulations and Incentives		
<p><i>Accessory Dwelling Units</i> ADUs are allowed in all residential zones except the downtown residential zone.</p>	No income restrictions	Milwaukie Planning Department
<p><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.</p>		Milwaukie Community Development
Direct and Indirect Support		
<p><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.</p>		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
	Goal 1: Develop New Units						
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
	Goal 1: Develop New Units						
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					
	Goal 2. Prevent Displacement and Keep Affordable Units Affordable						
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				
Goal 3. Connect People to Existing Affordable Housing							
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.
<p><i>Purchase and preservation of existing affordable multifamily units through partnerships</i></p> <ul style="list-style-type: none"> • Recommend partnering with King County Housing Authority, nonprofit organizations, and/or state of Washington. • Work with partners to identify and prioritize properties at risk or redevelopment or loss of market affordability. 	<p>https://bellevue.legistar.com/View.ashx?M=F&ID=5201317&GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</p>
<p><i>Property tax exemptions for affordable units</i></p> <ul style="list-style-type: none"> • Existing voluntary local property tax exemption (12 years on all units) should be calibrated to increase participation/attractiveness. • Advocate to amend state tax exemption to include existing units, not just new units. 	<p>https://planning.bellevuewa.gov/planning/planning-initiatives/affordable-housing-strategy/multifamily-property-tax-exemption/MFTE-requirements/ https://bellevue.legistar.com/View.ashx?M=F&ID=5201317&GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</p>
<p><i>Support for seniors to remain in their homes</i></p> <ul style="list-style-type: none"> • Support programs or provide technical assistance to services that support housing stability for seniors. • Transportation assistance, weatherization upgrades, virtual villages that create 	<p>https://bellevue.legistar.com/View.ashx?M=F&ID=5201317&GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89</p>

Bellevue, WA (cont.)

<p><i>Home repair and weatherization programs</i></p> <ul style="list-style-type: none"> • King County Housing Authority administers Bellevue Housing Repair program. • Provides loans for qualified low-income homeowners, often elderly and disabled. • Technical assistance for bids, supervision of work, and inspections. • King County has additional housing repair assistance for both owners and renters. 	<p>https://www.kcha.org/wx/ https://www.kingcounty.gov/depts/community-human-services/housing/services/housing-repair.aspx</p>
<p><i>Property tax, utility rate, and utility tax exemptions for income-eligible residents.</i></p> <ul style="list-style-type: none"> • 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. • End of year rebate of portion of utility tax for low-income households. 	<p>https://utilities.bellevuewa.gov/pay-your-utility-bill/utility-rate-and-tax-relief</p>
<p><i>Transportation Impact Fee Exemption</i></p> <ul style="list-style-type: none"> • Exemption of transportation impact fees for low and moderate-income housing. • Units affordable in perpetuity. • Created in the 1990s, and has been used in the production of 104 units. 	<p>https://bellevue.legistar.com/View.ashx?M=F&ID=5201317&GUID=1FA3F9EF-FEC5-4481-BAD3-CD5EB5E78C89 http://www.codepublishing.com/WA/Bellevue/html/Bellevue22/</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"> • DCLT acquires existing homes and preserves them as affordable housing and develops new, permanently affordable housing. • 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. • 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. 	<p>https://www.dclt.org/</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://communityhometruster.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.

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

Roxbury, MA

Relevance to Milwaukie	A traditionally working-class community in the Boston metro area with long-standing and active land trusts.
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Dudley Street Neighborhood Initiative

- 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.
- Also acquires and operates land for commercial uses, urban farming, and preservation of open space.

<https://www.dudleyneighbors.org/>
<http://www.yesmagazine.org/issues/cities-are-now/how-one-boston-neighborhood-stopped-gentrification-in-its-tracks>

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
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Affordable housing density bonus and parking reductions

- Bonus floor area ratio (FAR) and height available for creation of additional affordable units beyond code requirements.
- Parking reduction for affordable units in form-based zone district.

<https://housing.arlingtonva.us/development/land-use-zoning-tools/>

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.
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Minimum notice to tenants

- Minimum notice of ninety days when increasing rents more than 5 percent or when evicting tenants without cause.
- Required relocation expenses to tenants in no-cause eviction or when rents increased

<https://www.portlandoregon.gov/Citycode/28481>

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

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

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 Milwaukee to know about renting a home in Milwaukee?

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 Milwaukee.

Mid Term

Prioritize current Milwaukee Renters: Establish a database of current Milwaukee 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.

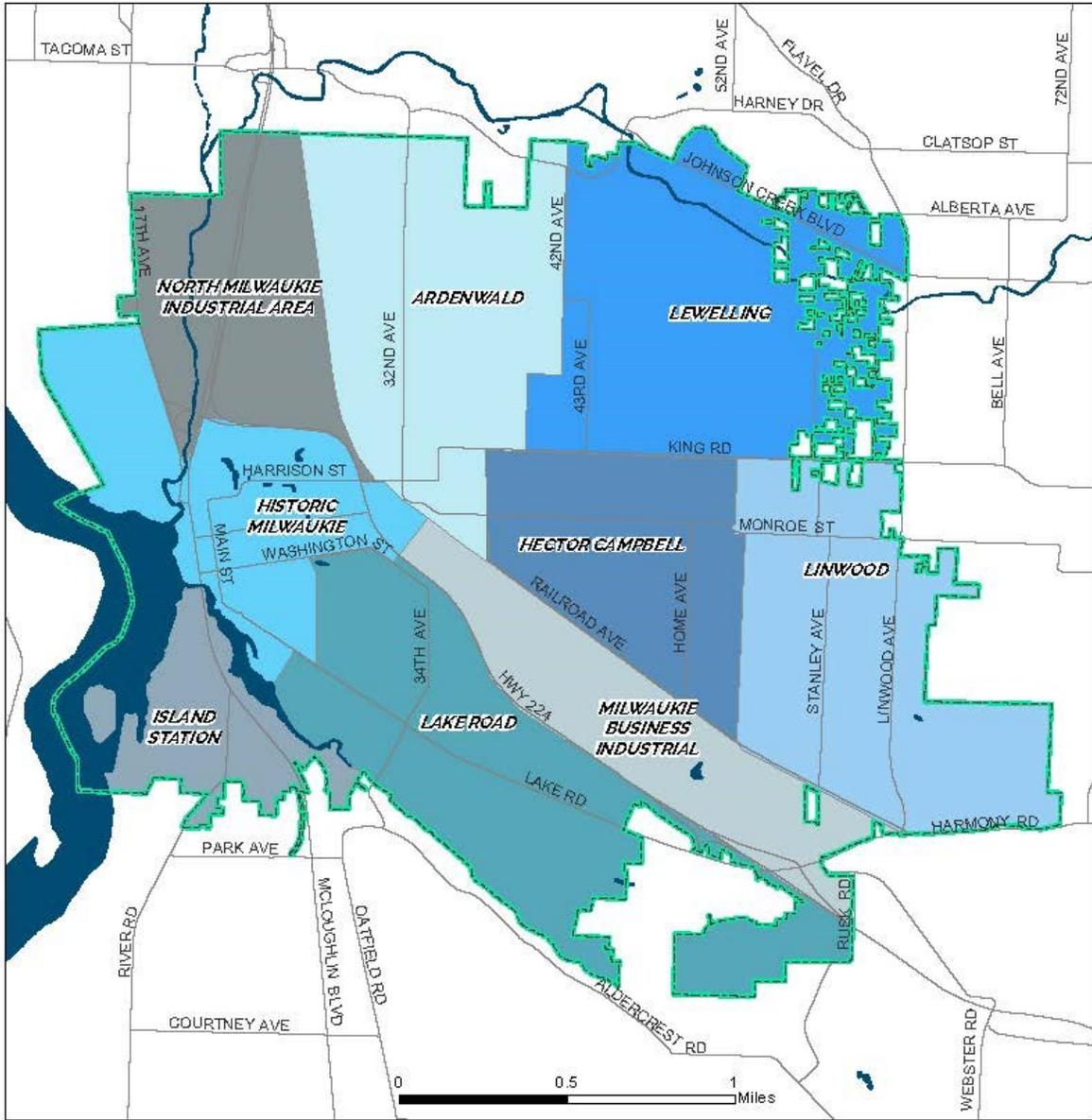
RENTAL ASSISTANCE: A subsidy provided to a property owner or low-income household to make the cost of renting affordable. Assistance is issued by a public entity such as a city, county, or local housing authority.

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

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GIS Coordinator
City of Milwaukie
6101 SE Johnson Creek Blvd.
Milwaukie, OR 97136
(503) 795-7498

Appendix D: Neighborhood Pulse Profiles

The Portland State University [Neighborhood Pulse](#) website showcases the Milwaukie neighborhoods. An example of the Ardenwald neighborhood is provided in this report.

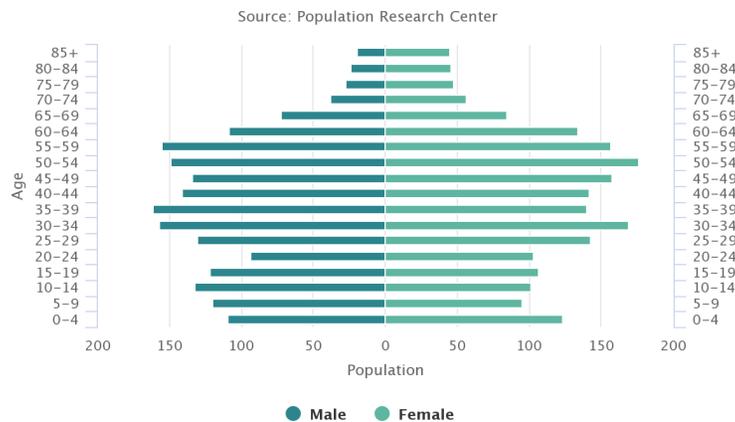
Visit <https://neighborhoodpulse.imspdx.org/neighborhood-resources/319-2>

Neighborhood profiles will help City staff track change over time.

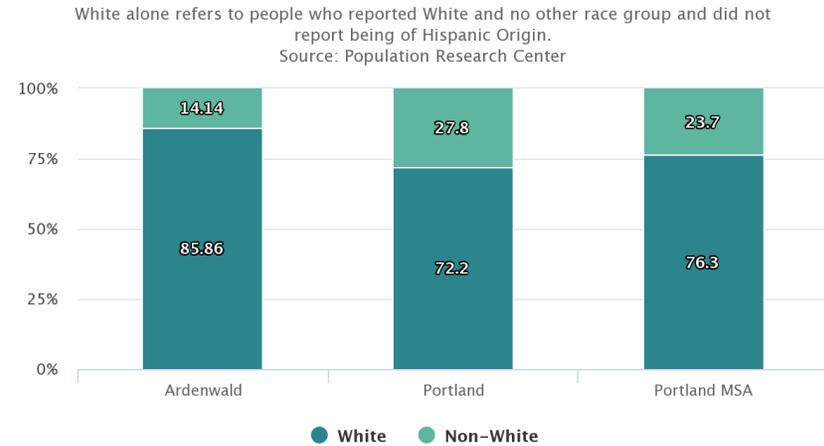
Ardenwald

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

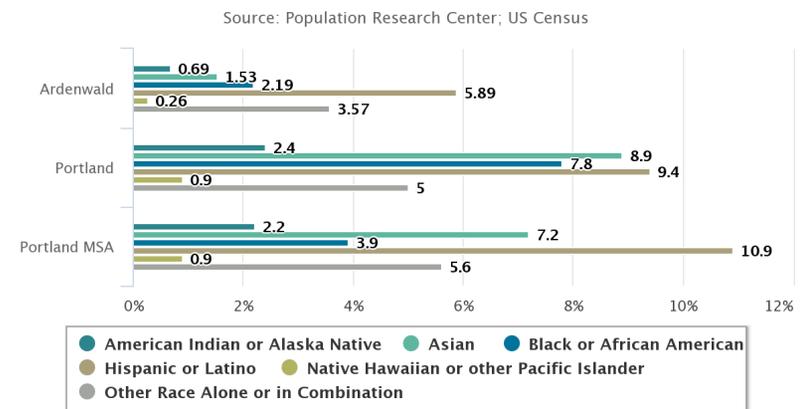
Population distribution by age and sex, Ardenwald, 2010



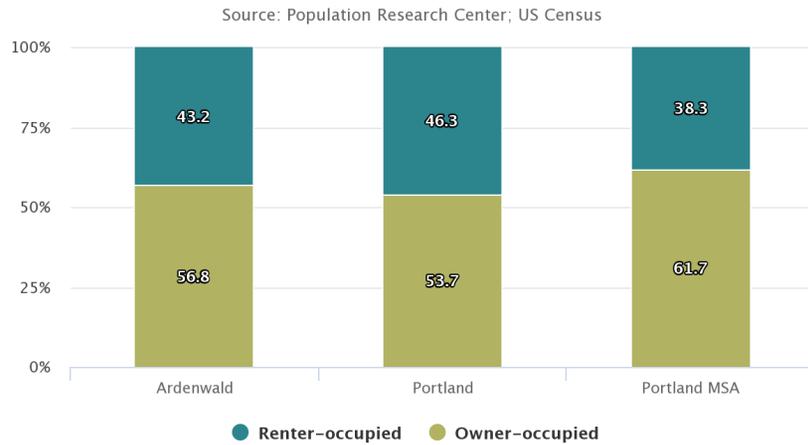
Percentage white (alone) and non-white population, Ardenwald, 2010



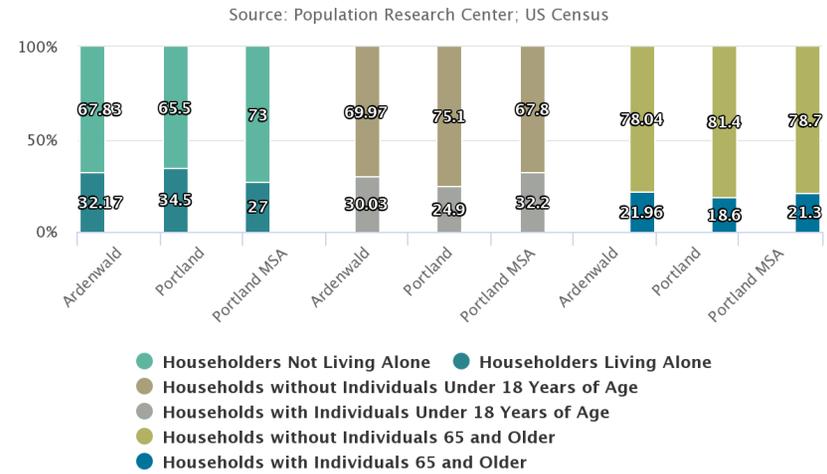
Non-white populations by race alone or in combination and Hispanic origin of any race, as a percent of the total population, Ardenwald, 2010



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



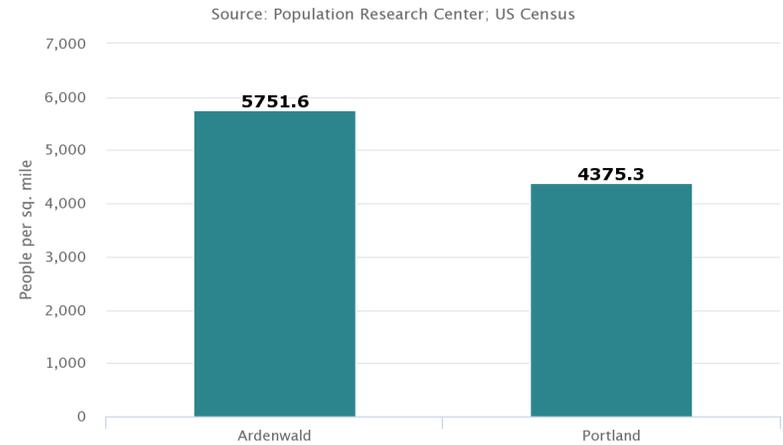
Household characteristics, Ardenwald, 2010



Average household size, Ardenwald, 2010



Population density, Ardenwald, 2010



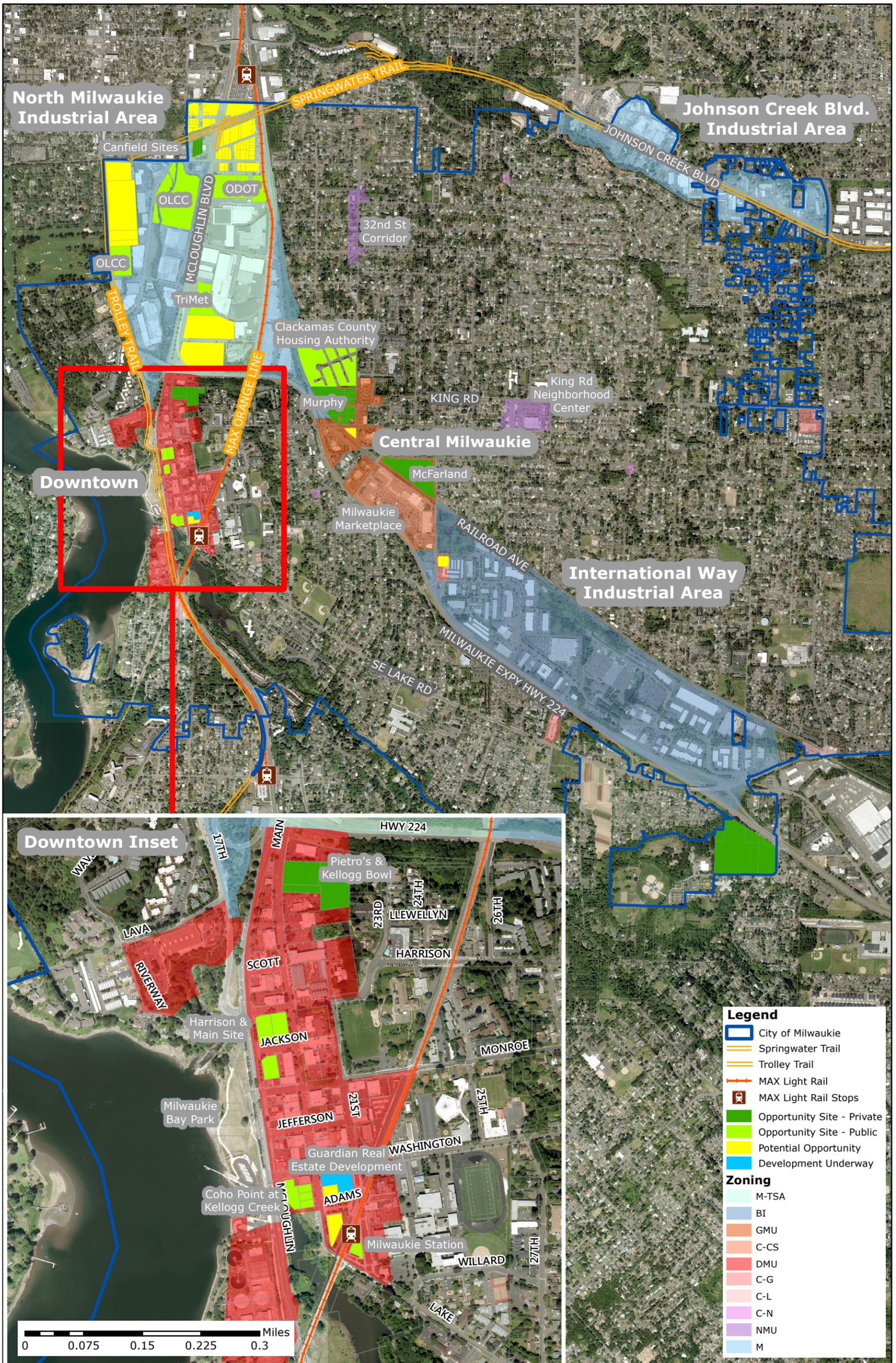


CITY OF MILWAUKIE

4.2.

Opportunity Sites

City of Milwaukie Opportunity Sites



City of Milwaukie Opportunity Sites
Date: 1/2/2018



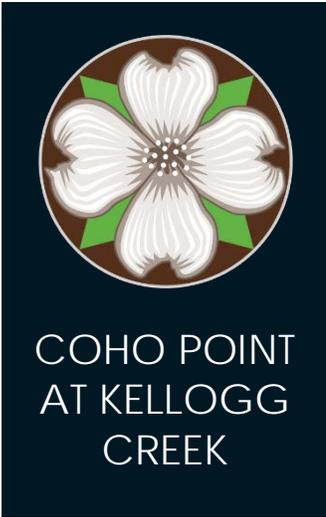
Miles
0 0.15 0.3 0.45 0.6

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Data Sources: City of Milwaukie GIS, Metro Data Resource Center. 1/2/2018

4.2.1.

Coho Point at Kellogg Creek

OPPORTUNITY SITES IN MILWAUKIE, OREGON



- Lot Size** 0.81 acres
- Features**
 - Publicly-owned
 - Highly visible location on McLoughlin Blvd/Highway 99E
 - Adjacent to Adams Street Connector and future Farmers Market site and Plaza
 - Willamette River views over Milwaukie Bay Park
 - Adjacent to Kellogg Creek natural area
- Opportunity Type** New construction – mixed-use housing
Negotiations with selected development team underway
- Current Zoning** Downtown Mixed Use (DMU) permits office, entertainment, hotels and services, businesses, and limited retail shops or restaurants
- Transportation** Adjacent to Highway 99E
Walking distance to Main St. MAX stop
Bike facilities on Main St. and Trolley Trail
- Environmental** Portion of the site in flood plain
Portion of site in Natural Resource Area
Western half of site within Willamette Greenway Zone
Phase I Environmental Site Assessment and Natural Resources Reports complete



Leila Aman
Development Project Manager
AmanL@milwaukieoregon.gov
503.786.7616

4.2.2.

Harrison/Main

OPPORTUNITY SITES IN MILWAUKIE, OREGON



Lot Size

0.96 acres

Features

Publicly-owned – city-owned parcel on the eastern half and Metro-owned parcel on the western half of the block
 Highly visible location
 Gateway to downtown
 Across from City Hall
 Opportunity for Willamette River Views over Riverfront Park

Opportunity Type

New construction

Current Zoning

Downtown Mixed Use (DMU) permits mixed uses with retail or service businesses on ground floor and residential on upper floors

Transportation

Adjacent to Highway 99E
 Walking distance to Main St. Light Rail Stop
 Shared bike facilities on Main & Harrison
 Adjacent to Jackson St. bus shelters that serve 11 different bus lines

Environmental

Potential brownfield mitigation needed, but approved for residential use above ground floor



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 503.786.7616



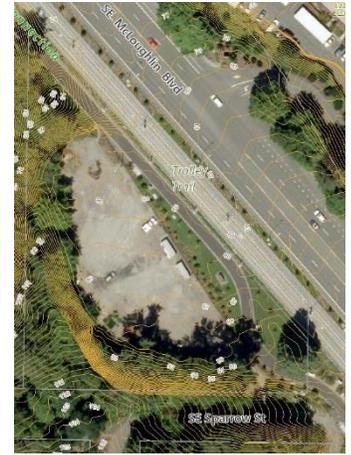
4.2.3.

Sparrow Site

LAND ACQUISITION: LAND BANK/HOUSING



**SPARROW SITE:
SE 26TH AVE &
SPARROW ST**



PURPOSE

The City of Milwaukie will be purchasing the Sparrow site to land bank for housing.

SITE

- Ownership:** TriMet
- Sewer:** Access to 15" pipe
- Water:** Access to 10" pipe
- Stormwater:** Onsite treatment needed, diversion to Kellogg Creek on north side
- Access:** Adjacent to Orange Line & Trolley Trail – 0.3 miles from Park Ave MAX Station Road access to site under review
- Neighborhood:** Island Station

LAND

- Land Area:** 1.96 AC
- Developable Area:** 1.09 AC (47,450 sf)
- Zoning:** R-5
- Taxlot:** 11E36CC00300



TIMELINE

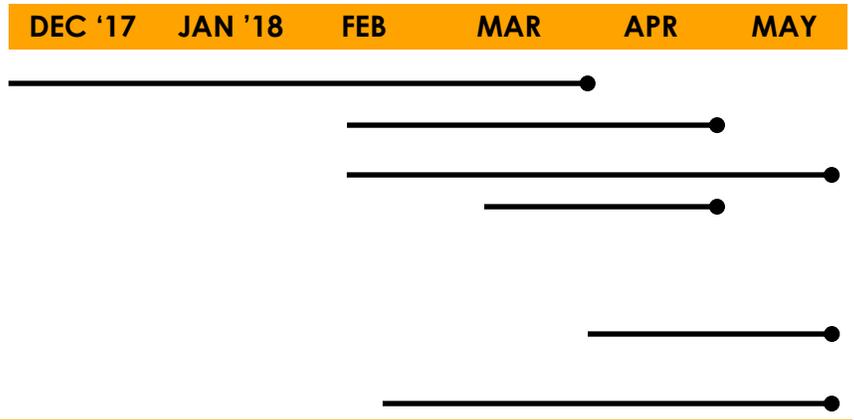
Purchase and Sale of TriMet Site started Due Diligence Items

- Phase 1 & 2
- Phase 2 Remediation (if needed)
- Geotechnical Study

Site Planning

- Zoning
- Fire Access
- Tiny Home Configuration

PSA DRAFT REVIEW and Signed



Alma Flores
Community Development Director
FloresA@milwaukieoregon.gov
503.786.7501



4.2.4.

TriMet Remnant
Lot

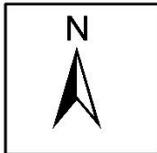


Legend

- Sewer Manholes
- Sewer Mains

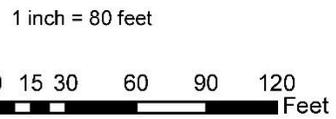
Water Mains Status

- In Service



TriMet Site

Milwaukie Planning Dept.
 Data: City of Milwaukie GIS;
 Metro RLIS
 Date: 10/24/2017
 Author: Planning Staff



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4.2.5.

