

Final Report

# Rockwood Town Center Design & Redevelopment Plan

Prepared for the Gresham Redevelopment Commission

Prepared by

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## Acknowledgements

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## Final Report

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The contents of this document do not necessarily reflect views or policies of the State of Oregon.

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## Project Charge

### Introduction

Rockwood is a place full of possibilities. It can be a thriving cultural marketplace that sustains and energizes its inhabitants and a place where the optimism and diversity of its people is reflected in Rockwood's commercial vitality. Rockwood occupies a unique location: at the junction of major thoroughfares, at the intersection of different cultures, at the crossroads between past and future. Momentum is increasing.

Rockwood is ready. But there are significant challenges. It has experienced rapid change in racial and ethnic diversity, lower-income households, and disinvestment in retail and commercial properties. It has been negatively impacted by social, political and economic trends from far beyond its borders. Over the last 5-10 years, these events have impacted the community:

**Unemployment** The economy boomed and then declined precipitously. Oregon is still climbing out of the depths of the recession and our unemployment rate is high by national standards.

**Housing Prices** Housing prices have risen across the region increasing the attractiveness of Rockwood's low cost housing stock to households displaced by price increases in other neighborhoods.

**Retail** Retail formats and markets have changed, rendering several large retail buildings in Rockwood obsolete by today's standards.

The result of these and other trends in Rockwood can be seen in the empty commercial buildings, the character of the existing businesses, crime statistics, employment statistics and the condition of the housing stock.

The City has a comprehensive strategy to address these conditions and has already accomplished two important objectives: creation of an urban renewal district for the Rockwood area and the placement of zoning to encourage higher density mixed-use development. To obtain the maximum advantage from these tools the City of Gresham also determined that it needed to identify specific development opportunities in the heart of Rockwood, including a specific action plan for revitalization. To support the study effort, the City sought and received a grant under the Transportation Growth Management Program of the Oregon Department of Transportation. The City also received support from the Regional Investment Board.

With project funding in hand, the City solicited consultant proposals to assist in completing the Rockwood Town Center Design and Redevelopment Plan. The City selected a consultant team led by David Evans and Associates, Inc. (DEA). DEA provided project management, urban planning and development strategy services. The team also included Urbsworks, a Portland urban design firm, and Marketek, a Portland market analysis firm.

The charge to the project team was to prepare:

- **A Design Vision** for the Rockwood Town Center
- **A Street Plan** that maximizes neighborhood circulation and encourages pedestrian, bicycle and transit travel
- **A Market Analysis** that defines the residential, retail and commercial markets for the Rockwood area
- **A Redevelopment Plan** that identifies key development sites and their proposed uses
- **An Implementation Strategy** that provides specific direction to the City on how to build the proposed plan.

The Rockwood Town Center Design and Redevelopment Plan provides these products, including a clear set of ideas about how to “brand” the Rockwood area as part of an effort to change the perception of the district.

## Project Approach

The most productive approach in a community driven project is to provide a highly interactive environment in which all parties can come together to debate ideas and take advantage of the professional resources offered by the project consultants. Accordingly, the majority of the work to create a vision and a design plan for Rockwood was accomplished through a design charrette.

For a charrette to be successful, extensive data collection and outreach is necessary in advance. These steps preceded the charrette.

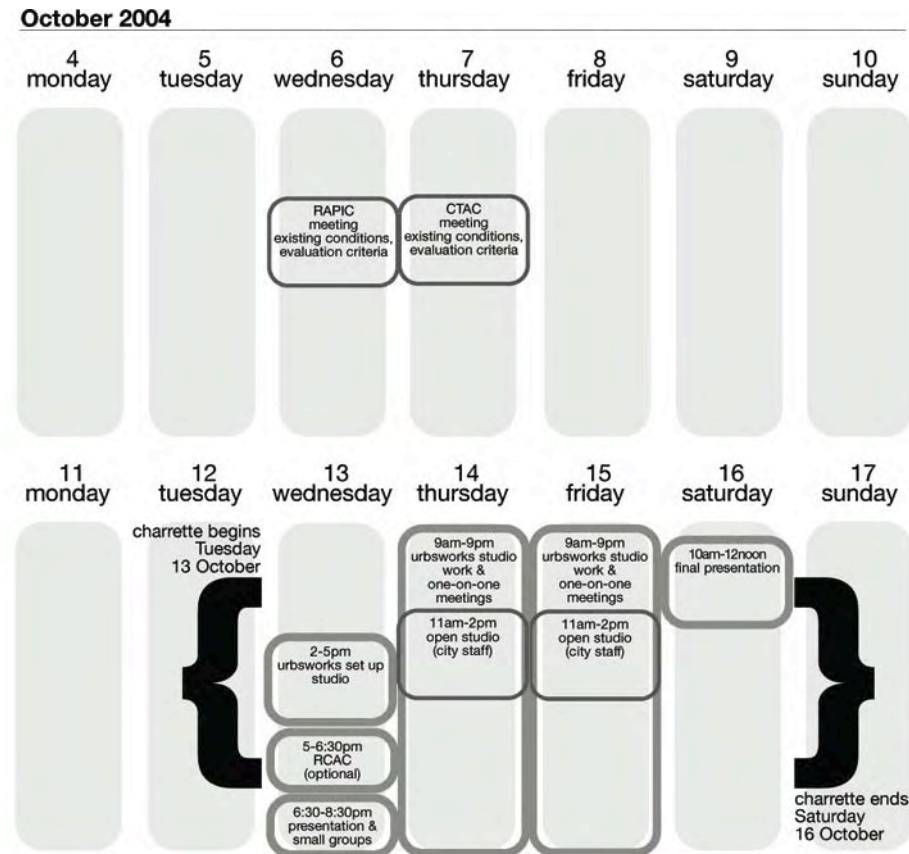
- Existing conditions in the Rockwood area were researched and summarized in an Existing Conditions Report
- Marketek completed an analysis of the current retail, residential and office market in the Rockwood area and projected the market potential possible.
- The City's Project Advisory Committee and Technical Advisory Committee reviewed and adopted design principles to guide the creation of the vision and plan.
- The City conducted a substantial outreach effort to raise public awareness of the project and the specific public participation opportunities available during the charrette.

With this work complete, a design charrette was conducted from October 13<sup>th</sup> to 16<sup>th</sup>, 2004 in the heart of Rockwood at the Rockwood Grange. The charrette work began with a series of meetings with stakeholders. These 10 meetings over two days included social service agencies, affordable housing providers, developers, property owners and public agency providers of public safety, transportation, transit and parks services. The information gathered during these meetings informed the work of the consultant team on a proposed vision, design plan and implementation strategy. Intense work on these items continued during all three days, culminating in a public presentation on Saturday, October 16<sup>th</sup>, 2004.

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Over the next six months, the consultant team presented the proposed vision, plan and implementation strategy to the TAC, the Public Advisory Committee and the Gresham City Council. The consultant team refined the results based upon comments from each of these groups.

This series of meetings led to a particularly important understanding for the City and the consultant team. In order to change the public perception of Gresham and to promote a focus on Rockwood's strengths, it would be necessary to affirmatively market the area. The consultant team proposed a "branding" exercise in which a professional firm would evaluate the barriers and opportunities in Rockwood and develop proposed themes for the area. This work occurred in May, 2005 and is included in this report.

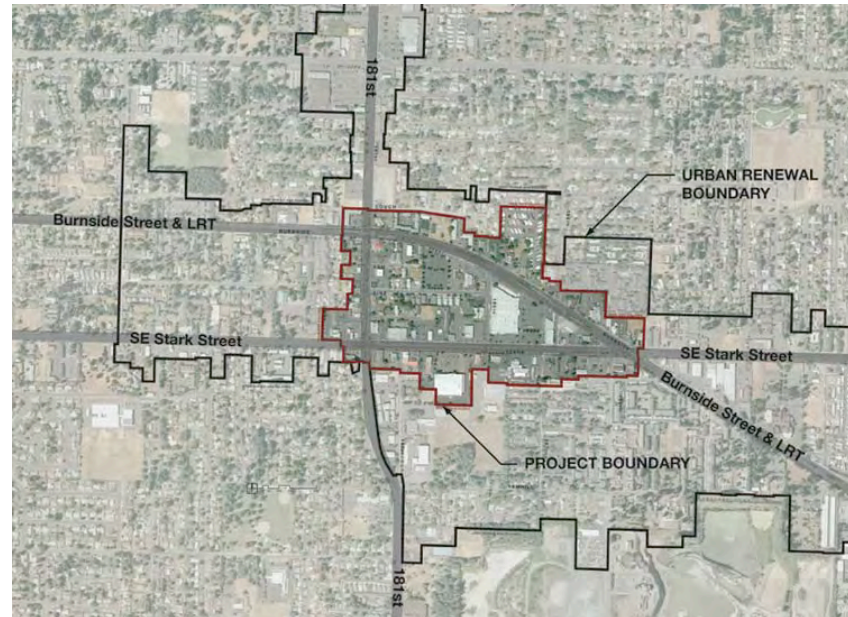


**Charrette Schedule I** The charrette work began with a series of meetings with stakeholders. These 10 meetings over two days included social service agencies, affordable housing providers, developers, property owners and public agency providers of public safety, transportation, transit and parks services. The information gathered during these meetings informed the work of the consultant team on a proposed vision, design plan and implementation strategy. Intense work on these items continued during all three days, culminating in a public presentation on Saturday, October 16<sup>th</sup>, 2004.



## Study Area

The Rockwood Town Center (RTC) District is a large area within Gresham, encompassing 282 tax lots on approximately 155 acres with an average parcel size of 0.55 acres. While the project area includes the entire RTC, this project focuses on the redevelopment potential of the Rockwood Triangle formed by East Burnside, NE 181st Avenue, and SE Stark Street. The project study area accounts for about 37 percent (57 acres, 123 parcels) of the RTC District and poses some of the greatest redevelopment challenges in terms of transportation and access, high vacancy rates, and lack of pedestrian amenities. In contrast, the Triangle also has some of the greatest potential with its proximity to light rail, arterial connections, and large vacant buildings where redevelopment could have a significant impact on the project area to become a gathering point for area residents. Unlike many commercial areas, Rockwood already has a significant number of residential units, offering the potential for developing commercial and retail properties supported by existing residents.



Project Boundary & Study Area

## Existing Conditions

The existing physical and social characteristics of Rockwood underscore the challenge of transforming the area into a successful mixed-use urban community. The key points:

**Demographics:** The Rockwood Town Center 2004 neighborhood trade area (0.5 mile radius) population accounts for about nine percent of Gresham's 2004 population. A significant portion of the area's population, about 38 percent, are Latino or Hispanic compared to Gresham with about 14 percent. While 2004 median household incomes are about 26 percent higher citywide (\$48,504) than the neighborhood trade area (\$35,794), there are pockets in and near the Town Center where median household incomes are higher than the city. Approximately seven percent of households in the area earn more than \$100,000 annually.

**Land Use and Buildings:** The Rockwood Town Center is dominated by commercial and auto-oriented businesses, intermixed with high-density apartment complexes. There are few vacant parcels in the Town Center. However, a large percentage of the existing retail buildings are vacant or underutilized. These represent the most significant redevelopment opportunities. Buildings within the Town Center and adjacent area are typical commercial structures, generally tilt-up concrete or masonry construction. There are several apartment buildings, most of which appear to be 25 to 30 years old. Overall, there is little structural interest within the Triangle that residents and visitors would be attracted to. There is no defined gathering space, large parking lots used by adjacent buildings are numerous, and pedestrian access is limited by existing traffic patterns and a lack of pedestrian amenities. While the Rockwood area supports residential uses, the architecture of the area is not conducive to gathering, as a Town Center is envisioned to do.

**Transportation:** A series of arterials and collectors provide good access to the Town Center, but the street network within the area is disconnected, particularly for north-south movements. The MAX line provides excellent transit service to the area from two stations within the Town Center.

## Market Analysis

The Market Analysis was instrumental in understanding the economic forces impacting Rockwood and for defining how retail, residential and commercial development could help transform the area. This analysis was completed by Marketek, Inc. The following summarizes the conclusions:

### Retail: Market Capture

- 2014 baseline  
216,000 square feet
- **Potential:**  
**35% increase**  
**292,000 square feet**

### Capture potential through strategic improvements

- Address public safety issues
- Enhance physical environment
- Strengthen existing businesses
- Provide developable sites
- Actively promote district



**Retail Market Capture |** The retail market capture “baseline” is shown on the left. If the city made strategic improvements it could capture additional retail. The potential increase in capture is shown on the right. The pink areas indicate parking area needed to support retail. The area demarcated within the square is the amount of residential square footage included in the catalyst projects.

## Residential: Market Capture

- 2014 baseline  
for rent multi-family: 586 units  
for sale multifamily: 367 units

### Keys to successful residential development

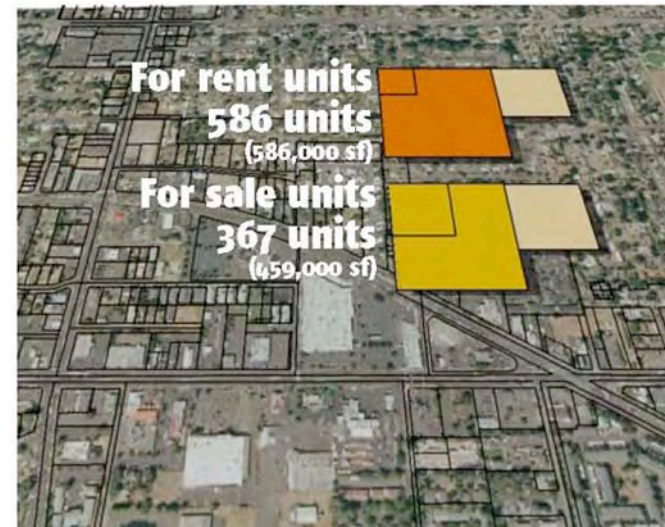
- Safe and secure environment
- Mid-market range price points
- Clustered development
- Active management
- Placemaking elements
- Access to convenient retail

## Office: Market Capture

- 2014 baseline  
102,600 square feet
- **Potential:**  
**162,000 square feet**

### Potential increase through:

- Attraction of specialty office (medical, government, college-related)



**Residential Market Capture** | The residential market capture “baseline” for rent and for sale housing is shown. The area is square footage in scale with the underlying map to illustrate how much land new housing could occupy. The light yellow areas indicate parking needed to support residential. The area demarcated within the square is the amount of residential square footage included in the catalyst projects.



**Office Market Capture** | The office market capture “baseline” is shown on the left. If the city made an effort to attract specialty office it could capture additional office space. The potential increase in capture is shown on the right. The light pink areas indicate parking area needed to support office space.

## The Plan

The Rockwood Town Center Redevelopment Plan builds upon Rockwood’s assets, bridges the barriers that now exist and creates a framework for achieving the community’s vision. The plan consists of four elements.

- Vision Goals that frame the Plan and guide the implementation actions.
- A Development Plan that identifies key redevelopment opportunities.
- A Transportation Plan that addresses pedestrian and vehicle connectivity and access to key sites.
- A Branding Strategy that could be used in concert with the other plan recommendations to change public perception about Rockwood.

The design workshops produced two sometimes competing objectives for this Plan. One objective is to excite the community and its leaders with a vision of a revitalized Rockwood. The second objective is to create a plan that is practical and capable of early implementation. The Plan balances those two objectives. In doing so, it relies on Rockwood’s core strength—the people who live and work in this unique community.

## **Assets, Barriers, & Challenges**

The design process began with an assessment of assets, barriers and challenges in Rockwood. This analysis formed the basis of the vision statements.

### **Rockwood Assets:**

- Served by Light Rail
- Zoning here already supports mixed-use development
- Urban renewal mechanism can pay for change
- Active, attentive citizens
- Diversity
- Spectacular view of Mt. Hood

### **Rockwood Barriers:**

- Streets and Light Rail Tracks form a physical barrier
- Housing is poorly maintained
- Crime or the perception of crime
- Lack of services for residents
- Lack of a coherent vision

### **Rockwood Challenges**

- Building from within versus bringing from outside
- Small and local versus big and national
- What will make Rockwood a Town Center
- Mixed income housing
- Affordable housing that looks good

## Vision Goals

- Strengthen and create connections within Rockwood
- Strengthen and create connections beyond Rockwood
- Identify catalyst projects and use market capture to set trends for future development
- Focus uses to create subdistricts
- Bring nature in

### **Strengthen existing and create new connections within the Triangle.**

Primary among all of the key characteristics that make transit-oriented development successful is pedestrian connectivity. A new network of existing streets, new streets, and pedestrian ways –coupled with the open space and plazas– is the first step in transforming Rockwood Town Center. Streets are the primary generators of urban form.

The plan recommends development of interior streets within the Triangle as local streets with pedestrian amenities, including street trees in planting strips or grated tree wells, decorative light standards, benches, trash receptacles, and other elements that contribute to the design of an interesting and lively public realm.

