
AGENDA

Steering Committee for Milwaukie Residential Standards Project

March 31, 2011

4:00 p.m. to 6:00 p.m.

PURPOSE

- Develop an understanding of national and Milwaukie housing trends
- Discuss Milwaukie's existing development standards, and share observations on how they could change.

SCHEDULE

- 4:00 Welcome – staff and committee introductions
- 4:10 Presentation on future housing trends, and what they might mean for Milwaukie
– Marcy McInelly, AIA (Urbsworks)
- 4:40 Presentation of Milwaukie's current development standards, as illustrated on six prototype sites in Milwaukie
– Marcy McInelly, AIA (Urbsworks)
- 5:00 Group Discussion:
- How can we (should we) ensure that new development is a good neighbor?
 - Should we apply similar controls to expansions as new?
 - What form should housing be allowed to take?
- 5:50 Summary and next steps
- Scheduling upcoming meetings

MEETING MATERIALS

The following documents are included in this mailing for review and discussion at the meeting (sent as hard copy, by request):

- Site Prototype Illustrations
- Issue Summary Sheets: Changing Demographics and Housing Choices; Infill Housing Design; and Infill Compatibility Issues
- List of Land Use Acronyms and Terms
- February 24 Meeting Notes

If you would like *additional background* on the project and issues we will discuss, the following documents have recently been added to the project website (see the back of this agenda for the full list of background material (<http://www.ci.milwaukie.or.us/planning/residential-development-standards-update-project>))

Tentative Steering Committee Meeting Agendas:

- ✓ **Mtg #1, February:** Introduction, overview of existing policies, and problems to solve. (City staff)
- **Mtg #2, March 31:** Set the housing discussion in context, considering changes in demographic and housing development trends. Presentation of site prototypes to illustrate the City's existing standards. Discuss potential approaches to creating and administering single- and multi-family compatibility and design standards. Discuss different forms housing can take.
- **Mtg #3 April 25:** No committee meeting; instead committee members should attend the public workshop on Housing Choices for Milwaukie. Will include descriptions of different types of housing, why people choose different housing types for different points in their lives. Housing choices workshop will set the context for the discussion of the types of housing that is or should be allowed in Milwaukie.
- **Mtg #4, May 26:** Staff will report on feedback from focus group meetings, interviews, and workshops. Committee will reflect on input received to date; discuss issues; craft preliminary policy recommendations on where to go from here.
- **Mtg #5 June 23:** Presentation of draft design and development standards.
- **No meetings July & August.**
- **Mtg #6, Sept:** Review and discuss allowed uses, recommendation on design development standards.

Background Material Available on the Steering Committee Website:

(Any can be mailed to SC members upon request)

- Report: Code Assessment Action Plan, 2008 Brief identification of issues with the City's residential development standards, and suggested solutions.
- Report: Code Assessment Final Report, 2008
- Memo: Summary of Milwaukie's Existing Residential Development Standards, 2010
- Memo: Summary of Milwaukie's Comprehensive Plan Residential Policies, 2010
- Memo: History of the City's Residential Development Standards, 2010
- Memo: Summary of the City's Allowed Housing Typologies
- Milwaukie Housing Examples Slideshow
- Project Timeline and Scope
- Basics of Development Review
- Current adopted zoning code that applies to residential development

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS

PROTOTYPE SITE ILLUSTRATIONS

1 | Project Purpose

Milwaukie is a city of neighborhoods. It is also a city of large lots and older homes, so there is room for both new "infill" development and expansion of existing homes. Many in the community have called for more attention to the development and design standards for infill residential development. The purpose of this project is to review all policies that shape new and expanded single- and multifamily development, with the goal of creating a better set of standards that do not inadvertently discourage investment but result in a higher level of quality when projects are built.

Residential **development standards** regulate where a dwelling is placed on a lot and how far it is from dwellings next door (through minimum lot sizes, minimum setbacks, maximum lot coverage, and minimum lot width and depth); how tall a dwelling is (through maximum heights); and what type of dwelling – single-family detached, multifamily, rowhouse, etc - can be built on a site (through use zones).

Residential **design standards** apply to single-family residential development and regulate how a dwelling looks; this can be done by requiring a certain number of windows, a door to face a particular way, and requesting or requiring façade treatments or materials.

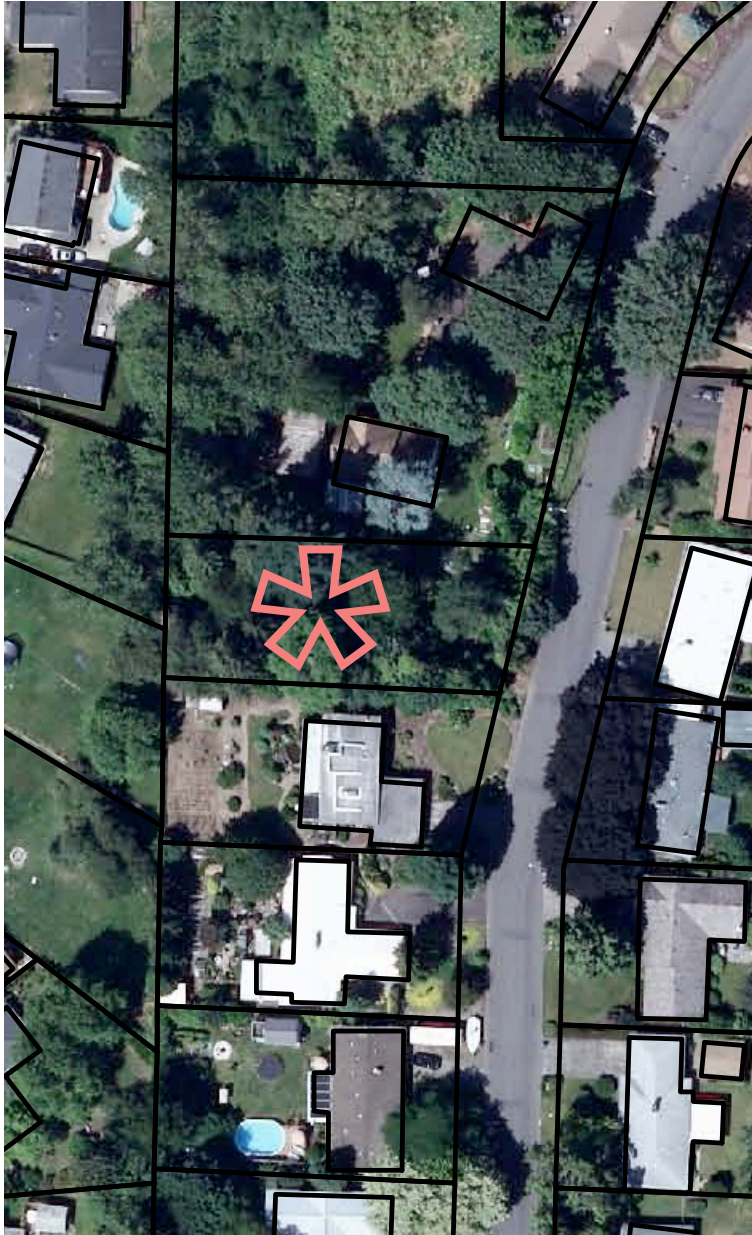
2 | Document Purpose

The purpose of this document is to help community members understand and analyze the City's existing development standards through illustrations and images. Each page of this document shows a site; describes the area surrounding the site (the context); and lists the development standards that apply to a case study site. The graphics represent the maximum allowable building envelope (the maximum height, width, depth, and lot coverage) of a dwelling that could be built on the site.

Later in the project, these sites will also be used to demonstrate alternative approaches to development standards and the potential outcome of those approaches.

None of the case study sites are targeted for actual redevelopment; these illustrations are intended only to show how sites with similar characteristics could be developed using the City's current residential development and design standards.