Milwaukie Marketplace

ANCHOR TENANT OPPORTUNITY: RETAIL GROCERY



COMMERCIAL DISTRICT: CENTRAL MILWAUKIE - HWY 224 & SE OAK ST.

COMMUNITY FEATURES

- Less than 1 mile from downtown, with a trade area of over 44,000 people and an employee market of over 21,000 people within a 5-minute drive
- Median income = \$55,605 within a 10-minute drive
- Per capita income = \$30,783 within a 10-minute drive

COMMUNITY NEED

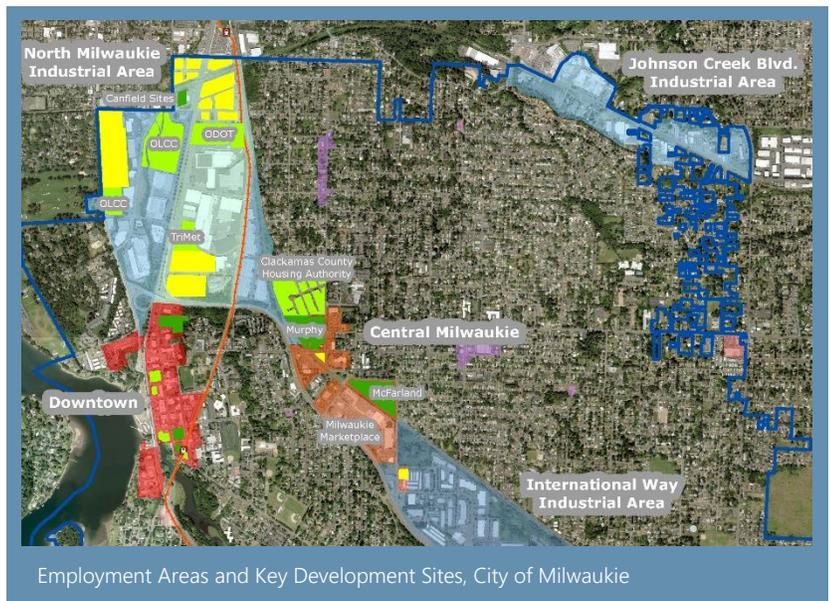
- Seeking a grocer to fill a service gap – currently, there is only one grocery in city limits
- In a 2016 survey, "grocery store" ranked as the number one request of Downtown customers, business owners, and property owners
- The site is adjacent to the Historic Milwaukie and Ardenwald neighborhoods, International Way Industrial Area, and Providence Hospital
- New multifamily development projects are in the pipeline, bringing 150 units immediately adjacent to the site and a total of 250-400 new units within a 2-mile radius

COMMUNITY VISION PRIORITIES

- An opportunity to be part of the unique heartbeat and rhythm of the Milwaukie family, a place that co-created a community-centered vision for the future
- Milwaukie's neighborhoods are the centers of daily life, with each containing amenities and community-minded local businesses that meet residents' needs. They form a network of unique, interconnected local hubs that together make Milwaukie a livable, equitable, and sustainable community

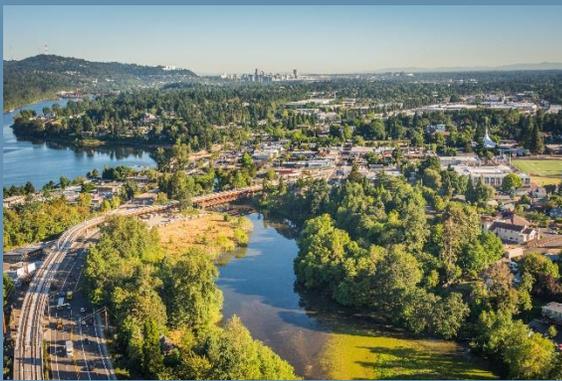


Alma Flores, Community Development Director
 FloresA@milwaukieoregon.gov
 503.786.7501





Partial façade of Milwaukie Marketplace and available site



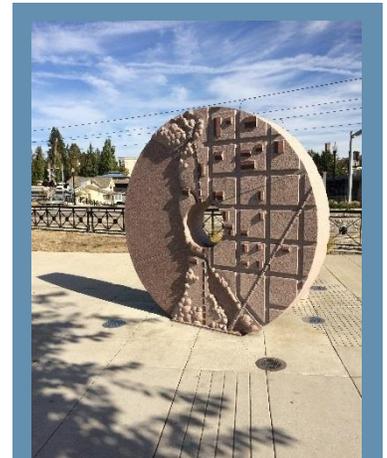
Aerial view of the City of Milwaukie

SITE ACCESS

- Adjacent to Highway 224 with over 26,000 cars passing daily
- Quick connections to McLoughlin Boulevard and I-205
- 1.5 miles to the Springwater Corridor
- 0.5 miles to Orange Line (Main St. MAX Station)
- Served by bus lines 29, 30, 33, 152, 156

SITE DETAILS

- 10840 SE Oak St
Milwaukie, OR 97222
- Zoning: C-CS
Community Shopping
Commercial Zone
- GLA 42,630 sf
- 16 acres (entire site)
- 720 parking spaces



Public art at Main St. MAX Station

CUSTOMER PROFILE: 10-minute drive

KEY FACTS

96,075

Population

40.2

Median Age

2.3

Average Household Size

\$55,605

Median Household Income

EDUCATION

8%

No High School Diploma

22%

High School Graduate

36%

Some College

35%

Bachelor's/Grad/Prof Degree

BUSINESS



3,995

Total Businesses



53,381

Total Employees

EMPLOYMENT



White Collar

65%



Blue Collar

19%



Services

16%

4.8%

Unemployment Rate

INCOME



\$55,605

Median Household Income



\$30,783

Per Capita Income



\$66,410

Median Net Worth

Households By Income

The largest group: \$50,000 - \$74,999 (19.0%)

The smallest group: \$200,000+ (3.5%)

Indicator ▲	Value	Difference	
<\$15,000	10.2%	+3.4%	
\$15,000 - \$24,999	10.1%	+2.9%	
\$25,000 - \$34,999	10.6%	+2.6%	
\$35,000 - \$49,999	13.4%	+1.9%	
\$50,000 - \$74,999	19.0%	+0.5%	
\$75,000 - \$99,999	14.6%	-0.4%	
\$100,000 - \$149,999	14.4%	-2.8%	
\$150,000 - \$199,999	4.2%	-3.3%	
\$200,000+	3.5%	-4.7%	

4.3.

Economic Development

4.3.1.

Milwaukie Community Facts



Milwaukie Community Facts (2016-2017)

Socioeconomic and demographic data for Milwaukie

Population (2016):
20,643

Pop. Change (2010-2016):
1.2% growth

Median Family Income:
\$71,685

Median Household Income:
\$55,880

Unemployment:
5%

Sources: U.S. Census American FactFinder (2012-2016); Oregon Department of Education, North Clackamas School District, Bureau of Labor Statistics, Bureau of Economic Analysis

Housing (2016)

Occupied	8,883	96%
Vacancy	399	4%
Homeowners	5,288	60%
Renters	3,595	41%
Median Home Price	\$245,000	
Median Rent	\$972	
GROSS RENT AS A % OF HOUSEHOLD INCOME		
Less than 15%	296	8%
15%-30%	1,422	41%
30% or greater	1,792	51%

Race and Ethnicity (2016)

RACE		
White	18,277	89%
People of Color	2,366	11%
Black or African American	436	2%
American Indian and Alaska Native	296	1%
Asian	709	3%
Native Hawaiian and Other Pacific Islander	24	0%
Some other race	207	1%
Two or more races	694	3%
HISPANIC OR LATINO		
Hispanic or Latino	1,552	8%
Not Hispanic or Latino	19,091	93%

Education (2016)

Number of Schools in Milwaukie (K-12): 8

Number of Students (K-12): 2,476

Percent of population with high school degree or higher: 94%

Percent of population with Bachelor's Degree or higher: 29%

Students eligible for free or reduced lunch (NCSD): 35.5%



Business, Employment, and Income (2016)

Number of Businesses: 15,833

Top 3 Industries (by total employees): Government, Healthcare, Professional, Scientific, and Technical Services, Education, Metal Manufacturing

Labor Force Participation Rate: 62%

Unemployment Rate: 5%

Poverty Rate: 12%

Community Assets and Livability

23 Parks and Natural Areas

Located along **Springwater Corridor Regional Trail**

9 Neighborhoods & 7 Neighborhood District Associations

Leading Library

- 2015 circulation: **700,000+**
- 2015 Patron Visits: **256,971**

Transit

Access to **8 TriMet bus routes**: (29, 32, 33, 34, 70, 75, 99, 152)

Access to **TriMet Orange Line** (Main St. Station, Tacoma Station)

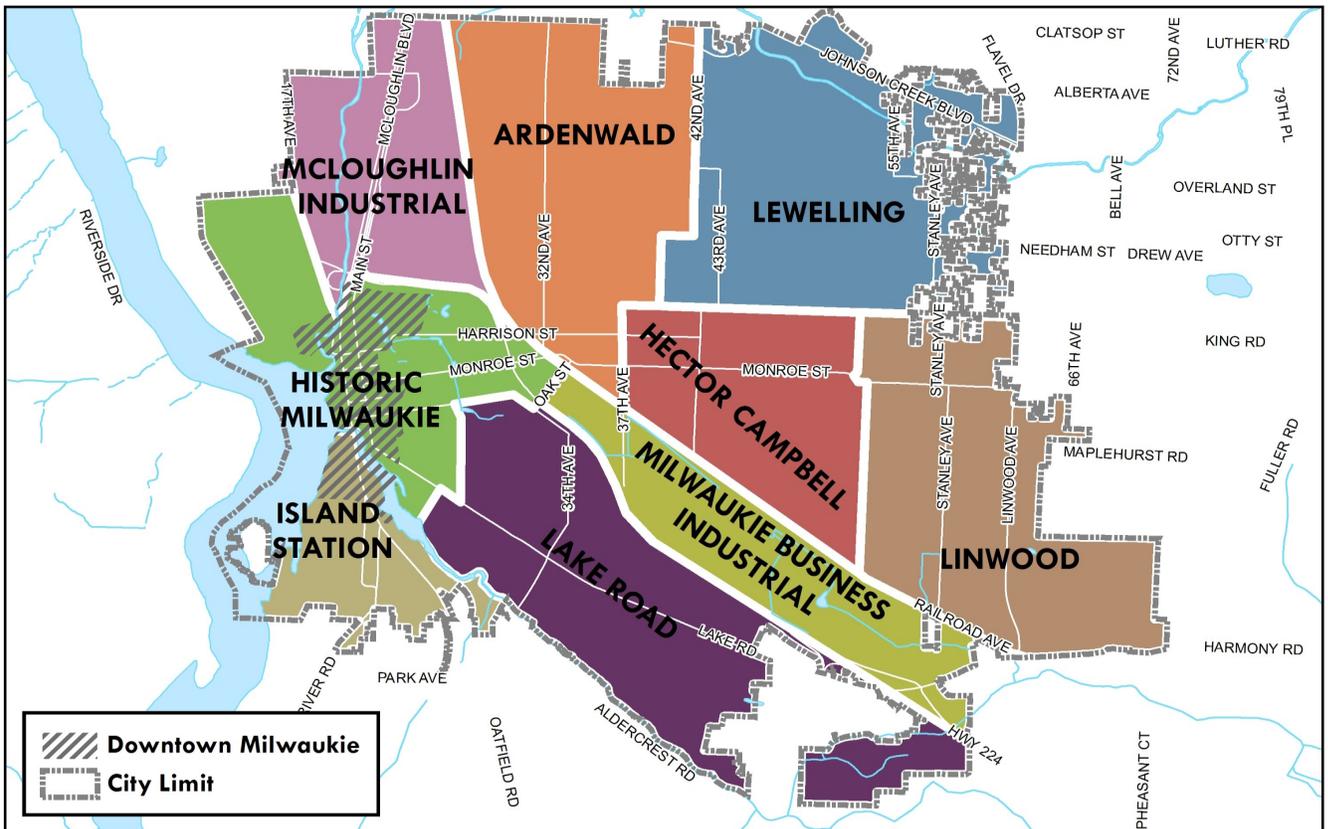


Transportation

Average Commute Time: 25 min

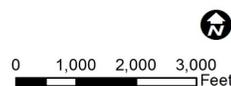
Commuter Mode Split

Drove alone	75%
Carpooled	8%
Public transportation	6%
Walked	2%
Other means	4%
Worked at home	5%



Milwaukie Neighborhoods

Milwaukie Planning Dept.
Data: City of Milwaukie GIS; Metro RLIS
Date: 1/12/2016
Author: Planning Staff



The information depicted on this map is for general reference only. The City of Milwaukie does 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.

4.3.2.

Enterprise Zones



ENTERPRISE ZONES

Three- to five-year tax abatement for new investment and equipment

Clackamas County & City of Milwaukie economic development staff market and manage the **Milwaukie Enterprise Zone** to encourage investment through property tax exemption for new or expanding non-retail businesses that strive to hire local and create above minimum wage jobs.

County Contact:
Cindy Knudsen
Zone Manager
CKnudsen@co.clackamas.or.us
503-742-4328

Or

City of Milwaukie
Alma Flores
Community Development
Director
(503) 786-7652
floresa@milwaukieoregon.gov



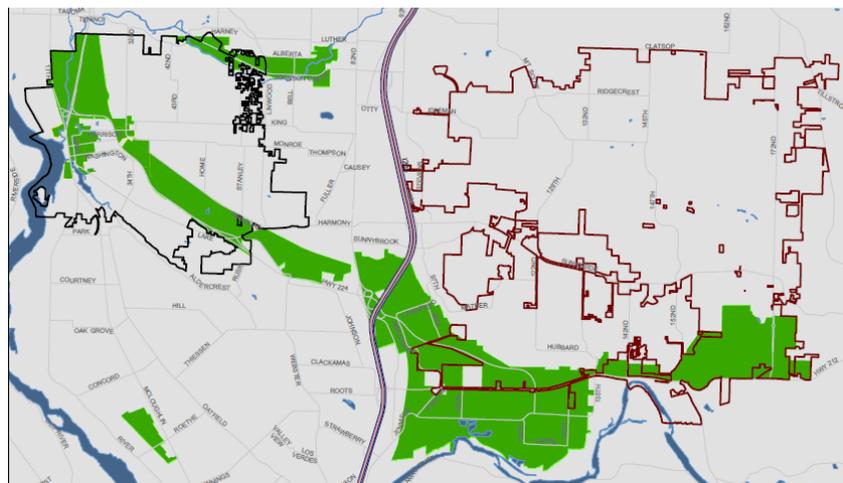
Enterprise Zones

Enterprise Zones are designed to encourage business investment through property tax relief in specific areas throughout the state. When locating or expanding into an Enterprise Zone, eligible businesses (generally non-retail) receive an exemption from the property taxes assessed on new investment, including building improvements, construction, machinery and equipment, for a period of three to five years.

Standard incentives are available to eligible businesses locating in an enterprise zone, subject to authorization timely filings, and employment criteria.

Standard incentives include:

- Construction-in-Process Enterprise Zone Exemption—up to two years before qualified property is placed in service, it can be exempt from local taxes. For most authorized businesses this provides broader benefit than the regular exemption for commercial facilities under construction.
- Three to five consecutive years of property tax exemption on qualified property, after it is in service.



North Urban Clackamas County Enterprise Zone

- City of Milwaukie
- City of Happy Valley
- North Urban Clackamas County Enterprise Zone

Data Sources: City of Milwaukie GIS, Clackamas County GIS, Metro Data Resource Center
Date: Thursday, December 22, 2016

The information depicted on this map is for general reference only. The City of Milwaukie cannot accept any responsibility for errors, omissions or positional accuracy. There are no warranties, expressed or implied, including the warranty of merchantability or fitness for a particular purpose, accompanying this product. However, notification of errors will be appreciated.

GIS Coordinator
City of Milwaukie
6101 SE Johnson Creek Blvd.
Milwaukie, OR 97136
(503) 716-7448

0 1 2 Miles

BUSINESS ELIGIBILITY

Prior to building construction/improvements or machinery/equipment installation begin on-site, the **Zone Manager** must receive and approve an *Application for Authorization*, which contains pertinent process information.

Eligible businesses include manufacturers, processors, shippers, and a variety of operations that serve other organizations, as well as call centers and headquarter-type facilities. Hotel/resort businesses are not eligible in the Milwaukie Enterprise Zone; nor are retail, construction, financial, or other defined businesses.

QUALIFIED PROPERTY

A new building/structure, structural modifications or additions, or newly installed machinery and equipment qualify for exemption. Nonqualified items include land, previously used property value, and miscellaneous personal items.

CRITERIA FOR QUALIFYING PROJECTS

For the standard, **three-year enterprise zone exemption**, the business should meet the following criteria:

- Increase full-time permanent employment by 10%
- Pay employees at least 150% of the State minimum wage (benefits can be used to reach this pay level)
- Maintain minimum employment level during the exemption period
- Enter into a first-source hiring agreement with local job training providers
- Pay an application fee of 0.1% of the proposed total investment.

Criteria for the extended **five-year exemption** the business should meet all criteria for the three-year enterprise zone exemption as well as the following:

- Compensation of new workers must be at or above 150% of the County average wage (benefits can be used to reach this pay level)
- There must be local approval by written agreement with the local zone sponsor
- The Company must meet any additional requirements that the local zone sponsor may reasonably request.

APPLICATION

Businesses or developers interested in locating or expanding in Enterprise Zones within Milwaukie can obtain the State application online at <http://www.oregon.com/gov/dor/PTD/docs/303-029.pdf> or from the Zone Manager at Clackamas County:

Cindy Knudsen
CKnudsen@co.clackamas.or.us
503-742-4328



4.3.3.

Brownfields Resources



BROWNFIELD RESOURCES

Resources are
Available for
Cleaning up
Brownfields at
Federal, State, and
Local Levels

Only a few sites within
Milwaukie require
brownfield
remediation. These
sites, however, are
located in distinct
opportunity areas with
attractive economic
potential. **Brownfield
Resources** are
available for firms
looking to develop
these sites.



Brownfields are commonly defined as properties where expansion or redevelopment is complicated by actual or perceived environmental contamination.

Many programs assist with brownfields. Listed below are federal, state, and local programs and funding sources commonly used to assist in brownfield investigation, cleanup, and redevelopment, plus news and links to related web pages. See the reverse of this flyer for more information about these programs.

Federal Brownfield Resources

- EPA brownfields and land revitalization
- EPA brownfield grants

State of Oregon Brownfield Resources

- Oregon Health Authority's Brownfield Initiative
- DEQ Prospective Purchaser Agreements
- DEQ Site-Specific Assessments of Brownfields
- Business Oregon Brownfield Redevelopment Fund
- Oregon Coalition Brownfields Cleanup
- Infrastructure Finance Authority
- Technical Assistance to Brownfields Communities
- The Center for Creative Land Recycling

Local Brownfield Resources

- Local Government Environmental Assistance Network



Photo by Mark Gamba

FEDERAL PROGRAMS

EPA Brownfields Program

The EPA's Brownfields Program is a federal program designed to empower states, communities, and other stakeholders in economic redevelopment to work together in a timely manner to prevent, assess, safely clean up, and sustainably reuse brownfields.

In the first quarter of 2015 alone, the EPA Brownfields Program completed 71 cleanups and 811 assessments. These actions leveraged an additional \$570 million from program recipients. The EPA estimates that these projects have already leveraged 2,937 jobs and has made 2,858 acres ready for anticipated reuse.

For more information visit <http://www.epa.gov/swerosps/bf/index.html>

EPA Grants & Funding

The EPA Brownfields Program offers funding for a variety of remediation activities. Various funds include Assessment Grants, Revolving Loan Fund Grants, Job Training Grants, Technical Assistance Grants, and Cleanup Grants. Cleanup Grants can be awarded up to \$200,000 for specific sites.

For more information visit: http://www.epa.gov/swerosps/bf/grant_info/index.htm

OREGON BROWNFIELD PROGRAMS

The Oregon Department of Environmental Quality manages two brownfields financing funds: the **Oregon Brownfields Redevelopment Fund**, funded by proceeds from the sale of state revenue bonds, and the **Oregon Coalition Brownfields Cleanup Fund**, capitalized through a revolving loan grant from the U.S. EPA.

Both programs are primarily revolving loan programs. However, limited grants can be awarded on a case-by-case basis for publicly-owned projects, depending on a financial analysis of the applicant's debt capacity and public benefits of the redevelopment project. Examples of public benefits include family-wage job creation, assistance for economically distressed communities, or addressing an urgent need of a local population.

For more information visit <http://www.orinfrastructure.org/Infrastructure-Programs/Brownfields/>

LOCAL BROWNFIELD RESOURCES

Local Government Environmental Assistance Network

The LGEAN offers numerous online resources including funding sources, EPA news and updates, and extensive information about various brownfield and pollution topics including air, water, wastes, materials, and energy.

For more information visit the LGEAN on the web at: <http://www.lgean.org/wastes/wastes.cfm>

MORE INFORMATION

For more information about brownfield resources as well as all the programs listed above visit the Oregon Department of Environmental Quality website at <http://www.deq.state.or.us/lq/cu/brownfields/index.htm>. For more information about specific brownfield sites in Milwaukie:

Alma Flores
Community Development Director
Phone: 503-786-7501
Fax: 503-774-8236
Email: FloresA@milwaukieoregon.gov



Photo by Mark Gamba

4.3.4.

Downtown Development Standards



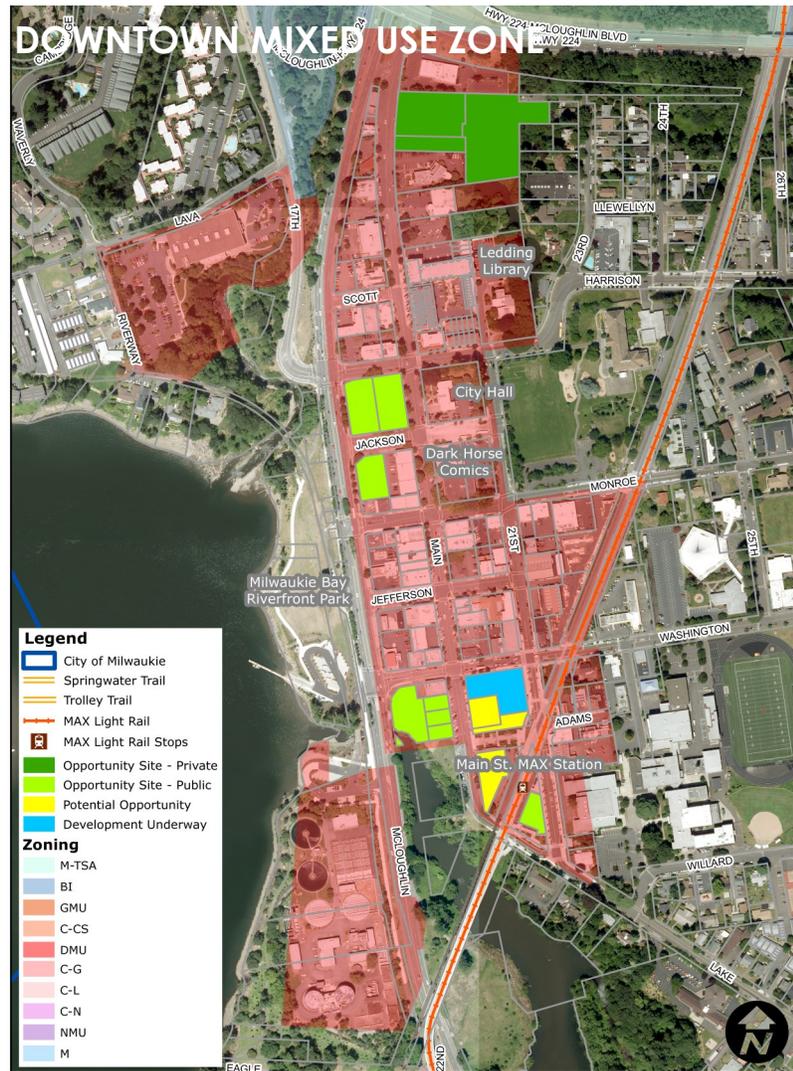
Downtown Development Standards

Downtown Mixed Use Zone (DMU)

The Downtown Mixed Use Zone provides for a wide range of uses—including retail, office, commercial, and residential—that will bring visitors to the downtown to live, work, shop, dine, and recreate. The desired character for this zone is a pedestrian-friendly and vibrant urban center, with a prominent main street and connections to the riverfront.

This handout summarizes key aspects of the Milwaukie Municipal Code that apply to downtown development. The detailed zoning code can be found at:

<http://www.qcode.us/codes/milwaukie/>



ALLOWED USES

Milwaukie Municipal Code (MMC) 19.304.2

Use	Type
Residential	Rowhouse, multifamily, live/work units, second-story housing, senior and retirement housing.
Commercial	Retail, restaurants, personal services, offices, commercial lodging.
Manufacturing	Manufacturing and production. Examples: breweries and bakeries.

STREAMLINED APPROVAL PROCESS

Design standards for development in downtown Milwaukie are applied through downtown design review. Developments that meet design standards (MMC 19.508.4) are permitted via a streamlined Type I or Type II administrative review process.