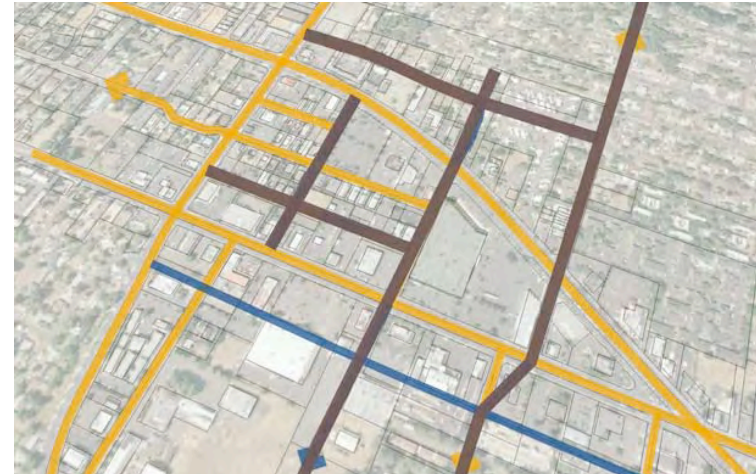
The network of streets and pedestrian ways will provide the robust environment that will foster economic development. All of these elements work together to support convenient circulation –in all forms– for cars, buses, light rail, bicycles, and pedestrians while incorporating a significant tree canopy.

Block length and connectivity are issues related to the street network. A rough collection of discontinuous streets and super-blocks characterizes the existing on-site conditions. Block length and perimeter are excessive and limit economic opportunity. The new network of streets and pedestrian ways provides more opportunities for block corner development. Corners bring vitality to urban spaces and create places for people to meet.

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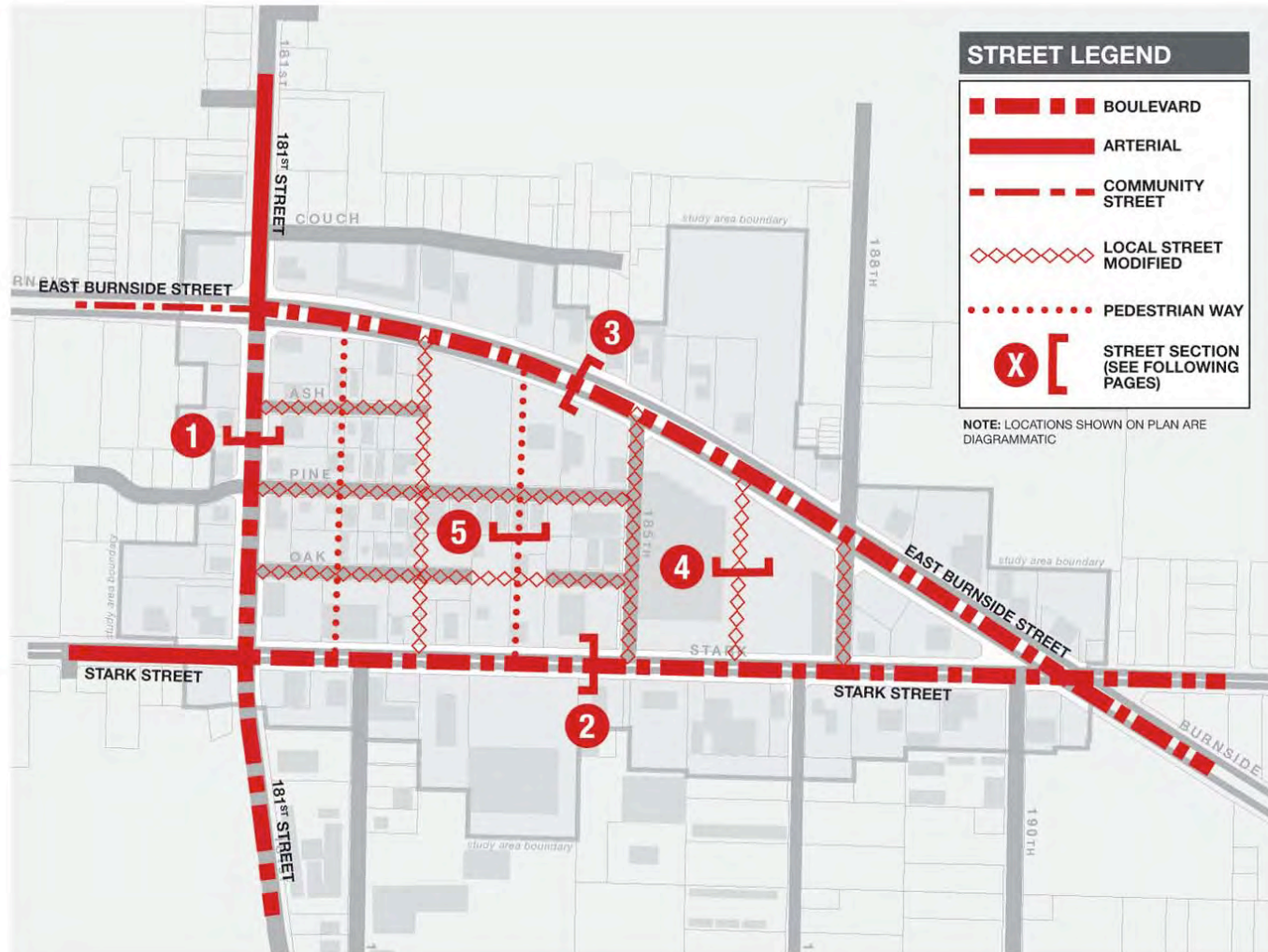
Constructing distributed and appropriately scaled open space and parks within the Triangle will enhance the social connections of the community. Since the surrounding arterial streets do form somewhat of a barrier, internal open space is essential. The plan recommends at least two separate and distinct types of open space within the Triangle: a village green and a plaza.

These new public spaces will provide ample opportunity for all residents and visitors to appreciate and enjoy the spectacular views of Mt. Hood.



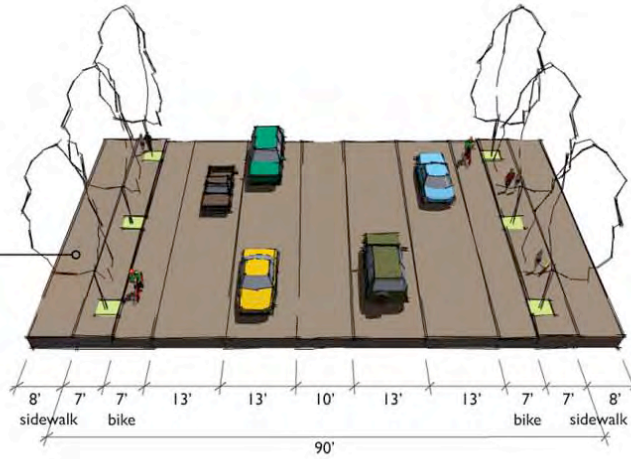
**Completing the Street Plan** | Block length and connectivity are issues related to the street network. A rough collection of discontinuous streets and super-blocks characterizes the existing on-site conditions. Block length and perimeter are excessive and limit economic opportunity. The new network of streets and pedestrian ways provides more opportunities for block corner development. Corners bring vitality to urban spaces and create places for people to meet.





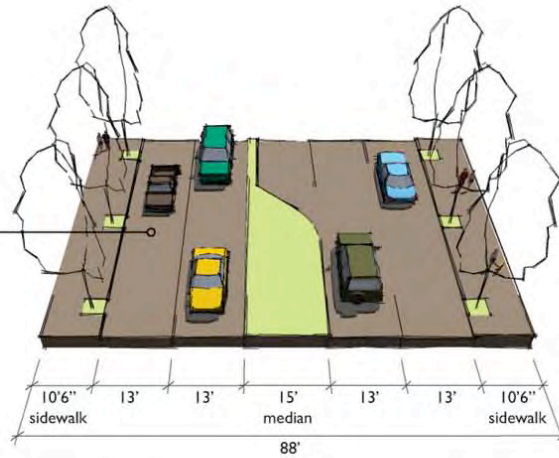
Local Street Plan | Street sections are shown on the following pages

This section shows sidewalk improvements as defined by the City of Gresham Transportation System Plan 2002 (TSP). Additional Right-of-Way would be necessary to meet the TSP sidewalk standard of 15'.

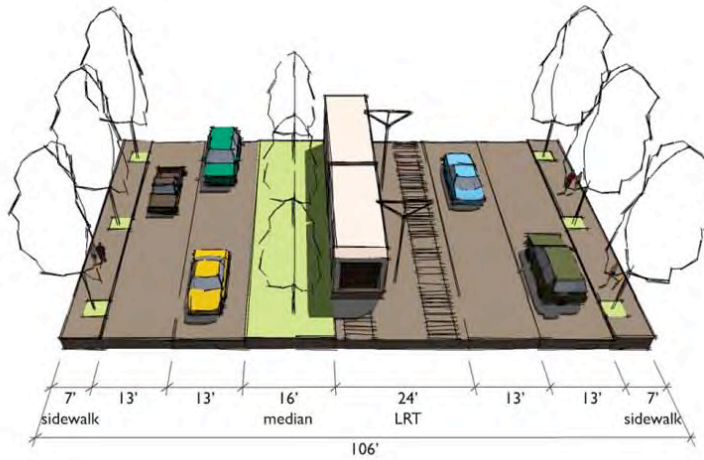


**1**  
181<sup>ST</sup> STREET  
Boulevard

SE Stark Street was upgraded in Fall 2004 to the standards defined by the TSP as shown in this illustration.



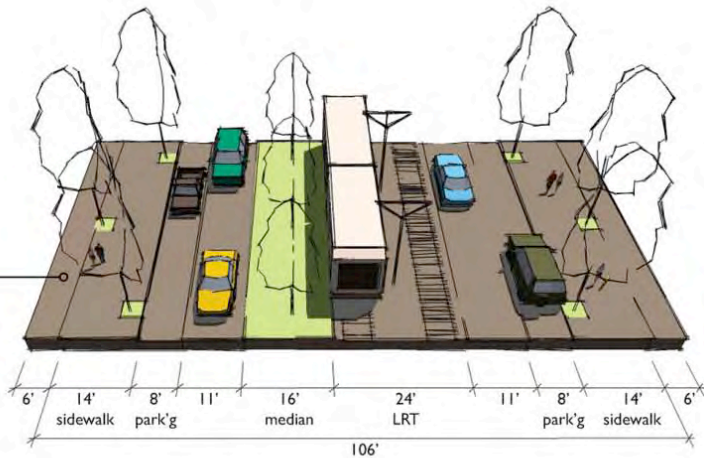
**2**  
SE STARK STREET  
Boulevard



**3a**

**EAST BURNSIDE STREET—EXISTING**  
4-Lane Regional Boulevard

Additional Right-of-Way will be necessary to achieve the proposed design.

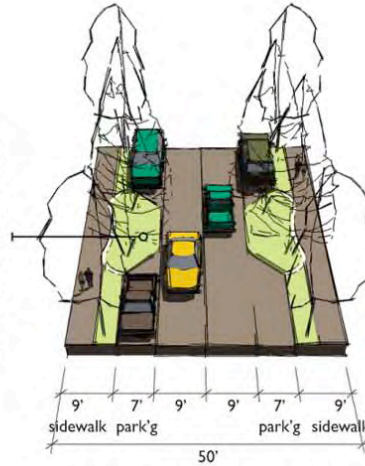


**3b**

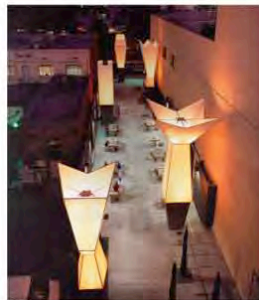
**EAST BURNSIDE STREET—PROPOSED**  
2-Lane Community Boulevard

Wherever possible, design new local streets to infiltrate stormwater through bioswales. This illustration shows a typical mid-block connection planted with coniferous trees.

*Action Item: City to adopt green street standard.*



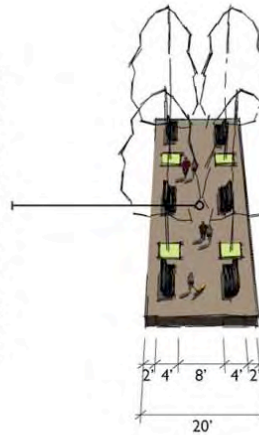
**4**  
**GREEN STREET—PROPOSED**  
 Local Street Modified



Precedent Image

The proposed street spacing and connectivity standard for the Rockwood Town Center is 350'. Connectivity can be achieved through streets or pedestrian ways. This illustration shows a mid-block pedestrian connection design standard.

*Action Item: City to adopt easement or dedicated Right-of-Way pedestrian way standard.*



**5**  
**MID-BLOCK CONNECTION—PROPOSED**  
 Pedestrian Way

**Strengthen existing and create new connections beyond the Triangle.**

The reasons that the Rockwood Town Center has not become successful –despite all of its advantages– is that the physical plan is characterized by excessively large blocks separated from a larger neighborhood by broad and busy streets that form a barrier to any possible connection. Properties within the Triangle are isolated from the surrounding neighborhood –and even relatively separated from one another—by the large grid of discontinuous streets.

The recent streetscape improvements completed for SE Stark Street demonstrate the possibilities for the other arterial streets that serve to connect beyond the Triangle. One of the suggestions presented at the design charrette in October 2004 was to “square the triangle” by including the neighborhoods on all sides.

The plan recommends that NE 181<sup>st</sup> Avenue be improved to the same boulevard standard as SE Stark Street.



**Typical Street – Before/After** | The plan recommends that NE 181<sup>st</sup> Avenue be improved to the same avenue standard as SE Stark Street.



**Burnside Street – Before/After** | Currently E. Burnside is a federally-designated freight route. The plan recommends that this route be relocated to a more appropriate alignment. The plan recommends that E. Burnside complete the northern edge of the Triangle as a boulevard with on-street parking and an allée (a double row) of trees to enhance an improved pedestrian experience of an “art walk”.

Currently E. Burnside is a federally-designated freight route. The plan recommends that this route be relocated to a more appropriate alignment. The plan recommends that E. Burnside complete the northern edge of the Triangle as a boulevard with on-street parking and an allée (double row) of trees to enhance an improved pedestrian experience of an “art walk”.

New connections extending beyond the Triangle can also extend to services. Currently there are no parks or open spaces within the Triangle and the parks and open spaces that do exist outside of the Triangle are well beyond walking distance.

The plan recommends that parks and open space be developed within –and without– the Triangle. A variety of parks, plazas, open space, and recreation facilities linked by pedestrian ways and local streets will provide the larger neighborhood with new opportunities for recreation as well as new reasons to visit the Triangle itself.



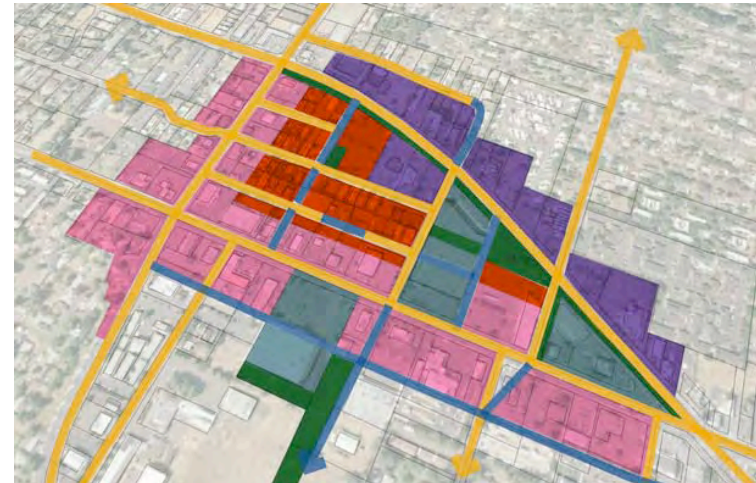
Stark Street – Before/After | The recent streetscape improvements completed for SE Stark Street demonstrate the possibilities for the other arterial streets that serve to connect beyond the Triangle.

**Focus uses to create sub-districts.**

The Triangle has a well-conceived mixed-use zone that promotes a diverse set of uses from commercial office to retail to housing. At least during the catalyst phase of the project, the plan recommends clustering uses in sub-districts as the most effective means to create a critical mass with the capability of substantial transformation. The plan recommends that SE Stark Street continue to be developed with an emphasis on retail and commercial office uses.

The plan shows that two of the three catalyst projects face onto SE Stark Street. The first catalyst project is a horizontal and vertical mixed-use project with a retail grocery store on the ground floor and offices above. The perimeter of the ground floor level is intended to have a mix of retail uses. The upper levels are commercial office. To the north facing E Burnside is a residential development with units for sale and for lease. The second catalyst project is a civic service or cultural facility with an effective presence on SE Stark Street.

The third catalyst project is located on the north side of the Triangle where the TriMet Park & Ride surface parking lot is currently located. It is a market-rate, for-sale condominium development with a mix of townhouses and flats. Together, these three strategically placed projects can be the start of a significant and long-lasting transformation of the Triangle.



Focused Land Uses | The plan recommends that SE Stark Street continue to be developed with an emphasis on retail and commercial office uses.



**Catalyst Key Plan I** The development of any one of these sites could trigger revitalization of the Rockwood area, provided that the character of the development is consistent with the community's vision. That's why achieving control is so important. The TriMet site is in public control. The former Fred Meyer and GI Joe sites are not. The City, through its urban renewal program, may be able to achieve control.



**Catalyst One I** The "Fred Meyer" site. This site is located between Burnside and Stark at 185<sup>th</sup> Street.



**Catalyst Two I** The "GI Joe" site. This site, approximately 4 acres fronts on Stark Street.



**Catalyst Three I** The TriMet Park and Ride lot. The lot is approximately 4 acres and is currently underutilized. It faces Burnside.



Green space, open space, and plazas can be the urban places where we engage with nature. The plan recommends that these types of places within the Triangle do more than merely remind people of natural areas far removed, but rather that they feel somehow connected to a larger network of open space and parks that extends beyond the Triangle into the rest of Gresham and beyond.

