

COMMUNITY SUMMIT 2

INSPIRING SPACES & PLACES / COMPLETE NEIGHBORHOODS & HOUSING

FEBRUARY 2, 2012
LAKERIDGE HIGH SCHOOL

SUMMIT OUTLINE – Updated January 19

1) Appetizers – (5:30 – 6:00)

- Light snacks will be provided

2) Introduction – (6:00 – 6:20)

- Welcome: CAC members
- Introduction: Councilor Sally Moncrieff (*PPT presentation*)
 - Why are we here/doing update?
 - Where we've been and process
 - Objectives: 1) engage the Lake Oswego community 2) create a user-friendly plan with implementation, 3) integrate the City's sustainability framework
 - LO 2035 Vision & Scenario
 - Next 1.5-year schedule
 - Summit Purpose – Feedback on key questions. Feedback will be used to update goals & policies
 - Two responsibilities for attendees:
 1. Small Group Discussion: what inspires you + topic-specific questions
 2. Comment Forms (Passive activity): Provide additional feedback on discussion questions. Time will be saved at the end of your group discussion for you to fill out the form.
 - The Policy Wall also provides an opportunity to comment on specific goals/policies (keep, delete, add, combine - - state reason why) and identify new policy considerations
- Presentation:
 - Introduce topics for the evening, including showing some of the photos and quotes that were received through the "Inspiring Space & Places" Survey
 - Complete Neighborhoods & Housing overview presentation
- Breakout session instructions: Kirstin (COC)
 - Provide overview for the rest of the summit/timing.
 - Direct people to find discussion tables in library/downstairs

3) Breakout Sessions: (6:25 – 7:30)

- Half of the group will stay upstairs and half will move downstairs
- The discussion topics will be the same upstairs and downstairs. This will allow all participants to discuss all topics.
- Tables will be organized around 4 geographic areas of city
 - People will sit at the table for the geographic area they live in/want to discuss
 - 3 tables upstairs & downstairs for each quadrant
 - 8 people max per table
= 192 discussion participants

- Facilitators: Board/Commission & CAC members & staff with topic expertise
- Designated note takers: CAC members and other volunteers take notes on flip charts
- Index cards available to pass comments up to the facilitator
- Discussion Outline
 1. What inspires you/what's needed to ensure LO is inspiring place? **(10 min)** – 6:25
 2. Discuss policy questions for Complete Neighborhoods and Housing **(25 min)** – 6:35
 3. Fill out comment forms for CNH topic provided at table **(5 min)** – 7:00

Stretch and transition to next topic

 4. Inspiring Spaces & Places Overview PPT: Annexation and Stafford **(5 min)** – 7:05
(1 presentation upstairs, 1 downstairs)
 5. Discuss policy questions for Inspiring Spaces & Places **(20 min)** – 7:10
 6. Comment forms for ISP topic provided at each table **(5 min)** – 7:30

4) Re-group and Summary Reports: (7:35 – 7:55)

- Downstairs participants move upstairs **(5 min)** – 7:35
- Summary reports of discussion highlights **(15 minutes)**: *Sample of major findings* – 7:40

5) Closing: (7:55 – 8:00) – Kirstin and CAC members wrap up

- Thank participants, discussion leaders, recorders
- Drop off comment cards/ respond to same questions on the website
- Introduce next summit topic and next steps
- Policy wall browsing/input

6) 8:00-8:30: Participants opportunity to: fill out comments forms, policy wall, and talk with other community members

COMPLETE NEIGHBORHOODS AND HOUSING VISION STATEMENT

We have a wide variety of neighborhoods with high quality, attractive and compatible housing that serves a range of ages, incomes and households. Our distinct and walkable neighborhoods contribute to the city's small town feel. Mixed-use districts enhance adjacent residential areas by providing access to quality jobs, housing, transit, entertainment, services and shopping. Higher density housing is located strategically and sensitively, including along transportation corridors and town centers to preserve the character of our existing neighborhoods.

Existing Comprehensive Plan Goal

Lake Oswego's 1994 Comprehensive Plan identifies three goals for housing:

1. Provide the opportunity for a variety of housing types in locations and environments to provide an adequate supply of safe, sanitary, energy efficient housing at price and rent levels appropriate to the varied financial capabilities of present and future city residents.
2. Protect the character of existing neighborhoods.
3. Provide for needed housing while protecting environmentally sensitive areas, using land and public facilities as efficiently as possible, and facilitating greater use of alternative transportation modes.