DEVELOPMENT STANDARDS

Type	Minimum	Maximum	MMC
Floor Area Ratio (FAR)	0.5:1-1:1	4:1	19.304.5.A
Height	25 ft.	35-65 ft.	19.304.5.B
Setbacks	0 ft.	10-20 ft.	19.304.5.D
Density			19.304.5.J
Rowhouses and live/work	10 units/acre	none	
Stand-alone multifamily	30 units/acre	none	
Mixed use	none	none	

BONUSES

Type	Provision	Bonus	MMC
Height (up to 2 available)			19.304.5.B.3
Residential	1 story/25% floor area residential use	1 story/12 ft. of building height	
Lodging	1 story/25% floor area lodging use	1 story/12 ft. of building height	
Green Building	ANSI-approved green building certification	1 story/12 ft. of building height	
FAR	1 sq. ft. structured parking	0.5 sq. ft. floor area	19.611.4

DESIGN STANDARDS

Type	MMC
Site design standards	19.504
Building design standards	19.505
Downtown site and building design standards	19.508



OFF-STREET PARKING

- All nonresidential uses are exempt from off -street parking requirements.
- Residential parking: minimum 1 space/dwelling unit, maximum 2 spaces/dwelling unit (MMC 19.605.1)
- Surface parking lots must be at least 50 feet from Main Street right of way.
- Off street parking may not be located between a building and the street-facing lot line.
- No curb cuts on Main Street

CONTACT

Planner on Duty: 503.786.7630 planning@milwaukieoregon.gov

Planning Director: Denny Egner 503.786.7654 egnerd@milwaukieoregon.gov

4.3.5.

EB-5 Investment Program

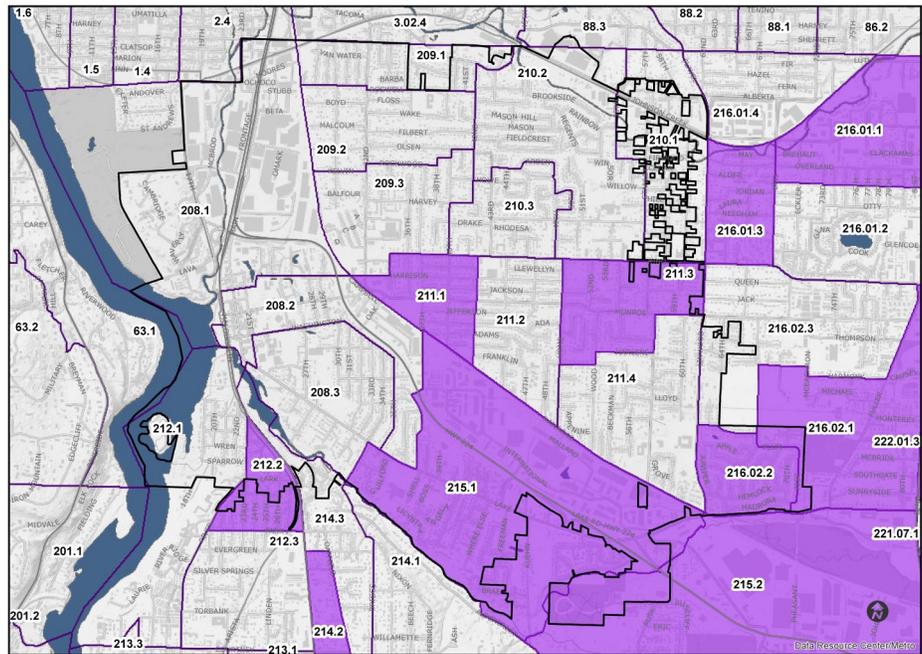


EB-5 INVESTMENT PROGRAM

Federal Program
for Expedited
Immigration and
Domestic Job
Growth

Milwaukie has
adjusted its Targeted
Employment Areas
for the EB-5 program
for 2017.

The EB-5 program
provides a two-year
roadmap to
citizenship for
immigrant investors
creating at least 10
full-time jobs in a
new or troubled
commercial
enterprise.



2017 High Unemployment Area Census Block Groups

Block Groups 2010 2017 High Unemployment Block Groups

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The **EB-5 Immigrant Investor Visa** is available to immigrants seeking to enter the United States in order to invest in a new commercial enterprise that will benefit the U.S. economy and create at least 10 full-time jobs.

There are two ways to invest in a commercial enterprise within the EB-5 program: creating a new commercial enterprise, or investing through a regional center in a troubled business.

The required investment that must be put "at risk" is \$1,000,000. However, in Targeted Employment Areas (TEAs), where unemployment is above 150% the national average, the minimum required investment drops to \$500,000.

The TEA areas within Milwaukie are extensive and offer many attractive locations such as all of Downtown, all of the city's industrial land, and several other opportunity sites as well.



EB-5 PROGRAM

COMMERCIAL ENTERPRISE CREATION

All EB-5 investors must invest in a new commercial enterprise, defined as either of the following:

- Established after November 29, 1990 or
- Established on or before November 29, 1990, that is:
 1. Purchased and the existing business is restructured or reorganized in such a way that a new commercial enterprise results, or
 2. Expanded through the investment so that a 40-percent increase in the net worth or number of employees occurs.

A Commercial Enterprise is any for-profit activity formed for the ongoing conduct of lawful business including, but not limited to:

- A sole proprietorship
- Partnership (limited or general)
- Business trust or other entity, which may be publicly or privately owned.
- Holding company
- Joint venture
- Corporation

JOB CREATION REQUIREMENTS

Commercial Enterprises must create or preserve at least 10 full-time jobs for qualifying U.S. workers within two years of the immigrant investor's admission to the United States as a Conditional Permanent Resident.

These jobs must be either direct or indirect. Direct jobs are actual identifiable jobs for qualified employees located within the commercial enterprise into which the EB-5 investor has directly invested capital. Indirect jobs are those jobs shown to have been created collaterally or as a result of capital invested in a commercial enterprise affiliated with a regional center by an EB-5 investor. A foreign investor may only use the indirect job calculation if affiliated with a regional center.

Investors may only be credited with preserving jobs in a troubled business. A troubled business is an enterprise that has been in existence for at least two years and has incurred net losses during the 12 or 24-month period prior to the priority date on the immigrant investor's Form I-526.

Full-time employment means employment of a qualifying employee by the new commercial enterprise in a position that requires a minimum of 35 working hours per week. It also means employment of a qualifying employee in a position that has been created indirectly from investments associated with the Pilot Program.

MORE INFORMATION

For more information about Oregon's EB-5 program, TEA areas, and regional centers visit the Business Oregon website at <http://www.oregon4biz.com/Global-Connections/EB-5/>.

For more information about the EB-5 Visa program and specific policies visit the U.S. Citizenship and Immigration Services website at <http://www.uscis.gov/eb-5>.

Alma Flores
Community Development Director
Phone: 503-786-7652
Fax: 503-774-8236
floresa@MilwaukieOregon.gov



4.3.6.

Parklets



Downtown Parklet Program

A new city initiative to activate the street for downtown businesses and organizations.

What are Parklets?

Parklets are extensions of the sidewalk, typically over parking spaces, that repurpose the street into a space for people.



By reclaiming the street for people, parklets can create more vibrant and inclusive community spaces. Often used for seating, these creative spaces typically exhibit distinctive designs that incorporate greenery and accommodate unmet demand for public and private space in commercial areas.

Applications Now Being Accepted!

The City of Milwaukie is excited to launch the Downtown Parklet Program. Following the completion of the successful Pilot Parklet Program in 2014, downtown businesses and organizations are now able to apply to install a parklet in front of their property.



Why Parklets?

There is broad community support for parklets in Milwaukie. Following the 2014 Pilot Program a survey was sent out to the community for feedback. The response was overwhelmingly in favor of parklets in downtown Milwaukie. 83% of respondents agreed that parklets are a positive addition to downtown.

Additional parklet benefits:

- Increased foot traffic and revenues for businesses
- Affordable, creative, and attractive use of streetscape
- Promote community interaction
- Can add valuable green space
- Reflect Milwaukie's commitment to active communities

Applying

In order to build a parklet in front of your property you must first receive approval from the City's Engineering Department by applying for a Applications for new parklets will be accepted on a rolling basis. The program is seasonal and allows parklets form April 1 to November 30.

A base permit fee is charged for all parklets. Applicants for private and hybrid parklets who wish to have table service will be charged for the use of on-street parking spaces. **See below on how to find out more!**

More Information

For further information on the Parklet Program or to request an application visit our website at <http://www.milwaukieoregon.gov/economicdevelopment/downtown-parklet-program>

Community Development Department

Alma Flores
Community Development Director
Phone: 503-786-7501
communitydevelopment@milwaukieoregon.gov

Engineering Department

Phone: 503-786-7600
engineering@milwaukieoregon.gov

Parklets are allowed in the Downtown Milwaukie area specified below:



4.3.7.

South

Downtown



SOUTH DOWN TOWN

From Ideas to
Implementation

Spring 2018 -
Winter 2020

[www.milwaukieoregon.gov/
southdowntown](http://www.milwaukieoregon.gov/southdowntown)



In the spring of 2018, the City of Milwaukie will begin several important **infrastructure projects** in South Downtown, including the construction of a **festival street** and the **South Downtown public plaza** which will serve as the new, permanent home of the **Milwaukie Farmers Market**.

South Downtown is also home to several new City led construction projects, including redevelopment of **the former Bernard's Garage** and **Milwaukie High School**.

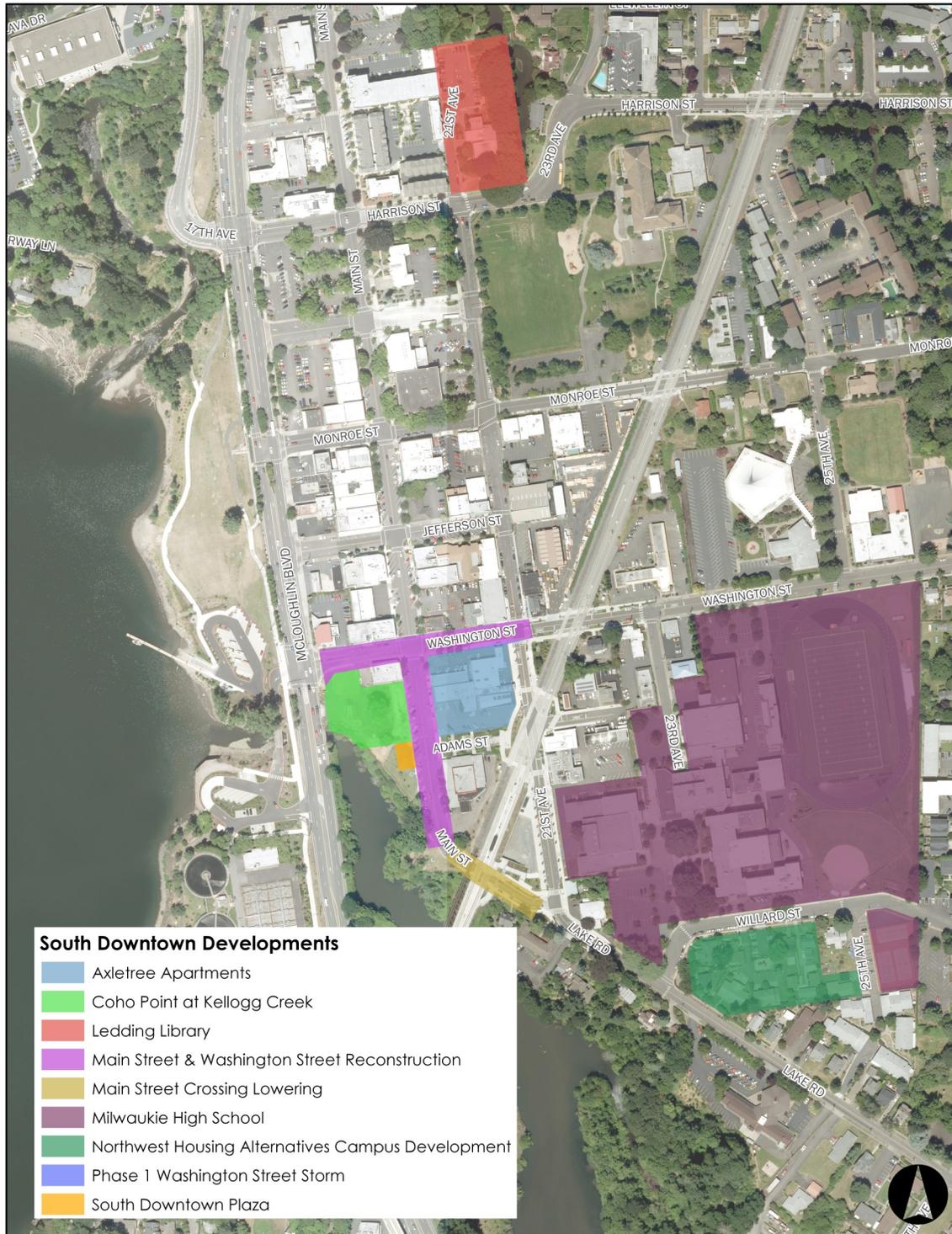
The City has taken a coordinated approach to expedite construction with a goal of limiting street closures as these projects evolve.

For the latest news about project impacts and road closures, please visit our **Construction Information** website: www.milwaukieoregon.gov/southdowntown/construction-information.



South Downtown

South Downtown



Contact Information

For more information visit our website at [milwaukieoregon.gov/southdowntown](https://www.milwaukieoregon.gov/southdowntown)
Subscribe to Traffic Closure and Construction alerts by choosing "South Downtown Updates" on the email subscriptions page here: <https://www.milwaukieoregon.gov/newsletter/subscriptions>

Community Development Department

Phone: 503-786-7600

Email: southdowntown@milwaukieoregon.gov

4.3.8.

Milwaukie Station Food Carts



MILWAUKIE STATION FOOD CART POD

Your destination for good eats and tasty treats! The City's first food cart pod opened in August 2017 and has become a source for community fun. Come check it out, order lunch (or dessert!) and stay a while.

Own a cart and interested in joining the club?
We'd love to chat!



MILWAUKIE STATION



LOCATION

Downtown Businesses
Milwaukie Bay High School
Milwaukie Bay Park
Farmers Market

FEATURES

12 Carts
Beer/Wine/Cider
Seating for 60
Restroom Facilities
Tables with Umbrellas

CART SPACES

\$605-\$705 (no grey water)
50 or 30 Amp Receptacle
Water Connections to Yard Hydrants

RESERVATIONS

Please provide us with:
Menu Description
Cart Dimensions
Serving Orientation



MILWAUKIE STATION

CITYWIDE REQUIREMENTS FOR FOOD CARTS

1. First identify location. The location must be in a zone that allows mobile food carts. A Type III land use review process is required in zones where mobile food carts are only allowed as a conditional use.
2. Submit appropriate Clackamas County applications and licenses for mobile food units. Information can be found at <http://www.clackamas.us/publichealth/restaurantlicensing.html>
3. Apply for a City of Milwaukie Business Registration. The form can be found at <http://www.milwaukieoregon.gov/finance/business-registration-1>
4. Apply for any necessary permits. For example, any electrical work will require a permit. Mobile food carts are commercial businesses and all electrical work in or on the cart must be done by a licensed electrical contractor.
5. Comply with the conditions for mobile food carts. They must be entirely self-contained, remain mobile with wheels attached at all times, meet the definition of an eating establishment, and no outside seating.

Food carts without wheels are considered structures, which are subject to development standards and may be subject to downtown design review.

COUNTY REQUIREMENTS FOR FOOD CARTS

1. Submit a Mobile Unit Plan Review Application, Operating Schedule, Mobile Unit Commissary & Warehouse License Application, and Mobile Unit Commissary/Warehouse Agreement —The purpose of these being to provide information relating to your base of operations, including times and dates of use.
2. Follow any additional requirements on the Applicant's Checklist for Mobile Food Units form.
3. Pay relevant Environmental Health Service License Fees and Plan Review and Construction Fees.
4. Along with those materials submit complete plans of the unit drawn to scale, a list of all equipment necessary for the operation of the unit, and a description of construction materials used on the unit, including surface finishes for floors, walls, ceilings, and countertops.
5. Submit a Restaurant License Application
6. And obtain a Food Handler's License
7. Comply with all of the guidelines within the Oregon Health Authority's Temporary Restaurant Operations Guide

Find all Clackamas County forms and info at <http://www.clackamas.us/publichealth/restaurantlicensing.html>

MORE INFORMATION

For more information about obtaining licensing and locating in the downtown food cart pod contact Alma Flores at floresa@MilwaukieOregon.gov or (503)-786-7652.

[Hablamos español. Servicios de Traducción Disponibles.](#)

Alma Flores

Community Development Director

Phone: 503-786-7501

FloresA@MilwaukieOregon.gov



4.3.9.

New Market Tax Credits



NEW MARKET TAX CREDITS

A Map of Eligible Sites for New Market Tax Credits

As of 2010, the city of Milwaukee was designated for New Market Tax Credit eligibility in certain census tracts.

New Market Tax Credits are a program that provides tax incentives to investors who make investments in low-income communities or areas of economic stress.

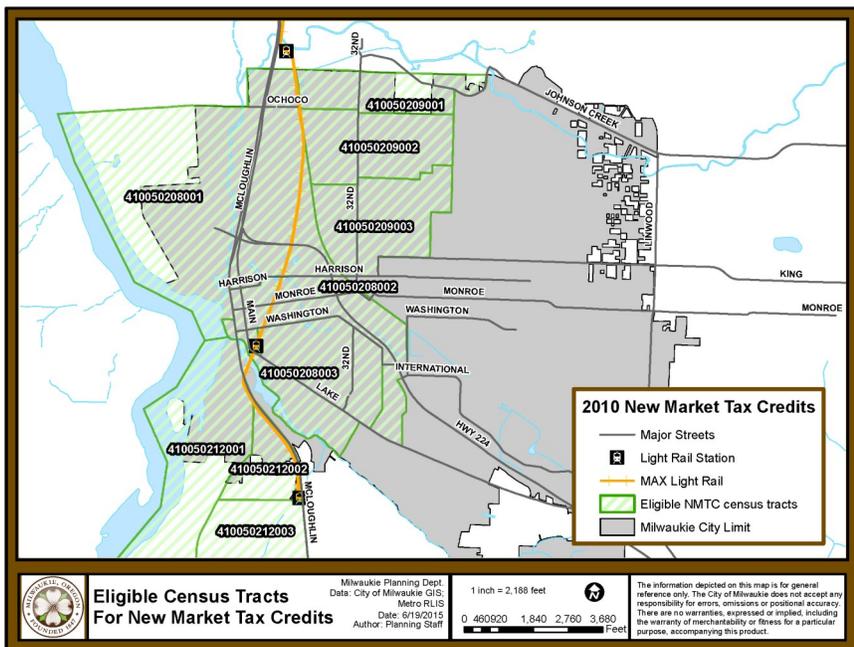


New Market Tax Credits (NMTCs) are a proven, cost-effective tool that supports job creation and encourages small businesses to expand. NMTCs allow developers to enjoy subsidized rates on debt or receive additional tax credit equity if investors fulfill Community Reinvestment Act (CRA) objectives.

In 2011 the State of Oregon passed HB 817, a statewide NMTC program, which was designed to leverage a modest investment of State funding to spur significant private job creation and rehabilitation in underserved communities.

NMTC projects have ranged from an elementary school in Portland, OR, to a domestic violence shelter in Harlem, NY. In each case, NMTC allocations have helped facilitate the completion of vital local projects that otherwise would not have moved forward. Through the program, NMTCs bridge financing gaps and provide a cushion against cash flow obstacles as projects reach stabilized operations.

New Market Tax Credits



TAX CREDITS

NMTC investments generate tax credits equal to 39% of total Qualified Equity Investments (QEI) made in a Community Development Entity (CDE). Credits are realized over a seven year period, five percent during the first three years, and six percent in the four remaining years (totaling 39%).

For example, \$10,000,000 of qualified equity investments made into a CDE would receive \$3,900,000 in total tax credits allocated over 7 years. This would be \$500,000 in each of the first three years, and \$600,000 in years four through seven.

In order to receive New Market Tax Credits, a competitive application must be filed by a CDE with the New Market Tax Credit Program. Due to the large number of applicants, typically only 1/3 of projects receive funding. Investments that are redeemed, or sold off from the CDE, before the seven year term is completed must pay back all of the tax credits with interest.

COMMUNITY DEVELOPMENT ENTITIES

All NMTC projects must be made through investments in Community Development Entities. However, these projects can meet a wide variety of community development objectives as well as several other criteria (see below).

Competitive applications must show that the CDE will be working in an economically distressed community or otherwise underserved communities. They also must be able to show demonstrable community development objectives as well as meaningful engagement with community stakeholders in deciding CDE investments.

Community development objectives can include job creation, jobs accessible to low-income persons, financing minority owned businesses, offering goods or services to low-income communities, offering community goods or services to low-income communities, offer flexible lease rates to future tenants, or create housing units available to low-income persons or within low-income communities.

APPLICATION

Businesses or developers interested in using New Market Tax Credits as part of their developments within Milwaukie can obtain the State application online at <http://nmtccoalition.org/allocation-materials/>

Investment must occur within the City of Milwaukie eligible New Market Tax Credit census tracts (see map on reverse).

Alma Flores
Community Development Director
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Fax: 503-774-8236
FloresA@milwaukieoregon.gov



4.3.10.

NMIA

Development

Standards



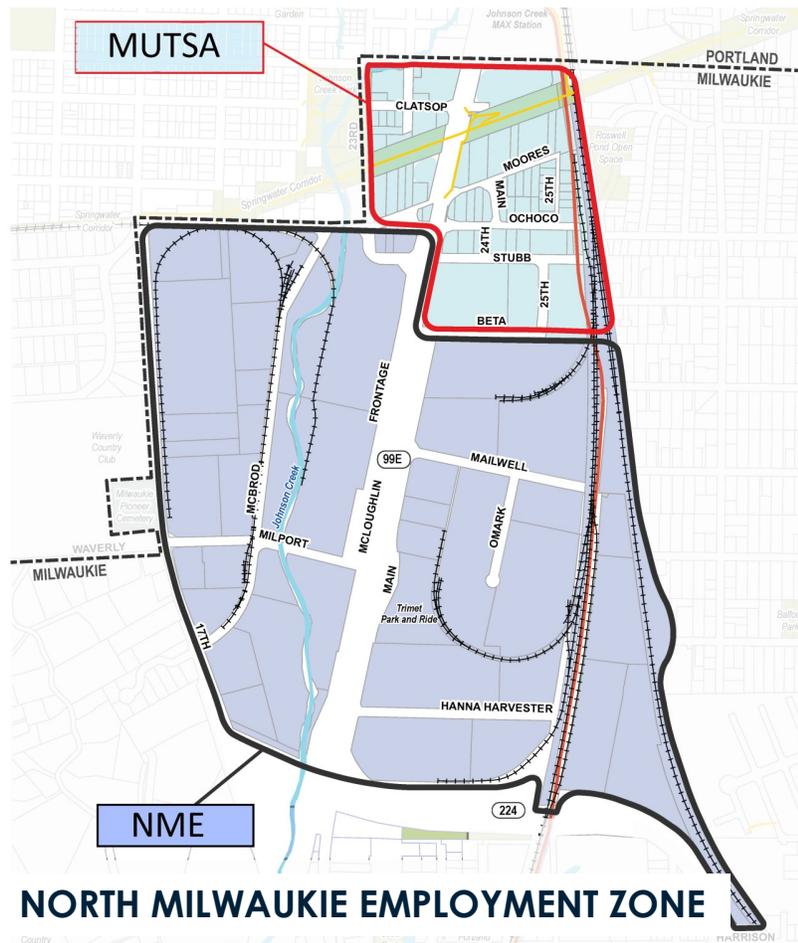
NMIA Development Standards

North Milwaukie Employment (NME)

The NME zone would permit existing industry, but also increase the type and extent of employment uses. Future design considerations should include emphasis on increasing employment density with varied uses and building types, priority for flex space and light manufacturing, research and development, and parking standards recommended in the Transportation Demand Management and Parking Strategy.