The plan recommendation for E Burnside is that it be developed as an “art walk” with a double row of street trees on the northern edge of the Triangle and that the plantings themselves, the paving, and other art elements combine to create a unique place that helps a new identity for Rockwood to grow.

All of the streets and pedestrian ways within the Triangle will be developed with street trees, either in planting strips or grated tree wells. Selection of the form and species of trees can be used to help identify the sub-districts within the Triangle that are a key part of the plan. The plan recommends a tree canopy design goal of 25 percent coverage. Ultimately the mature canopy of street trees will be a source of pleasure for the residents of Rockwood.



**Green Street I** “Green” streets are also a part of the design program for the Rockwood Town Center.

“Green” streets are also a part of the design program for the Rockwood Town Center. These streets perform the necessary task of infiltrating stormwater into the soil. The recommended stormwater treatment strategy for the study area uses the natural flow over the site to capture and treat stormwater in a system of bioswales at the downhill side of each block and intersection. Stormwater flow in the right-of-way will be recharged into the ground. Stormwater detention

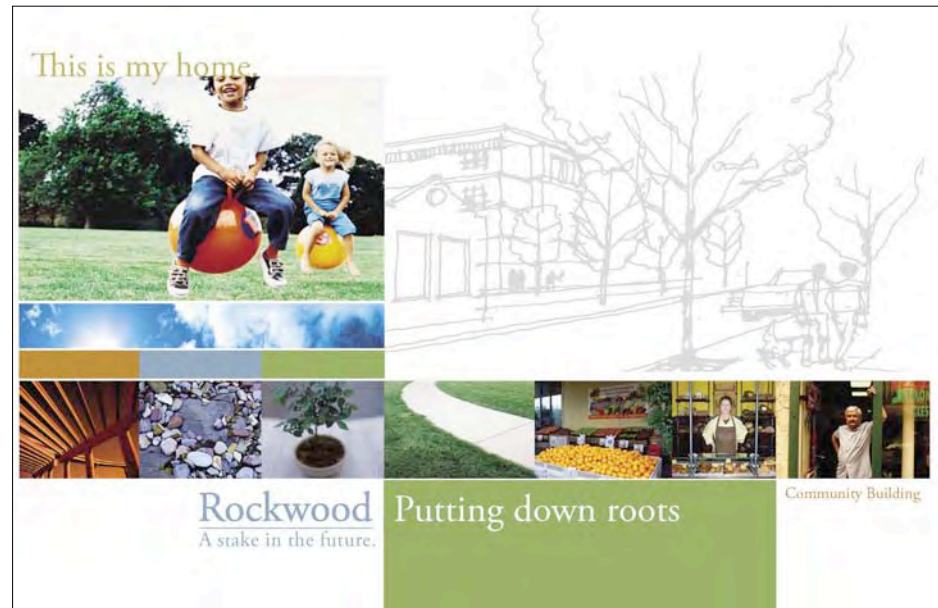
facilities, even in urban areas, augment invertebrate and avian habitat.

The long-term goals for the Triangle are to establish wildlife connectivity by creating partial wildlife corridors providing avian habitat –primarily through increased tree canopy.

A significant form of nature is human nature. The plan goals for placemaking for Rockwood is a vision of a community that is economically, socially, and environmentally sustainable in which development capacity is preserved in order to leverage the urban infrastructure of mass transit. The Triangle will be a place that successfully integrates sustainable technologies and concepts into a pedestrian-friendly urban center with a unique sense of place and identity. The community benefits of placemaking are improved use of public infrastructure, improved solar access, and an active, urban neighborhood that supports a diverse range of jobs and housing.

## Branding

During community outreach that was conducted following the charrette, it became apparent that while the proposed plan was solid, people thought it was missing imagery that captured the potential of the district. Some of the outreach audience members suggested that the plan include architectural renderings and pictures to illustrate a preferred architectural style for future



A Stake in the Future Identity Board

development. The design team felt that it would be inappropriate to propose architectural styles during the vision and plan stage. Furthermore, they felt that such style decisions needed to be part of a broader discussion involving the community. At the same time, the design team recognized that the comments reflected a longing for the vision to demonstrate and suggest—visually and with words—the richness and unique identity of the district, fragmentary as it is. So the City did something unusual. It hired an advertising agency to run a short, initial branding campaign, intended to be the first phase of a longer community branding process involving the larger Gresham community. During three intense weeks, members of ID Branding, a Portland-based branding and identity firm—assisted by Urbsworks—pored over the design team’s plan, citizen comments made during and after the charrette, and walked the streets of the district. Three identity image boards and written statements were prepared. Reception to the three Rockwood identity statements has been positive. While everyone may not agree with the selected imagery or the wording of the statements, everyone agrees that the effect of the work is powerful and thought provoking. Phase 2 of the Rockwood identity campaign will continue through summer and fall of 2005.

### **The three identity statements:**

**“A CONVERGENCE OF PLACE AND POSSIBILITY** Rockwood occupies a unique location: at the junction of major thoroughfares, at the intersection of different cultures, at the crossroads between past and future. The community is activated, primed to blossom and transform itself from an anonymous anywhere into a distinctive, richly varied cultural and commercial hub.

At this crucial point, opportunity lies in creating connections for and among the people of the community. Critical mass is building, and an identity is coalescing, formed by shared dreams and the connections between neighbors, between a place and the people who love it, between Rockwood and the community at large.”



## Actions to Transformation

Great things are possible for Rockwood. The recommended plan provides the vision and points the way. Now, how does the community make it happen? The consultant team has identified some general principles and specific development opportunities that will transform the community.

### Three Principles to Transformation

The charrette process and the unique characteristics of the Rockwood area led the team to identify three principles to guide the transformation of the neighborhood.

**Fix What You Have:** Substantial change will take time but there are early actions that can change some of the negative perceptions of Rockwood. For example, Rockwood has existing residential and commercial buildings. The Fred Meyer store sits empty today. Adding a major activity into that building would strengthen the neighborhood on an interim basis by adding activity to a currently vacant asset. Similarly the relatively high proportion of the housing in poor condition is a major contributor to the negative perception of Rockwood. Many of these problems are easily remedied by owners and landlords if pressed to do so. The team recommends that the City step up inspection and enforcement of existing nuisance and building code regulations. For a relatively small investment in city enforcement actions, the appearance of the existing housing stock can be improved and contribute to a revitalized Rockwood neighborhood.

**Achieve Control of Key Development Sites:** The planning process revealed that the character of development on three key sites will substantially determine the overall character and vitality of the community. The three sites are:

- The “Fred Meyer” site. This site is located between Burnside and Stark at 185<sup>th</sup> Street.
- The “GI Joe” site. This site, approximately 4 acres fronts on Stark Street.
- The TriMet Park and Ride lot. The lot is approximately 4 acres and is currently underutilized. It faces Burnside.

The development of any one of these sites could trigger revitalization of the Rockwood area, provided that the character of the development is consistent with the community's vision. That's why achieving control is so important. The TriMet site is in public control. The Fred Meyer and GI Joe sites are not. The City, through its urban renewal program, may be able to achieve control.

**Make it Happen:** Transforming Rockwood will require three things: **Vision, Money** and most of all **Leadership**. That leadership must come from the businesses, citizens and elected officials.

## Development Profiles

The consultant team evaluated each of the key sites to determine the ideal configuration and use of each site. The goal was to create a mix of uses and intensities on the three sites that were complimentary to each other and the existing community.

### Fred Meyer Site

Recommended Development Program: A 40,000 to 60,000 square foot grocery store to serve the neighborhood with second story office. A residential complex with a combination of for-sale and rental units would anchor the northern portion of the site.

### Former GI Joe Site (International Market)

Recommended Development Program: Community-serving civic/institutional use. The site can accommodate a building of 60,000 to 120,000 square feet fronting on Stark. Parking could be located behind the building.

### TriMet Park and Ride Lot

Recommended Development Program: High quality residential with a combination of for sale and rental units. Approximately 100 total units could be accommodated. A community pocket park would also fit on the site.

## **Making it Happen**

The transformation of Rockwood is a process, not an event. It began with this study process and it must continue with a series of implementation actions. The consultant team’s experience is that there are three factors that must be present for a transformation process to be successful.

### **Vision**

The community and its leaders must agree on a vision and stick to it. Consensus on a vision doesn’t come easily. Once you have it, do not give it up. Consistency and predictability is important for the community, for property owners, for developers and for city officials. Indecisiveness can be fatal.

### **Money**

Gresham voters had the foresight to create an urban renewal district that includes Rockwood. The designation provides a source of funds through tax increment financing. It will take several years for the district to generate adequate resources for major activities. Even then, there will never be enough public money to accomplish everything that needs doing. The City and the community must be very strategic about their expenditures and tie public dollars to private investment. The City and community should also seek every source of funding possible to implement the vision, no matter how small. The accumulation of small sources can create a critical mass quickly especially when driven by a compelling vision.

### **Leadership**

The third and most important success factor for Rockwood will be leadership—leadership provided by citizens, business owners, property owners, city staff and elected officials. Transforming a neighborhood is hard work. It requires a solid vision, a good plan and as much money as possible. But those ingredients will not be enough to change a community unless a group

of people decide to hold themselves accountable for implementing the vision and using scarce resources intelligently. Here is what community leadership could do:

- Communicate with major property owners to support the goals of the Rockwood plan
- Develop a work program for the City's code enforcement personnel
- Create and enforce a timeline for achieving both small and large objectives of this plan
- Continue the current work to build community pride and identity
- Be accountable for both the successes and the failures and share a common objective to make Rockwood a success

An added leadership requirement is strong project advocacy and management. In every successful project of this type, there is always someone whose job it is to make things happen. This is traditionally a government position, though sometimes it is a role performed by a property owner or developer. The City can demonstrate its commitment to a revitalized Rockwood by continuing its dedication of a staff position to the role of project advocate and project management.





## **Appendix**

**Evaluation Criteria**

**Market Analysis (attachment)**

**Existing Conditions Report (attachment)**

**Memorandum Regarding Level of Service Analysis (attachment)**

**Public Outreach Schedule (attachment)**

## Evaluation Criteria

The Rockwood Design Workshop created three development alternatives for the Rockwood Triangle. The following criteria were used to aid in selecting the best alternative. The criteria were crafted after reviewing the goals of the Rockwood/West Gresham Urban Renewal Plan:

1. **Quality mixed-use development that promotes live/work, 24-hour neighborhood.**  
A vibrant, active Town Center with a variety of uses in multi-storied, quality construction, that supports local neighborhood needs and attracts regional interest.
2. **Safe, convenient, direct circulation patterns throughout the Town Center, integrally linked to transit.**  
Numerous routing options with good internal circulation and a strong connection to transit.
3. **Multi-modal use is supported and enhanced through multi-modal design.**  
Appropriate street design with a strong interface between buildings and streetscape, ample pedestrian connections and other innovative transportation design methods.
4. **Green and more green. Lively community gathering spaces are provided.**  
Trees, parks, landscaping all surrounding active plazas and pocket parks that support the many grassroots, multi-cultural activities of Rockwood.

- 5. Place-based planning principles are used in effort to decrease the perception of crime through quality and comprehensive design.**  
Allow for direct response from Police, as well as more subtle design approaches that can proactively address community safety.
- 6. Creates the potential for community wealth.**  
Create the potential to attract private investment and new businesses, especially those that can offer a quality wage, training opportunities, and long-term, secure employment.
- 7. The plan is achievable.**  
Assure the plan can be implemented now and will complement future market needs.
- 8. Community consensus is achieved.**  
Broad public support is needed for the chosen design alternative if it is to be a success.



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## ROCKWOOD MARKET ANALYSIS: *RETAIL, RESIDENTIAL, OFFICE*

For the  
City of Gresham  
Rockwood Town Center Redevelopment Plan

*In association with  
David Evans and Associates, Inc. & Urbsworks, Inc.*

November 2004

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## DEMOGRAPHIC PROFILE

The socioeconomic characteristics of the retail and residential trade areas that surround the Rockwood area are provided in this section. For retail goods and services, the Rockwood area will be able to draw from a local trade area population of approximately a 3 mile radius from the Rockwood Triangle site. For residential product, Rockwood can expect to draw from a larger or 'greater trade area' defined by a 12 minute drive-time from the site, the geographic area from which a majority of potential new Rockwood area residents can be expected to originate.

The delineation of the local and greater trade areas is not meant to suggest that prospective customers of area businesses or future Rockwood residents will be drawn solely from these geographic areas. However, based upon factors such as Rockwood's location, competitive assets and proposed redevelopment activity in the Rockwood/Gresham area, these market areas provide a sound and reasonable basis for gauging future potential.

A map illustrating the boundaries of the local and greater trade areas is provided on the following page. For comparative purposes, demographics are shown for a local and greater trade area together with the immediate neighborhood (.5 mile), the City of Gresham, and the State of Oregon. Socio-economic trends are analyzed for the 1990-2009 timeframe.

### Population & Household Growth

- Over the past decade, population growth throughout the City of Gresham, the immediate neighborhood and trade areas has been moderately strong, above growth levels experienced for the state as a whole, (Exhibit S-1).
- The 2004 population of the City of Gresham was estimated at 98,814 increasing at an annual rate of 3.2% or by 2,202 persons per year since 1990. During the 2004-2009 time period, the city's average annual growth rate is expected to increase at a slower rate, 1.3% annually, with population growing to 105,357 by 2009. However, Gresham's growth rate will outpace local and greater trade areas as well as the State's.
- Population growth in the immediate neighborhood (0.5 mile radius) over the next five years is forecast to be modest, increasing from 8,527 in 2004 to 8,853 in 2009. The 2004 local trade area population was estimated at 125,837, with projections for growth to 132,196 by 2009. The greater trade area is presently home to an estimated 341,898 persons with a 2009 projected population of 357,525.
- In the past few decades, household size declined nationally due to a decrease in fertility rates, increasing divorces and single person households and a rise in the elderly population. Today, it is estimated at 2.58 persons per household. In all of the geographic areas examined for this project, except the state as a whole, household size exceeds the national average and is growing. In part, this may be linked to a relatively high Hispanic population, where household size tends to be above average. Exhibit S-1 shows a continuation of this trend over the next five years. It is and will remain the highest within the neighborhood trade area at 3.24 in 2004 increasing to 3.28 in 2009.

# Local and Greater Trade Areas

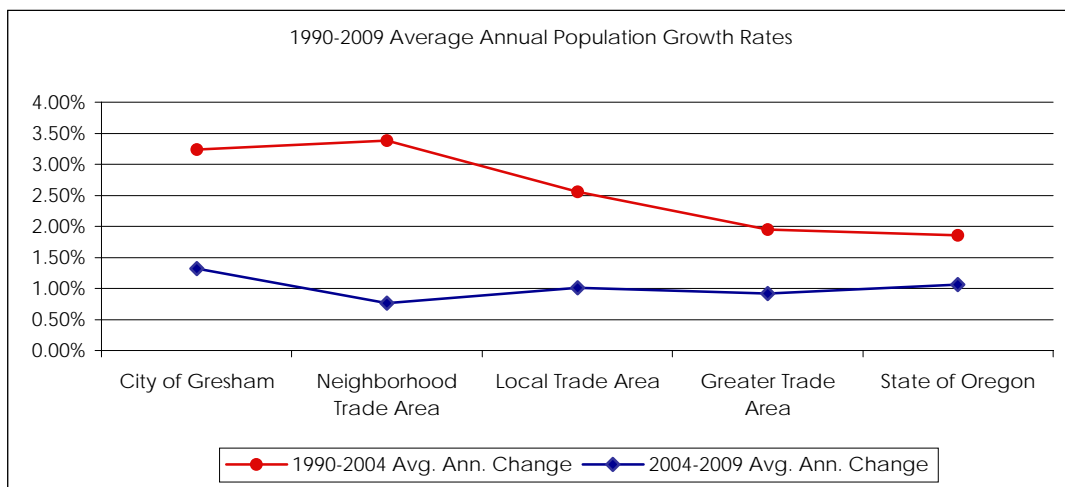


EXHIBIT S-1

POPULATION GROWTH

City of Gresham, Neighborhood Trade Area, Local Trade Area, Greater Trade Area and State of Oregon  
1990-2009

Geographic Area	1990	Avg. Ann. Change 1990-2004			Avg. Ann. Change 2004-2009		
		2004 (Estimate)	Number	Percent	2009 (Forecast)	Number	Percent
<b>City of Gresham</b>							
Population	67,984	98,814	2,202	3.24%	105,357	1,309	1.32%
Households	25,521	36,330	772	3.03%	38,600	454	1.25%
Avg. Household Size	2.63	2.69	0.004		2.70	0.002	
<b>Neighborhood Trade Area, 0.5 mi</b>							
Population	5,787	8,527	196	3.38%	8,853	65	0.76%
Households	2,157	2,601	32	1.47%	2,664	13	0.48%
Avg. Household Size	2.65	3.24	0.042		3.28	0.008	
<b>Local Trade Area, 3.0 mile</b>							
Population	92,650	125,837	2,371	2.56%	132,196	1,272	1.01%
Households	35,458	46,627	798	2.25%	48,738	422	0.91%
Avg. Household Size	2.59	2.67	2.610		2.69	0.004	
<b>Greater Trade Area, 12 min drive</b>							
Population	268,553	341,898	5,239	1.95%	357,525	3,125	0.91%
Households	105,031	128,741	1,694	1.61%	133,951	1,042	0.81%
Avg. Household Size	2.51	2.61	0.007		2.62	0.002	
<b>State of Oregon</b>							
Population	2,842,321	3,581,202	52,777	1.86%	3,770,744	37,908	1.06%
Households	1,103,313	1,399,425	21,151	1.92%	1,477,034	15,522	1.11%
Avg. Household Size	2.52	2.50	-0.001		2.50	0.000	



Source: ESRI BIS



**Age Distribution**

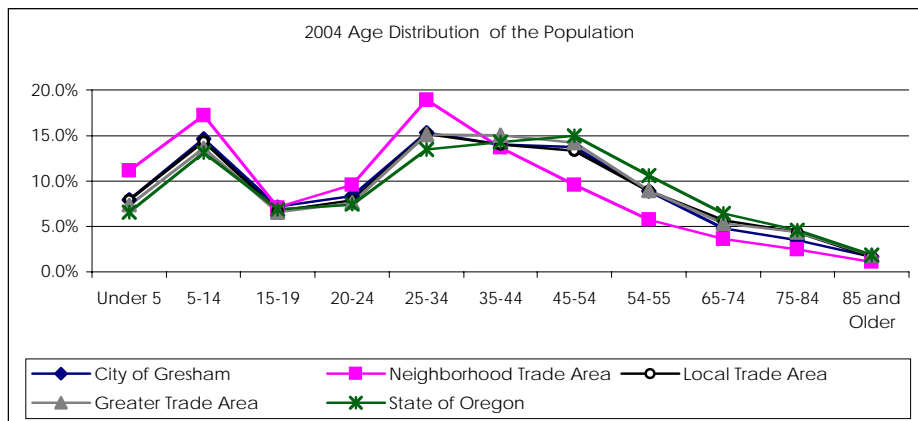
- The population within and immediately surrounding Gresham is quite young, compared to the State of Oregon as a whole. The 2004 median age within the city was estimated at 32.8 years and 33.6 years within the local trade area (Exhibit S-2). Median age within the immediate area is significantly below all other geographic areas at 27.4 years, owing largely to the large, family-oriented Hispanic population. Beyond the immediate Rockwood area, the population is older with a median age of 34.9 years within the greater trade area.
- The estimated proportion of the population under the age of 15 in 2004 was between 21% and 22.6% for the city and local/greater trade areas. Not surprising, the Rockwood neighborhood has a significant proportion of population within this age group, 28.4%.
- Prime consumer age categories, age 25-54 made up between 42.1% (neighborhood) and 44.3% (greater) of all the market area populations. Statewide the proportion of the population within this age group was 42.7%.