People, Places and Prosperity

As the City develops key elements of the Comprehensive Plan update, sustainability – defined for Lake Oswego as meeting the vital human needs of the present without compromising our ability to meet future needs – is an important consideration. Strategic questions will aid in the decision-making framework moving forward. Planning in a sustainable way means looking at the community as an interrelated system that includes places around us (the natural and built environment), people (that live and work here), and prosperity (of the local economy) that supports society's needs.

People: *Providing a range of housing choices for residents of all ages and income levels helps community members meet their basic needs. A range of housing options increases community diversity, resilience and strength. Well-designed housing in proximity to amenities, such as transportation options, parks and shopping contribute to a strong and active community. Quality housing opportunities are energy efficient and less expensive for people to maintain over time.*

Places: *Housing that is well-designed responds to its context and enhances existing neighborhoods. Construction that incorporates quality local, renewable resources whenever possible also contributes to the local economy.*

Prosperity: *Housing close to job locations and/or transportation options reduces commuting costs for households. Providing housing in proximity to commercial goods and services helps to support businesses. Using local building material suppliers and construction workers strengthens the city's economy.*

What We've Heard

The 2010 *We Love Lake Oswego* community survey which received 823 responses, asked a variety of questions about neighborhoods and housing:

- 57 percent of respondents said that “the ability to walk or bike safely to meet daily needs” is one of the three most desirable elements of a great neighborhood, followed by “proximity to high-quality neighborhood schools” (49%) and “caring and connected neighbors” (41%).
- When asked what housing options will be most important to accommodate Lake Oswego residents over the next 25 years, 64 percent said “preservation/rehabilitation of existing housing,” followed by “redevelopment of underused/blighted properties” (63%) and “cottage style housing” (59%).

- When asked what will attract more young individuals and families to Lake Oswego, 84 percent of respondents said “quality schools” followed by 46% who said “encourage a wider range of housing options.”

Background

Population

- U.S. Census data shows that Lake Oswego’s population is aging. Over the next 25 years, the population over age 65 is expected to increase from 14% to 24% of Lake Oswego’s population.
- Residents want to “age in place” in a community where they can maintain their independence with available and appropriate housing, increased mobility and effective services and support. This implies a need for smaller homes located near transportation and shopping.
- The 24-55 cohort is projected to shrink. If trends continue, the younger population cohorts (age 5-14) are likely to remain flat or experience some decline.
- The community has expressed a desire to attract a younger demographic, particularly families with school-aged children. Lake Oswego has been less able to accommodate younger working families due to high housing costs, which then impacts school enrollment. This indicates a need for smaller, more affordable housing for younger households.

Housing

- Lake Oswego is primarily a residential community, with 80% of the city’s land zoned for housing. 85% of residential land area is zoned for single family homes on lots that are at least 6,000 sq. ft. in size.
- Since 2000, attached housing (e.g. condos, townhomes, duplexes) has made up 70% of new housing development. This reflects both the lack of large vacant parcels remaining for development, and the increasing trend and preference for smaller homes.

Policy Questions to Consider

Based on the Community Vision for 2035, public input, and information compiled in this and other Lake Oswego housing reports, the following questions emerged for further community discussion. Input on these questions will help to guide updates to City goals and policies in order to implement the community vision.

Housing

- To meet the community’s housing needs of a range of household incomes and preferences, particularly for both young and senior households, the city needs additional opportunities for smaller and more affordable homes including townhomes, duplexes, courtyard cottage-style housing, and smaller lot detached homes to be developed. Secondary dwelling units (i.e. separate living unit in a home, backyard cottage or garage carriage house) can also benefit the community by providing smaller more affordable rental units. These housing types have also been shown to serve evolving housing preferences for smaller homes and lots, particularly for seniors and small households. Below are examples of some of these housing types (*provide photo for each*):

- Townhomes – good LO Examples
- Corner Duplex that looks like single family home
- Courtyard Cottage – larger lot & lower density
- Courtyard Cottage – smaller lot & higher density
- Small lot detached
- SDU: Carriage Housing and detached cottage

QUESTION: Looking at the 2035 Vision Map, where should Lake Oswego provide opportunities for these different types of housing to be developed?