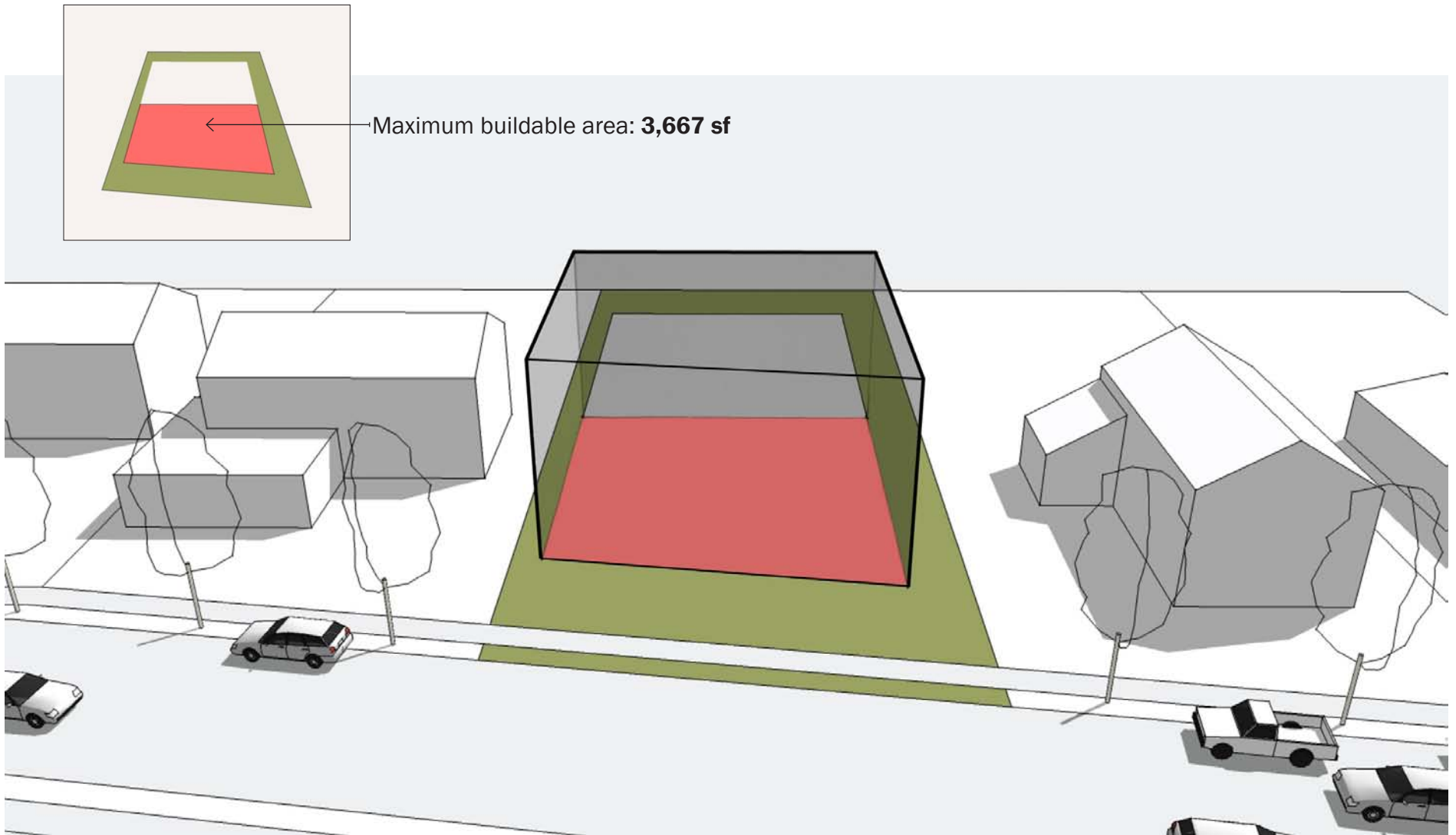
Case Study 1 | SFR



Oversized lot in an established neighborhood of large lots with consistent setbacks. The predominant housing type in the immediate area is 1- to 1.5-story ranch-style single family homes built between 1940 and 1960.

SITE INFORMATION	
Zoning	R-7
Site width	74 Feet
Site depth	164 Feet
Lot area	12,224 square feet
Applicable Standards	
Front setback	20 feet
Side setback	10 feet / 5 feet
Rear setback	20 feet
Max lot coverage	30%
Min lot area	7,000 square feet per unit
Max building height	35 feet (2.5 stories)
Min lot width	60 feet
Min lot depth	80 feet

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS
PROTOTYPE SITE ILLUSTRATIONS

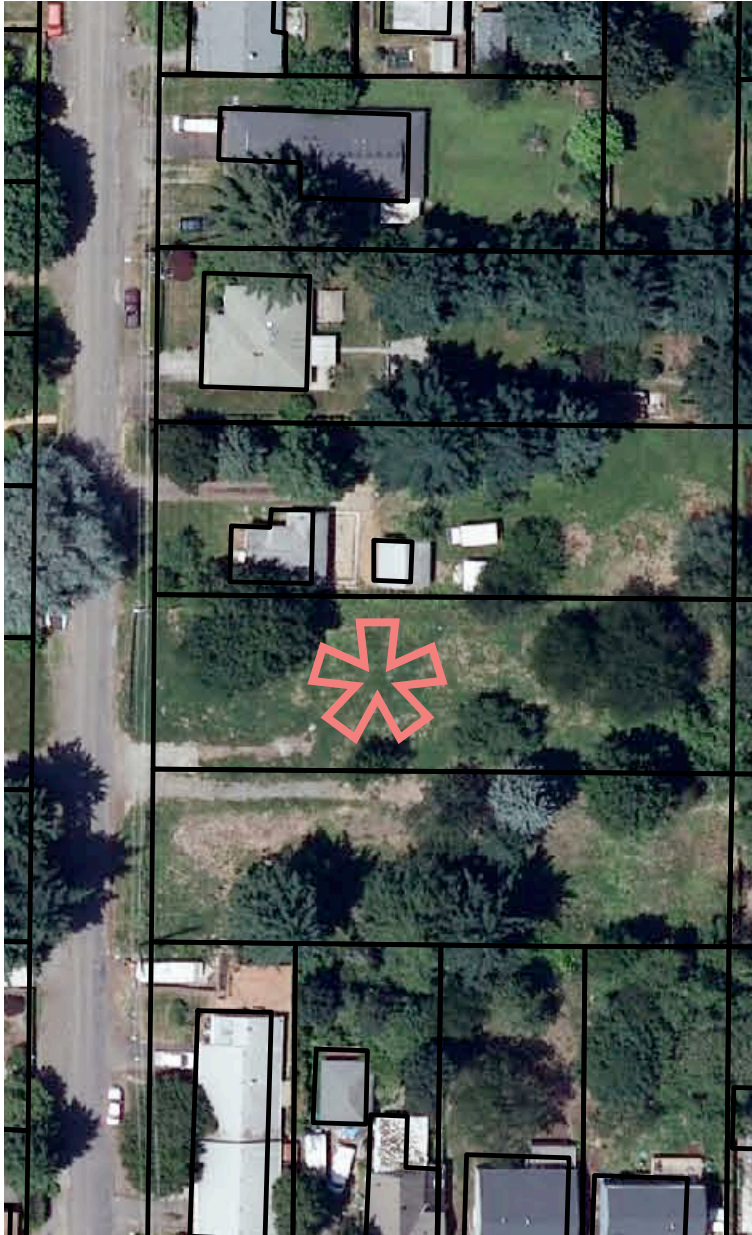


Maximum buildable area: **3,667 sf**

Maximum
buildable area

Maximum
building envelope

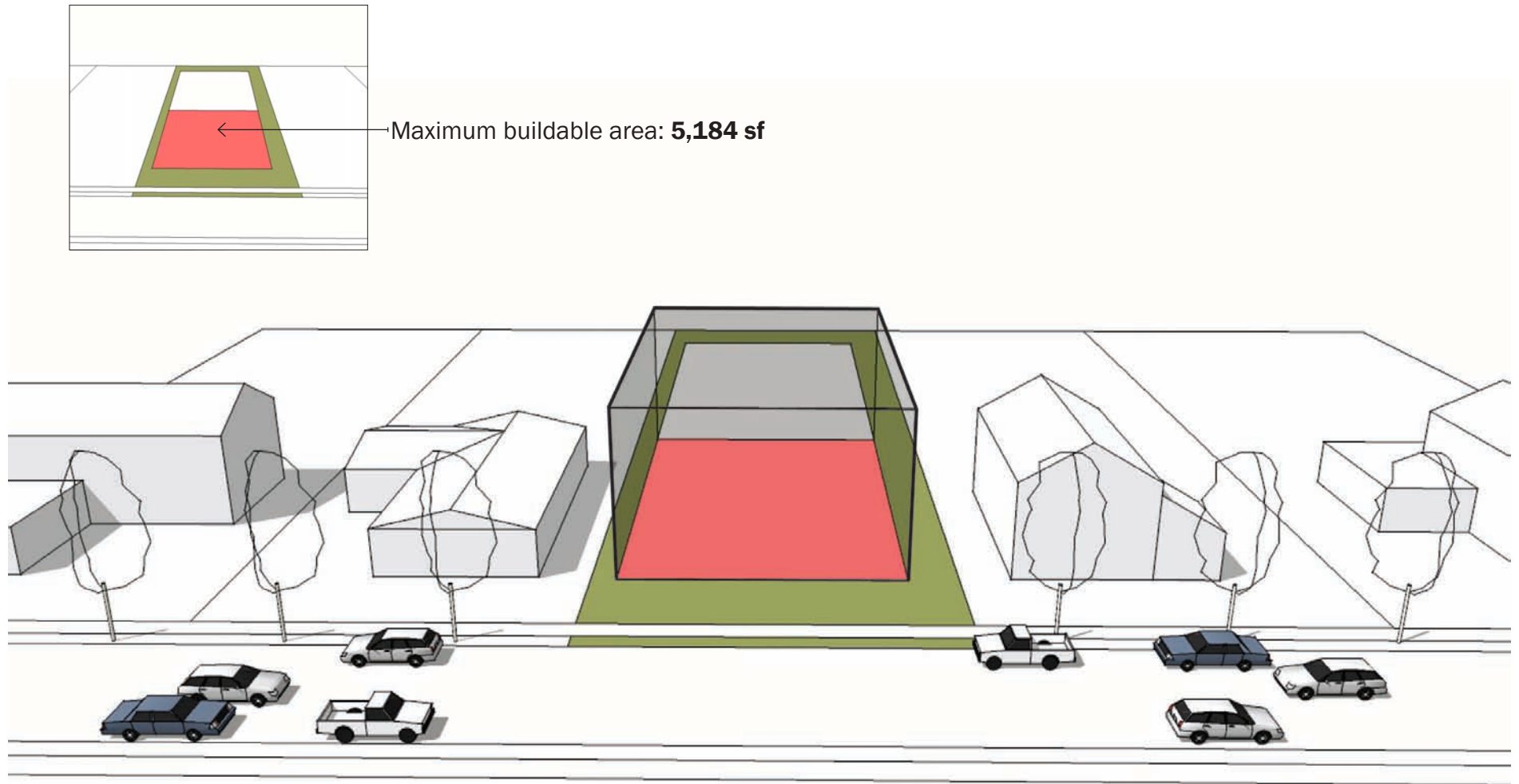
Case Study 2 | SFR



Oversized lot in an established neighborhood of deep, narrow lots with a variety of house sizes and inconsistent setbacks. The predominant housing type in the immediate area is 1- to 1.5-story single family homes of various architectural styles and periods.