EXHIBIT S-2

POPULATION BY AGE

City of Gresham, Neighborhood Trade Area, Local Trade Area, Greater Trade Area and State of Oregon  
2004

Age Category	City of Gresham	Neighborhood Trade Area	Local Trade Area	Greater Trade Area	State of Oregon
Under 5	8.0%	11.2%	8.0%	7.4%	6.5%
5-14	14.6%	17.2%	14.3%	13.6%	13.1%
15-19	7.1%	7.1%	6.7%	6.6%	6.8%
20-24	8.4%	9.6%	7.9%	7.7%	7.4%
25-34	15.3%	18.9%	15.2%	15.1%	13.4%
35-44	14.0%	13.6%	14.0%	15.1%	14.3%
45-54	13.8%	9.6%	13.4%	14.2%	15.0%
55-64	8.9%	5.7%	8.9%	9.0%	10.6%
65-74	4.8%	3.6%	5.7%	5.3%	6.4%
75-84	3.5%	2.4%	4.3%	4.4%	4.6%
85 and Older	1.6%	1.1%	1.6%	1.9%	1.8%
<b>Total</b>	<b>98,815</b>	<b>8,526</b>	<b>125,839</b>	<b>341,900</b>	<b>3,581,202</b>
<b>Median Age</b>	<b>32.8</b>	<b>27.4</b>	<b>33.6</b>	<b>34.9</b>	<b>36.9</b>



Source: ESRI BIS

- As to be expected with a youthful market population, the share of residents age 65 years or older in 2004 in all comparative areas was below that of the state's (12.8%). Within the immediate Rockwood neighborhood, only 7.1% of residents are seniors with the proportion rising to 11.6% for both the local and greater trade areas.

**Household Income Distribution**

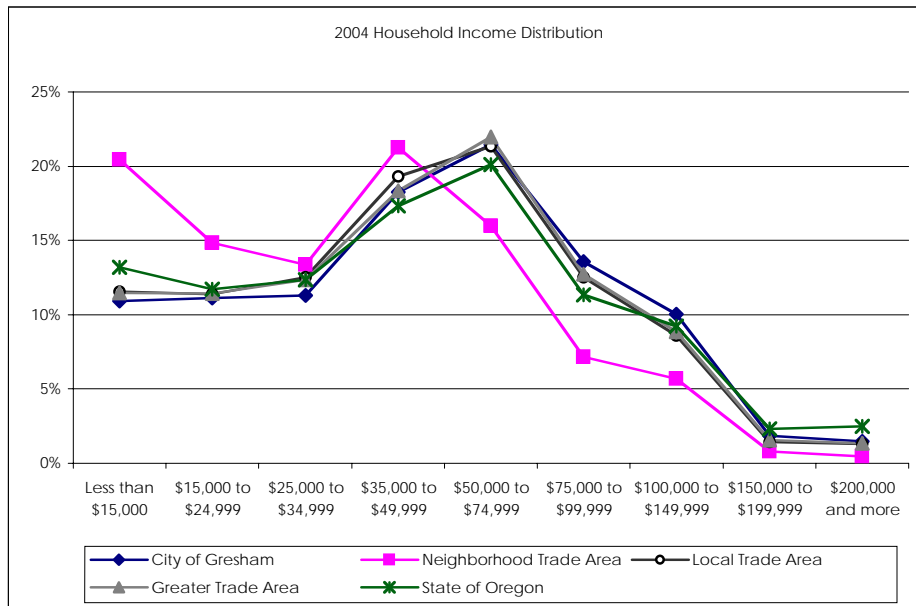
- Exhibit S-3 shows that on the whole, city and local and greater trade area residents are somewhat more affluent than households statewide. Within these areas, estimated 2004 median household income ranges from \$45,881 for the local trade area to \$48,504 in the City of Gresham, compared to \$45,702 for the state as a whole. Households within the immediate Rockwood neighborhood have markedly lower median household income of \$35,794.

EXHIBIT S-3

HOUSEHOLD INCOME

City of Gresham, Neighborhood Trade Area, Local Trade Area, Greater Trade Area and State of Oregon  
2004

Income	City of Gresham	Neighborhood Trade Area	Local Trade Area	Greater Trade Area	State of Oregon
Less than \$15,000	10.9%	20.5%	11.6%	11.5%	13.2%
\$15,000 to \$24,999	11.1%	14.8%	11.4%	11.4%	11.7%
\$25,000 to \$34,999	11.3%	13.4%	12.5%	12.3%	12.3%
\$35,000 to \$49,999	18.2%	21.2%	19.3%	18.3%	17.3%
\$50,000 to \$74,999	21.5%	16.0%	21.3%	22.0%	20.1%
\$75,000 to \$99,999	13.6%	7.2%	12.5%	12.7%	11.3%
\$100,000 to \$149,999	10.0%	5.7%	8.6%	8.9%	9.2%
\$150,000 to \$199,999	1.9%	0.8%	1.5%	1.6%	2.3%
\$200,000 and more	1.5%	0.5%	1.3%	1.3%	2.5%
<b>Total</b>	<b>36,328</b>	<b>2,600</b>	<b>46,627</b>	<b>128,741</b>	<b>1,399,424</b>
<b>Median</b>	<b>\$48,504</b>	<b>\$35,794</b>	<b>\$45,881</b>	<b>\$46,742</b>	<b>\$45,702</b>



Source: ESRI BIS

- Despite below average median incomes within Rockwood, there are clearly “pockets” of wealth, with 181 households (7%) earning in excess of \$100,000 a year. Within the local trade area, 5,292 households (11.4%) have incomes of \$100,000 or more, of which 609 households (1.3%) have incomes of \$200,000 or more.

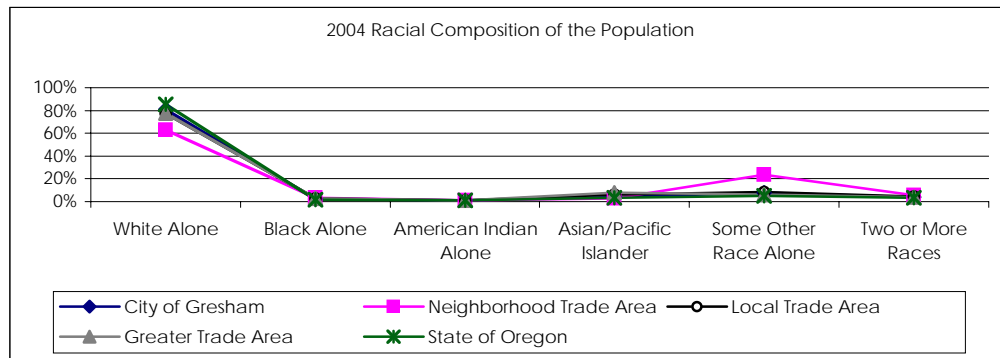
**Racial Composition**

- Racial distributions throughout all the trade area populations show two distinct differences compared to the state as a whole: a lower proportion of Whites and conversely, a greater proportion of Asian/Pacific Islanders and Hispanics as well. The greater trade area population includes 8.1% Asian/Pacific Islander population. The nearby Rockwood neighborhood has the greatest proportion of Hispanics with 37.5%, compared to only 9.5% for Oregon.
- The proportion of the population that is Hispanic is also well above average for the City (13.6%) and the local trade area (13.9%). Hispanics comprise 10.7% of the greater trade area.
- All of the trade areas show ethnic diversity with as little as 63% White population within a 0.5 mile radius to 81% White in Gresham city limits.

Exhibit S-4

RACIAL COMPOSITION  
City of Gresham, Neighborhood Trade Area, Local Trade Area, Greater Trade Area and State of Oregon  
2004

Race	City of Gresham	Neighborhood Trade Area	Local Trade Area	Greater Trade Area	State of Oregon
White Alone	80.9%	63.0%	77.4%	77.7%	85.2%
Black Alone	2.0%	3.5%	2.6%	2.9%	1.7%
American Indian Alone	0.9%	1.3%	1.0%	0.9%	1.3%
Asian/Pacific Islander	4.1%	2.8%	6.1%	8.1%	3.6%
Some Other Race Alone	8.0%	23.6%	8.5%	6.1%	5.0%
Two or More Races	4.0%	5.8%	4.4%	4.2%	3.2%
Total	98,814	8,527	125,838	341,899	3,581,202
Hispanic (any race)	13.6%	37.5%	13.9%	10.7%	9.5%



Source: ESRI BIS

### Community Tapestry Segments

Recognizing that people who share the same demographic characteristics may have widely divergent desires and preferences, Community Tapestry data (developed by ESRI Business Information Solutions) categorizes neighborhoods throughout the nation into 65 consumer groups or market segments. Neighborhoods are geographically defined by census blocks, which are analyzed and sorted by a variety of demographic and socioeconomic characteristics as well as other determinants of consumer behavior. Based on this information, neighborhoods are classified as one of 65 market segments.

Local and greater trade area households have been grouped into Community Tapestry market segments, which reveal a great deal of similarity. In both trade areas, Main Street USA and Aspiring Young Families represent the largest two segments with the balance of households distributed among many of the same categories.

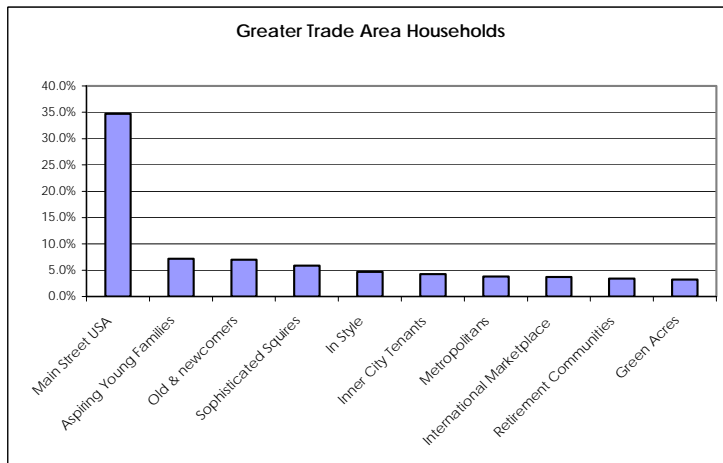
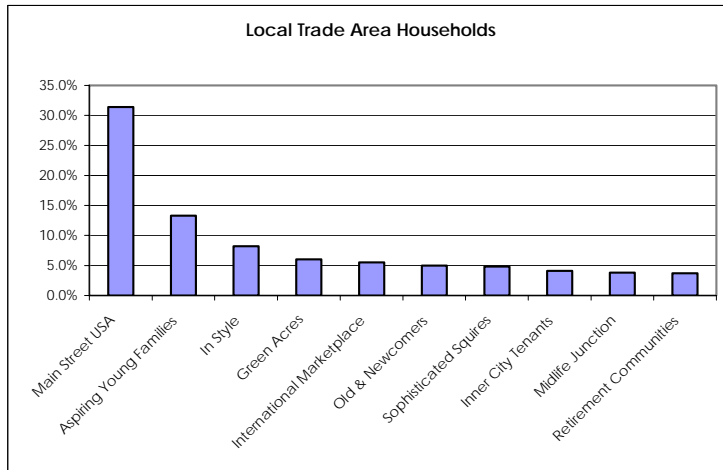
The four largest market segments in the local and greater trade areas are briefly summarized below with detailed descriptions of all the top segments comprising at least four percent (4%) of total households detailed descriptions provided in Appendix I. Exhibit S-5 follows the summaries to show into which market segments a majority of local and greater trade area households fall.

- **Main Street USA (31.4% of Local and 34.7% of Greater Trade Area HH)**  
*Main Street, USA* is highly representative of America's population: families with a growing mix of single households, household size of 2.53 people, and a median age of 35.9 years. Households in this segment earn a comfortable middle income with a median of \$48,000 and own older, single-family houses with a median home value of \$148,500. They are the suburban inhabitants of smaller metropolitan cities across the United States.
- **Aspiring Young Families (13.3% of Local and 7.2% of Greater Trade Area HH)**  
*Aspiring Young Families* are attracted to the large, growing metropolitan areas in the South and West with the highest shares in California, Florida, and Texas. These are mainly young, start-up families; married couples; or single parents with children. Although young, with a median age less than 30 years, approximately half have already purchased start-up homes, with a high percent of townhouses, and half are renters living in newer multiunit buildings.
- **In Style (8.2% of Local and 4.7% of Greater Trade Area HH)**  
Even though they're in the suburbs, *In Style* households favor the lifestyle of city dwellers, preferring townhouses to more traditional, single-family homes. These professional couples have careers but few children. Their median age is 37.6 years.
- **Green Acres (6.0% of Local and 3.2% of Greater Trade Area HH)**  
A little bit country, these blue-collar baby boomer families with children aged 6–17 enjoy living in rural-like settings of developing suburban fringe areas. These neighborhoods are often found in the Midwest. Their median household income of \$60,000 and their median home value of \$163,000 are high compared to that of others in the United States.

Exhibit S-5

HOUSEHOLDS BY PRIMARY MARKET SEGMENT  
 Rockwood Local and Greater Retail Trade Areas  
 2004

	Local Trade Area		Greater Trade Area	
	Market Segment	Percent of Households	Market Segment	Percent of Households
1	Main Street USA	31.4%	Main Street USA	34.7%
2	Aspiring Young Families	13.3%	Aspiring Young Families	7.2%
3	In Style	8.2%	Old & Newcomers	7.0%
4	Green Acres	6.0%	Sophisticated Squires	5.9%
5	International Marketplace	5.5%	In Style	4.7%
6	Old & Newcomers	5.0%	Inner City Tenants	4.3%
7	Sophisticated Squires	4.8%	Metropolitans	3.8%
8	Inner City Tenants	4.1%	International Marketplace	3.7%
9	Midlife Junction	3.8%	Retirement Communities	3.4%
10	Retirement Communities	3.7%	Green Acres	3.2%
<b>Total</b>		<b>85.8%</b>		<b>77.9%</b>



**Employment Trends**

- Employment data of area workers and the market area resident population provides additional insight to the characteristics and potential interests of these important markets.
- Exhibit S-6 illustrates the year-to-year fluctuations in the employment base within the Rockwood area showing an overall decline from 1999 to 2003. In general, manufacturing, accommodations and retail trade experienced the biggest losses during this timeframe, with health care and wholesale trade on the rise. The employment picture speaks to the ongoing need for more jobs within the Rockwood community.
- Exhibit S-7 depicts the employed population within the local and greater trade areas by economic sector. The majority of residents within the local and greater trade areas are employed in white collar jobs with service jobs accounting for the largest share of resident employment (42% and 43%). A significant share of residents are also employed within the retail trade and manufacturing sectors. Average commute times appear to be high at 27 minutes (local trade area) and 25 minutes (greater trade area.)