The detailed zoning code can be found at:

http://www.qcode.us/codes/milwaukie/view.php?topic=19-19_500&frames=off



NORTH MILWAUKIE EMPLOYMENT ZONE

Development Standards

ALLOWED USES

Milwaukie Municipal Code (MMC) 19.303.2

Use	Type
Manufacturing	Manufacturing and Production Creative space; studios Repair and Service; Construction-related businesses Waste Management ⁴
Distribution	Wholesale Trade Warehousing and Storage
Office	Service Office Production Office; Research & Development
Commercial/ Retail	Retail Sales; Personal Service; Repair ³ Eating & Drinking Establishments ³ Health Club/Gym ^{3,4}
Community Service Use	Government Offices Transit Facilities ⁴ Schools (public or private) ⁴ Recreation facilities (public or private) ⁴ Parks and open space Utilities; Communication facilities
Residential	None

¹Warehouse must be accessory to an industrial use or other permitted use

³Limited Uses: Limitations of size, location, and/or review process; primarily intended to serve district employees

⁴Conditional Use or Community Service Review (Type III)

DEVELOPMENT STANDARDS: NME

Type	Minimum	Maximum	MMC
Height	25' or none	90'	
Floor Area Ratio (FAR)	0.5	3	
Block Length (ft)	600'	1200'	
Retail Square Footage		20,000 (5,000 for individual retail. Max 20,000 per develop-	
Standalone Retail	None allowed		
Residential Density	NA		
Standalone Warehouse	Allowed		

- Mixed use and vertical industrial permitted
- Street frontage
- Future streets and buildings should blend the physical design of buildings in relationship to the street front, and consider a range of factors such as density, public spaces and natural features, and green building design and development. Specific applications can include:
 - Building setbacks
 - Building orientation and entrances
 - Landscaping
 - Weather protection
 - Fenestration
 - Building materials and articulation
 - Building signage
 - Activated street fronts
 - Illumination of gateway features

DESIGN STANDARDS

Type	MMC
Site design standards	19.504
Building design standards	19.505



CONTACT

Planner on Duty
 503.786.7630
planning@milwaukieoregon.gov

Denny Egner
 Planning Director
 503.786.7654
egnerd@milwaukieoregon.gov



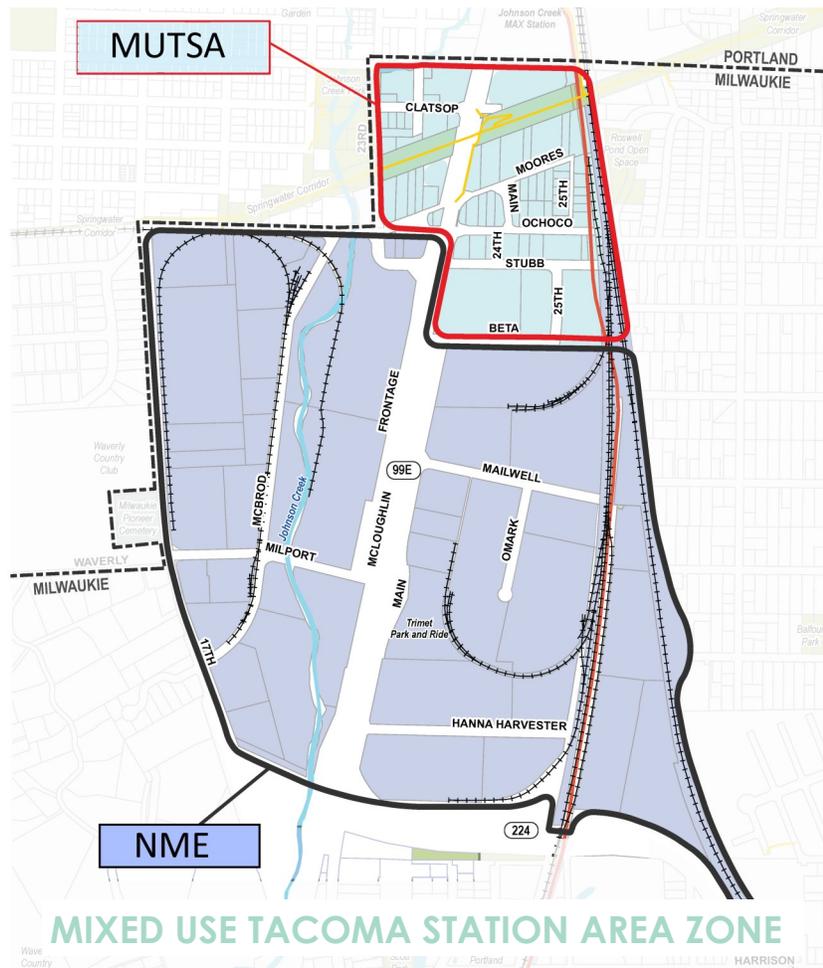


NMIA Development Standards

Mixed Use Tacoma Station Area (MUTSA)

The MUTSA district will continue to take advantage of the area's strategic location near the Tacoma MAX Station, the Sellwood neighborhood, Johnson Creek and the Springwater Corridor. The general purpose of the district is to still allow some commercial and residential uses as well as intensive employment uses.

The detailed zoning code can be found at:
http://www.qcode.us/codes/milwaukie/view.php?topic=19-19_500&frames=off



ALLOWED USES

Milwaukie Municipal Code (MMC) 19.303.2

Use	Type
Manufacturing	Manufacturing and Production
	Creative space; studios
	Repair and Service; Construction-related businesses
Distribution	Wholesale Trade
	Warehousing and Storage ¹
Office	Service Office
	Production Office; Research & Development
Commercial/Retail	Retail Sales; Personal Service; Repair ³
	Eating & Drinking Establishments
	Health Club/Gym ^{3,4}
Community Service Use	Government Offices ⁴
	Transit Facilities ⁴
	Schools (public or private) ⁴
	Recreation facilities (public or private) ⁴
	Parks and open space
Residential	Utilities; Communication facilities ⁴
	Multifamily/Mixed Use

¹Warehouse must be accessory to an industrial use or other permitted use

³Limited Uses: Limitations of size, location, and/or review process; primarily intended to serve district employees

⁴Conditional Use or Community Service Review (Type III)

DEVELOPMENT STANDARDS: MUTSA

Type	Minimum	Maximum	MMC
Height	25' or none	65'	
Floor Area Ratio (FAR)	0.5	3	
Block Length (ft)	600'	1200'	
Retail Square Footage		20,000 per building or develop-	
Standalone Retail	Allowed		
Residential Density	16 units/acre	None	
Standalone Warehouse	Not allowed		

- Mixed use and vertical industrial permitted
- Street frontage
- Future streets and buildings should blend the physical design of buildings in relationship to the street front, and consider a range of factors such as density, public spaces and natural features, and green building design and development. Specific applications can include:
 - Building setbacks
 - Building orientation and entrances
 - Landscaping
 - Weather protection
 - Fenestration
 - Building materials and articulation
 - Building signage
 - Activated street fronts
 - Illumination of gateway features



DESIGN STANDARDS

Type	MMC
Site design standards	19.303



CONTACT

Planner on Duty
 503.786.7630
planning@milwaukieoregon.gov

Denny Egner
 Planning Director
 503.786.7654
egnerd@milwaukieoregon.gov



4.3.11.

Strategic Investment Program



STRATEGIC INVESTMENT PROGRAM

Citywide overlay for property tax exemption on large monetary investments

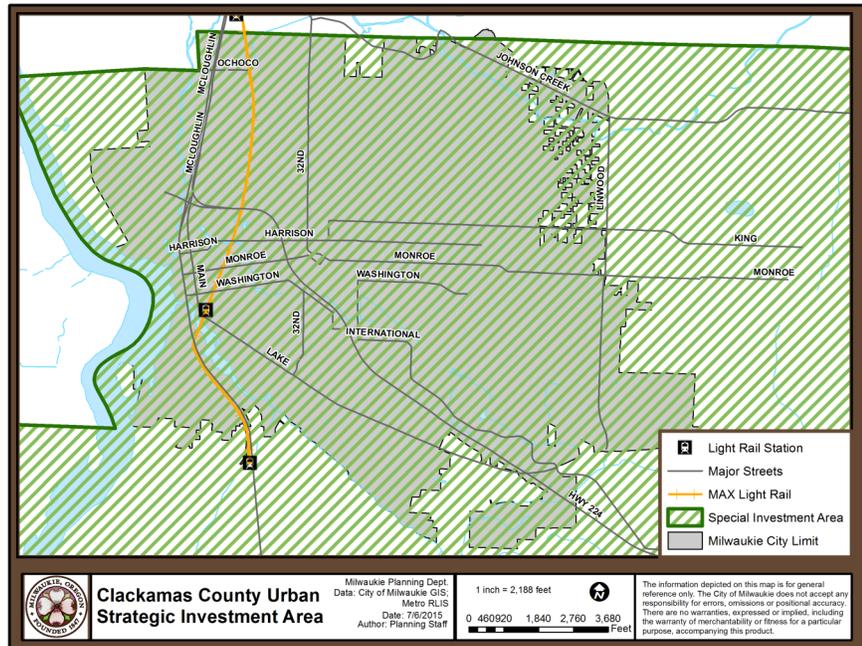
The Clackamas County **Strategic Investment Program** offers property tax exemptions for 15 years on investments increasing property values by more than \$25 million.



The **Strategic Investment Program** exempts a portion of large capital investments from property taxes. It is available statewide for projects developed by “traded-sector” businesses, most often used for manufacturing firms.

“Traded sector” is defined in Oregon law as “industries in which member firms sell their goods or services into markets for which national or international competition exists.”

Depending on the investment size, the Strategic Investment Program can offer exceptional benefits in terms of net present value. For example, all firms across Oregon currently taking advantage of the SIZ program each realize annual tax property savings in the hundreds of thousands of dollars.



Strategic Investment Program

BASIC PROGRAM ELEMENTS

Basic program elements for private investors include:

- Exemption on project property lasts for 15 years
- The project's first-year real market value greater than \$25 million is exempt— i.e., only the assessed value of property under this threshold is subject to property taxes
- The exemption threshold value then rises 3% per year during the exemption period
- A community service fee is paid each year to local public service providers
- This fee equals 25% of each year's tax savings, capped at an annual maximum of \$500,000
- Project must either receive local approval through a custom agreement with city government or be located in a pre-established "Strategic Investment Zone"
- Additional local requirements may apply

BENEFITS FOR BOTH COMMUNITY AND COMPANY

SIZ qualified investments represent much more to local communities than foregone tax revenues, community and company benefits include:

- Even with the community service fee, SIP represents a tremendous incentive for large investments, and the chance to more rationally tax large capital facilities
- It offers an excellent forum to solidify local community support for an otherwise special project
- The new taxable property value alone still represents extraordinary public revenue-not to mention corporate and personal income tax collections
- Characteristics of typical SIP projects include: exceptional capital outlays for technology and research, a well-trained and well-compensated workforce, major indirect effects on suppliers and other parts of the economy, and low impact on direct public services per dollar invested

APPLICATION

Businesses or developers interested in taking advantage of the Special Investment Program within Milwaukie can obtain the State application online at <http://www.oregon4biz.com/Oregon-Business/Tax-Incentives/SIP/>

Investment must occur within eligible Clackamas County designated Special Investment Areas (see map on reverse).

County Contact:

Cindy Knudsen

Phone: 503-742-4328

CKnudsen@co.clackamas.or.us



4.3.12.

Urban Renewal



URBAN RENEWAL

An Economic Development Tool for Retaining Businesses, Attracting Development, and Revitalizing Neighborhoods

Urban Renewal has been approved for use in Downtown Milwaukie and parts of Central Milwaukie to create more vibrant and economically viable areas.



WHAT IS URBAN RENEWAL?

Urban Renewal is an economic development tool that allows cities to borrow against future tax increases in a designated area to create funds for street or façade improvements, pedestrian amenities, and loans or grants to make development more feasible in difficult locations. The district in Milwaukie was adopted by City Council in August 2016 and is planned to last for until fiscal year 2046.

HOW ARE URBAN RENEWAL AREAS FUNDED?

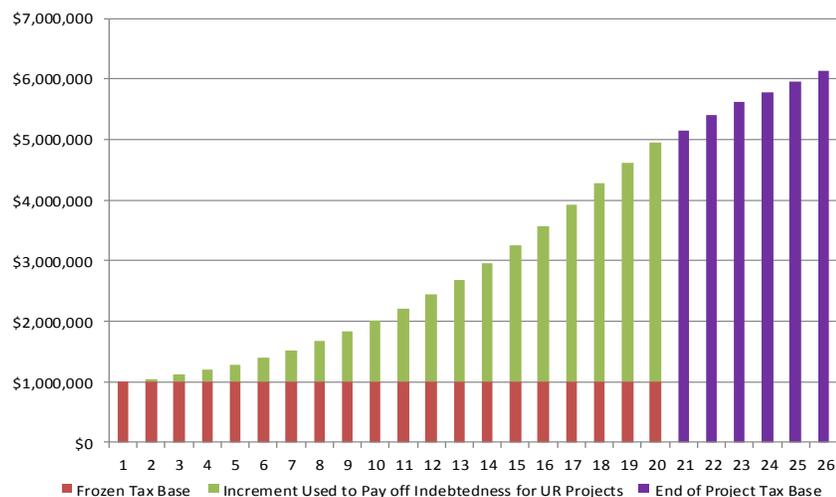
Important to note, **the impact on schools is indirect as schools are funded through a separate state school fund on a per pupil basis.**

Rather, Urban Renewal uses tax increment financing (TIF) to fund projects. This means that the existing tax base for the Urban Renewal Area is frozen for their current uses during the designated period (usually between 20-25 years). Then, as projects are completed thereby increasing the tax base, the additional tax revenues are used to pay off bonds taken to finance the projects. At the end of the URA period, ALL of the tax revenue can then be used as normal. See the chart below for an example of how this works.

If the URA is more successful than projected, **parcels can be returned to general tax rolls BEFORE the URA period is complete.**

See the reverse of this flyer for the types of projects that will be funded in Downtown and Central Milwaukie using the collected tax increment.

Tax Base and Tax Increment Financing Example



4.3.13.

Vertical Housing Tax Credit



Vertical Housing Tax Credit

A 10-year Property Tax Exemption

Encourages mixed-use commercial/residential developments in areas designated within a city's vertical housing development zone boundary through a partial property tax exemption.

City of Milwaukie
Council Resolution
No. 95-2017
Council Ordinance
No. 2157

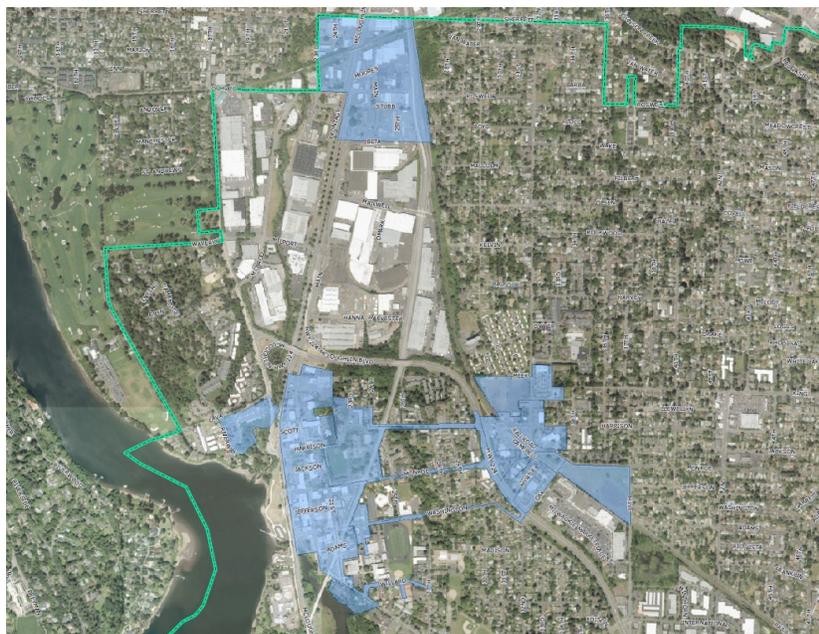


A Vertical Housing Development Zone (VHDZ) is designed to encourage the private sector to build higher-density mixed-use development (first floor commercial with residential above) in targeted areas of a city and provides a partial tax exemption on increased property value for qualified projects.

The VHDZ provides qualified development projects a 10-year property tax exemption on the value of new construction or rehabilitation for 20 percent per residential floor for floors above a commercial ground floor with total exemption limited to no more than 80 percent. Additional exemption may be available for projects with affordable housing.

The City of Milwaukie's goals for the vertical housing program include:

- Helping fulfill multiple city policies to incentivize higher density, mixed-use and transit-oriented development in our core and adjacent to light rail transit;
- Increasing assessed value throughout these areas;
- Increasing the number of residents living downtown that will shop, dine and patronize local businesses;
- Increasing the number of retail and office business opportunities in response to future residential growth;
- Increasing housing affordability and access to affordable housing; and
- Encouraging sustainable construction.



PROJECT ELIGIBILITY

Qualified new development projects within a VHDZ are eligible to receive a 10-year property tax exemption on the value of new construction or rehabilitation for 20 percent per residential floor for the first four floors above ground floor commercial. Total property tax abatement of the new construction is limited to no more than 80 percent. However, if the developer builds some or all affordable housing at 80 percent of area median income or below, an additional partial property tax exemption on the land may be given. The exemption applies to all taxing jurisdictions that did not opt out when the zone was established. After 10 years, the full value of the project is placed on the tax rolls. Property taxes on existing land for projects with no affordable housing, and at least 20 percent of the new construction, are preserved.

STATE CRITERIA

For the standard 10-year vertical housing exemption, projects must meet the following criteria:

- Project must be entirely located within the VHDZ.
 - Project must include one or more equalized floors.
 - Project must be comprised of a multiple-story building, or group of buildings including at least one multiple-story building, so that a portion of the project is to be used for non-residential uses and a portion of the project is to be used for residential use:
 - At least 50 percent of the project's ground floor that fronts on the primary public street must be committed to nonresidential use. If a project has access to only one public street, the square footage of driveways, loading docks, bike storage, garbage receptacles and building entryways shall be excluded before applying the 50 percent test.
 - For the project's ground floor to be considered committed to nonresidential use, all ground floor interior spaces that front on the primary public street must be constructed to building code standards for commercial use, are planned for commercial use and/or live-work use upon completion, or both.
 - The project application must be received by the City before the residential units are ready for occupancy (certificate of occupancy). For rehabilitation not involving tenant displacement, the project application must be filed before the rehabilitation work is complete.
 - Fees—Fees are subject to change annually and City may request verification of final total project costs.
 - An Application Fee of \$1,000 is required at the time of initial application.
 - An Application Processing Fee of 0.0003 (0.03%) of total permit valuation is collected at the time of final application before certificate of occupancy.
 - An Annual Monitoring Fee of \$400 is collected annually by December 31 for each year of exemption accompanied by an annual report to the City.
-

LOCAL CRITERIA

In addition to the state criteria, the City of Milwaukie requires that all buildings or major rehabilitations approved through the VHDZ program meet a green building certification level and associated use standards set within the Milwaukie Municipal Code Title 19 based on the date of land use approval.

The Milwaukie VHDZ has a local sunset provision of July 2022. Applications received by July 1, 2022 will have until December 31, 2022 to obtain a Certified Project approval certificate issued by the City per MMC Chapter 3.65; otherwise the application will be deemed inactive related to the VHDZ partial property tax exemption.

CONTACT

For additional information and application details, visit: <https://www.milwaukieoregon.gov/verticalhousing>

Alma Flores
Community Development Director
Phone: 503-786-7501
FloresA@milwaukieoregon.gov

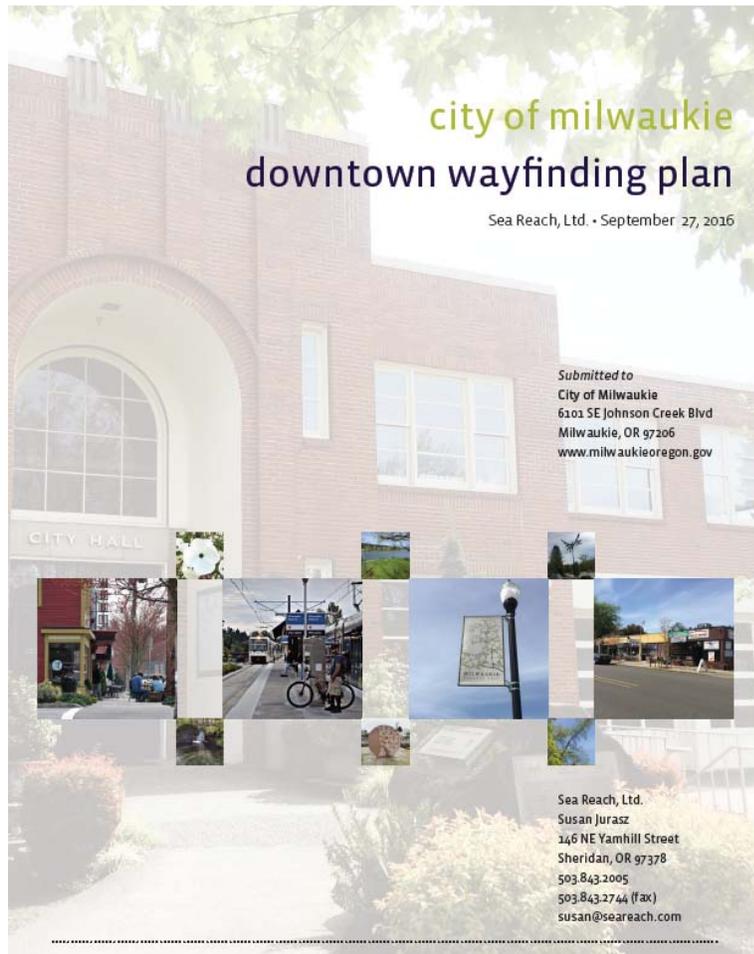
4.4.

Wayfinding

Downtown Wayfinding

Beginning in April 2016, the City has been working with Sea Reach, Ltd. to create and implement a Downtown Wayfinding Systems Plan.

What is wayfinding?



Wayfinding is a system of information that helps guide people through a physical environment while enhancing understanding and cohesiveness. A wayfinding system typically includes signage, maps, information kiosks, and other means of providing spatial and directional information.

In Milwaukie, our goal is to create a wayfinding system that increases the attractiveness of Downtown Milwaukie by helping residents, employees, employers, and visitors navigate by foot, bike, and car efficiently to area destinations and amenities while also creating positive perceptions for the area.

Downtown Wayfinding Systems Plan Planning Process –

(<https://www.milwaukieoregon.gov/communitydevelopment/downtown-wayfinding-systems-plan>)

A presentation at City Council on June 7, 2016 showed the continuing refinement of the overall design concept.

As part of the process for creating a wayfinding systems plan for downtown Milwaukie there were opportunities for public input and engagement including two public meetings, the Sunday farmers market, and a wayfinding survey.

- [Public Meeting #1](#) – Monday, April 18, 2016, 5:30-7:00pm at the Milwaukie Masonic Lodge, 10636 SE Main St.
- [Public Meeting #2](#) – Thursday, June 2, 2016, 5:30-7:00pm at the Milwaukie Masonic Lodge, 10636 SE Main St.
- Staff was also at the farmers market on May 8, 2016 from 11:30am to 2:00pm.
- We received terrific feedback on the 3 preliminary design concepts (Series A, B, and C), which helped our consultants create the refined design concept.
- The **final draft** of the Wayfinding Systems Plan was presented to and approved by City Council on [September 20, 2016](#).
- Final Wayfinding Systems Plan document:
https://www.milwaukieoregon.gov/sites/default/files/fileattachments/community_development/page/45111/final_draft_package_090716.pdf

Implementation

The total project cost for the implementation of the Wayfinding Systems Plan is estimated at approximately \$269,000. The plan identifies the following types and number of signs for the full project:

- 27 vehicular directional signs
- 17 pedestrian directional signs
- 3 kiosks
- 18 bicycle directional signs

Phase 1

As part of Phase 1 of the Wayfinding Systems Plan, the City is proposing to install a total of 6 vehicular directional signs, 8 pedestrian directional signs, and 1 pedestrian kiosk in and around the downtown area. Phase 1 of the project is estimated to cost \$55,000 for sign fabrication and approximately \$10,000 for installation (in-kind).

Funding

The Community Development Department included a budget line item for Phase 1 Implementation. Combined with a Metro Regional Travel Options Grant of \$15,000, Phase 1 has been fully funded at \$55,000 plus in-kind staff time.

Scope of Work – Project Schedule

Through an RFP process, the City selected Sea Reach, Inc. to finalize the sign locations and design, fabricate the signs, and assist with installation.