Site Information	
Zoning	R-7
Site width	72 feet
Site depth	240 feet
Lot area	17,280 square feet
Applicable Standards	
Front setback	20 feet
Side setback	10 feet/ 5 feet
Rear setback	20 feet
Max lot coverage	30%
Min lot area	7,000 square feet per unit
Max building height	35 feet (2.5 stories)
Min lot width	60 feet
Min lot depth	80 feet

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS
PROTOTYPE SITE ILLUSTRATIONS



Maximum buildable area

Maximum building envelope

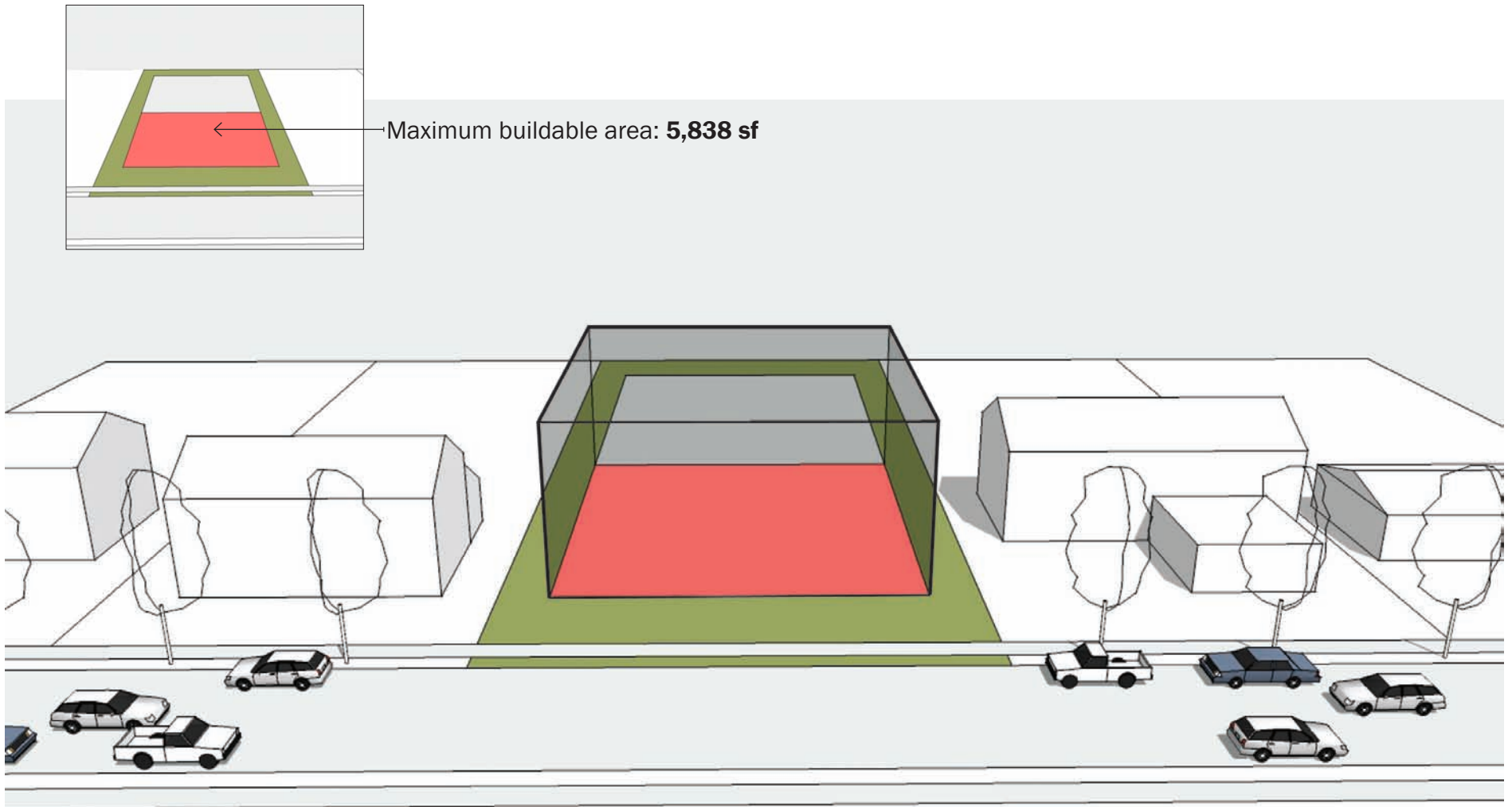
Case Study 3 | SFR



Oversized lot in a redeveloping area. The predominant housing type in the immediate area is 1- 1.5-story ranch-style single family homes built in the 1940s, '50s, and '60s.

Site Information	
Zoning	R-10
Site width	93 feet
Site depth	235 feet
Lot area	19,462 square feet
Applicable Standards	
Front setback	20 feet
Side setback	10 feet
Rear setback	20 feet
Max lot coverage	30%
Min lot area	10,000 square feet per unit
Max building height	35 feet (2.5 stories)
Min lot width	70 feet
Min lot depth	100 feet

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS
PROTOTYPE SITE ILLUSTRATIONS



Maximum buildable area

Maximum building envelope

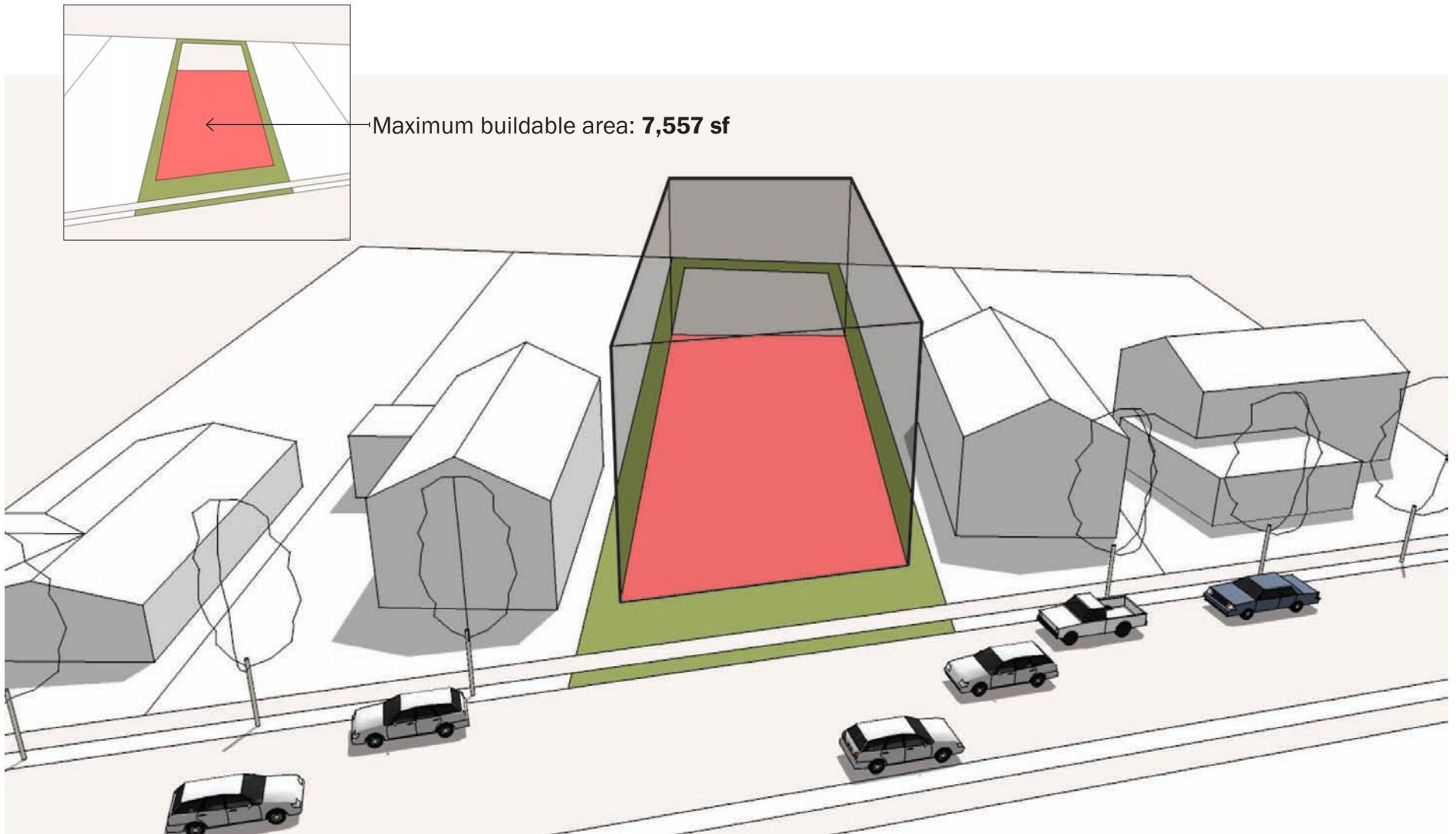
Case Study 4 | MFR



Oversized lot in an established neighborhood. The site is currently developed with a single family home and zoned for multifamily dwellings. The predominant housing type in the immediate area is multi-story multifamily dwellings.