Exhibit S-6  
Total Industry Employment in Rockwood\*\*

NAICS	INDUSTRY TITLE	1999	2000	2001	2002	2003
11	Agriculture, Forestry, Fishing and Hunting	*	*	*	*	*
21	Mining	*	*	*	*	*
22	Utilities	*	*	*	*	*
23	Construction	533	430	439	404	480
31	Manufacturing	148	141	150	153	202
32	Manufacturing	1,133	994	921	923	784
33	Manufacturing	1,175	1,081	1,035	974	970
42	Wholesale Trade	362	314	343	429	455
44	Retail Trade	1,280	1,179	668	667	588
45	Retail Trade	344	310	280	274	198
48	Transportation and Warehousing	45	*	37	42	51
49	Transportation and Warehousing	*	*	*	*	*
51	Information	96	*	*	106	*
52	Finance and Insurance	166	167	178	151	118
53	Real Estate and Rental and Leasing	254	210	255	239	263
54	Professional, Scientific, and Technical Services	76	61	82	69	60
55	Management of Companies and Enterprises	*	*	81	94	*
56	Administrative/Support & Waste Management/ Remediation Services	202	239	282	235	266
61	Educational Services	*	93	89	92	778
62	Health Care and Social Assistance	997	930	1,135	1,174	1,179
71	Arts, Entertainment, and Recreation	121	110	111	140	151
72	Accommodation and Food Services	1,237	*	1,131	1,038	890
81	Other Services (except Public Administration)	497	*	487	471	453
92	Other non classifiable	*	*	*	*	*
<b>TOTAL ALL INDUSTRIES</b>		<b>8,665</b>	<b>6,261</b>	<b>7,703</b>	<b>7,671</b>	<b>7,885</b>

Source: Oregon Employment Department Quarterly Census of Employment and Wages. \* Data not available due to confidentiality. \*\* Rockwood defined using census tracts within boundaries as follows: Russell (north), Division (south), 162nd (west) and 202nd (east).

Exhibit S-7

EMPLOYED POPULATION 16+ BY INDUSTRY  
 Rockwood Local and Greater Trade Areas  
 2004

Industrial Sector	Local		Greater	
	#	%	#	%
Agriculture, Forestry, Fishing	389	0.70%	937	0.6%
Construction	3,666	6.60%	9,528	6.1%
Manufacturing	6,831	12.30%	19,212	12.3%
Transportation/Utilities	4,165	7.50%	11,090	7.1%
Wholesale Trade	2,721	4.90%	7,029	4.5%
Retail Trade	7,387	13.30%	19,837	12.7%
Finance, Insurance, Real Estate	4,054	7.30%	10,934	7.0%
Information	1,111	2.00%	3,905	2.5%
Services	23,271	41.90%	67,478	43.2%
Government	1,999	3.60%	6,404	4.1%
TOTAL	55,594	100.0%	156,355	100.0%
<i>White Collar</i>		54%	57%	
<i>Blue Collar</i>		28%	26%	
<i>Services</i>		18%	17%	
Worked at home, 2000		3.30%	3.70%	
Av. Travel Time to Work (in min.) 2000		27	25	

Source: US Census Bureau, ESRI BIS Forecasts

**Business Trends**

- Despite employment declines, the overall number of businesses has increased from 572 to 615 within the last five years in the Rockwood area defined by the Employment Department using census tracts. Of all the industry sectors depicted in Exhibit S-8, real estate has had the most significant increase in the total number of businesses from 39 to 48.
- Exhibit S-9 provides a more detailed look at the number of businesses in the immediate Rockwood Town Center area. The most significant business cluster is restaurants, totaling 19.

Exhibit S-8

Number of Business Units in Rockwood\*\*

NAICS	INDUSTRY TITLE	1999	2000	2001	2002	2003
11	Agriculture, Forestry, Fishing and Hunting	*	*	*	*	*
21	Mining	*	*	*	*	*
22	Utilities	*	*	*	*	*
23	Construction	74	62	72	75	79
31	Manufacturing	7	7	5	6	6
32	Manufacturing	17	15	14	13	13
33	Manufacturing	23	22	26	18	18
42	Wholesale Trade	25	22	25	29	29
44	Retail Trade	60	47	52	52	57
45	Retail Trade	24	21	22	30	27
48	Transportation and Warehousing	7	*	5	6	6
49	Transportation and Warehousing	*	*	*	*	*
51	Information	4	*	*	6	*
52	Finance and Insurance	30	24	27	26	27
53	Real Estate and Rental and Leasing	39	28	48	49	48
54	Professional, Scientific, and Technical Services	22	12	21	19	18
55	Management of Companies and Enterprises	*	*	5	4	*
56	Management and Remediation Services	28	26	30	28	33
61	Educational Services	*	4	5	5	20
62	Health Care and Social Assistance	68	52	73	71	67
71	Arts, Entertainment, and Recreation	5	5	6	10	10
72	Accommodation and Food Services	67	*	67	74	72
81	Other Services (except Public Administration)	72	*	73	78	85
92	<i>Other non classifiable</i>	*	*	*	*	*
<b>TOTAL ALL INDUSTRIES</b>		<b>572</b>	<b>347</b>	<b>576</b>	<b>599</b>	<b>615</b>

\* Data not available due to confidentiality. \*\*Rockwood defined using census tracts within boundaries as follows: Russell (north), Division (south), 162nd (west) and 202nd (east).

Source: Oregon Employment Department Quarterly Census of Employment and Wages.

Exhibit S-9

Rockwood Town Center Businesses

Business Category	#
Automotive Services	5
Beauty Services	5
Financial	8
Health Care	10
Lodging	2
Recreation	5
Restaurants	19
Retail	13
Specialty Services	14

Source: City of Gresham, 2004



## RETAIL ASSESSMENT

This section includes an overview of the retail sector, a synopsis of the existing supply within the Rockwood local trade area and an assessment of the current competitive posture of the Rockwood study area for commercial development.

### Local and National Retail Trends

Retail spending contributed significantly to the U.S. economy during the 2001 recession and the 2002-2004 jobless recovery and is expected to remain strong over the next year. Low interest rates have played a key role in supporting retail sales by increasing the disposable income of borrowers and facilitating new housing construction that has, consequently, boosted the demand for grocery-anchored shopping centers. The short-term prospect of higher interest rates combined with rising fuel costs hopefully will be offset by greater buying power ensuing from anticipated job growth (i.e., a forecasted monthly gain of 200,000 jobs nationally).

Changing consumer preferences are forcing developers to consider retail formats other than enclosed malls and strip development. Discounters such as Wal-Mart and Target are undergoing aggressive expansion. Open-air power centers, town centers with grid systems and neighborhood business districts that enable customers to park a few steps from their destination are growing in popularity. Also, malls that offer entertainment venues are attracting more customers than those with traditional tenant mixes.

Portland's retail market experienced an overall decline in vacancy during the first half of 2004 according to CB Richard Ellis, from 5.08% to 4.92%. Vacancy in the 'close-in' southwest Portland submarket fell nearly 48% during this time. Leasing activity was reportedly strong with 292,502 square feet (SF) of positive net absorption. New retail construction is underway. As a whole, Portland added 318,802 SF in 10 new buildings to the retail inventory in the second quarter of 2004. These relatively low vacancies may be attributable in part to containment of commercial development due to the urban growth boundary as well as a reluctance to add commercial land (over industrial land) during an economic downturn. Throughout Portland, many older shopping centers are undergoing renovation and new lifestyle centers are emerging spurring a rise in rental rates. Ten of Portland's 13 submarkets experienced an increase in asking rates during the first half of 2004, with the average per square foot lease rate increasing from \$16.15 to \$16.66 over six months.

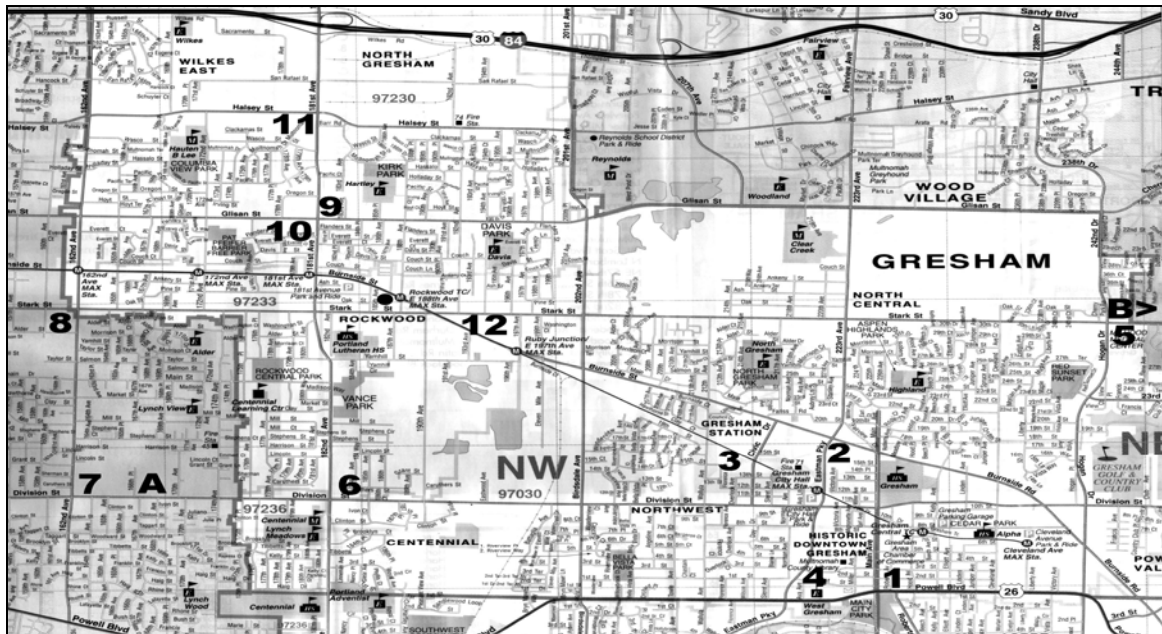
### Rockwood Area Competitive Retail Supply

Marketek conducted a survey of competitive shopping centers located within a three mile radius from the Rockwood Triangle. Retail uses are concentrated on arterials such as 181<sup>st</sup>, 162<sup>nd</sup>, Division, Burnside, Powell and in the downtown Gresham area. Summary characteristics including observed vacancies are presented in Exhibit RS-1, followed by a map locating the surveyed properties.

Exhibit RS-1  
Retail Centers: Local Trade Area

Center/Location	Type	Radius (Miles)	GLA	Vacancies		Year Built	Sq. Ft. Rate	Anchors
				Rate	Space			
1 Gresham Downtown Main Avenue	Street Retail	3	>100,000	10%	8	1905	\$8-12	Restaurant, Boutique, Services, Professional
2 Gresham Station Eastman & Burnside	Community-Lifestyle	2	300,000	3%	1	2001	\$18 \$14 \$26	Bed Bath & B. Borders Old Navy, GAP, OFC Small shops (1-3000SF)
3 Gresham Square 240 SE Burnside (SE 223rd)	Community	2	130,000	18%	6	1969 2003	\$12 NNN	Office Max, Provid. Reh. Beneficial Mortg., JR Furnit
4 Gresham Town Fair Eastman Pkwy at Div	Community-Power	3	265,765	15%	2	1987	\$18	GI Joes, PetSmart, Ross Jo-Ann's Fabrics, Pier 1
5 College Square Cer 242nd and Stark	Community	3	111,987	15%	3	1983	\$11-16	Bi-Mart, Harbor Freight IHOP (dark)
6 Rockwood Plaza SE Division & 182nd	Community	1	92,244	5%	1	c.1968 2000		Dollar Tree, Volunteers of Amer, Asia Food Market
7 Division Crossing 162nd and Division	Community	2	94,640	0%	0	1991		Safeway, Rite-Aid Weight Watcher, Nails
8 Village Square 162nd and Stark	Neighborhood	2	84,426	20%	sub-leases	c. 1975		Victory Bingo, Murphy's Furniture
9 Gilsan Center 181st and Gilsan	Neighborhood	2	30,000	15%	2	c.1975		Rite-Aid, Bingo
10 Roger's Square 181st and Gilsan	Neighborhood	1	73,000	0%	0	1987		Albertson's, Blockbuster, Baskin-Robbins, Subway
11 Halsey Crossing 181st and Halsey	Neighborhood	2	99,373	5%	1	1990		Safeway, Wendy's, Blimpie Fashion Bug, Hollywd Vid
12 Germantown Square 19220 SE Stark	Neighborhood Eclectic	1	25,000	20%	4	N/A		Set-N-Me-Free Aloe Vera Fantastic Flea Market
A Regal Division Street 16603 SE Division St.	Cinema	2	13 screens					
B Regal Stark Street 10 257th and Stark	Cinema	4	10 screens					

Source: Marketek, Inc. September 2004; National Research Bureau, 2003



The quality of retail centers within the local trade area varies considerably. For instance, grocery-anchored centers such as Roger’s Square and Halsey Crossing are well maintained with little or no vacancy. Nearby Gresham Square has converted significant space to service use (Providence Rehab and a mortgage company) and has several vacancies. Gresham Station is the newest, largest and healthiest shopping center in close proximity with only one vacancy. On the other end of the spectrum within a half mile from Rockwood is Germantown Square, an awkwardly situated, neglected center with an eclectic business mix and several vacancies.

Few local retail centers are operating at optimum capacity, many with several vacancies. The reasons vary widely from the quality of the anchors and condition of the facilities to management and marketing. Close to the Rockwood Triangle are older centers with value-oriented retailers. The nearest grocery is an Albertson’s, less than a mile a way.

The closing of the Fred Meyer at the Rockwood Triangle has had an obvious impact on the retail dynamics of the trade area, but is only one contributing factor to the current sparse and shallow retail mix. The long term competitive posture of Rockwood has been eroded over time by the establishment and/or redevelopment of larger retail centers, challenging transportation networks and the difficulty in agglomerating a large site to help create critical mass, and a perception of the Rockwood area tied to crime and other factors.

**Competitive Retail Assessment**

Key observations about the competitive environment for retail expansion and development within the general Rockwood Triangle area are noted in the table that follows.

Exhibit RS-2

Selected Opportunities & Challenges  
Rockwood Triangle Area

Opportunities & Assets	Weaknesses & Challenges
Residents have a strong desire for more ‘local’ shopping and demand exists, especially for convenience goods.	The Fred Meyer site is owned by trust in California. Kroger holds 10 year remaining leasehold and may seek to retain control to avoid a competitive venture.
High traffic volumes and MAX line and generate high visibility for storefronts.	Rockwood’s negative image related to crime continues to be a serious concern to many.
Favorable business environment with most area businesses satisfied w/ Rockwood location.	Encouraging developers’ interest while meeting city/ residents’ needs and vision.
Large employers (e.g., Kaiser) in close proximity providing jobs and captive daytime customer base. Close proximity to interstate makes Rockwood desirable location.	Neighborhood appearance is another often-noted concern among locals. A greater concern is the need for higher wage jobs to boost neighborhood incomes.

Neighborhood pride is increasing and grassroots self-improvement projects are being implemented through Weed and Seed.	Vacant and poorly maintained properties scattered throughout the commercial and residential areas.
Cohesive group of Rockwood business owners owing in part to City's business assistance efforts.	Public image and crime/safety concerns significantly limit potential investors and shoppers.
Significant undeveloped land b/w Rockwood and Central Gresham will influence the character of Triangle.	No large sites for new retail anchor retail (e.g., a national retailer).
Cultural diversity can be built upon to form a diverse interesting business mix: retail and restaurants that represent the area's variety.	Rents are inadequate to support new construction or significant rehabilitation without subsidy.
Key organizations playing active role in area's revitalization besides the City: Weed 'n Seed Program is key to social change; OAME spawning new businesses; and business association.	The MAX line and major roadways bisecting this neighborhood challenge the creation of a cohesive commercial area. When surveyed, many business owners cited 'traffic congestion' as a concern.
Numerous neighborhood assets: Library, schools, International Marketplace.	Enticing new businesses is a challenge as is encouraging residents, workers and visitors outside of the neighborhood to shop.
Significant public infrastructure projects are committed or expended, most recently the streetscape improvements.	Lower end retail (flea market, second hand stores) serving low to moderate income clientele and 'strip clubs' project a downward economic spiral.
Urban renewal is important investment vehicle and cohesive plan.	Some vacant storefronts and several rundown, properties project poor image.
Growing population and housing base will generate increased demand for local business.	Meeting demand locally is both a challenge and an opportunity.
Long time business anchors provide continuity, customer traffic.	Functionally obsolete properties or ones that are social/economic detractors may need to be eliminated.

Resident comments during the charrette process reinforce the issues and opportunities noted above:

*"The need for a unifying visual appearance is important to Rockwood's future."*

*"Rockwood's redevelopment cannot be 'piecemeal.' A holistic development plan is needed for success."*

*"The only thing holding us back is lack of a vision."*

*"Dilapidated properties need to be eliminated."*

*"The neighborhood needs stability. Part of that is helping existing businesses."*

## RETAIL DEMAND ANALYSIS

This section provides estimates of potential market demand for retail uses in the local Rockwood trade area as well as the study area’s capture of this demand.

### Retail Sales Potential and Supportable Space

The methodology for estimating statistical market support for retail space in the local trade area is displayed in Exhibits RD-2 through RD-6. This methodology applies expenditure potential<sup>1</sup> by type of merchandise to trade area population figures in order to obtain potential sales volume for trade area residents. Potential sales are divided among several merchandise and service categories: *shoppers goods, convenience goods, restaurants, entertainment and personal services*. Exhibit RD-1 specifies the types of goods and services within several of these categories. For instance, “apparel” (part of shoppers goods) includes women’s apparel, men’s apparel, children’s apparel, footwear, watches and jewelry.