MATERIALS FOR HOUSING DISCUSSION TABLES

- Example photos of each of the housing types listed above
- Site massing diagrams
- Aerials/site massing within neighborhood context
- Consider how these types (as appropriate) could fit into low-density neighborhoods with no alleys, deep narrow lots, etc.
- Note density discretely – not the focus

- While providing opportunities for smaller and attached housing helps to provide lower cost housing opportunities, it does not ensure this housing is affordable. For example, an older apartment building with affordable rents could be replaced with a large new condo building that provides the same number of units but at a much higher cost. The current Comprehensive Plan calls for the City to provide low-to-moderate cost housing opportunities, and Metro’s regional plan calls specifically for cities to develop strategies and actions to ensure diverse housing types and to maintain and increase the stock of housing that’s affordable to households earning 50% or less of the regional median family income. In Lake Oswego, twenty percent of households earn less than 50% of the median family income (\$35,600 or less – number based on 2010 Urban Clackamas County income levels).

The City’s Affordable Housing Task Force (2005) came up with several recommendations to retain affordable housing in the city:

- Work toward a goal of “no net loss” of existing affordable housing;
- Support local efforts to establish employer-assisted housing to accommodate people employed in the community;
- Support the efforts of nonprofit housing providers;
- Establish an affordable housing trust fund to create, preserve and maintain affordable housing; and
- Establish a minimum percentage of affordable housing units in all developments that receive assistance from the Lake Oswego Redevelopment Agency (LORA).

QUESTION: Which of these and/or other tools should the City consider to ensure affordable housing is available?

Policy Questions to Consider

Complete Neighborhoods

(Discussion tables will focus on 4 different geographic areas around the City)

1. A component of the 2035 Vision is to create safe connections between, housing, recreation, work, stores, dining, and services. The 2035 Vision Map identifies employment centers, town centers, neighborhood villages, and community hubs. After looking at the map to find these areas, what is needed in order to make recreation, stores, dining, services, work and housing a reality within walking distance of the mixed use areas?

2. The 2035 Vision Map identifies neighborhood gathering places or “hubs” in places where there is existing neighborhood activity. Looking at the map, what makes these gathering places function? How can we improve on these places that where people gather and make them a more meaningful and active as community hubs?

3. The Vision 2035 Map identifies the Kruse Way area primarily as an employment center. There has been some community interest in enlivening this district after 5 p.m. Should the future of Kruse Way include housing and other amenities, and if so where and what should they look like?

MATERIALS FOR NEIGHBORHOOD DISCUSSION TABLES

- Neighborhood Hubs: Photos of range of ideas /scale for hubs
- Photos examples for future of:
 - Different examples for Palisades, Mt. Park, Pilkington neighborhood villages
 - Kruse Way mixed-use employment center including housing examples
- Massing of what would be allowed under current NC zoning
- Maps of area noting:
 - Zoning
 - Amenities/sites (schools, parks, grocery stores, etc)
 - Transportation (sidewalks, bike lanes, bus)
 - Walking distances

Background

- Since the last Plan update much redevelopment has occurred in the downtown, and planning for downtown and the Lake Grove Village Center has supported these areas’ designations as pedestrian friendly mixed-use centers with high-density housing and supportive commercial uses.
- The Lake Grove Village Center Plan, adopted in 2008, focuses on transforming Lake Grove to a pedestrian friendly mixed-use center with high density housing and supportive commercial uses.
- The Foothills Plan envisions it as an expansion of the downtown area that is well-served by transit.
- The 2035 Vision Map identifies smaller scale, neighborhood serving mixed-use centers at existing commercial areas: McVey and South Shore, Pilkington and Jean Road, and the Mountain Park Shopping Center. These areas are intended to support future neighborhood housing, and to provide opportunities for residents to walk or bike to nearby stores, services, restaurants and jobs to support their daily needs. Neighborhood Hubs are also identified throughout the city as places where neighbors would gather for social, recreational or cultural activities.

Sources

Lake Oswego Comprehensive Plan, City of Lake Oswego, Adopted 1994.
Draft Lake Oswego Housing Needs Analysis, City of Lake Oswego, 2011.
Community Vision and Values Survey, 2010.

INSPIRING SPACES AND PLACES VISION STATEMENT

Our architecture and natural setting inspire people to live here. Development respects the physical environment and meets the highest quality of community design to preserve and foster the distinctive character and beauty of this special place.

Existing Goals

Lake Oswego's 1994 Comprehensive Plan identifies two goals related to inspiring spaces and places.

What We've Heard

The 2010 We Love Lake Oswego community survey which received 823 responses provided the following information:

- 87% of the respondents agreed with the following statement:
"Our built environment and natural setting inspire people to live here. The City is a regional leader, making conscientious decisions that protect our quality of life and unique place in the region. Development respects the physical environment and meets the highest quality of community design to maintain the distinctive character and beauty of this special place"
- 69 % said they choose Lake Oswego for its "small town feel" and 65% for its "scenic beauty"
- 70% said that "connections to the lake, river, and hiking trails" is the most important aspect of the City's public spaces that should be maintained and improved.