Site Information	
Zoning	R-2
Site width	52 feet
Site depth	224 feet
Lot area	16,794 square feet
Applicable Standards	
Front setback	15 feet
Side setback	5 feet
Rear setback	15 feet
Max lot coverage	45%
Min lot area	5,000 square feet per unit (2,500 sf/unit over one unit)
Max building height	45 feet (3 stories)
Min lot width	50 feet
Min lot depth	80 feet

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS
PROTOTYPE SITE ILLUSTRATIONS



Total number of dwelling units: **6**
(estimated based on lot area and density standards)



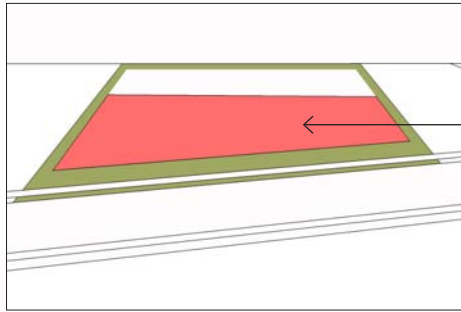
Case Study 5 | MFR



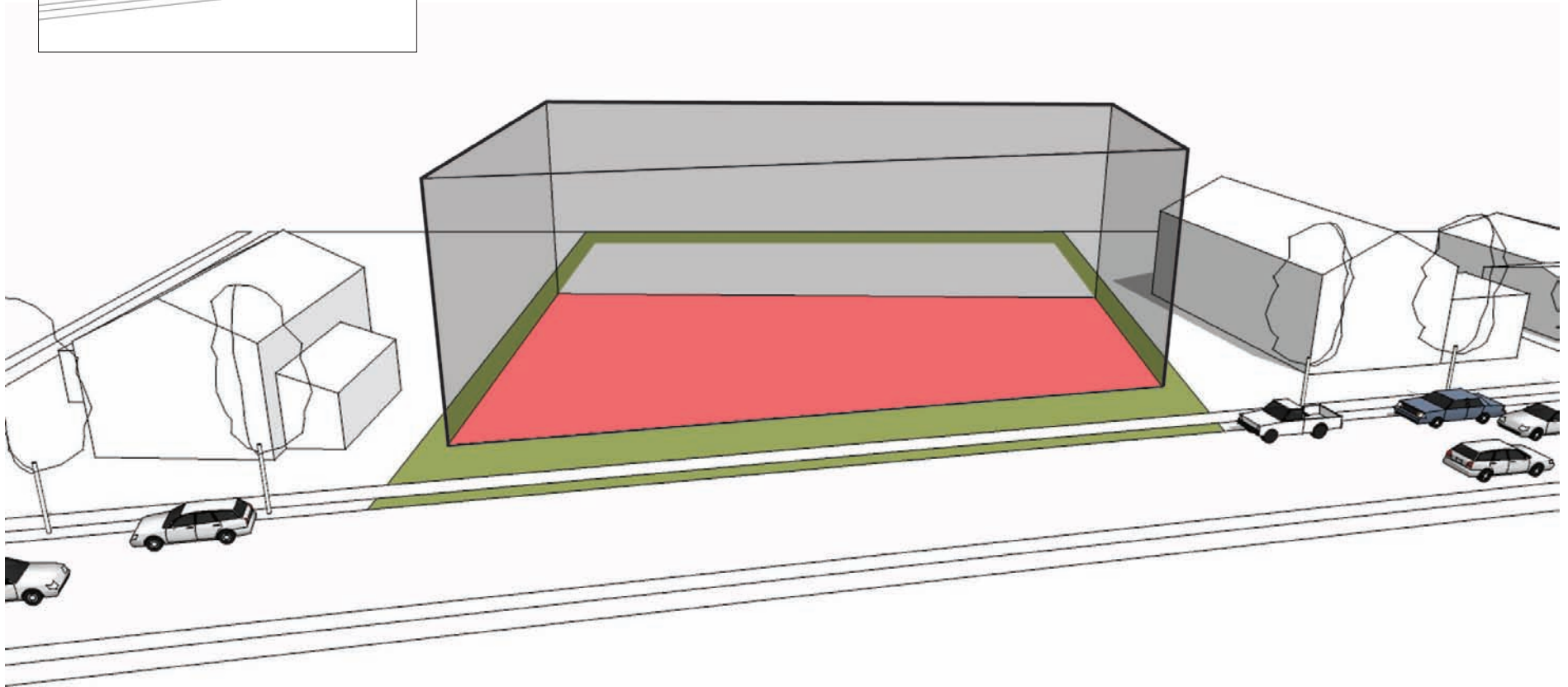
Oversized lot in an established historic neighborhood. The predominant development type in the immediate area is multi-story multifamily dwellings; institutional uses; and commercial uses.

Site Information	
Zoning	R-2
Site width	298 feet
Site depth	184 feet
Lot area	23,242 square feet
Applicable Standards	
Front setback	15 feet
Side setback	5 feet
Rear setback	15 feet
Max lot coverage	45%
Min lot area	5,000 square feet per unit (2,500 sf/unit over one unit)
Max building height	45 feet (3 stories)
Min lot width	50 feet
Min lot depth	80 feet

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS
PROTOTYPE SITE ILLUSTRATIONS



Maximum buildable area: **10,459 sf**



Total number of dwelling units: **8**
(estimated based on lot area and density standards)



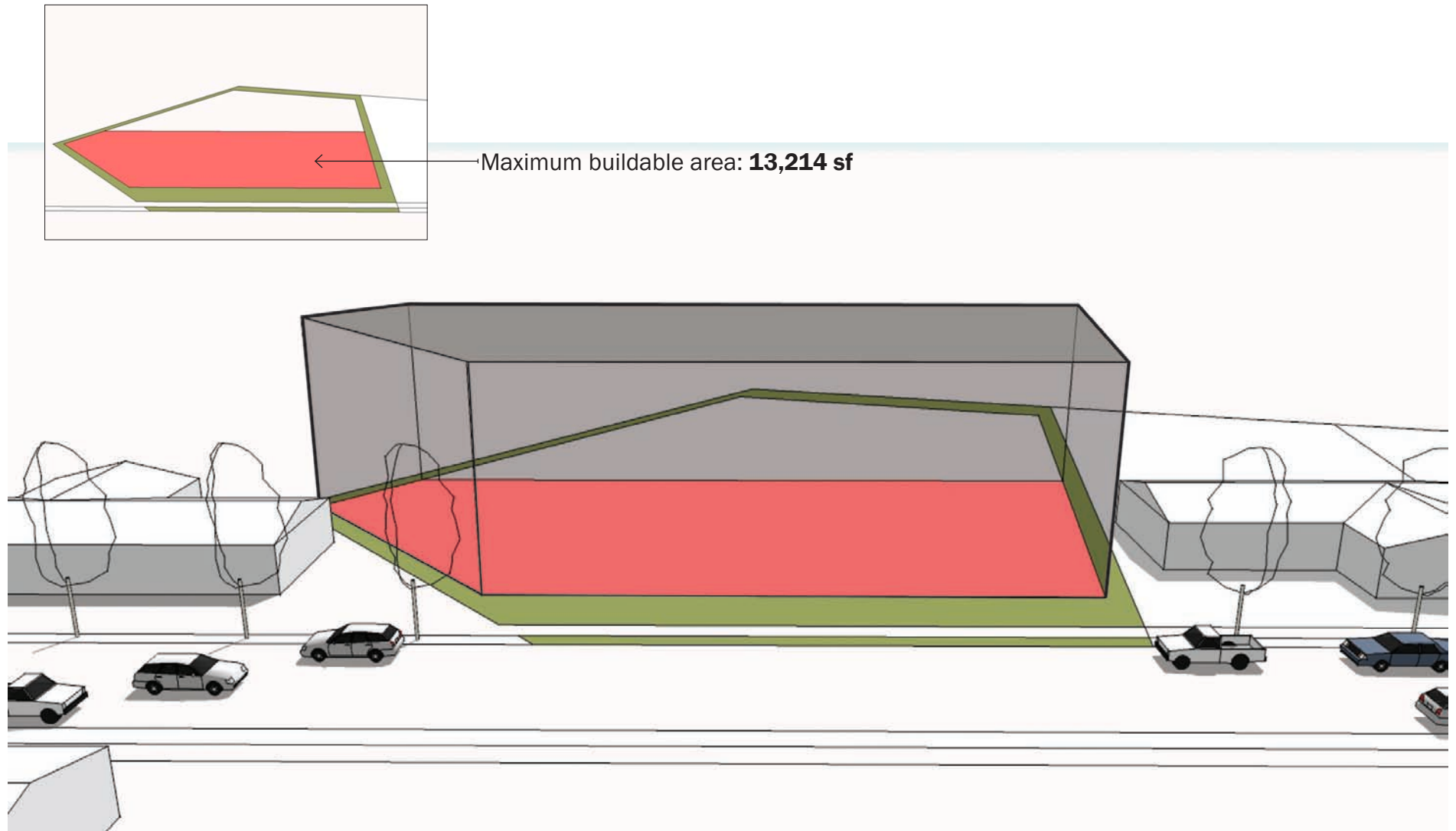
Case Study 6 | MFR



Oversized lot currently developed with a single family home and zoned for multifamily dwellings. The predominant development type in the immediate area is single family homes and institutional uses.

Site Information	
Zoning	R-2
Irregular shape	
Lot area	29,364 square feet
Applicable Standards	
Front setback	15 feet
Side setback	5 feet
Rear setback	15 feet
Max lot coverage	45%
Min lot area	5,000 square feet per unit (2,500 sf/unit over one unit)
Max building height	45 feet (3 stories)
Min lot width	50 feet
Min lot depth	80 feet

MILWAUKIE RESIDENTIAL DEVELOPMENT STANDARDS
PROTOTYPE SITE ILLUSTRATIONS



Total number of dwelling units: **11**
(estimated based on lot area and density standards)



Design Standards | SFR

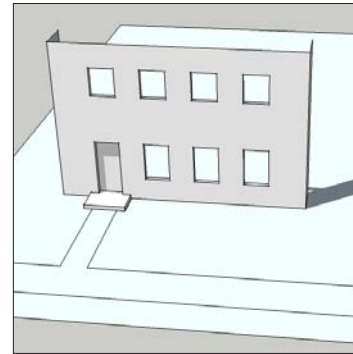
Required Design Standards

Main Entrance Standard

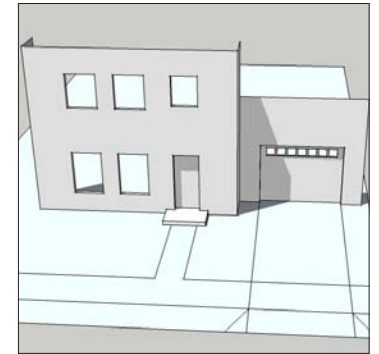
The main entrance of the dwelling shall be oriented to the street upon which the lot fronts or which provides vehicle access. The main entrance shall be considered to be oriented to the street if the front door faces the street or if the front door leads to a porch, patio, or sidewalk that is located in the front yard.