TASK	DATE COMPLETED
Kick-off meeting	08/24/17
Site meeting to finalize locations	10/10/2017
Final locations and legend plan update	11/15/2017
Update construction drawings for final approval	11/15/2017
Submit colour samples	12/13/2017
City final approval of construction drawings	5/16/2018
City approval of colours	7/3/2018
Begin fabrication	7/15/2018
Interim inspection of fabrication	8/2/2018
Finish fabrication (est.)	9/1/2018
Deliver (est.)	9/15/2018
Installation (est.)	By 10/31/2018

The final design package for fabrication and installation was updated to reflect the City's new color palette and branding design between January and May. The following is a sample of the final design of the signs and photos of the fabricated signs taken during a site visit to inspect fabrication:

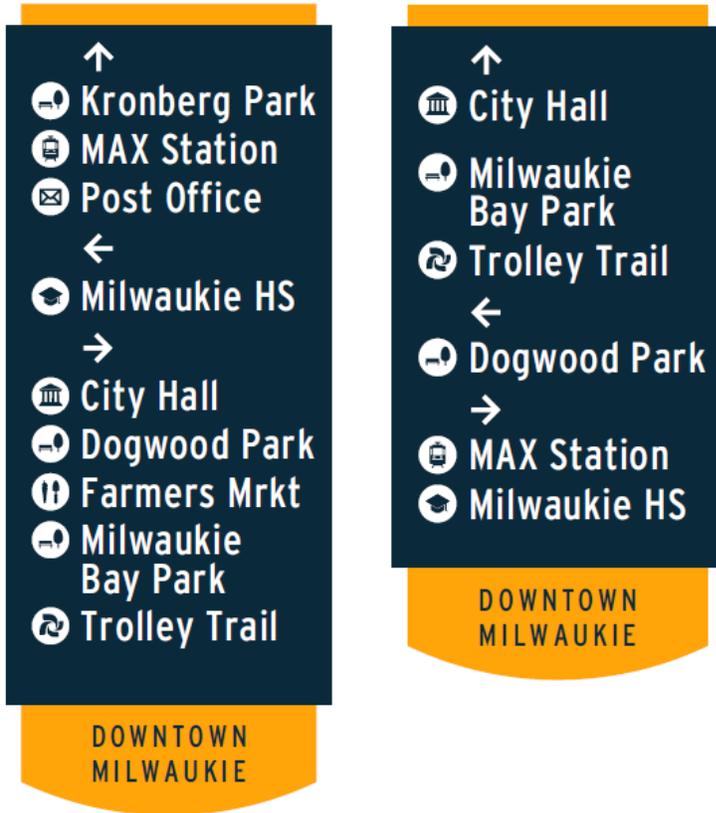


Figure 1. Pedestrian signs

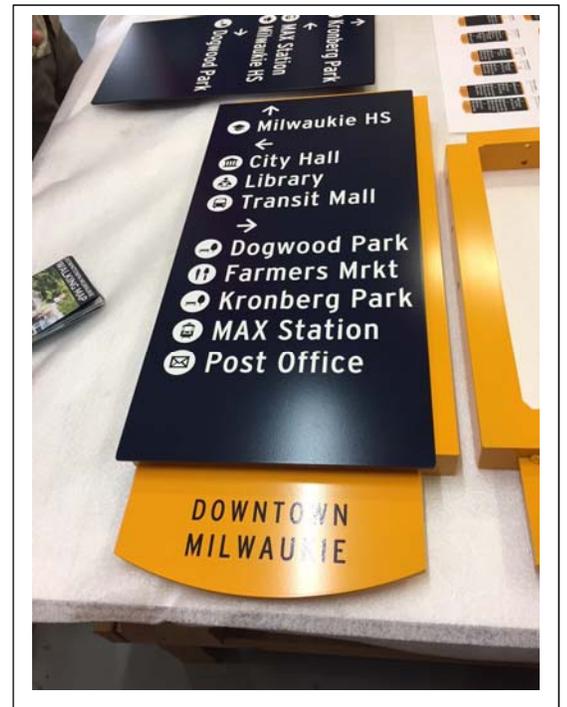
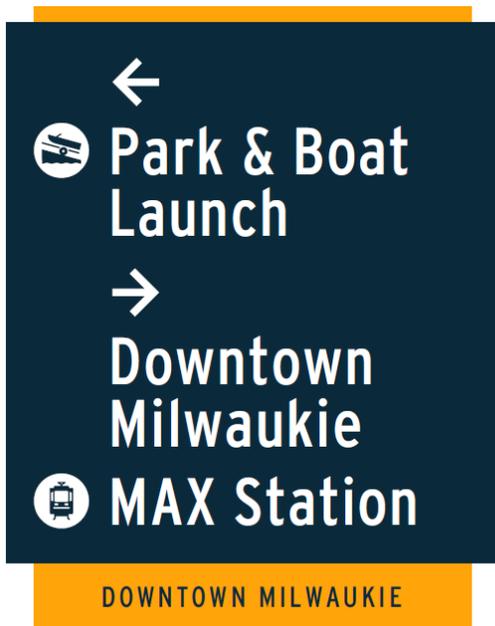


Figure 2. Vehicular sign

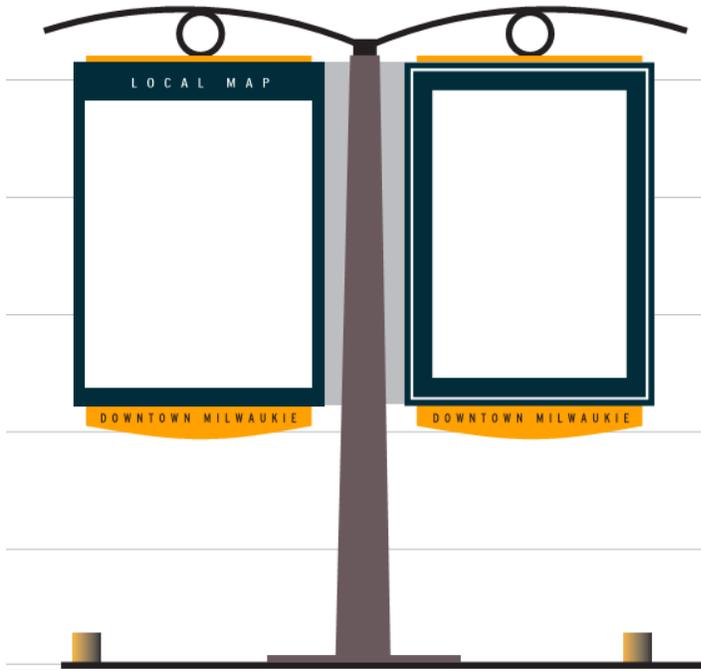


Figure 3. Pedestrian kiosk - top of Adams Street Connector

4.5.

Construction
Excise Tax
Program

 CITY OF MILWAUKIE
COUNCIL **ORDINANCE No. 2154**

AN ORDINANCE OF THE CITY OF MILWAUKIE, OREGON, RELATING TO CONSTRUCTION EXCISE TAXES FOR AFFORDABLE HOUSING, ADOPTING RELATED ADMINISTRATIVE PROVISIONS AND ESTABLISHING NEW CODE CHAPTER 3.60.

WHEREAS, the 2016 Oregon Legislative Assembly enacted Senate Bill 1533 (2016 Or. Laws ch. 59) authorizing cities to impose a construction excise tax for the purpose of promoting affordable housing; and

WHEREAS, the Milwaukie City Council has declared a housing emergency due to low vacancy rates, high rents and lack of affordable housing opportunities.

Now, Therefore, the City of Milwaukie does ordain as follows:

Section 1. Chapter 3.60, as set forth below, hereby is adopted and incorporated into the Milwaukie Municipal Code.

Chapter 3.60 AFFORDABLE HOUSING CONSTRUCTION EXCISE TAX

3.60.010 PURPOSE

This chapter establishes a construction excise tax on commercial, industrial and residential improvements to provide funding for affordable housing in the City of Milwaukie.

3.60.020 DEFINITIONS

“Commercial” means any structure designed or intended to be used, or actually used, for occupancy for other than residential purposes and includes structures otherwise categorized or described as industrial.

“Construct” or “construction” means erecting, constructing, enlarging, altering, repairing, improving, or converting any building or structure for which the issuance of a building permit is required pursuant to the provisions of Oregon law.

“Improvement” means any improvements to real property resulting in a new structure, additional square footage added to an existing structure or additional living space to an existing structure.

“Median family income” means median family income by household size for the City of Milwaukie as defined by the United States Department of Housing and Urban Development as adjusted and published periodically.

“Net revenue” means revenues remaining after refunds and the administrative fees described in Section 3.60.130.A are deducted from the total construction excise tax collected.

“Residential” means any structure designed or intended to be used, or actually used, for occupancy for residential purposes including any residential structure, dwelling, or dwelling unit.

“Value of improvement” means the total value of the improvement as determined by the construction permit(s) or building permit(s) for the improvement, regardless of the number of separate permits issued. The City building official shall calculate the total value in accordance with OAR 918-050-0100 Statewide Fee Methodologies for Residential and Commercial Permits or as otherwise provided by law.

3.60.030 ADMINISTRATION AND ENFORCEMENT AUTHORITY

The city manager or designee is responsible for the implementation, administration and enforcement of this Chapter. The city manager may adopt such policies and procedures as are necessary to efficiently and effectively carry out that responsibility, consistent with the provisions of this Chapter.

3.60.040 IMPOSITION OF TAX

- A.** Each person who obtains a permit to construct a commercial improvement in the City of Milwaukie shall pay a commercial construction excise tax in the amount of one percent of the value of the improvement.
- B.** Each person who obtains a permit to construct a residential improvement in the City of Milwaukie shall pay a residential construction excise tax in the amount of one percent of the value of the improvement.
- C.** The construction excise tax shall be due and paid at the time of issuance of a building permit.

3.60.050 Exemptions

- A.** Notwithstanding Section 3.60.040, the construction excise tax shall not be imposed on the following:
 - 1.** Residential housing units, including detached housing, that are subject to a deed restriction or other mechanism acceptable to City ensuring that the unit(s) are affordable under guidelines established by the United States Department of Housing and Urban Development, to households that earn no more than eighty percent of the median household income for a period of at least thirty years following the date of issuance of the building permit on which the improvement value is based and that remain affordable. For purposes of the initial determination of eligibility for this

exemption, the City shall use the median family income for the year prior to the date of issuance of the permit on which the improvement value is based. Continuing affordability shall be determined based on the median family income for the prior calendar year.

2. Accessory dwelling units. This exemption expires automatically on the date that is the fifth anniversary of the effective date of this Ordinance. The construction excise tax shall apply to all building permits for accessory dwelling units issued after that date.

3. Improvements having a total improvement value of less than \$100,000.

4. Public school improvements.

5. Public improvements as defined in ORS 279A.010.

6. Public or private hospital improvements.

7. Improvements to religious facilities primarily used for worship or education associated with worship.

8. Long term care facilities, as defined in ORS 442.015, operated by a not-for-profit corporation.

9. Residential care facilities, as defined in ORS 443.400, operated by a not-for-profit corporation.

10. Continuing care retirement communities, as defined in ORS 101.020, operated by a not-for-profit corporation.

11. Any improvements required to be exempted from this construction excise tax by state law.

B. The City may require any person seeking an exemption to demonstrate that the improvement is eligible for an exemption and to establish all necessary facts to support the exemption.

3.60.060 FAILURE TO PAY

The City shall not issue a building permit to any person who has failed to pay the construction excise tax unless the person has paid the full amount alleged by the City to be due.

3.60.070 FAILURE TO MAINTAIN UNITS AS AFFORDABLE

The exemption for affordable unit(s) provided in Section 3.60.050.A.1. automatically terminates if the unit(s) ceases to qualify as affordable at any time during the 30-year period of affordability. For purposes of this section,

affordability shall be calculated using the median family income determination for the preceding calendar year. The CET immediately shall be due and payable to City as of the date the unit no longer qualifies as affordable, together with interest and penalties as provided in Section 3.60.090. The amount of the CET shall be calculated using the CET in effect at the time the unit(s) ceases to qualify. The person obligated to pay shall be the owner of record of the unit(s) at the time the unit(s) ceases to qualify. The seller and buyer, jointly and severally, shall be obligated to pay if the unit(s) ceases to qualify as the result of a sale, including a sale to a person occupying or intending to occupy the unit whose income exceeds the median family income determination for the prior year.

3.60.080 STATEMENT OF ENTIRE VALUE OF IMPROVEMENT REQUIRED

- A.** It is a violation of this chapter for any person to fail to state or to misstate the full value of the improvement.
- B.** The construction excise tax shall be due on any increase in the value of the improvement arising from the value having been understated or arising from construction changes that result in increased building permit fees.

3.60.090 INTEREST AND PENALTIES FOR FAILURE TO COMPLY

- A. Interest.** Interest shall be due on the entire amount that the city manager or designee determines has not been paid, assessed at the rate of ten percent per annum from the due date. Interest shall be assessed to the 15th day of the month following the due date. Interest amounts properly assessed in accordance with this section may not be waived or reduced by the city manager.
- B. Penalties.** In addition to assessing interest, a penalty of five percent of the otherwise applicable construction excise tax liability shall be imposed upon:
 - 1.** Any person who removes a unit from the affordability exemption provided in Section 3.60.050.A.1 shall pay a penalty of five percent for each unit that no longer is exempt.
 - 2.** Any person who intentionally fails to state the full value of an improvement.
 - 3.** Any person who fails to pay the full amount of the tax, interest and any penalty within 30 days of notice from City that the tax is due.
- C. Penalties and Interest Merged with Tax.** Any accrued interest and imposed penalties under this section shall be merged with and become a part of the construction excise tax required to be paid under this chapter. This amount becomes the new base for calculating new interest amounts.

3.60.100 ENFORCEMENT BY CIVIL ACTION

The construction excise tax, and any assessed interest and penalties, due and owing under this Chapter constitutes a debt owing to the City by the person liable for the tax as set forth in Section 3.60.040. City has all remedies available at law and equity.

3.60.110 REFUNDS

A. The City shall issue a refund to any person who has paid a construction excise tax if:

1. the person establishes that the tax was paid for improvements that were otherwise eligible for an exemption under Section 3.60.050 at the time of permit issuance;
2. the person establishes that construction of the improvements was not commenced and the associated building permit has been cancelled by the City; or
3. the city manager or designee determines that the amount of any construction excise tax, penalty, or interest was erroneously collected or paid to the City.

B. The City shall either refund all amounts due within thirty days of a complete request for the refund or give written notice of the reasons why the request has been denied. Claims for refunds shall be made upon forms provided by the City. The request for the refund must be submitted within three years from the date of payment of the construction excise tax.

C. Denial of a request for refund may be appealed as provided for in Section 3.60.120.

3.60.120 APPEALS

A. A person who objects to a determination issued by the City applying the provisions of this chapter may file for review of the determination by the City's community development director. The request for administrative review must be in writing and received within ten days of the determination, and must include documentation supporting the request. The community development director's determination in the administrative review shall be sent by regular mail.

B. The administrative review determination of the community development director may be appealed to the city manager by filing a notice of appeal with the city manager within 10 days of issuance of the community development

director's determination. The notice shall describe the basis for the appeal and the relief sought.

C. The filing of any notice of appeal shall not stay the effectiveness of the written determination unless the city manager so directs.

D. Notwithstanding Section 3.60.060 the City may issue a building permit while an appeal is pending provided that the applicant posts with the City the full amount alleged by the City to be due. No interest shall accrue to the applicant on the deposit.

E. The city manager shall provide a written decision by U.S. mail to the person who filed the appeal. The city manager's decision on appeal shall be the City's final decision, subject to judicial review only as provided in ORS 34.010 et. seq.

3.60.130 DEDICATION OF REVENUE

A. The City may retain up to four percent of the tax collected for payment toward administrative expenses related to collection and distribution of the tax.

B. The net revenue from the tax on residential improvements will be allocated by the City as follows:

1. Fifteen percent of net revenue will be remitted to the Oregon Department of Housing and Community Services to fund home ownership programs.
2. Fifty percent of net revenue to fund incentives for the development and construction of affordable housing authorized by the City as provided by state law.
3. Thirty-five percent of net revenue to fund programs and activities related to affordable housing.

C. The net revenue from the tax on commercial improvements will be distributed as follows:

1. Fifty percent to fund incentives for the development and construction of housing that is affordable at up to 120 percent of median family income; and
 - Fifty percent for economic development programs with an emphasis on areas of the City that are subject to plans designated as eligible by the City. The eligible plans as of the date of this Ordinance are: Central Milwaukie Land Use and Transportation Plan, Downtown and Riverfront Land Use Framework Plan, and the

Milwaukie Urban Renewal Plan, the Economic Development Strategic Plan, and the North Milwaukie Industrial Area Plan. Additional eligible plans may be designated by the City Council.

Section 2. Construction and Severability

To the extent practicable, this Ordinance shall be construed so as to not conflict with any mandatory or prohibitory provision of state law. If any provision of this Ordinance is held invalid, such invalidity shall not affect other provisions of this Ordinance and such provisions shall be given effect without the invalid provision.

Section 3. Effective Date.

This Ordinance shall take effect on the 31st day following enactment. The tax imposed herein shall apply to all building permit applications for the improvement received on or after the effective date.

Read the first time on 11/21/17, and moved to second reading by 5:0 vote of the City Council.

Read the second time and adopted by the City Council on 11/21/17.

Signed by the Mayor on 11/21/17.



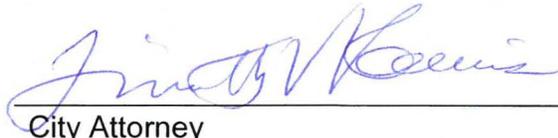
Mark Gamba, Mayor

ATTEST:

APPROVED AS TO FORM:
Jordan Ramis PC



Scott S. Stauffer, City Recorder



City Attorney

5. Planning

5.1.

Key Documents

For your convenience:

Attached are introductions and brief summaries of the following Planning Documents. They are available in full via the Milwaukie City Council Online Handbook.

- **Comprehensive Plan**
- **Land Division Ordinance**
- **Sign Ordinance**
- **Zoning Ordinance**
- **Transportation System Plan (TSP)**

5.1.1.

*Comprehensive
Plan

MILWAUKIE'S COMPREHENSIVE PLAN UPDATE

PROJECT OVERVIEW

[The Comprehensive Plan Update](#) was launched in Fall 2017 and will take approximately 24 months to complete. The Comprehensive plan is Milwaukie's primary land use document and includes a series of goals and policies that guide growth and development over a 20-year period. The Comprehensive Plan is implemented through the Development Code, Land Division Code, and other city codes and ordinances. Oregon state law requires that all cities and counties adopt Comprehensive Plans that are consistent with the state's 19 Statewide Planning Goals.



The last complete update to Milwaukie's Comprehensive Plan was adopted by the City Council in 1989. In the nearly 30 years since the Comprehensive Plan was updated, Milwaukie has experienced a number of significant changes, including the emergence of new housing types, industries, and the opening of the Orange Line light rail line. A complete update to the Comprehensive Plan will serve to create a central document that reflects these changes and the community vision adopted in September of 2017.

WORK PLAN AND SCHEDULE

Work Blocks

The work plan and schedule for the Comprehensive Plan Update includes three blocks where different chapters and new chapters of the Comprehensive Plan will be reviewed and refined. Each block will take 6 months to be completed with a process that will include:

- Update or development of a background report for each chapter
- Policy analysis
- Alternatives for existing or new policies
- Policy selection
- Review and refinement

The three blocks and the chapters/topic areas being developed and/or refined include:

Block 1 Chapters/Topic Areas

- Economy
- Community Engagement
- Community Culture

- Urban Growth Management Area (UGMA)/Annexations

Block 2 Chapters/Topic Areas

- Parks and Recreation
- Energy/Climate
- Natural Hazards
- Willamette Greenway
- Housing (crosses Blocks 2 and 3)

Block 3 Chapters/Topic Areas

- Public Facilities
- Natural Resources
- Environmental Quality
- Urban Design

Over Blocks 2 and 3, the Housing chapter will be discussed to allow longer discussion and analysis.

After the completion of the three work blocks there will be a Synthesis stage where all of the chapters and policies from the whole process will be reviewed and refined to create consistency and incorporate any changes.

Community Input and Outreach

Following the precedent setting process from the Milwaukie Vision, the City has set up a process for community input during the Comprehensive Plan Update.

Comprehensive Plan Advisory Committee (CPAC)

To guide the process, a citizen-based Comprehensive Plan Advisory Committee (CPAC) was formed and made up of 15 volunteer community members. Committee representation was diverse in terms of age, interests and background, and neighborhood representation. They serve in an advisory committee role and meet roughly every month to discuss the chapters and policies of each work block.

Community Outreach

Each work block will include a community town hall and a web-based survey. Simultaneously Spanish translation will be provided at each town hall and the web-based survey will be translated into Spanish. The Housing chapter is expected to have its own community town hall to receive specific input related to that topic.

PROJECT STATUS

On August 21st, 2018, the Milwaukie City Council adopted a resolution “pinning down” the goals and policies for the four Block 1 chapters/topic areas. Work has begun on the Block 2 chapter/topic areas in September 2018 and work on the Housing chapter is expected to begin in November 2018.

5.1.2.

*Land Division
Ordinance

Milwaukie Municipal Code							
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TITLE 17 LAND DIVISION							

CHAPTER 17.04 ADMINISTRATION AND ENFORCEMENT

17.04.010 TITLE AND STRUCTURE

A. Title

The ordinance codified in this title shall be known and may be cited as the "Land Division Ordinance" of the City of Milwaukie.

B. Structure

This title is divided into chapters and sections. Chapter divisions are denoted by the 2-digit number following the title number. Section divisions are identified by the 3-digit number following the chapter division. (Ord. 1907 (Attach. 1), 2002)

17.04.020 AUTHORITY

A. The Planning Director shall have the authority to apply, interpret, and enforce the provisions of this title. An appeal from a ruling by the Planning Director regarding a requirement of this title may be made to the Planning Commission under provisions of Chapter 19.1000.

B. The Engineering Director shall have the authority to accept, conditionally accept, or reject construction and engineering plans and specifications in accordance with professional judgment and accepted engineering or surveying practices. (Ord. 1907 (Attach. 1), 2002)

17.04.030 CONSISTENCY WITH MUNICIPAL CODE

All land divisions and property boundary changes shall be consistent with Title 16 Environment, this title, Title 18 Flood Hazard Regulations, and Title 19 Zoning. (Ord. 1907 (Attach. 1), 2002)

17.04.040 APPROVAL REQUIRED

All lot consolidations, land divisions, changes in property boundary lines, and creation of streets or rights-of-way shall be approved in accordance with these regulations prior to conveying or recording any instrument effecting a lot consolidation, land division, or property boundary change. A person desiring to partition, subdivide, replat, consolidate, or change property boundaries shall submit application for approval as provided in this title and State law. (Ord. 1907 (Attach. 1), 2002)

17.04.050 TIME LIMIT ON APPROVAL

A. Expiration of Approval

All decisions on boundary changes and land divisions shall expire 1 year after the date of approval. Reactivation of expired decisions may only be made by submission of a new application and related fees.

B. Extensions

Approvals may be extended up to 6 months upon submission of formal request to the original decision-making authority. One extension of the approval period not to exceed 6 months will be granted provided that:

1. No changes are made on the original plan as approved;
2. The applicant can show intent of recording the land division or boundary change within the 6-month extension period; and
3. There have been no changes in the ordinance provisions on which the approval was based.

(Ord. 1907 (Attach. 1), 2002)

17.04.060 REDUCTION OF LAND BELOW MINIMUM STANDARDS

No unit of land shall be split or reduced by any means in conflict with the requirements of this title or Title 19 of this code. The splitting of a lot or parcel to add to another shall not be allowed unless the remaining portion meets all zoning standards for the zone where the land is located, or it is simultaneously consolidated with a contiguous parcel, which will thereafter comply with zoning standards. (Ord. 1907 (Attach. 1), 2002)

17.04.070 CORRECTION OF IMPROPER LAND DIVISION OR BOUNDARY CHANGE

Improper land divisions or boundary changes shall be corrected by submission of appropriate applications and by following the associated review procedures prescribed in this title. This section shall not preclude enforcement against violations of this title. (Ord. 1907 (Attach. 1), 2002)

17.04.080 FORM OF APPLICATIONS

All applications provided for in this title shall be made on forms prescribed by the Planning Director. (Ord. 1907 (Attach. 1), 2002)

17.04.090 FEES

A fee as established by resolution of the City Council shall be paid to the City upon the filing of an application. Such fees shall not be refundable. (Ord. 1907 (Attach. 1), 2002)

17.04.100 AMENDMENTS

Legislative amendments to this title shall be made in accordance with Chapter 19.1000 and Section 19.902. (Ord. 2025 § 3, 2011; Ord. 1907 (Attach. 1), 2002)

17.04.110 DETERMINATIONS OF LEGAL STATUS

Requests for determinations on the legal status of units of land shall be processed pursuant to Section 19.903 Code Interpretations and Director Determinations. (Ord. 2025 § 3, 2011; Ord. 1907 (Attach. 1), 2002)

17.04.120 RECORDING

- A. Recording instruments for boundary change, subdivision, partition, and replat shall be submitted to the County Surveyor within 6 months of City approval.
- B. Prior to recording a lot consolidation, property line adjustment, subdivision, or partition plat or replat, the applicant shall submit the recording instruments to the Planning Director for a determination of consistency with the City Code and required approvals.
- C. Lot consolidations for units of land legally created by metes and bounds descriptions may be recorded by deed subject to approval of the County Surveyor.
- D. Subdivision and partition plats, and replats, must be recorded by plat.
- E. A copy of the recording instruments shall be submitted to the Planning Director no later than 15 days after filing with the County Surveyor. (Ord. 1907 (Attach. 1), 2002)

17.04.130 MONUMENTATION AND SURVEY

- A. Monuments are required in accordance with ORS Chapter 92.
- B. Monumentation surveys shall be filed with the County Surveyor in accordance with ORS Chapters 92 and 209. (Ord. 1907 (Attach. 1), 2002)

17.04.140 VIOLATION—PENALTIES

Violation of any provision of this title is a civil infraction. The civil penalty for violation of this title shall be \$200.00. The cost of completing or correcting any improvements required by this title and incurred by the City may be assessed to persons as part of the civil infraction judgment. Each day a violation continues shall be considered a separate violation. (Ord. 1907 (Attach. 1), 2002)

17.04.150 APPEALS

Appeals on actions authorized under this title shall be made in accordance with Chapter 19.1000. (Ord. 1907 (Attach. 1), 2002)

View the [mobile version](#).

5.1.3.

*Sign Ordinance

Milwaukie Municipal Code							
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TITLE 14 SIGNS							

CHAPTER 14.04 GENERAL PROVISIONS*

* **CodeAlert:** This topic has been affected by Ordinance No. [2161](#). To view amendments and newly added provisions, please refer to the [CodeAlert Amendment List](#).

14.04.010 TITLE

This chapter shall be known and may be cited as the “Sign Ordinance of the City of Milwaukie, Oregon.” (Ord. 1733 § 1(1) (Exh. A), 1993)

14.04.020 PURPOSE

The Council of the City of Milwaukie, Oregon, finds and declares that it is necessary to regulate the design, quality of materials, construction, installation, maintenance, electrification, illumination, type, size, number, and location of all signs visible from a right-of-way or lot under other ownership in order to:

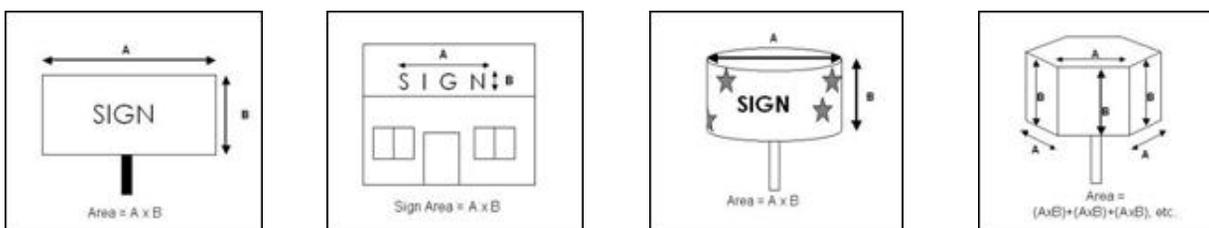
- A. Protect the health, safety, property and welfare of the public;
- B. Promote the neat, clean, orderly and attractive appearance of the community;
- C. Provide for the safe installation and maintenance of signs;
- D. (Repealed by Ord. 1965);
- E. Preserve and enhance the unique scenic beauty of Milwaukie;
- F. Accommodate the need of sign installers while avoiding nuisances to nearby properties;
- G. Ensure safe construction, location, installation, and maintenance of signs;
- H. Prevent proliferation of sign clutter;
- I. Minimize distractions for motorists on public highways and streets;
- J. Regulate solely on the basis of time, place, and manner of a sign, not on its content; and
- K. Coordinate review where multiple agencies have review authority for a sign permit. (Ord. 2040 § 2 (Exh. B), 2011; Ord. 1965 §§ 2, 3, 2006; Ord. 1733 § 1(1) (Exh. A), 1993)

⚠ 14.04.030 DEFINITIONS

The following words and phrases where used in this title shall, for the purposes of this title, have the meanings respectively ascribed to them in this section:

“Area” or “area of a sign” means the area to and within an established sign edge, frame or perimeter which encloses the limits of any writing, representation, emblem, figure, or character. The area of a sign having no such perimeter, or the area of a sign having an irregular shape, shall be computed by enclosing the surface area within a circle, square, rectangle, and/or triangle. The area of all signs in existence at the time of the enactment of the ordinance codified in this chapter, whether conforming or nonconforming, shall be counted in establishing the permitted sign area of all new signs to be allowed for an individual business on a premises. Where a sign is of a three-dimensional or round or irregular solid shape, the largest cross-section shall be used, as though it were a flat surface, to determine sign area.