Exhibit RD-1

SUMMARY OF MERCHANDISE AND SERVICE CATEGORIES

Merchandise/Service Category	Types of Goods/Services
Apparel	Women's Apparel, Men's Apparel, Children's, Footwear, Watches & Jewelry
Home Furnishings	Furniture, Floor Coverings, Major and Small Appliances, Household Textiles, Floor Coverings, PC Software and Hardware, Housewares, Dinnerware, Telephones
Home Improvement	Maintenance and Remodeling Materials, Lawn & Garden
Misc. Specialty Retail	Pet Care, Books & Periodicals, Sporting Equipment, Toys & Hobbies, Video Cassettes & Games, TV/VCR/Cameras, Audio Equipment, Luggage, Eyeglasses
Groceries	Food at Home, Nonalcoholic Beverages at Home, Alcoholic Beverages, Smoking Products
Restaurants	Food Away From Home, Alcoholic Beverages
Entertainment	Admission to Movie/Theater/Opera/Ballet, Recreational Lessons, Participation in Clubs
Personal Services	Shoe Repair, Video Rental, Laundry & Dry Cleaning, Alterations, Clothing Rental & Storage, Watch & Jewelry Repair, Photo Processing & Supplies, Child Care

Source: ESRI BIS

<sup>1</sup> Consumer spending is estimated from the Bureau of Labor Statistics’ Consumer Expenditure (CEX) Surveys. The CEX surveys have been used for over a century to provide data to study consumer spending and its effect on gross domestic product.

Estimates of sales per square foot of store space derived from the Urban Land Institute's *Dollars and Cents of Shopping Centers* are used to convert adjusted potential sales to supportable space estimates. In Exhibit RD-2, for example, in the case of apparel, potential sales of \$119,271,866 in the local trade area at sales per square foot of \$209 will support 570,679 square feet devoted to this type of merchandise. For all shoppers goods, total potential sales in the year 2004 are \$291,325,496 equating to 1.4 million square feet of floor space.

Exhibit RD-2 shows that in 2004, there is the potential for approximately 3.2 million square feet of retail space based on potential expenditures of the population residing in the local trade area. However, these potential expenditures by residents may occur outside of the local or greater trade areas- including the Internet - if desirable goods and services are not available locally.

Exhibit RD-2  
RETAIL EXPENDITURE POTENTIAL  
Rockwood Local Trade Area  
2004

Merchandise or Service Category	Per Household Expenditure	Potential Sales Volume	Target *Sales (\$/sq.ft.)	Potential Supportable Space(Sq. Ft.)
Apparel	\$2,558	\$119,271,866	\$209	570,679
Home Furnishings	\$1,301	\$60,661,727	\$199	304,833
Home Improvement	\$571	\$26,624,017	\$140	190,172
Misc. Specialty Retail	\$1,818	\$84,767,886	\$216	392,444
<b>Shoppers Goods</b>		<b>\$291,325,496</b>		<b>1,458,127</b>
Grocery	\$5,529	\$257,800,683	\$390	661,027
Health & Personal Care	\$859	\$40,052,593	\$365	109,733
<b>Convenience Goods</b>		<b>\$297,853,276</b>		<b>770,761</b>
<b>Restaurants</b>	<b>\$3,280</b>	<b>\$152,936,560</b>	<b>\$263</b>	<b>581,508</b>
<b>Entertainment</b>	<b>\$340</b>	<b>\$15,853,180</b>	<b>\$90</b>	<b>176,146</b>
<b>Personal Services</b>	<b>\$858</b>	<b>\$40,005,966</b>	<b>\$151</b>	<b>264,940</b>
<b>Total</b>		<b>\$797,974,478</b>		<b>3,251,482</b>

**Potential Supportable Retail Space** 3,251,482

Note: Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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Exhibit RD-3 depicts projected retail expenditure potential for the local trade area for the year 2009. Based on population growth and subsequent increases in retail sales for the years 2004-2009, total supportable retail space in the local trade area will have increased to 3.4 million square feet by the year 2009. Exhibit RD-4 provides the same type of analysis for the year 2014 when supportable space will have increased to approximately 3.5 million square feet in the local trade area.

Exhibit RD-3

RETAIL EXPENDITURE POTENTIAL  
Rockwood Local Trade Area  
2009

Merchandise or Service Category	Per Household Expenditure	Potential Sales Volume	Target *Sales (\$/sq.ft.)	Potential Supportable Space( Sq. Ft.)
Apparel	\$2,558	\$124,671,804	\$209	596,516
Home Furnishings	\$1,301	\$63,408,138	\$199	318,634
Home Improvement	\$571	\$27,829,398	\$140	198,781
Misc. Specialty Retail	\$1,818	\$88,605,684	\$216	410,212
<b>Shoppers Goods</b>		<b>\$304,515,024</b>		<b>1,524,143</b>
Grocery	\$5,529	\$269,472,402	\$390	690,955
Health & Personal Care	\$859	\$41,865,942	\$365	114,701
<b>Convenience Goods</b>		<b>\$311,338,344</b>		<b>805,656</b>
<b>Restaurants</b>	\$3,280	<b>\$159,860,640</b>	\$263	<b>607,835</b>
<b>Entertainment</b>	\$340	<b>\$16,570,920</b>	\$90	<b>184,121</b>
<b>Personal Services</b>	\$858	<b>\$41,817,204</b>	\$151	<b>276,935</b>
<b>Total</b>		<b>\$834,102,132</b>		<b>3,398,690</b>

**Potential Supportable Retail Space** 3,398,690

Note: Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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Exhibit RD-4

RETAIL EXPENDITURE POTENTIAL  
Rockwood Local Trade Area  
2014

Merchandise or Service Category	Per Household Expenditure	Potential Sales Volume	Target *Sales (\$/sq.ft.)	Potential Supportable Space( Sq. Ft.)
Apparel	\$2,558	\$130,317,310	\$209	623,528
Home Furnishings	\$1,301	\$66,279,445	\$199	333,063
Home Improvement	\$571	\$29,089,595	\$140	207,783
Misc. Specialty Retail	\$1,818	\$92,618,010	\$216	428,787
<b>Shoppers Goods</b>		<b>\$318,304,360</b>		<b>1,593,160</b>
Grocery	\$5,529	\$281,674,905	\$390	722,243
Health & Personal Care	\$859	\$43,761,755	\$365	119,895
<b>Convenience Goods</b>		<b>\$325,436,660</b>		<b>842,139</b>
<b>Restaurants</b>	\$3,280	<b>\$167,099,600</b>	\$263	<b>635,360</b>
<b>Entertainment</b>	\$340	<b>\$17,321,300</b>	\$90	<b>192,459</b>
<b>Personal Services</b>	\$858	<b>\$43,710,810</b>	\$151	<b>289,476</b>
<b>Total</b>		<b>\$871,872,730</b>		<b>3,552,593</b>

**Potential Supportable Retail Space** 3,552,593

Note: Target sales are based on the Urban Land Institute, "Dollars and Cents of Shopping Centers."

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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Exhibit RD-5  
 POTENTIAL SUPPORTABLE RETAIL SPACE  
 Rockwood Local Trade Area and Study Area Capture  
 2004-2014

Merchandise or Service Category	2004	2009			2014			Total Study Area Capture
	Local Trade Area	Local Trade Area	Numeric Increase	Study Area Capture	Local Trade Area	Numeric Increase	Study Area Capture	
<i>Shoppers Goods</i>								
Apparel				20%			25%	
Potential Sales	\$119,271,866	\$124,671,804	\$5,399,938	\$659,476	\$130,317,310	\$5,645,506	\$861,834	\$1,521,310
Supportable SF	570,679	596,516	25,837	3,399	623,528	27,012	4,442	7,842
Home/Furniture								
Potential Sales	\$60,661,727	\$63,408,138	\$2,746,411	\$549,282	\$66,279,445	\$2,871,307	\$717,827	\$1,267,109
Supportable SF	304,833	318,634	13,801	2,906	333,063	14,429	3,798	6,704
Home Improvement								
Potential Sales	\$26,624,017	\$27,829,398	\$1,205,381	\$290,170	\$29,089,595	\$1,260,197	\$379,207	\$669,376
Supportable SF	190,172	198,781	8,610	1,458	207,783	9,001	1,906	3,364
Misc. Retail								
Potential Sales	\$84,767,886	\$88,605,684	\$3,837,798	\$767,560	\$92,618,010	\$4,012,326	\$1,003,082	\$1,770,641
Supportable SF	392,444	410,212	17,768	4,288	428,787	18,576	5,604	9,892
<b>Total</b>								
Potential Sales	\$291,325,496	\$304,515,024	\$13,189,528	\$2,266,488	\$318,304,360	\$13,789,336	\$2,961,948	\$5,228,436
Supportable SF	1,458,127	1,524,143	66,016	12,052	1,593,160	69,018	15,750	27,802
<i>Convenience Goods</i>								
Grocery				60%			65%	
Potential Sales	\$257,800,683	\$269,472,402	\$11,671,719	\$7,003,031	\$281,674,905	\$12,202,503	\$7,931,627	\$14,934,658
Supportable SF	661,027	690,955	29,927	18,675	722,243	31,288	21,151	39,826
Health & Personal Care								
Potential Sales	\$40,052,593	\$41,865,942	\$1,813,349	\$1,088,009	\$43,761,755	\$1,895,813	\$1,232,278	\$2,320,288
Supportable SF	109,733	114,701	4,968	3,411	119,895	5,194	3,863	7,274
<b>Total</b>								
Potential Sales	\$297,853,276	\$311,338,344	\$13,485,068	\$8,091,041	\$325,436,660	\$14,098,316	\$9,163,905	\$17,254,946
Supportable SF	770,761	805,656	34,896	22,085	842,139	36,482	25,014	47,099
<i>Restaurants</i>								
Potential Sales	\$152,936,560	\$159,860,640	\$6,924,080	\$2,423,428	\$167,099,600	\$7,238,960	\$2,533,636	\$4,957,064
Supportable SF	581,508	607,835	26,327	10,676	635,360	27,525	11,161	21,837
<i>Entertainment</i>								
Potential Sales	\$15,853,180	\$16,570,920	\$717,740	\$143,548	\$17,321,300	\$750,380	\$150,076	\$293,624
Supportable SF	176,146	184,121	7,975	621	192,459	8,338	650	1,271
<i>Personal Services</i>								
Potential Sales	\$40,005,966	\$41,817,204	\$1,811,238	\$633,933	\$43,710,810	\$1,893,606	\$662,762	\$1,296,695
Supportable SF	264,940	276,935	11,995	4,661	289,476	12,540	4,873	9,535
<b>Total</b>								
Potential Sales	\$797,974,478	\$834,102,132	\$36,127,654	\$13,558,438	\$871,872,730	\$37,770,598	\$15,472,328	\$29,030,766
Supportable SF	3,251,482	3,398,690	147,208	50,096	3,552,593	153,903	57,448	107,544

Note: This exhibit represents the estimated potential demand for new retail sales and space in the local trade area in the years 2009 and 2014. This potential demand estimate is based on the projected expenditure potential of retail market area households by type of merchandise or service.

Sources: ESRI BIS; Urban Land Institute; Marketek, Inc.

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Exhibit RD-5 on the previous page distributes increases in sales and supportable retail space in the trade area among various retail categories for the years 2004, 2009 and 2014. The exhibit also provides an estimate of the Rockwood study area's capture of the increase in potential sales and demand for space for the years 2009 and for 2014.

Based on this analysis, *total* potential retail and service sales for the local trade area are projected to reach \$834 million by 2009 and \$871.8 million by 2014, supporting 3.5 million square feet of space, an increase of over 300,000 square feet over that which is supportable in 2004. However, this retail potential is shared with numerous competing shopping venues and areas, Rockwood being one. For this reason, estimates are provided of how much retail/service demand realistically can be captured by the Rockwood area.

The assignment of capture rates for *shoppers goods* and other retail categories is primarily based on Marketek's experience with comparable shopping districts throughout the nation and the Rockwood area's current retail competitive posture. One significant assumption underlying retail captures is that the Rockwood study area will work (and succeed) over the next 5-10 years to strengthen its position as a healthy commercial center, serving local resident consumers, area employees and possibly other markets.

It is also assumed that in the near term the majority of space devoted to *shoppers goods* will remain concentrated in the major shopping and commercial strip centers located in the local and greater trade areas. For this reason, the study area's projected capture of the potential increase in total trade area demand for *shoppers goods* during the 2004-2014 timeframe is conservative. The projection shows that the study area has the potential to capture 20% of the increase in total sales generated by local trade area residents by 2009 and 25% by 2014, assuming an increase in competitive retail space for shoppers goods. Examples of *shoppers goods* that would appeal to the target markets of nearby employees, trade area residents and passers-through include: books/magazines, sporting goods, card/stationery/gifts, electronics, jewelry, and specialty children's and women's apparel.

Capture rates for *convenience goods* (grocery, drug store items, etc) are appreciably higher (60%) for the reason that most residents prefer to make these purchases closer to home and will do so if the goods are available. Compared to available convenience shopping in other neighborhoods within the local trade area, the Rockwood neighborhood is significantly lacking. For this reason, too, Rockwood was assigned a relatively high capture of the projected increase in retail demand.

In addition to the Rockwood area's ability to capture a portion of total projected growth over the next ten years, estimates of existing 'unmet' demand for retail and services are also included in the final summary of supportable square feet, Exhibit RD-6. Public input during the charrette process underscored the very limited supply of existing retail establishments in Rockwood and the significant *out shopping* that is occurring, indicating that the neighborhood is not presently meeting its retail potential. In other words, a gap exists between current supply and potential

sales—'unmet demand'—which should be included in Rockwood's 2004-2014 potential demand for retail space. Further support for this existing unmet demand is provided by the findings of a recent Price Waterhouse Coopers study for the Initiative for a Competitive Inner City. The study documented that approximately 25% of potential retail demand is not being met in many inner city neighborhoods. Due to a limited supply and poor quality of merchandise/services, inner city residents are forced to shop outside their community.

Marketek estimates that there currently exists 108,662 square feet of unmet demand for retail space in the Rockwood area, of which approximately 35% is derived from convenience goods or grocery and drugstore demand. This demand reflects a highly conservative capture of between 3% and 5% (varying by type of merchandise/service) of all 2004 demand identified within the local three mile radius trade area (Exhibit RD-5). Coincidentally, shoppers and convenience goods demand totals about 90,000 SF, about the size of the vacant Fred Meyer store. Given the large supply of existing restaurants, no additional restaurant demand was identified at this time. It may be argued, however, that the supply is concentrated in Mexican and fast food restaurants and that opportunity exists for greater diversity in the restaurant sector.

Exhibit RD-6 provides a summary of the total current unmet demand by category of goods/services, as well as increases in supportable retail space that can

Exhibit RD-6

POTENTIAL SUPPORTABLE RETAIL SPACE IN THE ROCKWOOD AREA  
2004-2014

Merchandise/ Service Category	Rockwood Area Existing Unmet Potential Demand 2004	Rockwood Area New Supportable Square Feet 2009	Rockwood Area New Supportable Square Feet* 2014	Total New Supportable Square Feet 2004-2014
<b>Shoppers Goods</b>				
<i>Apparel</i>	17,120	3,399	4,442	24,962
<i>Home Furnishings</i>	9,145	2,906	3,798	15,849
<i>Home Improvement</i>	5,705	1,458	1,906	9,069
<i>Misc. Specialty Retail</i>	19,622	4,288	5,604	29,514
Subtotal	51,593	12,052	15,750	79,394
<b>Convenience Goods</b>				
<i>Grocery</i>	33,051	18,675	21,151	72,877
<i>Health &amp; Personal Care</i>	5,487	3,411	3,863	12,761
Subtotal	38,538	22,085	25,014	85,637
<b>Restaurants</b>	0	10,676	11,161	21,837
<b>Entertainment</b>	5,284	621	650	6,555
<b>Personal Services</b>	13,247	4,661	4,873	22,782
<b>Total</b>	<b>108,662</b>	<b>50,096</b>	<b>57,448</b>	<b>216,205</b>

\*Not cumulative

Source: Marketek, Inc. © 2004 by Marketek, Inc.

potentially be captured by the Rockwood area by the years 2009 and 2014. It is important to note that area businesses will also generate sales from other target markets in addition to the local population base, including area employees, passers-through, business and recreational visitors, students and others. Estimating potential demand from these other markets is beyond the scope of this study.

### **Retail Spending Activity**

The Spending Potential Index (SPI) is a measure of market activity developed by ESRI Business Information Solutions and denotes actual dollars *spent* on certain goods and services by residents within a given market area. This information adds another dimension to the statistical and lifestyle analyses and is helpful in identifying an appropriate business and merchandise mix for the Rockwood commercial center.

When the SPI is equal to 100 for a specific type of merchandise, consumers are spending at a rate equal to the national average. An SPI greater than 100 indicates that consumers are buying or spending above the national average. In other words, the SPI is an indicator of what prices consumers will pay and/or the level of discretionary income they are willing to devote to a particular good or service. Exhibit RD-7 on the following page shows the SPI of Rockwood local trade area households for various types of goods and services.

The data presented in Exhibit RD-7 indicates local trade area residents generally spend at a rate below the national average, which is consistent with slightly lower household incomes. Spending is highest for food & beverage categories ranging from 97 for meats & related to 101 for alcoholic beverages. Apparel categories rank relatively high with the average being 97 and toys & games is at 100, both indicative of a family-oriented population. Spending is lowest for insurance (77-79), home improvement (77-78) and transportation (78-81).

It is important to note that while spending is below the national average for several of the types of goods and services listed in Exhibit RD-7, trade area consumers may still demand these goods and services; on the whole they tend to pay less for them.