12% Window Standard

The area of windows on all exterior wall elevation(s) facing the street shall be at least 12% of the area of those elevations. Roofs, including gable ends, shall not be included in wall area.



12% Window Standard:
building elevation only



12% Window Standard:
garage windows contribute

Design Standards Menu

- Covered porch at least 5 feet deep.
- Recessed entry area at least 2 feet from the exterior wall to the door.
- Bay or bow window that projects at least 1 foot from exterior wall.
- Building face offset at least 16 inches from one exterior wall surface to the other.
- Dormer
- Roof eaves minimum projection of 12 inches from the intersection of the roof and the exterior walls.
- Roof line offsets at least 16 inches from the top surface of one roof to the top surface of the other.
- Garage attached garage
- Cupola
- Roof material: tile or wood shingle
- Material: horizontal lap siding.
- Material: brick: covering at least 40% of the building elevation that is visible from the street.

PROTOTYPE SITE ILLUSTRATIONS



Existing development that meets SFR design standards

CHANGING DEMOGRAPHICS AND HOUSING CHOICES: NATIONAL TRENDS

Demographic trends and the recession and how they affect housing choices

Demographic trends and reactions to the recession are combining to redefine the future of homeownership, renting and the suburbs in America. Trends that were identified in the 2000 and 2010 Censuses, have been magnified by the recession, and are now assured to redefine the housing landscape.

- *Households will be smaller, and more likely to be headed by women;*
- *Baby-boomers will continue to redefine retirement, living longer and demanding a wider range of housing choices than their parents did, including downsizing to walkable urban areas, “lifestyle renting” (explained further below), or aging in place;*
- *Younger baby-boomers in their prime earning years, and years away from retirement, saddled with underwater mortgages and declining home values, are not able to move to where the jobs are;*
- *“Empty nesters,” couples whose children are no longer at home, will continue to grow in number, especially among Asians and Latinos;*
- *Generation Y, the children of the baby boomers, will continue to be drawn to diverse, walkable suburbs and urban areas in large numbers;*
- *Foreign-born residents, legal and illegal, will increase at a faster rate than any other segment of the population, mostly due to their American-born children and grandchildren;*
- *The American-born children of immigrants, (second generation immigrants) will surpass not only their parents in education and income, but also native-born Americans in their age group, and will dominate the housing market with their numbers and their preferences, which generally match those of Generation Y;*
- *Second generation immigrants and Generation Y will create a wave of household formations (when new, independent households are formed) even larger than the wave created by baby-boomers, and*
- *Homeownership levels are now reduced to levels of the 60s, 70s and 80s and will never return to pre-recession levels, but renting is strong and demand for rental housing may outstrip supply as early as 2012.*

The 2000 and 2010 Censuses revealed that the American household is changing, illustrating a striking divergence from the “typical” household defined as two-parents with 2.5 children. Four key trends emerged: the aging of baby boomers, shrinking household sizes, the geographic redistribution of populations between the suburbs and cities, and the growth of minority populations. At the same time, the recession has forced a fundamental shift from the long-held American Dream of homeownership, and younger generations just entering the housing market are more likely to rent longer, and place more emphasis on buying for shelter rather than for investment purposes. These trends, individually and combined, point to the need for a paradigm shift in housing design and community planning.

Smaller families need smaller houses

For decades, the majority of American households consisted of two parents and 2.5 children. Now the majority of households are either married without children, or headed by single persons. Aging baby boomers are adding to this increase, as are marital status trends, such as delayed marriage, higher divorce rates, and lower remarriage rates. The continued growth of unmarried men and women will increase the demand for smaller, more affordable housing options, in both rental and for-sale markets. Housing costs for these households is often more than 50% of monthly income. In addition, the majority of these households are headed by women, and the persistence of the male-female worker earnings gap will exacerbate the financial burden for female-headed households. The traditional family is a shrinking fraction of homebuyers, something the homebuilding industry has been slow to recognize. Only about a third of new households formed consist of a married couple with children. In addition, since the 1950s, even while household sizes have shrunk, the size of the average house has doubled.

The fastest-growing segment in household size recently has been single-person households, most of which are made up of women.

"Housing in America: The Next Decade," Urban Land Institute, 2010

Baby-boomer generation and associated housing trends

For decades, the graph depicting life cycles for American adults assumed a high mortality rate at young age that decreased over time, with relatively few surviving to old age. Advances in medicine and health care have increased adult life expectancies. Low fertility rates and the aging baby-boomer generation is creating a population shift; a significant wave of baby-boomers, individuals currently between 45 and 64, who will account for a quarter of the US population in 2020, and half of the population by 2030. Said another way, there are 78 million baby boomers, the oldest of whom will turn 65 in 2011. From then on, the population of seniors will grow at a faster rate than the total population of the United States. The housing provided for young families with children will not suit these individuals. Many couples whose children have reached the age of 18, called empty nesters, no longer need or want to live in isolated, large, suburban homes. Some of this population is expected to move to communities that fit their lifestyle and life stage, often moving to higher density, urban neighborhoods. A 2009 real estate survey found that 75% of retiring baby-boomers prefer to retire in mixed-age and mixed-income communities in urban settings. Not all will move to the central city, so walkable traditional town centers, or urbanized suburban town centers are likely to see an influx. Many of these baby boomers may defer moving to retirement or life care communities unless they are adapted to meet their preferences. Many baby-boomers are expected to rent multi-dwelling units, contributing to a trend called "lifestyle renting," when people rent by choice and not out of necessity. The change in tax laws that eliminated the capital gains penalty on sale of a primary residence has made renting more attractive to seniors.

Another segment of seniors is expected to push for changes that allow them to “age in place,” or to remain in their large, suburban homes safely and comfortably, with assistance. According to recent surveys, nine out of ten seniors prefer to remain in their homes. Home ownership among this segment of the population is very high, consequently, the baby-boomer tsunami also represents a housing stock maintenance tsunami; as baby-boomers who own homes and wish to remain in them age, their homes age and require increased maintenance. Fixed incomes and increasing medical needs will drive the need for assistance, including assistance with building modifications and medical assistance. Coordinated, comprehensive health and housing services for this population will become more organized, building on current models such as the NORC-SSP, in which Supportive Service Programs (SSPs), are targeted to communities with a large percentage of older persons residing naturally, through evolution rather than design, known as “NORC”s, or Naturally Occurring Retirement Communities. Another option for seniors is new homes specifically designed for their age group, in age-restricted communities that provide different levels of personal assistance.

The recession has revealed two separate cohorts of the baby boomers, the older baby boomers, aged 55 to 64, and the younger group, aged 46 to 54, just entering their prime earning years. The younger group accounts for two-thirds of all baby boomers; only one-third is approaching retirement within this decade. The younger baby boomer group faces distinct challenges, exacerbated by the recession. They have decades before they consider retiring, and their children are likely to be at home, either because they have not left yet, or because they have returned after leaving. Many find their suburban homes “underwater” (when the mortgage has a loan balance exceeding the value of the home), and even those that are not underwater are difficult to sell. For all these reasons, their mobility is hampered, limiting their ability to move to jobs. In addition, these younger boomers purchased their suburban homes from the older baby boomers when they “moved-up,” and now find themselves unable to sell because the move-up market is smaller; there are fewer members of generation X, now in their late 30’s to mid-40’s, to sell to. As younger boomers face flat incomes, lost equity in their homes and a smaller group of move-up buyers, the market for large suburban homes is projected to be weak over the next decade, compounded by oversupply; some reports say that there may be enough large suburban homes to meet market demand for the next decade, despite the growing US population.

Generation Y and associated housing trends

Generation Y, the children of the baby boomers, also known as the echo boomers, the net generation, or millennials, is generally the group of people in their late teens and early 30s, and accounts for about 83 million

The large share of second-generation Americans (children born in the US to immigrant parents) among the echo boomers—more than twice the share in the baby-bust generation and more than three times that in the baby-boom generation—will be important in shaping the characteristics of future households. This is good news in that US-born children of immigrants have incomes and education levels more like those of other native-born Americans than of their parents. In fact, among householders aged 25–64, second-generation Americans typically have higher household incomes than both foreign-born and other native-born households of all races and ethnicities.

“The State of the Nation’s Housing 2010” Joint Center for Housing Studies of Harvard University, 2010

Married couples without children (including empty nesters) will be the fastest-growing household type, followed closely by single-person households. While the number of married couples with children will fall by nearly a million among whites, it will increase by more than a million among Asians and Hispanics.

The State of the Nation’s Housing 2009” Joint Center for Housing Studies of Harvard University, 2009

individuals. As this group has become a dominant force in the economy, numerous reports have tracked their characteristics, revealing a generation that values community, ideas and information, is socially active and keenly aware of climate change and peak oil, and the unprecedented effects these events will have on their generation. According to many reports, they are the greenest generation yet. They value diversity, and don't perceive racial or ethnic differences as barriers, the way the way older generations have; rather, they cluster around educational levels and cultural affinities.

They are economically constrained and will have less money to spend on housing. US Census reports show incomes in this group have fallen 12 percent for men and three percent for women within the last decade. While this group is at the traditional age of highest household formation, or the age when they are most likely to form new, independent households, the rate of US household formation has fallen by more than half in the past two years. In the 1990s, many Generation Y members returned to live with their parents; this has increased due to the recession. Other members of Generation Y share housing costs, or have gone back to school to weather the recession. Some reports have projected that when jobs are available again for this group, they will move into the housing market in force, creating new demand in both rental and for sale housing. According to a 2008 real estate survey, this group wants to live in walkable urban areas, not in the suburbs where they were raised, and they will rent and live in smaller spaces to do so. Generation Y may rent for longer portions of their lives than past generations did, and are disillusioned about homeownership as a way to build wealth, especially since the recession.