**Figure 14.04.030-1
Calculating Sign Area**



“Awning” means either a permanent or retractable structural extension off a building or structure which has a minimum ground clearance of 8 feet.

“City” means the City of Milwaukie, Oregon.

“Clearance” is measured from the highest point of the grade below the sign to the lowermost point of the sign.

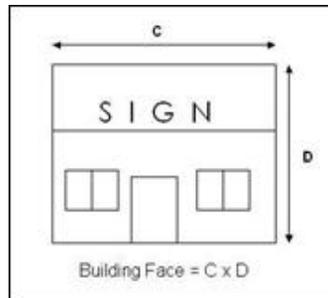
“Display surface” means the area made available by the sign structure for the purpose of displaying the message.

“Dissolve” means the changing of an electronic display by means of varying light intensity or pattern, where one display gradually appears to dissipate or lose legibility simultaneously with the gradual appearance and legibility of a subsequent display.

“Downtown zones” means the DMU, Downtown Mixed Use, and OS, Open Space, Zones, as defined in the Zoning Ordinance.

“Face of a building” means all window and wall area of a building in one plane.

**Figure 14.04.030-2
Building Face**



“Fade” means the changing of an electronic display by means of varying light intensity, where one display gradually reduces intensity to the point of being illegible or imperceptible and the subsequent display gradually increases intensity to the point of being legible or capable of being perceived.

“Flag” means any fabric displayed on a flagpole that is the symbol of a national government or political subdivision.

“Frontage” means the length of the property line of any one premises along each public street it borders. Each portion of the premises abutting a separate street shall be considered as a separate frontage.

“Height” is measured from the highest point of the grade below the sign to the topmost point of the sign.

“Home occupation” means an occupation carried on at a dwelling as an accessory use to the dwelling, with the activity conducted in such a manner as to give no appearance of a business, and with no infringement upon the right of neighboring residents to enjoy the peaceful occupancy of their homes.

“Install” means to build, construct, attach, place, suspend, or affix and shall also include the painting of wall signs.

“Maintain” means to permit a sign, sign structure or part thereof to continue, or to repair or refurbish a sign, sign structure, or part thereof.

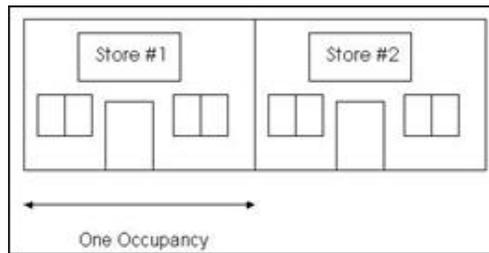
“Manufacturing zones” are the M, Manufacturing, and BI, Business Industrial, Zones as defined in the Zoning Ordinance.

“Marquee” means a permanent roof-like structure attached to and supported by a building and projected therefrom.

“Neighborhood Commercial Zone” means the C-N, Neighborhood Commercial Zone, as defined in the Zoning Ordinance.

“Occupancy” means a property or portion of property that is possessed or used separately from other properties or other portions of the same property. Examples of occupancies include a store in a mall or an office in an office building.

**Figure 14.04.030-3
Occupancy**



“Other commercial zones” means the C-L, Limited Commercial; C-CS, Community Shopping Commercial; GMU, General Mixed Use; NMU, Neighborhood Mixed Use; and C-G, General Commercial, Zones, as defined in the Zoning Ordinance.

“Parapet or parapet wall” means that part of any exterior wall which extends above the roofline.

“Person” means any natural person, firm, partnership, association, social or fraternal organization, corporation, estate, trust, receiver, syndicate, branch of government, or any other group or combination acting as a syndicate, branch of government, or any other group or combination acting as a unit.

“Premises” means a lot, parcel or tract of land occupied, or to be occupied, by a building or unit or group of buildings and its accessory buildings under control of a person. If more than one business is located on the lot, parcel or tract of land, each separate business shall be considered as a separate premises.

“Prohibited electronic display” means any part of the message or display on an electronic display sign that utilizes the following methods of presentation:

“Flash” means sudden or intermittent electrical illumination.

“Scroll” means the changing of an electronic display by the apparent movement of the visual image, such that a new visual image appears from the margins of the sign in a continuous or unfurling movement.

“Travel” means the changing of an electronic display by the apparent horizontal movement of the visual image.

“Video display” means providing an electronic display in horizontal or vertical formats to create continuously moving images.

“Projection” means the distance by which a sign extends from its supporting structure.

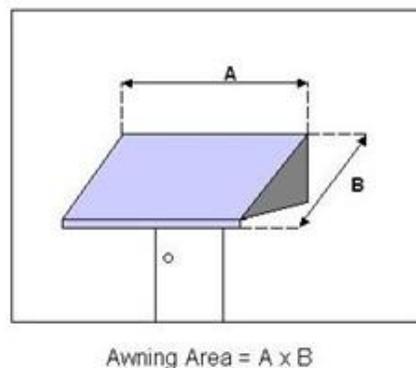
“Residential zones” means the R-10, R-7, R-5, R-3, R-2.5, R-2, and R-1 Residential Zones as defined in the Zoning Ordinance.

“Residential-Business Office Zone” means the R-1-B Zone, as defined in the Zoning Ordinance.

“Sign” means the physical components of materials placed or constructed primarily to convey a message or other display and which can be viewed from a right-of-way or lot under other ownership. Displays permitted through Title 20 Public Art are not signs for purposes of Title 14.

Sign, Awning. “Awning sign” means a sign which is painted onto, attached, or affixed to the surface of an awning or is suspended underneath an awning. The display surface of an awning is measured as the distance from where the awning meets the vertical wall to the outermost projection of the awning times length.

Figure 14.04.030-4
Calculating Awning Area



Sign, Banner. "Banner sign" means a sign of lightweight fabric or similar material that can be mounted both on a permanent or temporary basis. A banner sign may be used as a wall sign provided appropriate wall sign standards are met.

Sign, Bench. "Bench sign" means a sidewalk bench which displays a message and is subject to the provisions of Chapter 12.20 of the Milwaukie Municipal Code.

Sign, Cabinet. "Cabinet sign" means a sign in which the display face is mounted on or attached to the front of a self contained box-like structure, which usually houses a light source, and is affixed to a building or other structure.

Sign, Daily Display. "Daily display sign" means a nonpermanent sign normally associated with business activity which is placed out-of-doors during business hours for display and returned indoors during off-hours. Daily display signs may be constructed in a sandwich board (A-frame) style, mounted on a single pedestal, or other similar construction, and are intended to be unlit and easily moved.

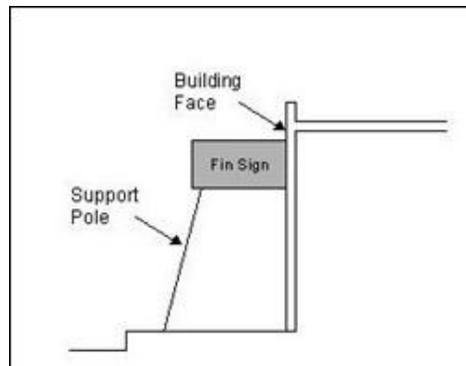
Sign, Electronic Display. "Electronic display sign" means a sign or portion of a sign on which the message or display is created by bulbs, light-emitting diodes, liquid crystal displays, plasma display panels, pixel or subpixel technology, or other similar technology.

Sign, Externally Illuminated. "Externally illuminated sign" means a sign illuminated by an exterior light source or luminous tubing which is primarily designed to illuminate only the sign.

Sign, Fence. "Fence sign" means a sign attached to the side of a fence on a permanent basis.

Sign, Fin. "Fin sign" means a sign which is supported by a pole or poles and partly by a building.

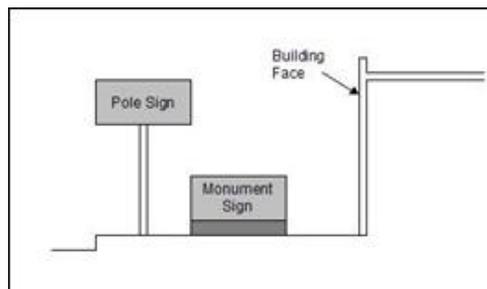
**Figure 14.04.030-5
Fin Sign**



Sign, Flashing. "Flashing sign" means any sign which contains an intermittent or flashing light source, or which includes the illusion of intermittent or flashing light by means of animation, or an externally mounted intermittent light source.

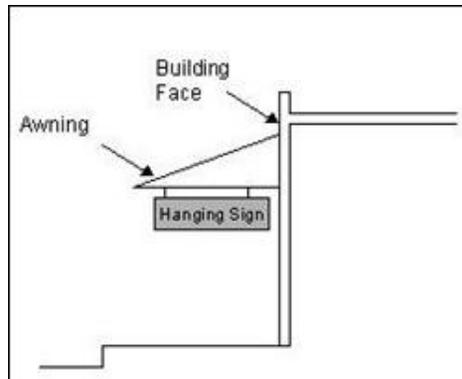
Sign, Freestanding. "Freestanding sign" means a sign wholly supported by a sign structure in the ground. Freestanding signs include pole signs and monument signs.

**Figure 14.04.030-6
Freestanding Signs**



Sign, Hanging. "Hanging sign" is a sign that is suspended below an awning or other portion of a building and typically oriented perpendicular to pedestrian or vehicular travel.

**Figure 14.04.030-7
Hanging Signs**

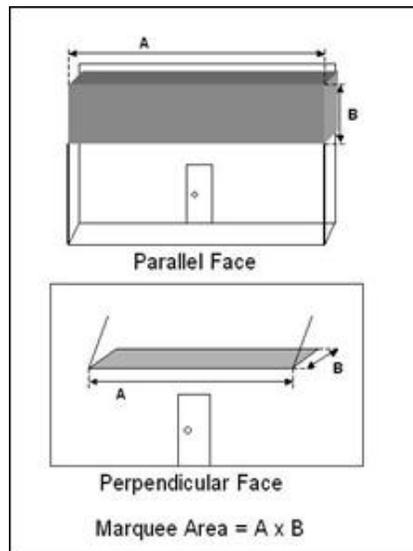


Sign, Internally Illuminated. "Internally illuminated sign" means a sign which is wholly or partially illuminated by an internal light source from which source light passes through the display surface to the exterior of the sign.

Sign, Kiosk. "Kiosk sign" means any sign with multiple display surfaces for view by pedestrians that illustrates information about a specific area, such as the layout of a development, tenants, businesses, or landmarks.

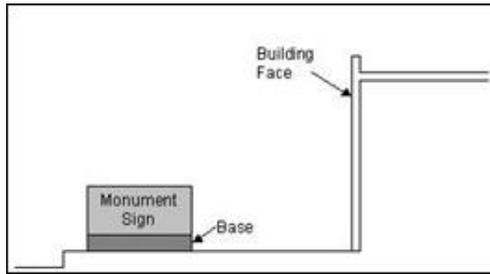
Sign, Marquee. "Marquee sign" means a sign which is installed or maintained under, over, or on, and supported or partially supported by, a marquee. The area of a marquee sign is calculated as the greater of the two marquee areas; either parallel or perpendicular to the building face.

**Figure 14.04.030-8
Calculating Marquee Area**



Sign, Monument. "Monument sign" means any sign affixed to a base which has a width that is equal to or greater than the width of the sign.

**Figure 14.04.030-9
Monument Sign**



Sign, Moving. "Moving sign" means a sign with a visible moving part or visible mechanical movement, including signs which move in the wind or forced air, or by motors, clockwork, or other mechanical means.

Sign, Noncomplying. "Noncomplying sign" means any sign that did not comply with applicable sign code standards when built or modified.

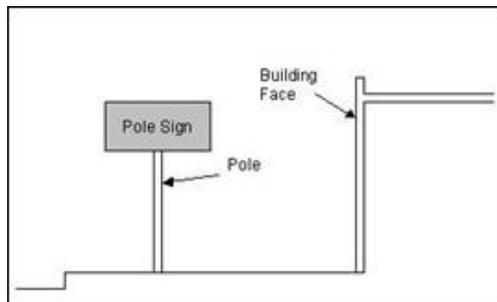
Sign, Nonconforming. "Nonconforming sign" means a sign that complied with applicable standards when created or modified but which does not comply with existing standards. Signs that did not require Planning Commission or Design and Landmarks Committee approval when created shall not be considered nonconforming if approval from these bodies is currently required.

Sign, Outdoor Advertising. "Outdoor advertising sign" means a sign that meets the definition of Oregon Revised Statute 377.710(2).

Sign, Pennant. "Pennant sign" means a shaped, lightweight sign made of plastic, fabric, or other material (whether or not containing a message of any kind); suspended from a rope, wire, or string; usually in a series; and designed to move in the wind.

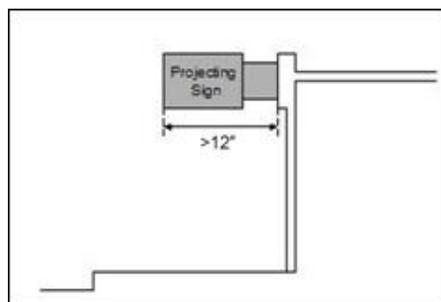
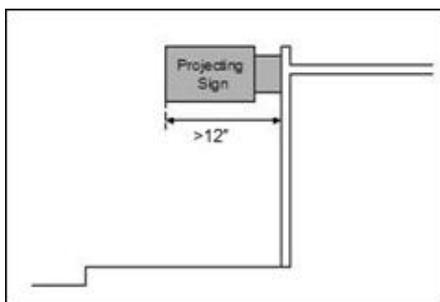
Sign, Pole. "Pole sign" means a freestanding sign in which the display face of the sign is supported on a base which may be tubular, columnar, or rectangular in shape and in which any portion of the base or support structure has a width that is less than the width of the display surface of the sign.

**Figure 14.04.030-10
Pole Sign**



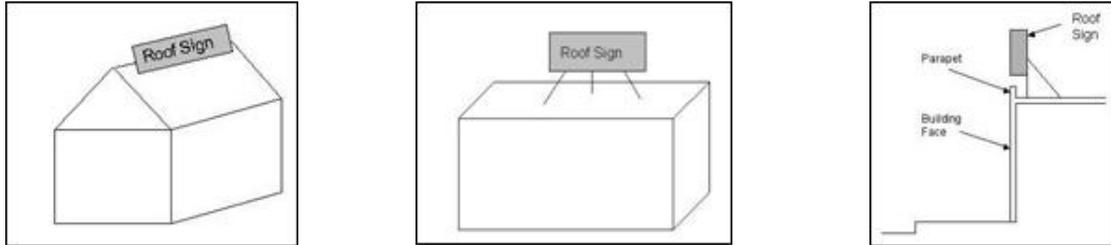
Sign, Projecting. "Projecting sign" means and includes any sign which is attached to a building and extends more than 12 inches beyond the line of the building or more than 12 inches beyond the surface of that portion of the building to which it is attached.

**Figure 14.04.030-11
Projecting Signs**



Sign, Roof. "Roof sign" means a sign installed upon or above a roof or parapet of a building.

**Figure 14.04.030-12
Roof Signs**

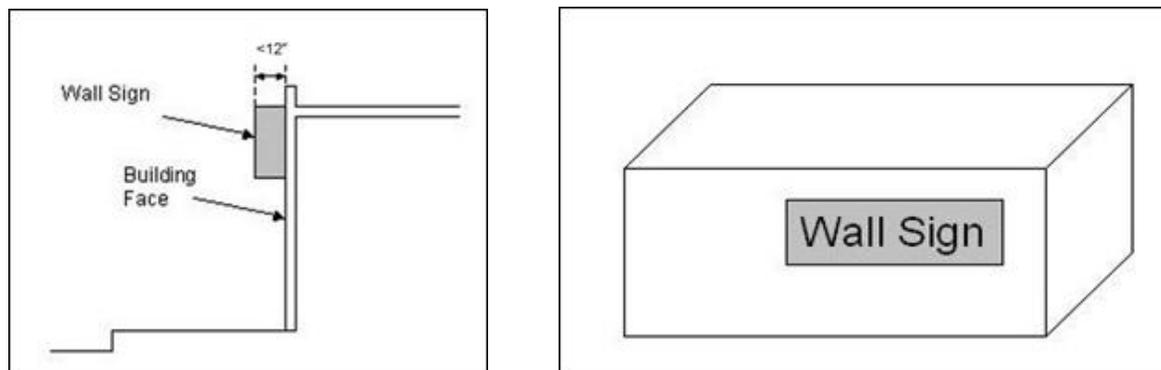


Sign, Temporary. "Temporary sign" means any sign, regardless of construction materials, which is not permanently mounted and is intended to be displayed on an irregular basis for a limited period of time.

Sign, Unsafe. "Unsafe sign" means any sign determined to be a hazard to the public by the City Manager or duly authorized representative.

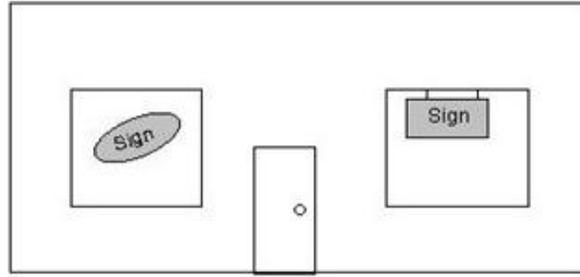
Sign, Wall. "Wall sign" means any sign painted on, attached to, or installed against the wall of a building or structure, with the exposed face of the sign in a plane parallel to the plane of said wall, the angle of said wall not to exceed thirty degrees from the vertical. Wall signs may not project more than 12 inches from the wall to which they are attached. Painted wall decorations which include a message are considered to be wall signs.

**Figure 14.04.030-13
Wall Signs**



Sign, Window. "Window sign" means a sign, pictures, symbols, neon tubing, or combination thereof, designed to communicate information, that is placed within a window and directed toward the outside of the window. Window signs do not include painted or printed displays of a temporary nature.

**Figure 14.04.030-14
Window Sign**



“State highway” means the entire width between the boundary lines of every State highway as defined in ORS 366.005, including but not limited to the Interstate System and the federal-aid primary system.

“Structural alteration” means any change in a structure or components. Structural alteration does not include a change in copy or message, normal maintenance, or repairs that simply restore the sign to original condition.

Table 14.04.030 summarizes the types of signs. In the sign district sections that follow, regulations are discussed in terms of the categories listed in this table.

Table 14.04.030 Types of Signs	
Sign Category	Sign Type
Wall signs	<ul style="list-style-type: none"> • Signs placed on parapets • Banners • Cabinet signs • Murals • Signs on the exterior of a window
Freestanding signs	<ul style="list-style-type: none"> • Pole signs • Monument signs • Billboards • Daily display sandwich board signs
Projecting signs	<ul style="list-style-type: none"> • Below an awning, eve, or marquee • Sign projecting from a structure
Window signs	<ul style="list-style-type: none"> • Signs on the interior of a window • Painted or printed temporary signs
Roof signs	<ul style="list-style-type: none"> • Signs mounted on a roof • Signs mounted on a parapet
Other signs	<ul style="list-style-type: none"> • Bench • Flags • Marquee • Awning

(Ord. 2112 § 2 (Exh. B), 2015; Ord. 2110 § 2 (Exh. G), 2015; Ord. 2106 § 2 (Exh. F), 2015; Ord. 2078 § 2 (Exh. B), 2014; Ord. 2040 § 2 (Exh. B), 2011; Ord. 1965 §§ 2, 3, 2006; Ord. 1917 § 3 (Exh. B), 2003; Ord. 1916 § 3 (Exh. B), 2003; Ord. 1880 § 6 (Exh. A), 2000; Ord. 1733 § 1(1) (Exh. A), 1993)

14.04.040 ZONING DISTRICTS

The regulations regarding signs contained in Chapter 14.16 relate to zoning districts which are defined in the Zoning Ordinance Map, which is part of the Zoning Ordinance of the City. (Ord. 1733 § 1(1) (Exh. A), 1993)

View the [mobile version](#).

5.1.4.

*Zoning
Ordinance

Milwaukie Municipal Code							
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TITLE 19 ZONING							

CHAPTER 19.100 INTRODUCTORY PROVISIONS*

* **CodeAlert:** This topic has been affected by Ordinance No. [2163](#). To view amendments and newly added provisions, please refer to the [CodeAlert Amendment List](#).

19.101 TITLE

This title shall be known and may be cited as the Zoning Ordinance of the City of Milwaukie, Oregon. This title and any amendments to it shall be adopted by ordinance. Amendments to this title shall be subject to the provisions of Section 19.902. (Ord. 2025 § 2, 2011)

19.102 PURPOSE

This title implements the Comprehensive Plan, which provides the policy framework within which land use and development review is conducted in the city. Amendments to the Comprehensive Plan shall be subject to the provisions of Section 19.902.

The purpose of this title is to provide for the public health, safety, and general welfare of the citizens of the City through orderly community development including, but not limited to, consideration for concentration of population; economic development; sustainability; limitation of dangerous, offensive, or unwholesome trades or industries; maintenance of adequate light and air; and regulation of traffic. (Ord. 2025 § 2, 2011)

19.103 APPLICABILITY

This title applies to all land, uses, and development within the corporate limits of the City of Milwaukie. It does not apply to temporary events as defined and provided for in Chapter 11.04. (Ord. 2025 § 2, 2011)

19.104 INTERPRETATION

The Planning Director shall have the authority and responsibility for interpreting all terms, provisions, and requirements of this title. Unless specifically defined in Section 19.201, words or phrases used in this title are intended to be interpreted with the meaning they have in common usage. Requests for interpretations may be made as described and provided for in Section 19.903. (Ord. 2025 § 2, 2011)

19.105 SEVERABILITY

The provisions of this title are severable. If any section, sentence, clause, or phrase of this title is adjudged by a court of competent jurisdiction to be invalid, the decision shall not affect the validity of the remaining portions of this title. (Ord. 2025 § 2, 2011)

19.106 COMPLIANCE

Development may occur, a lot may be used, and a structure or part of a structure may be constructed, reconstructed, altered, occupied, or used only as this title permits. Where this title imposes greater restrictions than those imposed or required by other rules, regulations, or ordinances, the provisions of this title shall control. Where comparable provisions of this title are in conflict, the provisions that are the most restrictive shall control.

19.106.1 Land Use Approvals

Uses or development that are regulated by Titles 14, 17, and 19 of the Milwaukie Municipal Code shall submit and obtain approval of all required land use applications prior to establishment or construction. Table 19.901 contains a complete list of the City's land use applications and the locations of the provisions that govern their submittal, review, and approval. Chapter 19.1000 contains the City's land use review procedures.

19.106.2 Permit Approvals

Uses or development that are regulated by Titles 14, 17, and 19 of the Milwaukie Municipal Code shall submit and obtain approval of all required development permits prior to establishment or construction.

- A. The Planning Director shall review applications for development and sign permits for compliance with applicable code provisions.
- B. The Planning Director may approve or deny applications for development and sign permits based on consistency with applicable code provisions.

- C. All development authorized by approved development and sign permits shall be in substantial conformance with plans approved by the Planning Director.
- D. Buildings for which permits have been issued shall not be occupied without prior occupancy approval in accordance with this subsection.
- E. Final occupancy approvals shall not be issued until completion of final zoning inspections and issuance of notice of completion by the Planning Director. Approval criteria for issuance of notice of completion includes all of the following:
 - 1. A written statement from the applicant that all improvements have been constructed in accordance with approved plans, except as modified and approved by appropriate approval authorities.
 - 2. Completion of zoning inspection by the Planning Director and confirmation that the project is in substantial conformance with approved plans.
 - 3. Payment of the final zoning inspection fee, as adopted by the City Council.
- F. The Planning Director shall complete the final zoning inspection within 5 working days from receipt of the applicant's request for final zoning inspection.

19.106.3 Violations

- A. A person violating a provision of this title shall, upon conviction, be punished by imprisonment for not more than 30 days, or by a fine of not more than \$200, or both. A violation of this title shall be considered a separate offense for each day the violation continues. If the violation was of a provision that was repealed or amended, the violation shall remain a violation to the extent that it does not conform to the provisions of this title.