At the October 2010 workshops citizens indicated that streetscapes (paving, benches, plants, etc.) and architectural quality are important ways to improve public spaces, provide a sense of privacy, comfort and to develop a unique sense of place.

LAND USE

Existing Goal - Community Design and Aesthetics

The City shall maintain and enhance the appearance and design quality of Lake Oswego.

People, Places and Prosperity

As the City develops key elements of the Comprehensive Plan update, sustainability – defined for Lake Oswego as meeting the vital human needs of the present without compromising our ability to meet future needs – is an important consideration. Strategic questions will aid in the decision-making framework moving forward. Planning in a sustainable way means looking at the community as an interrelated system that includes places around us (the natural and built environment), people (that live and work here), and prosperity (of the local economy) that supports society's needs.

People: *Land use planning promotes public health and safety.*

Places: *Effective land use planning supports great places to live, work and play.*

Prosperity: *Land use planning helps to secure a community's future by helping ensuring coordinated development.*

ICEBREAKER/OPENING DISCUSSION QUESTION AT EACH TABLE

- Lake Oswego is recognized and valued for its character, quality and beauty. Planning, architecture, and attention to detail have helped to create Lake Oswego’s distinctive character. Think about the inspiring spaces and places people shared in the survey. What makes them inspiring and what can we learn from them? What are the special characteristics that are needed to ensure that spaces and places in Lake Oswego are truly inspiring?

Background

- Lake Oswego is a largely developed, or built-out community.
- The impacts of small land divisions and infill development in established neighborhoods have been increasingly important.
- The region is known nationally for its compact urban form, integrated land use and transportation planning and other leading planning practices.
 - Within the region, Lake Oswego has a reputation for its exceptionally high quality of life.
- Effective planning in Lake Oswego must balance the desires of local residents to preserve Lake Oswego’s existing character with regional and statewide land use regulations with which local jurisdictions must comply.
- Two primary impacts of Metro’s 2040 Growth Concept and Urban Growth Management Functional Plan on land use planning in Lake Oswego are:
 - More intensive land uses in the city’s two primary commercial areas (downtown Lake Oswego and the Lake Grove Village Center commercial area), both of which are designated “Town Centers” by Metro. In the 2040 Growth Concept, “Town Centers” are described as compact, well-connected community hubs providing essential services for residents within a two- or three-mile radius.
 - Increased infill and redevelopment in established residential neighborhoods.

Sources

Draft Lake Oswego Housing Needs Analysis, City of Lake Oswego, 2011
Community Vision and Values Survey, 2010
Metro 2040 Growth Concept
Neighborhood Plans
Lake Grove Village Center Plan

URBANIZATION

Existing Goal

Lake Oswego shall ensure that the rate, amount, type, location and cost of population growth and development within or outside of the Urban Service Boundary will not diminish the quality of life the City has presently attained.

People, Places and Prosperity

As the City updates key elements of the Comprehensive Plan, sustainability is an important consideration. Lake Oswego defines sustainability as “meeting the vital human needs of the present without compromising our ability to meet future needs”. Strategic questions will aid in the decision-making framework moving forward. Planning in a sustainable way means looking at the community as an interrelated system that includes places around us (the natural and built environment), people (that live and work here), and prosperity (of the local economy) that supports society’s needs.

***People:** Planning for urbanization identifies where Lake Oswegans can live, work and play as population increases.*

***Places:** Compact urban growth uses resources in an efficient manner. Lake Oswego is currently known for its attractive quality of life.*

***Prosperity:** Planned urbanization secures a community’s future by organizing intended growth and infrastructure investment.*

Background - Annexations

The City of Lake Oswego plans for not only the areas inside the City, but also for the areas outside the City limits and inside the Lake Oswego Urban Services Boundary (USB). Currently there are 43,000 residents who live inside the USB. Approximately 37,000 of those residents live within the City limits. The remaining 6,000 live outside the limits are not subject to City land use requirements or governance. Being located inside the USB means that at some point in the future these areas are expected to be annexed into and governed by the City of Lake Oswego.

Cities may be motivated to annex property to expand the local tax base or to gain greater land use control over lands in the unincorporated area. Conversely, property owners may initiate annexation in order to obtain City services or enhance development opportunities on their lands.