Real estate predictions state that in order to attract this generation to buy their first homes, builders will need to offer starter homes that are small, simple, on small lots, well-designed, and built to green energy standards. When they have children, they will look for good public schools. This may mean moving to the suburbs, more likely the older, closer-in and less expensive suburbs or compact town centers, rather than the low-density outer suburbs. Alternatively, they may stay and becoming involved in improving the schools in their urban neighborhoods.

Immigrant populations and associated housing trends

Foreign-born people, both legal and illegal, now account for 40 million residents in the US, and represent 13 percent of the population, and their impact is far greater when their US-born children and grandchildren are included. According to reports, the Latino population, already the nation's largest minority group, is projected to triple in size from its current level by 2050, and, combined with other minorities, will account for over 70 percent of the nation's population growth. This increase is a result of births in the US rather than immigration. Sometime before 2050, non-Latino whites,

The U.S. population is growing at a rate of 2.5 million to 2.8 million people per year. The size of households, however, has been on a long-term decline: it was 4.6 people in 1900, 3.38 in 1950, and 2.6 in 2000. Recently, however, it has begun to increase slowly due largely to immigration.

...lower housing costs often mean higher travel costs and times. On average, low-income households with children that spent less than 30 percent of monthly outlays for housing devoted 4.4 times as much to transportation as those with high housing outlays. Indeed, even those households with affordable housing still had to dedicate over 37 percent of their total outlays to housing and transportation combined.

now a majority population, will become the largest minority, as its numbers increase more slowly than those of other racial and ethnic groups.

The effect of this demographic shift is significant in numbers alone, and when combined with housing preferences and patterns, which are very different from those of non-Hispanic whites, is extremely significant. These immigrants tend to be younger, have larger families and more traditional households. They are more likely to favor large houses because they have larger, multi-generational families living in one house. These households are also more likely to live in poverty, and have lower education levels. Immigrant populations tend to cluster together, and over the last two decades these clusters have moved from the central cities to the suburbs.

Prior to the recession, this group tended to move to the suburbs; now they may want to move to the suburbs, but will find housing too expensive, even after the current drop in prices. Furthermore, the cost of transportation to outer suburbs will wipe out any savings that may be gained in lower house costs. While immigrant populations tend to move to national norms after the first generation, in education, incomes and lifestyles, the recession is likely to slow this transition, delaying growth in immigrants' incomes and wealth.

Post-recession: the future of homeownership, the suburbs and renting

Real estate researchers are emphatic that the age of suburbanization and growing home ownership that characterized US in the postwar decades is over. Demographic trends that were becoming apparent in the two decades before the recession (low immigrant homeownership, Generation Y preferences, and real estate markets favoring urban cores in some cities), combined with specific responses to the recession, have irreversibly altered the dominant pattern of homeownership.

The recession has caused homeownership numbers to decline to the lowest levels in twenty years. Numbers are now in line with homeownership levels of the 60s, 70s and 80s. During the 2000s, homeownership reached an all time high of 69.9 percent (in 2005). There is agreement among researchers that homeownership will probably never return to this level. After the recovery, homeownership may return to pre-1990 levels, to the low 60 percent range. Foreclosures and underwater mortgages (a predictor of imminent foreclosures) will continue to add to the decline in homeownership, and slow appreciation of home value will dampen interest, and add to a widespread pessimism about the value of homeownership. According to the Wall Street Journal in January 2010, 42 percent of people who once purchased a home but don't currently own, don't think they'll ever own again.

More people will stick with renting, either by choice or necessity. A 2010

The percentage of new housing production that is multifamily will increase as production returns because most new households will be members of generation Y and immigrants, both of which will be renting in large numbers. This will be reflected in a decline in the homeownership rate.

...once the economy recovers and household formation resumes, the demand for urban housing will greatly outstrip the supply. This imbalance is likely to continue for the rest of the current decade and beyond. Producing enough urban housing to meet this demand, even in the close-in suburbs, requires infill development, which is time consuming and costly.

survey conducted by the National Apartment Association found that more than 76 percent of people say they would prefer to rent a home than buy one, up from 5 percent in 2009. Reasons cited include having no responsibility for repairs or maintenance, not being affected by unpredictable real estate markets, and not being susceptible to foreclosure.

Construction of rental units is one the strongest real estate markets now, and is predicted to be even stronger in years 2012 through 2014. Much of this rental housing will be in the form of infill. If the economy is recovered by 2014, with unemployment down to 6 or 7 percent, as expected, housing demand, especially rental housing demand, should rebound. However, researchers are concerned that supply will not meet demand in coming years, due to the low rate of multifamily starts now.

Trends all point to a demand for urban housing, in the form of compact infill housing, for rent and for sale, close to affordable transportation. Producing enough urban housing to meet the demand will be a significant challenge for many towns, cities and suburbs. Removing barriers to infill is important now. Otherwise, members of Generation Y and second generation immigrants will be forced to move to outer suburbs, instead of to the urban and walkable suburban town centers that they would choose if the housing there were available and affordable.

With the share of minority renters rising, demand for larger and more child-friendly units is likely to increase. On average, minority renter households include 2.8 persons and white renter households include 2.1. Even controlling for age, minority renter households are larger. For example, among renters aged 35-44, minority households have an average of 3.2 people, compared with just 2.6 for whites. A major difference is in the number of children present.
The State of the Nation's Housing 2009"
Joint Center for Housing Studies of Harvard University, 2009

(Quotes from Housing in America: The Next Decade," Urban Land Institute, 2010, unless otherwise noted)

References and Additional Reading

- Mclwain, John. "Housing in America: The Next Decade," Urban Land Institute, 2010.
- "The State of the Nation's Housing 2010" Joint Center for Housing Studies of Harvard University, 2010.
- "The State of the Nation's Housing 2009" Joint Center for Housing Studies of Harvard University, 2009.
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INFILL HOUSING: TENANCY, TYPOLOGY AND DESIGN

What is infill housing?

Infill housing is a term that encompasses a broad range of housing types, but is usually applied to housing that is fitted into already developed areas. Infill housing can be the result of dividing extra large parcels, development on vacant lots, or replacing existing buildings. Infill housing can also be small units, either individual units or groups of units, which occupy lots smaller than the conventional 5,000 to 6,000 square foot lots that typify postwar suburban housing. An example of this type of infill is the ADU, or Accessory Dwelling Unit, which takes the form of an additional unit on a conventional lot, and occupies the lot along with the original home. At the other end of the spectrum in size, infill can take the form of multiple dwellings in a single building that replaces the original home on a conventional lot. Variations on this type include an original home that is converted to multiple dwellings, or an original home that is surrounded by multiple, smaller cottages, or a combination. Sometimes this type of infill occupies lots that have been aggregated, and are larger than the typical single dwelling lot.

The future of infill housing

Infill is going to be an increasingly important form of housing for several reasons. Changing demographic trends such as smaller household sizes, aging baby-boomers and the future wave of homebuyers and renters of the Generation Y (which includes second-generation immigrants), will continue to push for smaller, more affordable units, both for rent and for sale, in walkable areas with affordable transportation choices, including transit. Walkable urban areas, suburban town centers and retrofitted suburban areas stand to benefit from these trends.

Post recession, homeownership numbers will stay low, and renting will be the best option for many people, by choice or necessity. In the next few decades, the homebuilding industry will be scrambling to respond to a severe undersupply of small compact housing, for rent and for sale. But homebuilders and developers will not be the only ones building infill housing; infill housing is a do-it-yourself phenomenon, and individuals who have never developed property, including some residents, will take advantage of infill options, if they are allowed to.

Infill development can be costly and difficult because of land costs, complex and out-of-date zoning and building codes, and community opposition. However, ***communities that are actively engaged in defining the type of infill that is appropriate for their community, building community support, and adjusting their codes and design review to encourage, rather than discourage infill, stand to gain high quality affordable infill.***

There are many people who want a more urban lifestyle but want to stay close to their friends in the suburbs, do not want to live in the "big city," or simply cannot afford to live downtown. These people will be looking to live in suburban town centers that can provide real urban amenities—namely, a wide mix of housing, stores, and services; a vibrant, diverse community of people; and an attractive, walkable central area. Those areas that have good public transportation within them and transit links to the city and other parts of the region are likely to be the most successful...

"Housing in America: The Next Decade," Urban Land Institute, 2010

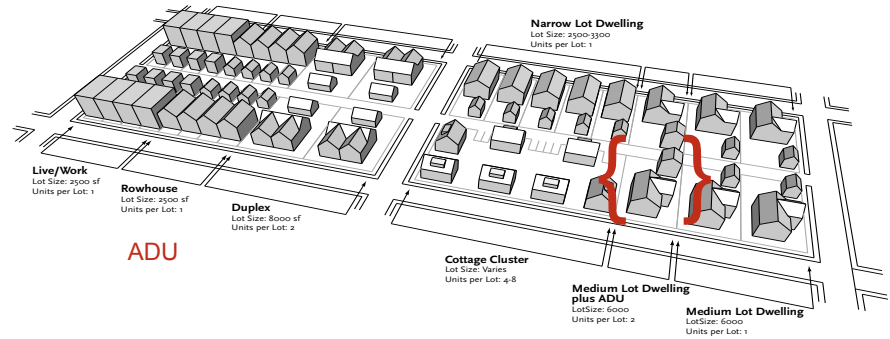
Infill typology

Below is a physical description of different types of infill housing, the types of people who live in each, whether they rent or own, and who is likely to build each type.

Accessory dwelling unit (ADU) Small living unit located on the same lot as a single-family house. Often rented, and sometimes occupied by a family member.