- B. In case a building or land is located, constructed, maintained, repaired, altered, or used in violation of this title, the building or land in violation shall constitute a nuisance, and the City may, as an alternative to other remedies that are legally available for enforcing this title, institute injunction, mandamus, abatement, or other appropriate proceedings to prevent, enjoin temporarily or permanently, abate, or remove the unlawful location, construction, maintenance, repair, alteration, or use. (Ord. 2025 § 2, 2011)

 **19.107 ZONING**

19.107.1 Zone Classifications

For the purposes of this title, the following base zones and overlay zones are established in the City per Table 19.107.1:

Table 19.107.1 Classification of Zones	
Zone Description	Abbreviated Description
Base Zones	
Residential	R-10
Residential	R-7
Residential	R-5
Residential	R-3
Residential	R-2.5
Residential	R-2
Residential	R-1
Residential-Business Office	R-1-B
Downtown Mixed Use	DMU
Open Space	OS
Neighborhood Commercial	C-N
Limited Commercial	C-L

General Commercial	C-G
Community Shopping Commercial	C-CS
Manufacturing	M
Business Industrial	BI
Planned Development	PD
Tacoma Station Area Manufacturing	M-TSA
General Mixed Use	GMU
Neighborhood Mixed Use	NMU
Overlay Zones	
Willamette Greenway	WG
Historic Preservation	HP
Flex Space	FS
Aircraft Landing Facility	L-F
Tacoma Station Area	TSA

19.107.2 Zoning Map

The zones described in Subsection 19.107.1 above are displayed on a zoning map entitled “Zoning Map of Milwaukie, Oregon.” The Zoning Map shall be dated with the effective date of the ordinance that adopted the Zoning Map and the effective date of the ordinance that most recently amended the map. A certified copy of the map and map amendments, shall be maintained in the offices of the City Planning Department.

19.107.3 Zoning Map Amendments

Zoning Map amendments are subject to the provisions of Section 19.902. The procedures for processing a Zoning Map amendment application are located in Chapter 19.1000.

19.107.4 Zone Boundary Determinations

The exact location of a zone boundary shall be determined by the Planning Director where there is uncertainty, contradiction, or conflict as to the intended location of any zone boundary due to the scale, lack of detail, or illegibility of the Zoning Map. The determination shall be in accordance with the following guidelines:

A. Street Lines

Where zone boundaries are shown as approximately following the centerline of a right-of-way, such centerlines shall be construed to be the zone boundaries.

B. Lot Lines

Where zone boundaries are shown as approximately following lot lines, such lot lines shall be construed to be the zone boundaries.

C. Water Courses

Where zone boundaries are shown as approximately following the centerline of water courses, such lines shall be construed to be the zone boundaries unless such boundaries are otherwise fixed by dimensions described elsewhere in this title.

If a property owner disagrees with the Planning Director’s initial determination, a formal determination request may be made as described and provided for in Section 19.903.

19.107.5 Zoning of Lots with Multiple Zones

If a zone boundary for a base zone in Chapter 19.300, as shown on the Zoning Map, divides a lot between 2 or more base zones, the entire lot shall be deemed to be in the base zone in which the greater area of the lot lies, provided that this adjustment involves a distance not to exceed 20 ft from the mapped base zone boundary. If an adjustment exceeds 20 ft, the regulations for the base zones shall apply to the lot as depicted on the Zoning Map.

19.107.6 Zoning of Annexed Areas

Land annexed to the City shall be assigned a land use and zoning designation that is consistent with the land use designations established by the Comprehensive Plan and the zones established by this title at the time of annexation.

Annexations shall be adopted by ordinance pursuant to Chapter 19.1100.

19.107.7 Zoning of Public Right-of-Way

The zones applied to the public rights-of-way within the City boundaries as shown on the Zoning Map do not directly regulate the improvements or structures that are allowed in these rights-of-way. Improvements and structures in public rights-of-way are regulated by other rules, regulations, and ordinances maintained by the City and other road authorities, such as Chapter 19.700, Public Works Standards, and the Transportation System Plan. (Ord. 2112 § 2 (Exh. B), 2015; Ord. 2110 § 2 (Exh. G), 2015; Ord. 2106 § 2 (Exh. F), 2015; Ord. 2036 § 3, 2011; Ord. 2025 § 2, 2011)

19.108 SPECIAL AREAS

19.108.1 Special Area Classifications

For the purposes of this title, the following special areas are established in the City per Table 19.108.1:

Table 19.108.1 Classification of Special Areas	
Special Area Description	Abbreviated Description
Natural Resources	NR

19.108.2 Special Area Maps

The special areas described in Subsection 19.108.1 are not displayed on the City's Zoning Map. They are shown on specific administrative maps.

Natural resources are displayed on the Natural Resource (NR) Administrative Map, which is adopted by reference. Provisions for administering the NR Administrative Map are established in Subsection 19.402.15.

19.108.3 Classification of Annexed Areas

Land annexed to the City shall be assigned a special area designation consistent with the special area designations established by this title at the time of annexation. Annexations shall be adopted by ordinance pursuant to Chapter 19.1100.

Land annexed to the City shall be assigned a natural resource designation as applicable in accordance with the provisions established in Subsection 19.402.15.

19.108.4 Classification of Public Rights-of-Way

The special area designations applied to the public rights-of-way within the City boundaries, as shown on any specific administrative map, do not directly regulate the improvements or structures that are allowed in these rights-of-way. Improvements and structures in public rights-of-way are regulated by other rules, regulations, and ordinances maintained by the City and other road authorities, such as Chapter 19.700 Public Facility Improvements, the Public Works Standards, and the Transportation System Plan. (Ord. 2036 § 3, 2011)

View the [mobile version](#).

5.1.5.

*Transportation
System Plan

1

Executive Summary

The Milwaukie Transportation System Plan (TSP) is the City's long-term plan for transportation improvements and includes policies and projects that could be implemented through the City Capital Improvement Plan, development review, or grant funding. The 2007 TSP planning process was a great opportunity for the community to fully define its transportation goals and discuss how the whole transportation system could be improved to support livability in Milwaukie. The 2013 TSP update process provided an opportunity to ensure that the plan reflected current conditions and took into account the latest forecasts and projections.

Milwaukie is a city of approximately 21,000 people and just under five square miles. Part of Milwaukie is designated as a Town Center in the 2040 Growth Concept. Though Milwaukie's population is expected to grow moderately (approximately one % per year), the city lies at the intersection of several regional transportation facilities and downstream from several areas slated for significant growth in Metro's 2040 Growth Concept.

THE PURPOSE OF A TRANSPORTATION SYSTEM PLAN (TSP)

A primary purpose of an up-to-date TSP is to fulfill the State of Oregon Transportation Planning Rule (TPR) requirements for comprehensive transportation planning in the cities of Oregon. The TSP is a guiding policy document for long-term transportation planning and presents the City's goals and policies while outlining and prioritizing proposed improvements for pedestrian, bicycle, public transit, motor vehicle, and freight systems; downtown parking; and neighborhood traffic management. In addition, the TSP outlines the financial forecast for potential funding and ties that back to potential prioritized improvements to determine any funding shortfalls for projects. When funding shortfalls exist, potential concepts for generating additional revenue are outlined to help guide City funding-related decisions.

The TSP strives to determine existing problem areas for all modes of transportation, looks into the future to identify the needs created by growth, and provide solutions to existing and future needs with guidelines to develop the desired multimodal transportation system. Identifying specific transportation system needs will help the City guide its future transportation system investments and determine how land use and transportation decisions can be brought together beneficially for the community.

After Chapter 4 Future Forecasting Process, each section of the TSP includes a long-range master plan and an action plan. The action plans address those transportation improvements that could be made using limited local funding sources. The final prioritization of transportation

system improvements will be determined by the Milwaukie City Council as part of the annual capital improvements planning and budgeting process.

WHO WAS INVOLVED IN THE CITY'S TSP UPDATES?

During the 2007 TSP update process, the City of Milwaukie launched an extensive public outreach and involvement process (see Appendix B). Citizens, partner agencies, and business representatives were invited to join one or more mode-specific working groups and the TSP Advisory Committee. The working groups were created to focus on different subtasks of the TSP, including: Traffic and Street Network Solutions, Pedestrian and Bike Solutions, Street Design, Transit Solutions, Downtown Parking, and Freight Access. The Advisory Committee oversaw both technical and policy review of the TSP, and offered guidance on the final prioritization of projects and strategies.

In 2013, the City conducted a smaller-scale update to the TSP in order to maintain compliance with Metro's 2035 Regional Transportation Plan (RTP). The public engagement component of the 2013 TSP update was far less intensive than the one in 2007, as the proposed changes did not involve major policy decisions and instead focused on the following elements:

- Update existing figures, tables, and text to reflect current conditions.
- Adjust the TSP's planning horizon year from 2030 to 2035.
- Remove completed projects and update project descriptions as needed.
- Add the final Portland-Milwaukie Light Rail (PMLR) alignment to master plan maps.

The 2013 TSP update, driven by the RTP compliance requirement, allowed the City to confirm that the master plans for the various travel modes (e.g., pedestrian, bicycle, public transit, etc.) will help the region move toward meeting its performance targets for 2035, including reductions in congestion, percentage of single-occupancy vehicle trips, and vehicle miles traveled per capita.

TSP UPDATE PROCESS

In addition to data collection and public involvement, a TSP update consists of seven main elements. The following sections describe each of these elements in more detail.

Goals

Transportation goals and policies form the basis for how the local transportation system will be developed and maintained over the next 22 years. The City's transportation goals support a multimodal approach to transportation planning and reflect how citizens think about and experience Milwaukie's transportation system. The City's nine transportation goals are:

- **GOAL 1 Livability:** Design and construct transportation facilities in a manner that enhances the livability of Milwaukie's community.
- **GOAL 2 Safety:** Develop and maintain a safe and secure transportation system.
- **GOAL 3 Travel Choices:** Plan, develop, and maintain a transportation system that provides travel choices and allows people to reduce the number of trips made by single-occupant vehicles.

- **GOAL 4 Quality Design:** Establish and maintain a set of transportation design and development regulations that are sensitive to local conditions.
- **GOAL 5 Reliability and Mobility:** Develop and maintain a well-connected transportation system that reduces travel distance, improves reliability, and manages congestion.
- **GOAL 6 Sustainability:** Provide a sustainable transportation system that meets the needs of present and future generations.
- **GOAL 7 Efficient and Innovative Funding:** Efficiently allocate available funding for recommended transportation improvements, and pursue additional transportation funding that includes innovative funding methods and sources.
- **GOAL 8 Compatibility:** Develop a transportation system that is consistent with the City's Comprehensive Plan and coordinates with County, State, and regional plans.
- **GOAL 9 Economic Vitality:** Promote the development of Milwaukie's, the region's, and the state's economies through the efficient movement of people, goods, and services, and the distribution of information.

Existing Conditions

Project staff reviewed existing conditions to establish how the transportation systems within Milwaukie currently operate in terms of quality, effectiveness, accessibility, and safety. Sidewalk and pavement conditions, roadway and intersection traffic volumes, transit and freight operations, as well as parking, rail, environmental justice and natural resources were all reviewed with the goal of understanding the "bigger picture" of the City's transportation needs. Additional detail related to these topics can be found in Chapter 3.

Forecasting Future Traffic Conditions

The forecast year for this plan is 2035. The City used Metro's urban area transportation forecast model to forecast future p.m. peak-hour traffic volumes at study area intersections. This is a complex model that takes many anticipated trends in demographics, changes in land use, population, etc. into account when forecasting future traffic volumes. Some of the more important assumptions include the projected growth in population in Clackamas County and the rest of the Metro region, residential and employment growth in downtown Milwaukie, and an increase in transit use within the Metro region. See Chapter 4 for more detail.

Identification of Needs and Potential Improvements

The traffic volume projections forecasted from the Metro model formed the basis for identifying potential roadway deficiencies and evaluating alternative circulation improvements within Milwaukie. Needs for other modes were then identified, based on the future traffic forecasts and deficiencies in the existing infrastructure (sidewalks, bike lanes, transit stops, etc.).

Collectively, the master plans in Chapters 5 through 12 of the TSP describe the proposed capital and operational improvements to the transportation system between 2013 and 2035. While many of these potential improvements are presented as benefiting one mode, when possible, multiple modes are combined into one project. For instance, the Railroad Ave road-widening project listed in the Street Network Master Plan could include new bike lanes and sidewalks, as well as improvements for freight and transit.

Between the 2007 and 2013 TSP updates, the PMLR project became more defined, with construction starting in 2012. A thorough feasibility and impact study was conducted for the

PMLR project, identifying and developing appropriate mitigation for the new light rail system's impacts to Milwaukie's transportation infrastructure. The warranted improvements are being constructed as the new light rail system is being built. Once completed, PMLR will become a part of the City's transportation system and will be further studied to identify and address needed improvements as part of future updates to the TSP.

In June 2013, the Tacoma Station Area Plan (TSAP) was adopted to address potential redevelopment opportunities near the new PMLR station at Tacoma St. The TSAP included a list of approximately 20 projects identified to meet new transportation needs. These projects were assigned order-of-magnitude costs and were added to the relevant project lists for the various modes.

Ranking and Prioritizing Improvements

The action plans in Chapters 5 through 12 focus on the highest priority projects that are most likely to be funded over the next 22 years with limited City funds. The action plans are built upon the premise that, given the limited funds available, the City should prioritize funding of transportation projects that 1) effectively address identified problems, and 2) best meet the City's Goals.

To prioritize the projects as part of the 2007 TSP update, project staff and the Advisory Committee used three sources: the project rankings from the working groups, evaluation of each project against the nine TSP Goals, and other information regarding dependence on other projects, neighborhood support, etc. Using this approach, project staff and the Advisory Committee developed a relative ranking of the projects, grouping them into three categories (high, medium, and low priority).

For the 2013 TSP update, project staff did not reevaluate projects against the nine TSP Goals but, instead, considered the input generated around a public meeting that was held to discuss transportation project priorities. For approximately 20% of the existing projects, the priority classification was adjusted to reflect changes in current conditions or a new awareness of community need. For new projects arising from the Tacoma Station Area Plan (TSAP), staff assigned a priority to each based on input from the TSAP Advisory Committee as well as staff knowledge of overall system needs.

Financing Transportation Projects

The financially constrained action plan lists in Chapters 5 through 12 identify which projects the City should prioritize for funding with limited City funds. While these action plans will set the priorities for use of local funds, they do not assume funding sources such as State or regional grants, or contributions from local development. Therefore, the "financially constrained" lists are very constrained.

Given the limited availability of funding, the City will have to make tradeoffs when deciding how to spend the limited funds each year. As part of the 2007 TSP update, the Advisory Committee determined that the City should use a strategic approach that funds a range of high priority "implementable" projects. This approach encourages the City to tackle smaller projects with local funds, but also use local funds as the required local match to leverage State and federal funds for larger high priority projects. The 2013 TSP update reaffirmed this strategic approach.

The primary function of the TSP is to provide guidance for long-range policy and investment decisions about needed improvements to the transportation system over the next 22 years. The Consolidated Action Plan in Table 13-3 (located in Chapter 13 Funding and Implementation Plan) provides a list of the highest priority projects for the community. This list is utilized to build

the "Transportation Priority Project—Unfunded" section of the City's 5-year Capital Improvement Plan (CIP). The CIP is a list of projects for the City's water, wastewater, stormwater, and transportation systems that are scheduled to be funded in the short term. As funding becomes available, projects are moved from the unfunded section of the CIP to the section recommended for funding. Projects in the CIP section recommended for funding are reviewed by the City Council for funding every 2 years through the City's budgeting process. In essence, the CIP is the primary implementation mechanism for TSP projects.

Recommendations

The Milwaukie TSP focuses on Milwaukie's transportation needs and decisions. Therefore, participants in the 2007 planning process created a set of recommendations that implemented State and regional policies but were tailored to Milwaukie's current and future needs. From all of the input that citizens and businesses offered during the 2007 TSP process, there were some clear messages. The highest priorities established in 2007 for improving transportation in Milwaukie were:

- Improve pedestrian and bicycle facilities throughout the city.
- Enhance public transit service.
- Maintain existing facilities.
- Manage traffic in neighborhoods (address "cut-through" traffic) as regional traffic volumes increase.
- Improve safety and accessibility of crossings over major corridors.

Though it is common for people to be focused on their own street, neighborhood, or bus line, a broad number of people identified the following areas as a priority in 2007:

- Downtown
- Milwaukie Marketplace area
- Railroad Ave
- Railroad crossings throughout the city

The 2013 TSP Update process did not involve the same level or depth of public involvement and discussion, as it was intended as only a minor refresh of the 2007 document. However, public comments gathered at and around a public meeting held in June 2013 largely confirmed the above recommendations (with at least one exception, that there was no clear identification of the Milwaukie Marketplace as a priority area). In 2013, people appear to be generally more supportive of projects that serve to improve multiple modes of transportation than those that enhance only one aspect of the larger transportation system. In addition, there is a clear emphasis on improving east-west connections across the community, especially to mitigate the divisive effect that Hwy 224 has in separating downtown from the predominant population in the eastern neighborhoods.

The following section summarizes the specific recommendations that resulted from the analysis of each mode and aspect, including: pedestrian, bicycle, public transit, motor vehicle, freight, street design, neighborhood traffic management, and downtown parking. Figure 1-1, the Composite Master Plan Map, summarizes the recommended improvements on one map, showing the location of recommended master plan improvements for pedestrian, bicycle, public transit, motor vehicle, and freight modes.



Transportation System Plan

FIGURE 1-1

COMPOSITE MASTER PLAN

November 2013

Legend

- | | | | |
|--|---------------------|--|-------------|
| | Schools | | Streets |
| | Light Rail Station | | Major Roads |
| | Light Rail Transit | | County Line |
| | Kellogg Creek Trail | | Water |
| | Springwater Trail | | Parks |
| | Trolley Trail | | City Limits |
| | Railroad | | |

Proposed Projects

- Bicycle Corridor Improvement
- Pedestrian Corridor Improvement
- Transit Corridor Improvement
- Freight Intersection Improvement
- Bicycle Intersection Improvement
- Pedestrian Intersection Improvement
- Auto Intersection Improvement



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0 500 1,000 2,000 3,000 4,000 Feet

PEDESTRIAN FACILITIES

Walking is the most affordable and accessible of all transportation modes. It is also clean, low-impact, and healthy for the individual. A safe and comfortable pedestrian environment allows people of all ages and abilities to travel independently.

Milwaukie's pedestrian system is challenged by an incomplete arterial/collector sidewalk system, a lack of local street connectivity, arterial crossings with potential safety and connectivity issues, and a lack of complete multiuse trails (see Chapter 3).

The City has several strategies for addressing pedestrian system needs and guiding project prioritization. The prioritization process helps to focus community investment on those projects that are most effective at addressing critical needs, while deferring other projects of lesser importance. The strategies for pedestrian facilities include:

- Key pedestrian corridors to connect neighborhoods with schools, parks, activity centers, and major transit stops.
- Arterial crossing and safety enhancements.
- Fill gaps in the network where some sidewalks exist.
- Pedestrian corridors that connect to major recreational uses.
- Enforcement of laws that protect pedestrians.
- Education about pedestrian safety and available walking routes.

These strategies would be implemented by projects that address needs and deficiencies.

Key Recommendations

- **Arterial and Collector Street Improvements:** Construct walkways along key collector and arterial streets, especially when project is publicly funded:
 - Monroe St from 42nd Ave to eastern city limit
 - Stanley Ave within the city limits
 - Linwood Ave within city limits
 - 17th Ave north of downtown
 - Railroad Ave within the city limits
- **Local Street Improvements:** Walkways on local streets will be mostly constructed by new/infill development.
- **Intersection Improvements:** Construct intersection improvements to improve pedestrian safety near Hwy 224 and the Milwaukie Marketplace:
 - Oak St by the railroad tracks
 - Harrison St and Hwy 224
 - Railroad Ave and 37th Ave
- **Develop and distribute walking maps** that show routes to major destinations such as parks, schools, commercial areas, and trails.
- **Enforce against motorists** who speed and run stop signs.



Transportation System Plan

FIGURE 1-2

PEDESTRIAN MASTER PLAN

November 2013

LEGEND

Existing Sidewalks	Proposed Improvement
Orange line: < 5 ft width	Yellow circle: Pedestrian Intersection Safety Improvement
Blue line: 5 ft - 10 ft width	Green line: Pedestrian Facilities
Red dotted line: Kellogg Creek Trail	
Blue dotted line: Springwater Trail	
Green dotted line: Trolley Trail	
Black triangle: Schools	Black dashed line: County Line
Black line: Major Roads	Black dashed line: City Limits
Grey line: Streets	Orange line: Light Rail Transit
Black line: Railroad	Blue line: Water
	Green area: Parks
	Black square: Light Rail Station

PROPOSED PROJECTS

Improve Intersection to Increase Pedestrian Safety

- A Freeman Way/HWY 224
- B 37th Ave/HWY 224
- C Oak St/HWY 224
- D Monroe St/HWY 224
- E Harrison St/HWY 224
- F King Rd improvements
- G Olsen St/42nd Ave
- H Railroad Ave/37th Ave
- K Stanley Ave/Logus Rd
- AV McLoughlin Blvd and 22nd Ave
- BG All McLoughlin crossings
- BJ McLoughlin and Ochoco/Milport

Provide Pedestrian Facilities Where Not Currently Present

See Table 5-1 for project descriptions L-AG, AI-AO, BB, BH

- #### Enhance Existing Pedestrian Connection
- AH Create ped connection from Rowe Middle School to North Clackamas Park
 - AR Construct pedestrian underpass under HWY 99E at Kellogg Creek
 - AT Complete Springwater Trail along Ochoco St
 - AU Construct bike-ped overpass over Kellogg Creek
 - AV Construct Kronberg Park Trail
 - AX Pave connection to Springwater Trail at 29th Ave and Sherrett
 - AY Improve connection from Springwater Corridor to Pendleton Site
 - AZ Construct stairs to connect Springwater Corridor to LRT Station
 - BA Establish bike-ped connection across Railroad Ave and tracks
 - BC Establish bike-ped connection over railroad tracks and LRT
 - BD Construct stairs from Springwater Corridor to McLoughlin Blvd
 - BE Construct bike-ped bridge over Johnson Creek along Clatsop St at 23rd Ave to connect to LRT station
 - BF Improve bike-ped connection to neighborhoods west of station
 - BI Establish bike-ped connection over McLoughlin at River Rd
 - BJ Establish bike-ped connection to McLoughlin at Stubb St



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TRANSPORTATION SOLUTIONS

0 500 1,000 2,000 3,000 4,000 Feet

BICYCLE FACILITIES

The bicycle is a human-powered vehicle that allows people of all ages to move independently, at relatively low cost and with little impact to the environment. Bicycling promotes the well-being of people who live and work in Milwaukie, with the added benefit of reducing auto traffic on city streets.

Milwaukie's existing bicycle system is deficient in three primary ways: lack of connectivity, difficult crossings, and insufficient street designations. Recommended improvements should be aimed at closing the gaps in the bicycle network, improve crossing safety, maintaining the existing system, improving signage, and educating bicyclists and motorists.

Key Recommendations

- **Neighborhood Greenway Improvements:** Prioritize "neighborhood greenways" (also sometimes referred to as "bike boulevards") as a method for providing safe bikeway connections to other transportation modes and between parks, schools, activity centers, and regional destinations. Establish neighborhood greenways along the following routes:
 - Monroe St from downtown to Linwood Ave
 - Stanley Ave from Railroad Ave to Springwater Trail
 - 29th Ave from Springwater Trail to Monroe St (via Harvey St and 40th Ave)
 - 19th Ave and Sparrow St to Trolley Trail
- **Bikeway Improvements:** Improve existing bikeways by paving, striping, adding signage, establishing bike lanes where appropriate, etc.
- **Intersection Improvements:** Make key intersections safer and more functional for bicyclists with treatments such as improved striping, accessible signal buttons, and bicycle detection devices.
- **Education:** Improve education for bicyclists and drivers and encourage bicycling through planned bicycling events.
- **Maintenance:** Keep bike lanes clear of debris.
- **Coordination with Other Jurisdictions:**
 - Work with other jurisdictions on long-range projects such as route connectivity and trail system planning and construction.
 - Improve response on day-to-day issues such as sweeping out bike lanes and enforcing traffic and parking laws.