### **Hispanic Marketplace**

Although the demographics of Rockwood's Hispanic residents are incorporated into the analysis of the study area's socioeconomic characteristics as a whole, it is interesting to review national statistics on the Hispanic market segment. American Demographics Magazine and their research affiliates observe the following:

*"Unlike the U.S. as a whole, Gen Yers (age 5-24) are the largest Hispanic group, making up 38% of the Hispanic market. For the balance of the U.S., middle age baby boomers are the largest segment. Hispanic household income averages about \$9,000 less than the average U.S. household at \$42,000. However, the majority of Hispanic households are Middle Class."*

Exhibit RD-7

SPENDING POTENTIAL INDEX OF SELECTED GOODS AND SERVICES  
Rockwood Local Trade Area

Merchandise/ Service Category	Spending Potential Index	Merchandise/ Service Category	Spending Potential Index
Apparel	97	Financial Services	
Men's	96	Investments	85
Women's	98	Auto Loans	78
Children's	91	Health	
Footwear	99	Nonprescription Drugs	98
Watches & Jewelry	104	Prescription Drugs	76
Other Apparel	95	Eyeglasses and Contact Lenses	79
Computer		Home	
Computer/Hardware for Home	81	Home Improvement	
Software/Accessories for Home	82	Maintenance/Remodeling Serv	77
Entertainment & Recreation	83	Maintenance/Remodeling Supp	78
Entertainment Fees & Admissions	81	Household Furnishings	
Membership Fees	80	Household Textiles	80
Sports Participation	83	Furniture	81
Theater/Movies/Ballet/Opera	82	Floor Coverings	79
Sporting Events	81	Major Appliances	80
Recreational Lessons	80	Housewares	108
Television & Sound Equipment	80	Small Appliances	80
Cable Television	78	Luggage	83
Color Television	80	Telephone & Accessories	101
VCR/Video Camera/DVD Player	83	Child Care	82
Video Cassettes and DVDs	82	Lawn & Garden	83
Video Game Hardware/Software	81	Moving/Storage	85
Satellite Dishes	79	Housekeeping Supplies	99
Video/DVD Rental	83	Insurance	
Audio Equipment	83	Homeowners/Renters	77
Rental & Repair of TV/Sound	82	Vehicle	79
Pets & Supplies	89	Life	77
Toys & Games	100	Health	77
Recreational Vehicles & Fees	79	Personal Care Products	100
Sports/Exercise Equipment & Supplies	94	School Books & Supplies	83
Photo Equipment & Supplies	83	Smoking Products	77
Books/Magazines/Subscriptions	80	Transportation	
Food & Beverages	98	Vehicle Purchases	78
Groceries	98	Gas & Oil	78
Bakery & Cereal Products	98	Vehicle Maintenance & Repair	81
Meats, Poultry, Fish & Eggs	97	Travel	
Dairy Products	98	Air Fare	81
Fruits & Vegetables	99	Hotels/Motels	79
Other Foods at Home	99	Rental Cars	81
Meals at Restaurants	98	Food/Drink	80
Alcoholic Beverages	101		
Nonalcoholic Beverages at Home	98		

Source: ESRI BIS

The Hispanic market accounted for \$700 billion in consumer spending last year, which represents nearly 9 percent of the total U.S. disposable personal income (valued at \$8.02 trillion), according to the Department of Commerce, Bureau of Economic Analysis.

As the number of U.S. Hispanic immigrants continues to grow, so will this cohort's consumption levels. Already, with Hispanic Americans' disposable income growing in 2003 at a compounded annual growth rate (CAGR) of 7.5 percent, it is outpacing the overall U.S. disposable income, which only grew 2.8 percent CAGR last year. By 2010, the consumer spending among the U.S. Hispanic population is expected to reach \$1 trillion, according to Chain Store Guide, a market research company for the retail and food service industries.

Chain Store Guide is about to release a yearlong study of the Hispanic market. One of the preliminary conclusions is that it is not enough to identify members of this cohort merely as Hispanics. They do not behave as one monolithic group. Instead, sub-ethnic categories are forming, based largely on country of origin. *"They're looking for quality goods, good prices and products that come from their country of origin. Brands that come from different countries of origin are completely different and [Hispanics] want those brands that make them feel closer to home."* The survey concludes that 60 percent of foreign-born Hispanics tend to be focused on nutrition and food ingredients, while U.S.-born Hispanics are more worried about lifestyle factors such as smoking and stress.

In general, Hispanic lifestyle characteristics are dominated by young Baby Boomers with Children, making up 25% of the total. This population segment is characterized as:

- Young, with a median age of 31.2 years
- Above average median income
- Enjoy home projects, hunting, camping, fishing
- Rent videos, use PCs, visit museums/zoos/theme parks
- Own pets, campers, multiple vehicles

It is important to note that overall Hispanic shoppers spend between *50 and 100% more* of their budget (than the average American) on the following items:

- Apparel, children <2
- Rental housing
- Footwear
- Pork & beef
- Fresh fruits & vegetables
- Laundry & Cleaning Supplies
- Apparel, girls, age 2-15

Hispanic shoppers spend between 15 and 49% more of their budget (than the average American) on the following items:

- Variety of food products
- Furniture
- Apparel, boys, age 2-15
- Apparel & services

- Household products
- Bakery products

Advertisers have identified Hispanic youth as the marketer's challenge. By end of decade, 1 in 5 American youth will be Hispanic. According to the Association of Hispanic Advertising Agencies, *"One of the biggest misperceptions about Hispanic teens is that they will be completely assimilated into American culture. For young Latinos, their bilingualism is a huge part of their individuality."*

## RESIDENTIAL ANALYSIS

A statistical demand analysis was performed for the market area (defined by a 12-minute drive time from the center of Rockwood) to estimate the potential market depth for for-sale multi-family housing and rental housing. The two main sources of annual potential demand for housing are new household growth and turnover. New household growth is traditionally used to project market growth and is based on population and household growth projections. Projected owner or renter occupied households are qualified or segmented by owner or renter turnover rates (derived from the 2000 Census), income, age and household size.

To offer insight to the relative strength of the Rockwood residential market, the supply side of the local housing market is also provided, including: size and occupancy characteristics of nearby active for-rent developments that are medium density and a summary of the for-sale attached product, of which little exists.

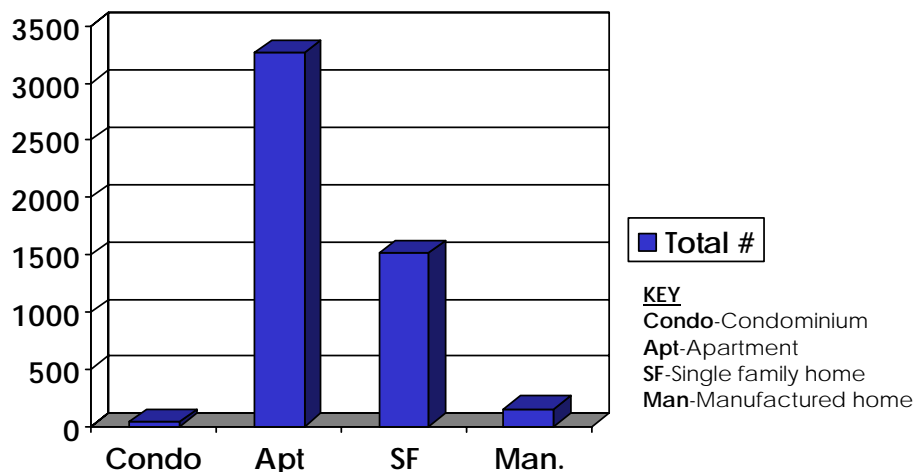
### Existing Residential Supply-Multi-Family Rental

With low employment growth and record low interest rates encouraging home ownership, the rental market in the Portland metro area has been characterized by high vacancies and limited construction in the last two years. However, according to the latest Portland-area apartment market report from the research firm, Marcus & Millichap, renter demand will rise (and renter concessions decline) through the fourth quarter of 2004 and into 2005.

The region’s average vacancy rate will stand at about 7.8% at year’s end, with the suburban markets of Gresham, Hillsboro and Beaverton continuing to register above-average vacancy levels. An estimated 2,000 new units will have been constructed in 2004, with 800 of these in downtown and the Pearl District. Average asking rents are expected to stabilize at \$689 per month through the end of 2004 and grow slightly in 2005.

HS-1

Residential Building Permits for New Construction  
3-mile Radius, City of Gresham



Over the last decade or more, the City of Gresham witnessed significant growth in rental product. Area multi-family housing development outpaced single-family development by 2 to 1 from 1990 – 2002 based upon City building permit data depicted in the following exhibit. Realtors and property managers agree that the current Gresham rental market is oversupplied.

The apartment market is dense and diversified within the local Rockwood trade area. There is an affordable, entry-level category of product that is older construction, typically smaller, (less than 40 units) and a 'shotgun' of doors in a straight line. Many of these are independently owned and managed. Observations of empty parking lots during workday hours implied an employed resident population. The middle category of apartments are 10 to 20 years old, with more architectural detail, clustered entrances, better maintenance, and professional property management with up to 100 units. At the high end, there are several new, amenity rich developments, often marketed as 'with MAX access.' These are secure, prestigious, professionally managed developments of more than 100 units. Two developments not included in the trade area, but, worth noting are the Russellville development along 102<sup>nd</sup> and the soon to be completed Hazelwood Station, an 88-unit development with on-site day care. These are notable for their transit-oriented design and a unique Northwest architectural aesthetic.

In an effort to understand the characteristics of market rate rental apartment projects in the Rockwood area, nine nearby apartment projects were surveyed, representing a cross section of quality product available to prospective tenants.

Overall, the apartments surveyed ranged in size from 22 units (Glendover Heights) to 264 units (Columbia Trails.) Average occupancies are 89%, with newer, 'trendier' complexes more fully occupied.

Unit features and amenities present in the rental communities surveyed generally include a full kitchen with a dishwasher, balcony or patio, carpeting and on-site laundry. Upgrade features and amenities include: washer/dryer connections, playground, clubhouse, fitness center and a pool.

Renter profiles obtained from interviews with managers and on-site leasing agents confirm that while there is a mix of tenants at the apartment communities surveyed. Tenants are typically young and older singles and families, many of whom work in the area or have family nearby.



Exhibit HS-1

Apartments within the Rockwood Triangle Effective Trade Area

Site		Units	Rent	Square Feet	Rent/ Sq. Ft.	Bed	Bath	Occ Rate	Year Built	Comments
No.	Name									
1	Columbia Trails 1112 NW 15th	264	\$775	672	\$1.15	1	1	95%	2002	Gresham Station stores and amenities. 5% large employer discount. Workcenter in bedrooms.
			\$1,050	1,054	\$1.00	2	2			
			\$1,250	1,293	\$0.97	3	2			
2	Avalon 202nd and Burnside	225	\$624	559	\$1.12	Studio	1	93%	2003	Controlled main entry gates, billiard room, pool/spa, private garages available, 24 hour fitness center, clubroom.
			\$769	770	\$1.00	1	1			
			\$789	784	\$1.01	1	1			
			\$905	1036	\$0.87	2	2			
			\$945	1038	\$0.91	2	2			
3	Stark Street Crossings 202nd and Stark	132	\$640	729	\$0.88	1	1	85%	2003	New with usual amenities. Far from MAX.
			\$670	871	\$0.77	2	1			
			\$725	938	\$0.77	2	2			
			\$880	1,165	\$0.76	3	2			
4	Burnside Commons 172nd & Burnside	22	\$649	950	\$0.68	2	1.5	77%	c. 1998	TOD, two level over parking. Townhouse style.
5	Rockwood Park 17500 Burnside	70	\$649	1,000	\$0.65	2	1	91%	c. 1979	No specials now. No 2 bdrms vacant. Nearby park.
			\$529	780	\$0.68	1	1			
6	Trymax Apartments 16405 Burnside	42	\$595	846	\$0.70	2	2	95%	c. 1982	All 2 bdrms. Water, sewer, garbage, and cable paid.
7	Glendover Heights 15850 NE Glisan	22	\$480	507	\$0.95	1	1	86%	c. 1975	Near golf course and MAX. Wooded. Older, but well maintained.
			\$490	619	\$0.79	1	1			
			\$670	1,015	\$0.66	3	2			
8	Sienna Lofts 22744 SE Stark	75	\$635	698	\$0.91	1	1	90%	2004	Covered parking and short term lease available.
			\$675	814	\$0.83	1	1			
			\$700	903	\$0.78	1	1			
9	Waverly Gardens 20121 SE Stark	146	\$500	600	\$0.83	1	1	95%	c. 1989	Well maintained garden apartment. Woodburning stove in every apartment.
			\$625	906	\$0.69	2	2			
			\$795	1,126	\$0.71	3	2			

Source: Marketek, Inc., September 2004

**Existing Residential Supply-Multi-family For Sale**

The residential sales market was examined in the six elementary school neighborhoods closest to the Rockwood Triangle (Alder, Davis, Hartley, Lynch Meadows, Lynch View, and north Gresham.) These schools are all within a two-mile drive distance. Single-family, detached homes begin at about \$120,000 to \$150,000, in the trade area, with the occasional distressed property at less than five figures. This makes the condo market less than attractive with single family homes in long supply. As of September 1, 2004, there were only six listings for condominiums in the subject area. The average asking price was about \$95.00 per square foot or \$110,308 for mostly 2 bedroom 2 bath units less than 1,350 square feet in size. While condominiums are not a common property type in the subject area (or in Gresham as a whole), there might be some opportunity for condos aimed at niche market, such as young professionals or empty nesters. Such a development could be made attractive in concert with any medical, educational, and government uses contemplated for the Rockwood town center site.

Given the high proportion of Hispanics in the immediate Rockwood area, it is interesting to note the difference in homeownership rates for this market. While

national home ownership rates are at an all-time high of 68.3 percent, Hispanic homeownership is lagging at 46 percent compared to 74 percent for non-Hispanic white families, according to the U.S. Census. At the same time, Hispanic buyers are projected to represent as much as 40 percent of first-time home buyers over the next 10 years, according to the National Association of Hispanic Real Estate Professionals. As a whole, first-time home buyers comprise about 45 percent of today's home sales market.

#### **For-Sale Residential Demand**

It is assumed that a strong majority of prospective home buyers within Rockwood's greater trade area (see map on page 2) will be age 25 to 64, have annual incomes of \$35,000 and higher and live in one to three person households. Based on the estimate that 60% of market area households will own rather than rent and that 61% of new households moving into the market area will own their homes, over the next 10 years an estimated 1,412 annual new households in the market area will be potential market rate homeowners. (See Exhibit HD-1). This estimate takes into account that a portion of renter households will move up to home ownership (especially with low interest rates) and that a certain portion of demand for new housing will emanate from outside of the market area, particularly as redevelopment progresses and as Rockwood's identity as a transit-village is communicated to external markets.

Based on an evaluation of planned and proposed physical improvements in the Rockwood area, the expansion of Rockwood's position as a mixed-use transit-village and Marketek's experience with residential development in other communities, during the first ten years of development an estimated 367 market rate for-sale housing units could potentially be absorbed in the Rockwood community. (See Exhibit HD-3). In other words, the study area has the potential to capture between 2% and 3% (or 367 units) of total market area demand for for-sale housing within the 2004-2014 period. Opening price points of for-sale units located in the Rockwood area should range from \$110,000 to \$130,000. While there may be demand for units priced above that range (particularly, with mountain views, for example) when unit prices rise above the entry level, demand will begin to thin out.

#### **For-Rent Residential Demand**

The rental demand analysis targets the middle rental market (representing the majority) rather than the total universe of possible renters and is based upon the Rockwood Greater Trade Area boundaries. It assumes that prospective Rockwood Town Center renters will be age 25 to 64, have annual incomes of \$25,000 to \$50,000 and live in one to three person households. Based on estimated renter propensity of new and existing market area households, an estimated 1,674 annual households in the market area will be potential market rate renters. (See Exhibit HD-2.) This estimate is adjusted to reflect potential owner households that would prefer to rent as well as demand from external markets.

Exhibit HD-1

POTENTIAL ANNUAL DEMAND ANALYSIS FOR FOR-SALE UNITS  
 Rockwood Greater Market Area (Residential)  
 2004-2014

New Household Demand		Turnover	
Annual New Households (1)	1,063	Total Households (1)	128,741
Owner Propensity	61%	Owner Propensity	60%
Number	648	Number	77,245
Target Market Adjustment (2)	40%	Turnover Rate (5)	11%
Number	259	Number	8,497
Income Qualified (3)	67%	Target Market Adjustment (6)	25%
Number	174	Number	2,124
Household Size Qualified (4)	79%	Income Qualified (7)	65%
Sub-Total	137	Number	1,381
		Household Size Qualified (8)	79%
		Sub-Total	1,091
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			1,412

1. ESRI BIS
2. Based on Lifestyle data, estimated proportion of new households to whom the proposed type of housing would appeal.
3. Estimated proportion of new households with annual incomes of \$35,000 and greater.
4. Estimated proportion of new households with 1, 2 and 3 persons.
5. U.S. Bureau of the Census estimate of the number of owner households that turnover within a 15 month period.
6. Based on Lifestyle data, estimated proportion of existing market area households to whom the proposed type of housing would appeal.
7. Estimated proportion of existing households with annual incomes of \$35,000 and greater.
8. Estimated proportion of existing households with 1, 2 and 3 persons.
9. Adjustment for households that fall outside of the model.