Variations

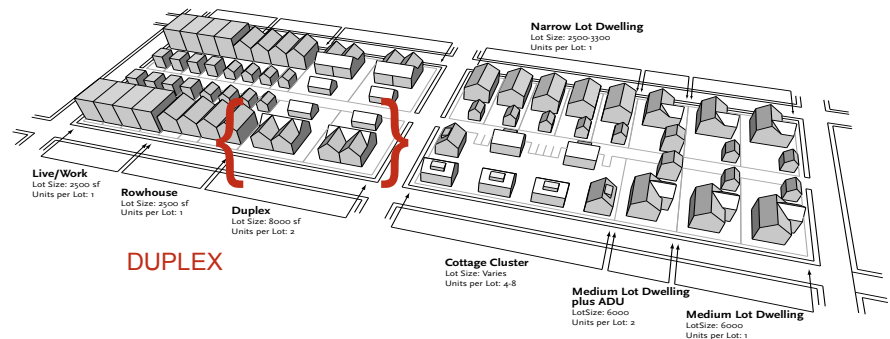
- *Attached ADU—Added to or within the existing structure*
- *Detached ADU—Detached and physically separate from existing structure*



Duplex Two units on a shared lot. The number of allowed units is determined by the zoning. Can be side-by-side, like townhouses, or stacked. Often designed to look like single dwellings, and to blend in with surrounding traditional neighborhood. Can be rented or owned.

Variations

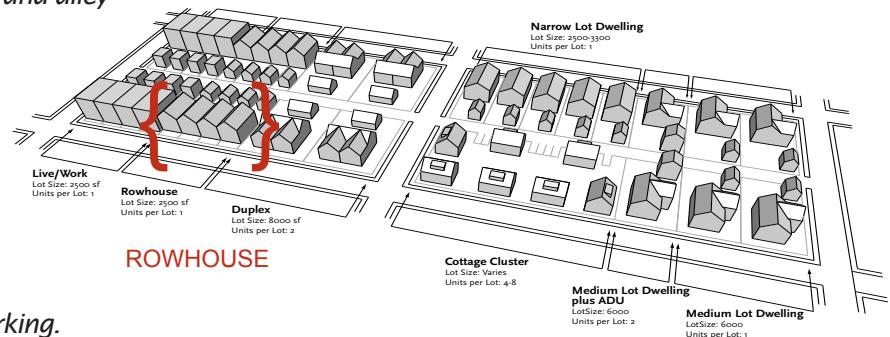
- *Multiplexes—Most commonly triplexes through sixplexes. Units can be stacked or side-by-side, like townhouses. These are often designed to look like a large house.*



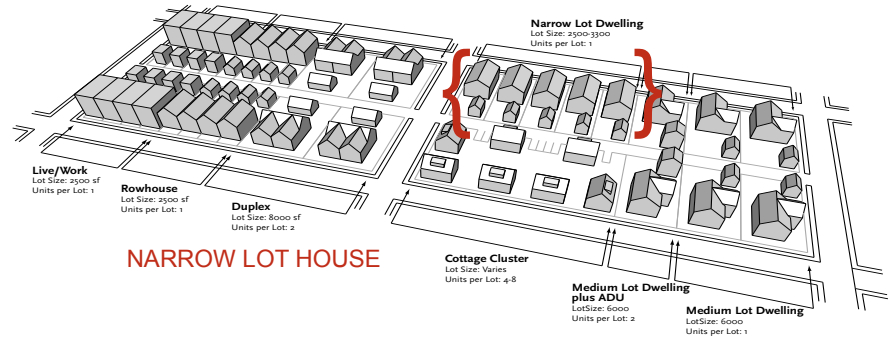
Rowhouse / townhouse Attached units, each on a separate lot, and each with its own entry from a public street. Often multiple stories tall. Usually owned.

Variations

- *With detached garages at the back and alley access.*
- *With attached garages at the back and access from an alley or a shared auto court.*
- *With attached garages and access from the street.*
- *Rowhouses on top of a base (or “podium”) of commercial uses. The podium usually accommodates parking.*



Narrow lot house Like rowhouses, but detached. Each on its own lot, these are usually owned.

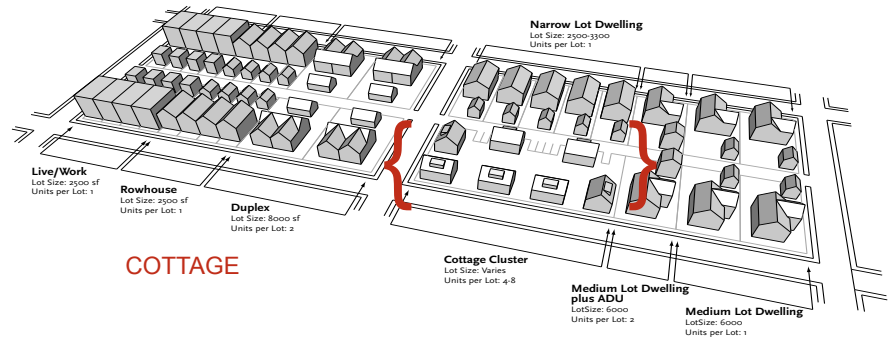


NARROW LOT HOUSE

Cottage cluster Modest-sized, detached units grouped around a common open space, each on its own lot, but with the common areas under shared ownership. Each cottage is typically smaller than 1,000 sq. ft. Cottages are often separated from one another by a side yard to provide some private space and single family-type scale and character.

Variation

- *Detached cottages on a shared lot, sold as condominiums.*



COTTAGE

Garden courtyard Units, either attached or detached, and sometimes stacked, arranged around a courtyard. Usually rented, but increasingly sold as condominiums.

Variation

- *Attached cottages arranged around a common court.*

Flats Multiple dwelling units in the form of stacked flats in a single building with one or more shared entrances. Units are sold as condominiums or rented as apartments.

Variations

- *Mixed-Use—Commercial uses on the ground floor with residential units above.*

Infill housing: financial and legal arrangements of tenancy

The typology suggests that infill housing unit types and arrangements are almost limitless, and are the product of creative entrepreneurs appealing to consumer tastes. Similarly, the financial and legal arrangements of infill tenancy blur the line between what is rented and what is sold, appealing to what people are willing to pay and whether they choose to rent or buy their home. In conventional residential areas, units that are rented are normally assumed to be apartments in an apartment building, and those that are sold are normally assumed to be homes on a detached lot. The names of conventional residential zones, “single-family,” and “multi-family,” hints at a predetermination about what type of people live in each zone, i.e., nuclear families live in detached, owned homes in single-family zones, and renters live in apartments in multi-family zones. To some extent, postwar zoning intentionally segregated rental apartments from detached, owned homes. Furthermore, over the decades, segregation of unit types has been institutionalized by financing norms. Developers of rental apartments are eligible for certain types of funding, loans, and tax incentives, while developers of for sale homes pursue other funding, loans, and tax incentives.

To the extent that local codes allow, infill designs tend to blur the line between what is built in multi-family zones and what is built in single-family zones; and between what is sold and what is rented. Infill housing that can be sold includes every type from flats to townhouses to compact small lot dwellings. Infill housing that can be rented includes everything that can be sold, but is more typically limited to ADUs, duplexes (and duplex variations), cottages, garden courtyards and flats. Some new infill housing types, such as co-housing and senior co-housing, cannot be financed through conventional lenders and have to pursue alternative funding. As infill housing becomes more accepted, it is hoped that banks and lenders will be more willing to step up and increase investment in infill housing.

Rapid growth in the population under age 45 and over age 65, as well as the rising minority share, will shift the composition of housing demand over the next 20 years. These changes in the age distribution will mean greater demand for both starter homes and rentals, and for seniors housing. In addition, as the baby boomers and older generations begin to turn over their homes to younger households, adjustments to the existing stock are likely, both through remodeling and pricing. The first wave of change will occur in the inner suburbs of large metropolitan areas where people now in their 70s and 80s are concentrated, then fan out to the outer suburbs as the baby boomers start to downsize.

“The State of the Nation’s Housing 2009” Joint Center for Housing Studies of Harvard University, 2009

INFILL COMPATIBILITY ISSUES AND CONTEXTUAL DESIGN

What is contextual infill housing?

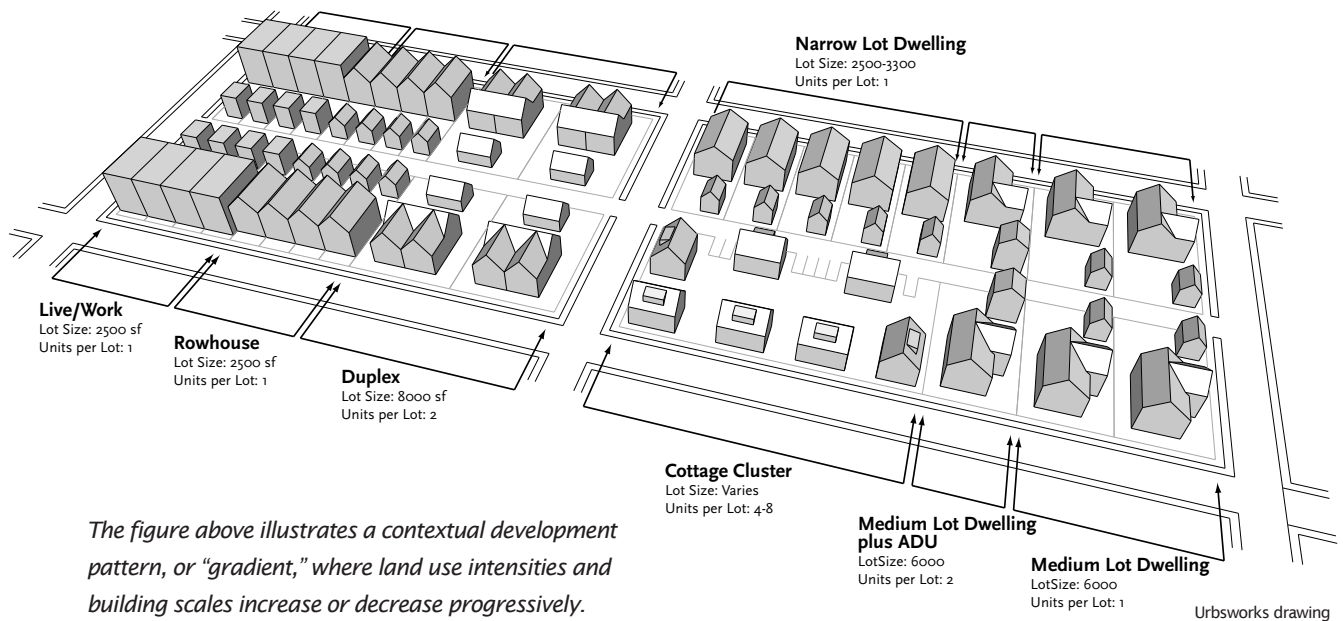
In single dwelling neighborhoods, it would be development types that may or may not have a higher residential density and yet are compatible with detached single dwelling residential development; development types that provide a range of dwelling types within the context of single dwelling neighborhoods.