Transportation System Plan

FIGURE 1-3

BICYCLE MASTER PLAN

November 2013

LEGEND

Existing Bicycle Facilities		Proposed Improvements	
	Shared Lane		Bicycle Intersection Safety Improvement
	Bicycle Lane		Bicycle Lanes
	Kellogg Creek Trail		Neighborhood Greenway
	Springwater Trail		Schools
	Trolley Trail		Railroad
	Schools		County Line
	Railroad		City Limits
	Major Roads		Light Rail Station
	Streets		Light Rail Transit
	Water		
	Parks		

PROPOSED PROJECTS

- Improve Intersection to Increase Bicycle Safety*
- A** Adams St/21st Ave/Railroad Crossing
 - B** Johnson Creek Blvd/Springwater Trail
 - C** Johnson Creek Blvd/Linwood Ave
 - D** Linwood Ave/King Rd
 - E** Linwood Ave/Monroe St
 - F** Linwood Ave/Harmony Rd
 - G** Washington St/Oak St/Hwy 224
 - H** International Way/Lake Rd
 - I** McLaughlin and 22nd
 - J** McLaughlin/Ochoco/Milport
- Provide Bicycle Lanes Where not Currently Present*
See Table 6-2 for project descriptions B-R, AI, and AJ
- Enhance Existing Bicycle Connection*
- U1** Install Neighborhood Greenway treatments at various locations
 - V** Construct bicycle overpass from Railroad Ave to International Way
 - W** Improve Springwater Trail paving
 - X** Improve Kellogg Creek Trail
 - Y** Install Trolley Trail signage
 - Z** Fill in gaps in existing bike network with bike lanes or multiuse path.
- Improve Intersection safety on 17th Ave at HWY 224 and at 99E.*
- AB** Complete Springwater Trail along Ochoco St
 - AC** Construct Kronberg Park Trail
 - AD** Construct bike-ped overpass over Kellogg Creek
 - AE** Construct pedestrian underpass under HWY 99E at Kellogg Creek
 - AG** Pave connection to Springwater Trail at 29th Ave and Sherrett
 - AH** Improve connection from Springwater Corridor to Pendleton Site
 - AK** Establish bike-ped connection over railroad tracks and LRT
 - AL** Construct stairs to connect Springwater Corridor to McLaughlin Blvd
 - AM** Construct bike-ped bridge over Johnson Creek along Clatsop St at 23rd Ave to connect to LRT station
 - AN** Improve bike-ped connection to neighborhoods west of station
 - AO** Establish bike-ped path on Sparrow to connect River Rd to Trolley Trail
 - AP** Establish bike-ped connection over McLaughlin at River Rd
 - AR** Establish bike-ped connection to McLaughlin at Stubb St



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TRANSPORTATION SOLUTIONS

0 500 1,000 2,000 3,000 4,000 Feet

PUBLIC TRANSIT FACILITIES

The availability, convenience, and desirability of public transit are key aspects of a system that must support the movement of people to, from and through Milwaukie. Transit trips reduce single-occupant vehicle trips (which reduces traffic and energy consumption), serves community members who cannot drive (including the elderly, disabled, and youth), and minimizes transportation system impacts to the environment, such as vehicle emissions and soil and water pollution from impervious surface runoff.

Though transit service in Milwaukie needs to be improved in many ways, its greatest deficiencies are in the areas of service levels, safety, and convenience of service. There is a disparity between the City's goals for transit service and use, and the system's ability to meet those goals today. To close this gap, the City and TriMet should simultaneously pursue three types of improvements: service enhancements, capital improvements, and policy improvements.

Key Recommendations

- **Service Enhancements:**
 - Add a bus route on Railroad Ave (extending to Clackamas Town Center via Harmony Rd)
 - Add a bus route on Johnson Creek Blvd
 - Reduce headways to less than 30 minutes on all routes.
 - Enhance service on north-south routes.
 - Improve reliability of all routes.
- **Capital Improvements:**
 - Install shelters at bus stops that meet TriMet criteria.
 - Improve downtown bus stops and shelters, and include ample bike parking.
 - Construct a new bus layover facility at the Southgate park-and-ride.
- **Policy Recommendations:**
 - Eliminate the layover function of the downtown transit center.
 - Expand transit service. Provide service in "transit disadvantaged" areas. Fund local service enhancements through savings made from transit capacity improvements.
 - Provide appropriately located and sized park-and-ride facilities. Provide park-and-rides on Milwaukie's fringe for commuters and park-and-rides inside Milwaukie for Milwaukie residents.
 - Improve transit safety.
 - Reinvest transit "savings" within Milwaukie. Any savings derived from new capacity should be contained and reinvested within the Milwaukie service area.



Transportation System Plan

FIGURE 1-4

PUBLIC TRANSIT MASTER PLAN

November 2013

LEGEND

Existing Facilities

- Bus Route Number
- Bus Stop
- Bus Route
- Light Rail Station
- Light Rail Transit
- Park-and-Ride

Proposed Improvements

- Park-and-Ride
- New or Rerouted Bus Route
- Bus Rapid Transit Route

Other Map Features

- Schools
- Major Roads
- Streets
- Railroad
- Kellogg Creek Trail
- Springwater Trail
- Trolley Trail
- County Line
- Water
- Parks
- City Limits



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TRANSPORTATION SOLUTIONS

0 500 1,000 2,000 3,000 4,000 Feet

MOTOR VEHICLE FACILITIES

The Street Network element of the TSP focuses on maintaining motor vehicle traffic flow and mobility on arterial and collector roadways, protecting residential neighborhoods from excessive through traffic and travel speeds, providing reasonable access to and from residential areas, improving safety, and promoting efficient through-street movement.

Limited connectivity between Milwaukie neighborhoods often forces motorists to travel out of direction and increases traffic volumes and miles traveled on the few connecting streets. Regional and local traffic volumes are projected to increase on many city streets and cause many intersections to operate below jurisdictional standards.

Key Recommendations

- **Use Transportation System Management** to get the most out of the existing system.
- **Improve substandard streets and intersections** to accommodate traffic and improve safety.
- **Enhance neighborhood character and livability** through well-designed street improvements.
- **Leverage Street Surface Maintenance projects** to bring roads up to standards when possible.
- **Initiate a Hwy 99E/Hwy 224 Refinement Plan** with ODOT to define the future conditions of this corridor. Assumptions to include:
 - Primary crosstown connection is Harrison St.
 - Improve freight access to North Industrial area
 - Multiple grade-separated connections between Harrison St and Freeman Way.
 - Reduce the visual and physical "barrier" effect of the highway for nonmotorized modes of travel.
- **Implement capacity improvement projects on key corridors** as needed:
 - Harrison St/Main St
 - Harrison St/42nd Ave/King Rd
 - Johnson Creek Blvd/Linwood Ave
 - King Rd/Linwood Ave
 - Monroe St



Transportation System Plan

FIGURE 1-5

STREET NETWORK MASTER PLAN

November 2013

LEGEND

Proposed Street Network Improvements

	Travel Route Improvement		Corridor Refinement Plan
	Roadway Widening Project		Intersection

	Schools		Major Roads
	Kellogg Creek Trail		Streets
	Springwater Trail		Railroad
	Trolley Trail		County Line
	Light Rail Station		Water
	Light Rail Transit		Parks
			City Limits

PROPOSED PROJECTS

- A** Prohibit left turn movement at 17th Ave/McLoughlin Blvd and include in Refinement Plan
- B** Signalize Harrison St/42nd Ave
- C** Conduct Refinement Plan for HWY 99E/HWY 224 focused on motor vehicle and freight mobility.
 - HWY 99E Project Limits: Tacoma St to 17th Ave
 - HWY 224 Project Limits: HWY 99E to Lake Rd Interchange
- D** Reconfigure intersection to consolidate 37th Ave/Industrial Way
- E** Add eastbound/westbound right turn lanes and integrate the trail crossing
- G** Implement protected/permitted phasing for northbound and southbound left turns
- H** Widen Linwood Ave to standard three lane cross section
- I** Widen Railroad Ave to standard three lane cross section
- J** Redesign intersections of River Rd and 22nd Ave to consolidate intersections; or
Add northbound left turn pocket on River Rd
- K** Widen Harrison St to standard three-lane cross section
- L** Add left turn-lanes and protected signal phasing on Harrison St approaches
- M** Widen Lake Rd to standard three-lane cross section
- N** Replace 3-way stop with signal when warranted and appropriate. (Coordinate with the City of Portland)
- O** Enhance connection between King Rd and Harrison St
- P** Add protected signal phasing on Oak St approaches
- Q** Improve intersection/modify access at HWY 224 and Freeman Way
- R** Enhance connection along Stanley Ave at King Rd
- S** Enhance connection along Stanley Ave at Monroe St
- V** Improve safety of Trolley Trail crossing at 22nd Ave
- W** Realign intersection to improve traffic between 42nd Ave and King Rd east of 42nd Ave
- X** Connect local streets within Tacoma Station Area (see Fig 8-4)
- Y** Construct street improvements on Stubb St, Beta St, Ochoco St, Hanna Harvester Dr and Mailwell Dr (TSAP)



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TRANSPORTATION SOLUTIONS



0 500 1,000 2,000 3,000 4,000 Feet

FREIGHT PLAN

A quality local freight network facilitates movement of bulk goods and materials, and is essential to the economic health of the city. While all cities have some need for local delivery of goods to retailers and similar activities, in Milwaukie a majority of employment is in the heavy manufacturing, warehousing, and distribution sectors, which are dependent on efficient movements of large quantities of both raw materials and finished products. A well-functioning and reliable system for the movement of freight into and out of the city contributes significantly to the City's ability to attract and retain industrial investment—and the jobs and tax proceeds that come with that investment.

The city's freight network faces a few specific challenges. Access to the North Industrial area from McLoughlin Blvd is limited due to turn restrictions at Milport Rd and Ochoco St. Most rail crossings exhibit deterioration due to wear and tear and frequent train crossings, resulting in increased delay for the general public and freight haulers. The number of routes available to trucks is limited by weight limitations on certain freight routes and narrow intersections.

Key Recommendations

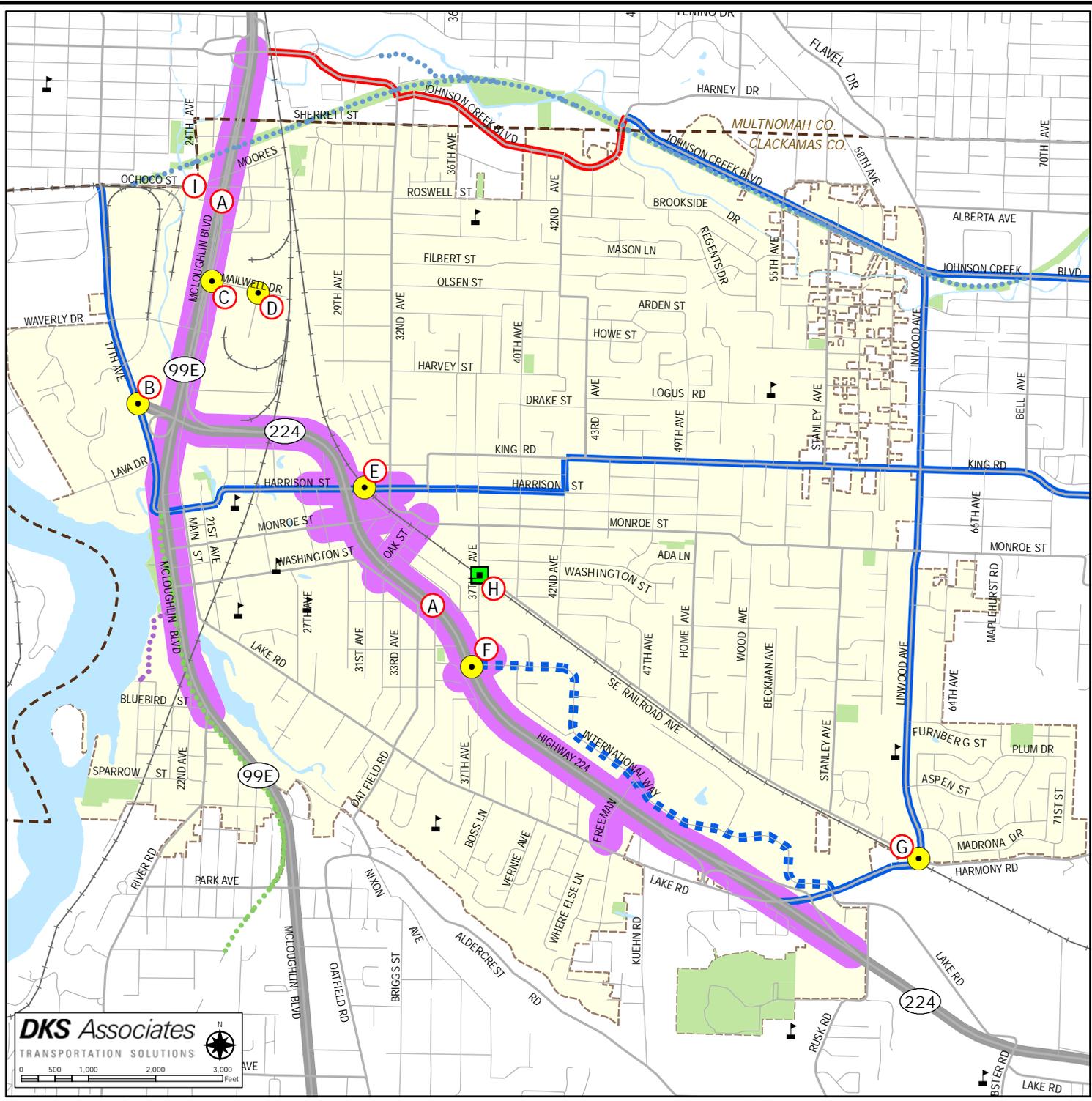
- **North Industrial Access:** Improve access to the area, potentially with an overpass of Hwy 99E at Ochoco St. This and other solutions should be evaluated through a Hwy 99E/224 Refinement Plan (described in the previous section).
- **Rail Crossings:** Improve the quality of the materials at at-grade crossings and pursue the grade separation of key crossings.
- **Street Reclassification:** Designate International Way as a freight route.



Transportation System Plan

FIGURE 1-6

FREIGHT MASTER PLAN November 2013



LEGEND

Existing Freight Routes	Proposed Improvements
Major Regional	Intersection Improvement
Minor Preferred (Local)	Intersection Material Upgrade
Weight Restricted Minor Preferred (Local)	Corridor Refinement Plan
Minor Preferred Freight Route (Local)*	Minor Preferred Freight Route (Local)*
Major Roads	County Line
Streets	Parks
Railroad	Water
Springwater Trail	City Limits
Kellogg Creek Trail	
Trolley Trail	

PROPOSED PROJECTS

- Improve Corridor**
- A** Conduct Refinement Plan for HWY 99E/HWY 224 focused on motor vehicle and freight mobility.
 - HWY 99E Project Limits: Tacoma St to 17th Ave
 - HWY 224 Project Limits: HWY 99E to Lake Rd Interchange
- Improve Intersection**
- B** 17th Ave/HWY 224 Upgrade intersection turning radii to better accommodate freight movements
 - C** Main St/Mailwell Dr Upgrade intersection turning radii to better accommodate freight movements
 - D** Mailwell Dr/Omark Dr Upgrade intersection turning radii to better accommodate freight movements
 - E** Harrison St/Union Pacific Railroad Crossing Upgrade crossing to grade separated facility (outcome of crossing dependant upon 99E/224 Refinement Plan findings)
 - F** HWY 224/37th Ave Consolidate two northern legs of 37th Ave and Industrial Way into one leg at HWY 224.
 - G** Linwood/Harmony/Lake Road Intersection Improvements Add northbound right turn lane and eastbound right turn lane AND/OR grade separate Harmony Road from Union Pacific Railroad and align as a through east-west movement
 - H** Railroad Crossing Improvements at 37th Ave Improve road transition to railroad crossing
 - I** Signage and Intersection Improvements at McLoughlin Boulevard and Ochocho St. Establish signage for trucks and improve intersection (TSAP)

DKS Associates
TRANSPORTATION SOLUTIONS

STREET DESIGN

A street's design determines how it will look and function. How a street looks and functions ultimately depends upon which elements are included, their dimensions, and how they relate to each other. Well-designed streets can contribute to the identity and character of a neighborhood and increase property values. They can also speed or slow traffic, reduce environmental impacts, and allow for safe multimodal use.

Problems

Milwaukie is a developed city with a largely incomplete street network. Though the community supports the completion of its streets through construction of safe pedestrian and bicycle facilities, most neighborhoods also want to maintain neighborhood character by saving existing trees and maintaining the slower traffic speeds that often accompany substandard roads. The City's current design standards limit the City's ability to sensitively improve existing streets by only allowing a few street design options. Allowing for more flexibility when determining the design of a street would allow for the City to respond to the character of the surrounding natural and built environments.

Possible Solutions

The City should update its standards and policies to allow for implementation of context-sensitive street design. The use of innovative designs, such as green streets, skinny streets, and flexible pedestrian designs are some examples of street design options that the City could incorporate into its street design standards.

Key Recommendations

- **Standards:** Develop a baseline cross section for each street functional classification and a street design prioritization approach for when the baseline design elements do not fit.
- **Flexibility:** Build more flexibility into street design standards to:
 - Allow for local design preferences.
 - Increase bicycle and pedestrian safety.
 - Avoid costly and time-consuming variance process requirements.
- **Alternative Designs:** Develop street design standards for green streets, skinny streets, and alternative pedestrian facilities.
- **Balance:** Balance the larger community's needs, local design preferences, and best practices when developing street design standards.
- **Landscaping:** Provide for landscaping (including street trees) wherever feasible.
- **Maintenance:** Consider maintenance costs and issues when developing design standards and design alternatives.

NEIGHBORHOOD TRAFFIC MANAGEMENT

The City recognizes that the vitality and feel of a neighborhood can be greatly influenced by the speed and volume of traffic traveling to and through it. Neighborhood traffic management is a way for the City and its citizens to create a dialogue about traffic concerns on a neighborhood level.

Problems

Milwaukie consists mostly of residential neighborhoods, and has a relatively small population compared to the surrounding Portland metropolitan area. Because of its proximity to the city of Portland, its many employment opportunities, and the two major regional routes that traverse the city (McLoughlin Blvd and Hwy 224), cut-through traffic is an ongoing concern for Milwaukie residents. As traffic volumes increase and congestion occurs on regional routes and major streets, there is potential for traffic to spill over onto neighborhood routes and local streets in search of less congested or more direct routes. Neighborhood traffic management is a means to address the negative impacts of unchecked speed and volume on neighborhood and local streets.

Possible Solutions

There are many different options available in the neighborhood traffic management 'tool box,' but not all of these options are appropriate for all streets. Traffic management options need to be based on the functional classification of the road, surrounding land uses, the design of the street, as well as input from emergency services and residents. Effective use of neighborhood traffic management in Milwaukie can address community needs and concerns, including, but not limited to, the following:

- Speeding
- Cut-through traffic
- Pedestrian safety
- Student safety around school zones

Key Recommendations

- **Funding:** It is recommended that the City annually fund the Walk Safely Milwaukie Program so that prioritized needs are implemented over time. The Neighborhood Traffic Management Action Plan (see Table 11-2) does not identify specific projects, but it does show the level of funding the City aspires to commit to the Walk Safely Milwaukie Program for the duration of this plan. With regard to this funding, it is recommended that the City develop a process that ensures neighborhood traffic management funding is equitably distributed throughout the city.
- **Investment:** Allocate a certain amount of money per year to install selected neighborhood traffic management projects. The number of projects would be limited but coordinated with citizen involvement. Encourage implementation of neighborhood traffic management projects by private development.
- **Variety:** Allow for a wide variety of traffic management measures.
- **Effectiveness:** Ensure that the chosen measure addresses the identified problem.
- **Neighborhood Input:** Involve affected neighborhoods when designing neighborhood traffic management measures.
- **Landscaping:** Neighborhood traffic management solutions need to provide for landscaping wherever feasible.
- **Maintenance:** Consider maintenance needs and issues (including landscaping) when designing traffic management measures and ensure that the long-term maintenance needs can be met.

DOWNTOWN PARKING

Properly managed downtown parking is vital for implementing and maintaining the City's 2001 *Downtown and Riverfront Land Use Framework Plan*. This plan envisions a lively downtown area with a clear sense of place and identity, comprised of an attractive mix of uses and amenities. The city's downtown area will grow as an important employment center and therefore parking must be built and managed to serve the retail core as downtown transitions to a multimodal environment.

Problems

Currently, downtown Milwaukie is vulnerable to serving as an impromptu park-and-ride for people traveling to downtown Portland. Downtown residents and employees are parking in spaces that should serve visitors, which causes parking to spill over into neighborhoods. The parking lots that are available, and some downtown streets, are not well lit and do not feel safe. Downtown employees are often not aware of their parking and transportation options and the current parking permit system does not work as well as it could. As the downtown area evolves, the existing parking lots will be developed and other parking options will need to be considered.

Possible Solutions

There are two viable solutions Milwaukie can use to improve the downtown parking situation: parking management and parking supply. Parking must be managed to assure that priority land uses are supported with an effective and efficient system of access that caters to the needs of priority users. The City and the private sector can also invest in new parking supply to support downtown development.

Key Recommendations

- **Manage parking to support downtown revitalization**, according to the vision in the Downtown and Riverfront Plan. Manage on-street parking to serve adjacent ground-floor uses.
- **Keep an updated parking inventory** and conduct periodic parking use studies to understand how parking areas are used.
- **When parking areas are over 85% full**, adjust parking management practices to make the best use of available parking (adjust parking zones, increase prices, install parking meters, etc.).
- **Require the private sector to identify sufficient parking** for residential and commercial uses, but do not ask developers to "over-build" parking. Encourage shared parking arrangements.
- **Provide public off-street parking for downtown employees** as funds and property availability allows. First priority will be given to buildings and businesses existing in 2007.
- **Work with property and business owners** to decrease employees' need for auto parking as downtown transitions to a multimodal environment.
- **Develop a plan to locate a public parking structure** to support downtown, but only in collaboration with the downtown business community and only after a viable funding strategy is identified.

5.2.

Milwaukie's Community Vision

ALL ABOARD: MILWAUKIE'S COMMUNITY VISION

PROJECT OVERVIEW

Milwaukie All Aboard is a community visioning project that was launched in July 2016 and adopted by the City Council in September 2017. Over the course of 14 months, the City and its consultants gathered input from the community, and developed a Community Vision Statement that describes what Milwaukie community members want the city to be like in the year 2040. In addition, a 5-Year Action Plan was created that spells out how the community can achieve the vision, which will be periodically updated in the future. In addition, Milwaukie All Aboard will help inform the update of the Comprehensive Plan, the City's primary long-range planning document.



MILWAUKIE
ALL ABOARD

COMMUNITY INPUT AND OUTREACH

The visioning process set a precedent for the City on how to gather input from the Milwaukie community. Within the process, there were multiple opportunities for all members of the community to provide feedback.

Vision Advisory Committee (VAC)

To guide the process, a citizen-based Vision Advisory Committee (VAC) was formed and made up of 15 volunteer community members. Committee representation was diverse in terms of age, interests and background, and neighborhood representation. Supported with community feedback, the VAC was instrumental in helping shape the topics and themes in the Vision and developing action items, metrics, and recognizing partners.

Community Outreach

Significant community outreach occurred over the 14-month period. A thousand community members were engaged through various events and activities. A Youth Vision Action Team, made up of four Milwaukie High School students, helped extend the impact of those efforts. This included:

- 15 Summer fairs and events
- 20 Stakeholder interviews
- 18 Community conversations in fall 2016
- 4 Web-based surveys (both in English and Spanish)
- 2 Town halls (with simultaneous Spanish translation at one town hall)

- 3 Place It! workshops with urban designer James Rojas (with simultaneous Spanish translation at one of the workshops)
- 7 VAC committee meetings
- 5 Steering committee meetings
- 10 Community conversations in Spring 2017 (one community conversation in Spanish, one in Russian)

THE VISIONING AND ACTION DOCUMENT

[The Milwaukie Community Vision and Action Plan](#) has three distinct sections: the Milwaukie Vision for 2040, Goal Statements, and Superactions/Actions. The Vision for 2040 stated:

“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 neighborhood 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 prepare for emergencies, such as the Cascadia Event.

Milwaukie’s government is transport 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 entire document used a quadruple bottom line approach to guide decision-making and foster innovative thinking about how the Milwaukie community can be improved to achieve multiple objectives and provide the greatest benefits for People, Place, Planet, and Prosperity, also known as the “The Four P’s”.

The Four P's

The Vision and Action Plan applies this quadruple bottom line approach to frame the development of action items and identify priorities. The Four P's cover a wide array of areas where goals and action items can be placed. Under each of them includes 3 goal statements. The Four P's and what areas they may cover are listed below:

- People: Arts, community, education, happiness, health, innovation, safety
- Place: Housing, infrastructure, mobility, neighborhoods, parks
- Planet: Ecosystems, energy, environment, resilience
- Prosperity: Business, entrepreneurship, income, innovation, investment, jobs

Superactions

Building from a comprehensive action matrix, the community, City department heads, and partner agencies identified priority action items under each goal statement. These priority actions were then categorized and consolidated into five Superactions. These Superactions serve to unify 2017 City Council Goals with leading 2040 Vision and Action Plan Items across multiple components of the Quadruple Bottom Line framework, and will be used as an organizational framework for the Comprehensive Plan Update.

5.3.

Downtown
Design
Guidelines

MILWAUKIE'S DOWNTOWN DESIGN GUIDELINES UPDATE

PROJECT OVERVIEW

The Planning Department initiated work with the City's Design and Landmarks Committee (DLC) to update the photo images that are used to illustrate design guidelines for downtown buildings. As the work progressed, it was decided that the design guideline document needed to be refreshed. Staff identified numerous gaps and inconsistencies between the design guidelines and the downtown design and development standards. The inconsistencies have added unnecessary complexity and uncertainty to the development process in the downtown. Additionally, it is often unclear to site developers as to how to proceed efficiently and with clear direction through either the clear and objective standards process or through the discretionary guidelines process, and how to determine when a Type I, II, or III downtown design review would be necessary.

The work program has included the following tasks:

1. Review background materials and meet with Design and Landmarks Committee (DLC) to confirm understanding of needs/expectations.
2. Identify and assess gaps between the Downtown Design Guidelines and Design & Development Standards.
 - Identify any new standards that may be needed to fulfill the objectives of specific guidelines, including a consideration of the issue of cost.
 - Assess whether and how any guidelines should be adjusted to be consistent with the standards.
3. Evaluate the Downtown Design Review process and provide guidance about possible adjustments to what level of review is applicable when and with what approval criteria.
4. Provide recommendations for revisions to guidelines (including format of the guideline document) and to applicable code sections.
5. Draft sketches and/or provide annotated photos to illustrate expressed principles where useful.
6. Facilitate regular discussions with the DLC to discuss needs and to review consultant work.

Project Status: A consultant was hired to develop a set of initial recommendations. Staff and the DLC are in the process of refining the recommendations prior to preparation of a final draft set of code amendments that can be taken through the public hearing process and adopted.