Annexations can be initiated either by a city or by a petition from property owner(s). Recent annexations in Lake Oswego have only been those initiated by property owners through the petition process authorized under Oregon law.

Historically, the City has been reluctant to initiate annexations of larger areas because of citizen opposition

There are some areas within the USB that are outside the current City limits but are completely surrounded by City property. These areas are called “islands”. The areas that are not in the City are currently governed by Clackamas County and do not pay local Lake Oswego taxes.

Policy Question to Consider

Annexation

1. The existing comprehensive plan states that “Lake Oswego shall initiate island annexations”. However, currently annexations only occur incrementally when a property owner files an application for annexation.
 - a. Should the policy be revised to reflect the current City practice which would continue the incremental, applicant-initiated approach?
 - b. Should the policy remain the same, but be implemented?
2. Should the City also consider implementing a more active policy toward planned annexation of the areas inside the City beyond “islands”?

MATERIALS FOR ANNEXATION DISCUSSION TABLES

- Citywide maps showing city limits & zoning

Further Background

- Lake Oswego’s Comprehensive Plan and its urban growth management agreement with Clackamas County commit the City to providing urban services and annexing the properties within the Urban Services Boundary.
- The following neighborhoods have land in the City’s USB, but are not annexed:
 - Birdshill - 87 % is not annexed
 - Forest Highlands- 31% is not annexed
 - Lake Forest - 52% is not annexed
 - Oak Creek – 22% is not annexed
 - Rosewood – 85% is not annexed
 - Skylands – 68% is not annexed

Urban Services Boundary

- Since the late 1970’s, Metro, the regional government, has been charged with managing the Urban Growth Boundary (UGB) around the Portland metropolitan area.
- To accommodate projected population growth within the urban growth boundary, Metro adopted a regional plan entitled the “2040 Growth Concept”. The regional plan was based on broad public input and adopted in 1995. The 2040 Growth Concept envisions a region that “grows up and not out” with higher-density, mixed-use development in designated centers, main streets, station communities, and corridors and preservation of farmland outside the boundary.
- In 2007, the Oregon Legislature approved Senate Bill 1011 (SB 1011) to provide a long range planning process that provided more certainty over the next 40-50 years when considering expanding the UGB.
 - Legislation enabled Metro and the three counties (Clackamas, Multnomah, and Washington) to designate lands as either rural reserve or urban reserve, thereby providing a level of certainty about what land would be urbanized and what land would be farmed without threat of urbanization.
- In 2009, the City Council adopted Lake Oswego’s Community Aspirations, which were submitted to Metro and include the following statement:

- The City does not envision or support urban levels of development in the upper Stafford area. The area is envisioned to be a rural enclave within the region with access to small sustainable agriculture farms.
- However, the statement continues with “if the area is included, LO expects to have a primary decision making role in any planning and development decisions for the area.....and a walkable, transit oriented, mixed use town center.....”
- In 2011 the Stafford area (see map) was designated by Metro and Clackamas County as an Urban Reserve Area.
 - Metro and Clackamas County adopted policies that require West Linn, Tualatin, and Lake Oswego to jointly plan for how the basin will urbanize.
 - West Linn and Tualatin have continued to oppose designation of the area as an urban reserve area and presumably are in the process of appealing the designation.
 - In 2006, Clackamas County formed the Stafford Hamlet. The Hamlet is a citizen driven organization that is intended to provide advice to the County Commissioners about the future of the Stafford Basin. The Hamlet adopted a vision in 2009 which describes a mix of rural uses, residential development, and employment and commercial uses along Borland Road. The County is in the process of holding a series of meetings with Stafford residents about what Urban Reserve designation may mean for the area.
- The City Charter requires voter approval of annexations in the Stafford area.

Policy Question to Consider

Stafford/UGB

1. In 2010, Metro and Clackamas County identified the Stafford basin as an urban reserve area implying that it will be urbanized and developed over the next 40-50 years.
 - a. Assuming the area will urbanize, should Lake Oswego’s role include consideration of governing some or all of the Stafford basin and south of the current City boundaries? (Map provided)

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| MATERIALS FOR STAFFORD DISCUSSION TABLES |
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| <ul style="list-style-type: none">○ Regional map of urban reserves○ LO/Stafford map of urban reserves○ Stafford basin photos? |
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Sources

Community Vision and Values Survey, 2010
Inspiring Spaces and Places Survey
1994 Comprehensive Plan
Metro Urban/Rural Reserves
City Charter
City Council Annexation Report, January 5, 2010
Neighborhood Snapshots, City of Lake Oswego, October 2010