In multidwelling neighborhoods, it would be development types that meet residential densities but provides a wider range of housing types than are normally found in multidwelling zones, including types that are rented, owned or co-owned. Contextual infill housing in multi-dwelling zones would also allow, or possibly require, a more gradual transition in scale toward adjacent single dwelling zones.

What ensures that infill is compatible with existing neighborhoods?

It's usually about transitions One principle might be: where possible, avoid abrupt changes in scale and density between residential and non-residential areas and between residential areas of different densities. To promote compatibility and gradual transitions between land uses, zoning district boundaries are sometimes placed at the back of lots, instead of along the centerline of streets. Such an approach encourages buildings on that are similar in scale and appearance on the street, while a gradual transition of scale and density (along with architectural design for privacy) ensures compatibility at the back of the lot.

A contextual development pattern is one of a “gradient,” where land use intensities and building scales increase or decrease progressively. It is unusual and generally undesirable to place development of substantially different scales and intensities side by side. The distance between buildings and districts of differing scale can be relatively close, however. For example, commercial districts can be within just a few blocks of lower-scale residential areas. In some instances a single block or even a single project may include several “gradients” of building scales. For these relationships to have a positive impact, transitions between different building scales need to be carefully considered and designed. While zoning can define the land use and building scale gradient through progressively intensified land use zones, additional tools are needed to add further refinement and variations to the building scale gradient that can respond to specific context issues and conditions.



It's also about scale Another principle might be: Maintain the scale and character of the existing neighborhood. Avoid land uses that are overwhelming and unacceptable due to their size and scale.

Yards and setbacks usually can address compatibility at the scale of individual properties, however, when across the street from higher density or commercial zones, the use of residentially-oriented setbacks may be at odds with taller, street fronting facades and desired massing of neighboring multi-dwelling or commercial buildings. A contextual approach would apply setbacks designed to ensure compatibility with adjacent lower-intensity uses only where the uses are directly adjacent to each other. New projects should fit the character of their surroundings on all sides, while still being sensitive to the adjacent lower-intensity uses.

This does not mean setbacks and building forms need to be identical to existing adjacent properties to be compatible. For example, townhouses adjacent to single dwelling homes can be compatible even though they are two different building types with different setbacks, heights, and densities. Using a combination of yards, setbacks, stepbacks (when upper floors "step back" from the edge of the floor below), and facade design, the transition between different uses and building types can appear to be gradual, so that different uses and building types can be compatible neighbors without adopting identical building forms.

It's also about building design and orientation A third principle might be: design and arrange new multidwelling buildings, including entries and outdoor spaces, so that each unit has a clear relationship to a public street. Design buildings to revitalize streets and public spaces and to enhance a sense of community and personal safety. Provide an ordered variety of entries, porches, windows, bays and balconies along streets where it is consistent with neighborhood character; avoid blank or solid walls at street level, and include human-scale details and massing

Architectural details and character are also important for reinforcing a relationship to the surrounding context. Entries, porches, windows, bays, and balconies are all important for creating a relationship with the street and increasing compatibility with existing buildings. Even while the materials or architectural style of new infill may be very different from that of existing buildings, architectural details can ensure compatibility. A new infill building, for example, can align with or adopt similar spacing for details such as cornices, roof lines and projections (such as porches). Regulations can require that new buildings have entries facing the street, and have patterns of entries, windows, and porches that are consistent with neighboring buildings.

Consideration should be given to ensuring that privacy is maintained and created both for the residents of existing uses as well as the users of new projects. Windows and balconies should be carefully placed to avoid or minimize impacting the privacy of existing buildings. Landscaping can be designed to add additional privacy over both the short and long-term.



Land Use Acronyms and Terms

This list of acronyms and terms will be used frequently during the Residential Development Standards (RDS) update project, and will be updated as needed.

ACRONYM	TERM	DESCRIPTION
ADU	Accessory Dwelling Unit	Dwelling unit on a property that is smaller than and separate from the primary dwelling unit.
CC	City Council, or Council	The group of 5 members elected to act as representatives of the community. City Council approval is necessary for adoption of code amendments.
	Comprehensive Plan	The policy document that guides City development. Also, "Comp Plan."
DLCD	Department of Land Conservation and Development	State agency in charge of land use planning. Reviews city plans and ordinances for conformance with Oregon's 19 statewide land use goals.
LU	Land Use	Land use involves the regulation of uses and development on private property. The majority of the City's land use regulations are in the Zoning Ordinance and Land Division Ordinance.
LUBA	Land Use Board of Appeals	Oregon judicial board that hears appeals of a jurisdiction's final decision on a land use application. Further appeals of a LUBA decision may be made to other courts.
	Metro	Metropolitan Regional Government, the body that regulates land use policy for the Portland Metropolitan area.
MFR	Multifamily residential use or development	The Zoning Ordinance defines multifamily residential uses or developments as those containing 3 or more dwelling units.
MMC	Milwaukie Municipal Code	The rules that apply to the right-of-way and property within the City of Milwaukie. The MMC includes 19 separate titles, such as zoning, vehicles and traffic, buildings and construction, streets and sidewalks, and land division.

ACRONYM	TERM	DESCRIPTION
NDA	Neighborhood District Association	The 9 neighborhoods area that are officially recognized by the City of Milwaukie.
ODOT	Oregon Department of Transportation	State agency that owns and operates Oregon's highways. Highways in Milwaukie include McLoughlin Blvd (Hwy 99) and Hwy 224.
OAR	Oregon Administrative Rules	Rules adopted by various state agencies governing how they carry out their assigned functions.
ORS	Oregon Revised Statutes	Laws adopted by the Oregon State Legislature.
PC	Planning Commission	A volunteer body responsible for reviewing land use applications according to the provisions of the Comprehensive Plan, Zoning Ordinance, and other planning implementation documents.
PD	Planning Director	The director of the City's Planning Department, Katie Mangle.
SC	Steering Committee	Generally, a group that provides policy direction for staff and "steers" the project. Regular usage in this context will be in reference to the Residential Development Standards Update project steering committee.
SFR	Single-family residential use or development	The Zoning Ordinance defines single-family residential uses or developments as those containing 1 detached or 2 attached dwelling units.
R-10, R-7, R-5	Low-density residential zones	The City's low-density zones are described in the Zoning Ordinance and displayed on the Zoning Map. Low-density zones almost exclusively allow single-family residential development.
R-3, R-2.5, R-2, R-1, R-1-B, R-O-C	High-density residential zones	The City's high-density zones are described in the Zoning Ordinance and displayed on the Zoning Map. High-density zones allow for a range of single-family and multifamily residential development.
ROW	Right-of-way	Property dedicated to the City or other public agency for public travel on foot, bike, or vehicle. Common term for ROW is street.
TGM	Oregon Transportation and Growth Management Program	A joint program of ODOT and DLCDC that links land use and transportation planning. This project is being funded through a TGM Smart Development Code Assistance grant.
	Zoning Ordinance	The development regulations that implement the policies of the Comprehensive Plan. Also, "the Code" or "Title 19." The Zoning Ordinance contains the City's land use and development review regulations and procedures.
	Zoning Map	The map that shows the zoning designations for all property within the City.

Residential Development Standards Steering Committee
Meeting Notes
February 24, 2011

Committee Members present: Mark Gamba, Terry Whistler, Jim Perrault, Jean Baker, Chris Wilson, Dave Aschenbrenner, Julie Wisner, Frank Hemer, Dion Shepard

Staff present: Katie Mangle, Susan Shanks, Li Alligood, Beth Ragel

- Staff introduced the project and provided an overview, including the purpose of the effort, who was doing what, and how the committee would reach a recommendation.
- Committee members introduced themselves and discussed their reasons for interest in the project.
- The committee reviewed the Steering Committee protocols and agreed to adopt the document as presented by staff.
- The committee reviewed the public involvement plan and discussed future meeting dates and times. Generally, the third or fourth Thursday of the month from 4:00 p.m. to 6:00 p.m. was an acceptable meeting time.

- Group discussion:

The group's final discussion centered on what they wanted to see as outcomes of the project:

- Look at setbacks, scale of buildings in relation to others, and minimum vegetation requirements
- Sustainability—keep in mind
- Balance design with affordability
- Clean up the code based on the worse examples—the 'low hanging fruit'
- Make sure code is 'honest' and no social engineering or allowing something but making it so bureaucratic that something is effectively prohibited
- Want to understand *intent* of codes
- Group agreed to take photos of good and bad examples to share

The next meeting was tentatively scheduled for Thursday, March 31, from 4:00 p.m. to 6:00 p.m. Staff will confirm and sent out verification to committee members.