Sources: Marketek, Inc.; Census 2000; ESRI BIS

Exhibit HD-2

POTENTIAL ANNUAL DEMAND ANALYSIS FOR RENTAL APARTMENT UNITS  
 Rockwood Greater Market Area (Residential)  
 2004-2014

New Household Demand		Turnover	
Annual New Households (1)	1,063	Total Households (1)	128,741
Renter Propensity	39%	Renter Propensity	40%
Number	415	Number	51,496
Target Market Adjustment(2)	40%	Turnover Rate (5)	45%
Number	166	Number	23,173
Income Qualified (3)	28%	Target Market Adjustment(6)	25%
Number	46	Number	5,793
Household Size Qualified (4)	79%	Income Qualified (7)	31%
Subtotal	37	Number	1,796
		Household Size Qualified (8)	79%
		Sub-Total	1,419
Adjustment Factor (9)			15%
Total Potential Annual Market Demand			1,674

1. ESRI BIS
2. Based on Lifestyle data, estimated proportion of new households to whom the proposed type of housing would appeal.
3. Estimated proportion of new households with annual incomes of \$25,000-\$50,000.
4. Estimated proportion of new households with 1, 2 and 3 persons.
5. U.S. Bureau of the Census estimate of the number of renter households that turnover within a 15 month period.
6. Based on Lifestyle data, estimated proportion of existing market area households to whom the proposed type of housing would appeal.
7. Estimated proportion of existing households with annual incomes of \$25,000-\$50,000.
8. Estimated proportion of existing households with 1, 2 and 3 persons.
9. Adjustment for households that fall outside of the model.

Sources: Marketek, Inc.; Census 2000; ESRI BIS

The Rockwood area has the potential to capture between 3% and 4% of total market area demand for new market rate rental housing, which translates into 586 units over the 2004-2014 period. This estimate is viewed as *conservative* and could be significantly higher (6-8% of total) if the Rockwood area repositions itself as a desirable, transit-oriented community. Based on current monthly rents at the market rate rental communities in the competitive market area, market rents in the general range of \$600 to \$800 for 1- and 2-bedroom units would be achievable in the Rockwood study area. These rents are justifiably higher than average rents at projects surveyed within the immediate Rockwood neighborhood as the type of rental product envisioned will be new, urban, accessible and have amenities generally not offered in the rental communities in the competitive market area.

Convenient, secure parking should be provided with at least one space per unit at no charge. Other community features should include a laundry room and an exercise facility. Washer/dryer hookup, balcony, storage, dishwasher/ disposal, cable-ready, high-speed Internet access and possibly an alarm system should be standard unit features.

Exhibits HD-3–HD-5 provide a summary of the recommended housing program. An estimated 367 market rate, for-sale housing units can be absorbed in the Rockwood area over the next ten years, (HD-3). Approximately 586 market rate rental housing units are projected to be absorbed in the study area over the next ten years, (HD-4). A snapshot of the complete housing program is provided in Exhibit HD-5, including the percentage distribution of for-sale and rental units year-by-year.

### **Residential Strengths, Challenges, and Opportunities**

The strengths, challenges, and opportunities for residential development in the Rockwood study area are summarized below.

#### Strengths

- Access to regional employment centers (I-84, downtown Portland, I-205), nearby employment centers (downtown Gresham, Kaiser), and other nearby anchors such as Mt. Hood Community College via MAX, major surface street arterials and nearby interstate connections.
- If the Rockwood area is redeveloped as planned, prospective owners and renters will be able to live in a mixed-use, transit village – unlike any other in the area.
- With the Rockwood greater trade area which is the residential market area new product, incomes are above average.
- Successful new nearby apartment communities (Avalon) demonstrate demand for quality product.

#### Challenges

- New rental product will have to compete with existing apartment communities that have low to moderate rents and with affordable starter homes.
- Many older deteriorating apartment complexes nearby contribute to a less than desirable image for the Rockwood area.
- The perception of crime and scattered blight in the Rockwood area—if not overcome--may ward off prospective owners and renters.

EXHIBIT HD-3  
 PRELIMINARY FOR-SALE HOUSING PROGRAM  
 Residential Market Area and Rockwood Capture  
 Ten-Year Program

	Potential Demand for New For-Sale Housing Units (1)	Study Area Capture Rate	Total Study Area Capture
Year 1	1,412	2%	28
Year 2	1,412	2%	28
Year 3	1,412	2%	28
Year 4	1,412	2%	28
Year 5	1,412	3%	42
Year 6	1,412	3%	42
Year 7	1,412	3%	42
Year 8	1,412	3%	42
Year 9	1,412	3%	42
Year 10	1,412	3%	42
Total	14,123	3%	367

1. As shown in Exhibit HD-1

EXHIBIT HD-4  
 PRELIMINARY RENTER HOUSING PROGRAM  
 Residential Market Area and Rockwood Capture  
 Ten-Year Program

	Potential Demand for New Rental Housing Units (2)	Study Area Capture Rate	Total Study Area Capture
Year 1	1,674	3%	50
Year 2	1,674	3%	50
Year 3	1,674	3%	50
Year 4	1,674	3%	50
Year 5	1,674	3%	50
Year 6	1,674	4%	67
Year 7	1,674	4%	67
Year 8	1,674	4%	67
Year 9	1,674	4%	67
Year 10	1,674	4%	67
Total	16,738	4%	586

2. As shown in Exhibit HD-2

EXHIBIT HD-5  
 PRELIMINARY HOUSING PROGRAM  
 Rockwood Capture of For-Sale and Rental Product  
 Ten-Year Program

	Potential Demand for New Rental and For-Sale Housing Units	Percentage of For-Sale Units	Percentage of Rental Units
Year 1	78	36%	64%
Year 2	78	36%	64%
Year 3	78	36%	64%
Year 4	78	36%	64%
Year 5	93	46%	54%
Year 6	109	39%	61%
Year 7	109	39%	61%
Year 8	109	39%	61%
Year 9	109	39%	61%
Year 10	109	39%	61%
Total	953	39%	61%

Sources: Marketek, Inc.; Census 2000; ESRI BIS

- Developing new housing within the context of a compact, pedestrian-oriented transit-village is a new concept that will have to be “sold” to prospective owners and renters. Aggressive marketing of a ‘new and improved’ Rockwood will be key.

#### Opportunities

- Locating housing near the transit station will appeal to commuters who want to avoid traffic congestion by riding MAX.
- Developing for-sale and rental housing that attracts a variety of income and age groups will help to create an authentic and vibrant community.
- A mix of housing types will also allow existing residents to “upgrade” to new housing.
- Connecting residential development to shopping and services through sidewalks and bike paths will be a major selling point in attracting new residents.
- Consumers are increasingly looking for an alternative to the isolation of the suburbs. The proposed development will enable residents to be part of a community, to feel connected.
- As a unique, mixed-use, transit-oriented development, residential development may appeal to residents from outside of the market area. Marketing efforts should therefore target residents from within and outside of the market area.

Residential success within the Rockwood Town Center must be viewed as part of a larger coordinated effort to revitalize the area, including commercial development, job creation and transportation/infrastructure improvements. Physical improvements such as streetscape enhancements, building façade upgrades, green space and related changes will also be critical to creating a desirable residential location.

## OFFICE MARKET ANALYSIS

Within Portland as a whole, office market conditions vary widely and are challenged with overall vacancies of 16% as of the end of the 2<sup>nd</sup> quarter of 2004. Rates are declining, though gradually as absorptions rise. Construction is virtually at a standstill. (Source: CB Richard Ellis.). As is true in metropolitan areas across the nation, Portland’s suburban vacancy rates (20%) are significantly higher than the central business district (12.4%). Gresham makes up a small portion of the Eastside sub-market (totaling 1.7 million SF) but does not appear to reflect the relatively high 24.4% 2<sup>nd</sup> quarter vacancy rate. Average asking lease rates for metro Portland are \$17.89 and in the Eastside market, \$15.21. See Exhibit O-1 for a summary of current office market conditions.

Exhibit O-1			
Office Market: Current Conditions			
Variables	Portland Metro	East Metro	Gresham (est'd)
Office market size	38.7 mil SF	1.7 mil SF	250,000 SF
Office vacancy	16.3%	24.4%	10%
Asking lease rates	\$17.89/SF	\$15.21/SF	\$12 - \$18/SF
Under construction	52,262 SF	-0-	-0-
Outlook	Guarded optimism	Oversupplied for foreseeable future	Favorable for expansion
Source: Marketek, Inc. September 2004			

### Existing Supply of Office

Within the immediate Rockwood area (one-mile), an incidental office market exists with most properties falling into the Class C category with rents well below market average at between \$8/SF and \$12/SF. Dispersed storefronts and converted dwellings (especially along 181<sup>st</sup>) serve the usual “organic” demand for insurance agents, tax specialists, and specialty services such as computer, naturopaths, and sole practitioner professional in properties typically less than 5,000 square feet. The largest specialty office properties are Kaiser Permanente medical (SE Stark) and dental (NE 181<sup>st</sup>) and Cook Plaza housing the State Employment Office (SE Stark). Central Gresham, both downtown and the adjacent area, has a more developed office market, with properties in the 15,000 to 25,000 square foot range.

Local brokers report that Gresham’s office vacancy started to decline in early 2004 with 10,000 to 25,000 square feet (SF) of net absorption. Many Class A office properties are at or close to 100% occupancy. Gresham Corporate Center, 45,000 SF is currently 100% occupied, for the first time in several years. Rents range from \$16.50-\$17.50/SF with all services. The Powell Professional Center, totaling 15,748 SF is fully occupied at \$18/SF triple net. The Benjamin Franklin Building in downtown Gresham that was 50% vacant a year ago is nearly fully occupied today with rents ranging from \$12-\$18/SF. A new ‘designer’ office building, Gresham Vision Square on 182<sup>nd</sup> has a small 1,100 SF vacancy. Other freestanding office buildings, such as the 18210 E. Burnside Building are fully leased. A few properties marketed as office, such as the old JC Penney building in downtown Gresham sit vacant and will be difficult to lease because of challenging configuration. Among the



Class A and B properties, a handful of sub-leasing opportunities exist for smaller users requiring 400-900 SF. No executive suites are available with the nearest offering being Hall Business Suites at 234<sup>th</sup> and Halsey.

### **Potential Office Demand**

Since neither the City of Gresham nor the Rockwood area is a regional office destination, core demand for office space is expected to stem from more local serving uses versus regional serving. Local serving office space will house professional firms such as doctors, dentists, architects and lawyers, service firms like insurance, real estate and accountants as well as banks, non-profits and government offices. Demand for new office stems from two sources: existing local firms that are relocating and an increase in employment leading to the need for additional space. Specialty demand for large medical and educational users is not included in this analysis. Given the small existing office base, demand from relocation or office turnover is anticipated to be modest.

Based upon employment projections in a 3-mile radius (from City of Gresham boundaries) and Urban Land Institute industry standards for office jobs generated by economic sector and standard office space demand by job, Marketek estimates that new office demand will reach 513,000 square feet by 2009 and 1.02 million square feet by 2014 within the above described geographic area. Assuming a conservative capture rate of 10% within the town center area, between 2004 and 2009, Rockwood can support 51,300 square feet of additional office space. Assuming the same capture and a constant rate of employment growth and therefore office expansion, another 51,300 square feet of office will be demanded by 2014. Together these estimates result in 102,600 square feet of demand for local-serving space in Rockwood. Specialty office demand for large institutional uses such as educational, community and public facilities may also exist in the short term. During the charrette, many community leaders noted the need for a variety of these uses within the Rockwood area. Minimum space requirements were noted in the 40,000 to 60,000 square foot range.

Future office expansion should be encouraged in the Rockwood area focusing on quality infill development and mixed-use properties and avoiding residential conversions. Potential demand is likely from the growing medical market, education (public and for-profit,) and professional services. Financial and business/management services are noticeably absent from the business mix in the Rockwood area and will be an important complement to the science and technology business cluster the City of Gresham is seeking to create. The possible location of a Justice Center in the Rockwood area would help drive demand for some related office uses (primarily legal). Area realtors note that most office prospects are looking for smaller spaces in the 1,500-3,500 square feet range as well as small office suites. Executive suites with shared administrative services also present an opportunity for the Rockwood area.

## CONCLUSIONS AND RECOMMENDATIONS

This section reviews recommended maximum amounts of residential, office and retail space that can be supported in the Rockwood study area together with target markets and the appropriate business mix. Because of land and other constraints, the numbers included herein are not necessarily reflected within the Concept Plan. Rather, the Concept Plan balances these market conditions with community desires.

### Residential

New housing located in the Rockwood Town Center represents the opportunity to provide more residential choice at higher price points and overcome the lack of unique, high quality choices. Potential demand projections for housing in the Rockwood area assume that new, quality and market rate for-sale and rental housing product will be supportable and that an aggressive marketing program for new housing will be underway. The housing types would include newly constructed townhouses, live-work units, upper level residential and apartments.

Projections of housing demand in the study area focus on market rate housing and assume demand for both for-sale and rental housing product. An estimated 367 market rate, for-sale housing units can be absorbed in the Rockwood area over the next ten years, Approximately 586 market rate rental housing units are projected to be absorbed in the study area over the next ten years.

Although it is beyond the scope of this project to project affordable housing demand, there appears to be a need for attractive, quality, low-to-moderate cost housing in the Rockwood area. Developing mixed-income housing will help to create a more vibrant and authentic community. Affordability for a range of unit sizes should be promoted in the Rockwood concept plan.

National market trends support the development of a mix of housing at transit centers. Renters and buyers alike are eager for new housing options particularly locations that offer different product alternatives and unique locations and a sense of place, often difficult to find in suburbia. Other factors that support transit-oriented residential development are: young Gen-X'ers seeking lifestyle alternatives and locations different than those they were raised in; aging baby boomers becoming empty nesters and seeking a greater ease of lifestyle and convenience; a desire to live, work and play in close proximity with a decreasing reliance on the automobile; and strong growth in single-person and couple households with no children.

Exhibit HD-6 summarizes potential target markets for new Rockwood residential product. It assumes a more diverse demographic, economic and lifestyle market mix than presently exists within the neighborhood. Although families will comprise a portion of the target market for new residential, the product and marketing campaign should focus on multiple target markets including singles, professional couples, empty nesters and other groups that are underrepresented in the Rockwood area presently.

EXHIBIT HD-6

PRIMARY TARGET MARKET CHARACTERISTICS FOR NEWLY DEVELOPED HOUSING IN ROCKWOOD

	For-Sale Product	Rental Product	Live/Work Units For-Sale and Rental
Occupation Age Household Size Income Motivations/Preferences	<b>Entry-Level Professionals</b> 25 to 35 1 to 2 persons, few with children \$35,000-\$50,000 Access to work/downtown/MAX Location w/ identity/sense of place Tired of rentals/first time buyer Investment and resale important Seek vibrant, mixed-use setting Relatively mobile	<b>Entry-Level Professionals</b> 25 to 35 1 to 2 persons, few with children \$30,000-\$40,000 Access to work/downtown/MAX Seek vibrant, mixed-use setting Location w/ identity/sense of place Relatively mobile	<b>Professionals/Artisans</b> 25 to 50 1 to 2 persons, few children \$35,000+ Seek urban lifestyle Seek large adaptable spaces Access to suppliers, customers Relatively mobile
Occupation Age Household Size Income Motivations/Preferences	<b>Higher Level Professionals</b> 30 to 50 1 to 2 persons, some with children \$50,000+ Access to work/downtown/MAX Move-up or move-over buyer Seek vibrant, mixed-use setting Location with identity/sense of place Investment and resale important Relatively mobile	<b>Service, Technical, Administrative</b> 25 to 50 1 to 3 persons, with some children \$25,000-\$40,000 Access to work/downtown/MAX Value convenience/security Highly mobile	<b>Creative</b> Advertising, marketing, arts, film & music, software developers, culinary, photographers, designers
Occupation Age Household Size Income Motivations/Preferences	<b>Business Owners/Operators</b> 30 to 60 1 to 2 persons, few with children \$50,000+ Access to work/downtown/MAX Individualized unit Relatively settled	<b>Higher Level Professionals</b> 30 to 50 1 to 2 persons, few with children \$45,000+ Access to work/d-town/MAX Location w/ identity/sense of place Seek vibrant, mixed-use setting Highly mobile	<b>Professionals</b> More traditional fields of accounting/finance, education, law, various types of consulting
Occupation Age Household Size Income Motivations/Preferences	<b>Retirees/Empty Nesters</b> 55+ 1 to 2 persons \$35,000 or available equity Possibly strong ties to community Walk to businesses/services/activities Enjoy community/activities Less maintenance, more security Move-over, move-down buyer Highly settled	<b>Retirees/Empty Nesters</b> 55+ 1 to 2 persons \$30,000+ Possibly strong ties to the community Walk to businesses/services Enjoy community/activities Less maintenance, more security Location with identity/sense of place Relatively settled	
Occupation Age Household Size Income Motivations/Preferences	<b>Entry-Level Professionals</b> 25 to 35 1 to 2 persons, few with children \$35,000-\$50,000 Access to work/downtown/MAX Location with identity/sense of place Tired of rentals/first time buyer Investment and resale important Seek vibrant, mixed-use setting Relatively mobile	<b>College Students</b> 22 to 30 Single with/without roommate Varies Close to school, friends Access to MAX Seek vibrant, mixed-use setting Highly mobile Security conscience	
Occupation Age Household Size Income Motivations/Preferences		<b>Service, technical, administrative</b> 25 to 50 2-5 persons, including children \$30,000-\$45,000 Access to work/downtown/MAX Value convenience/security	

Source: Marketek, Inc.

### Office

Over the next ten years the office market in the Rockwood study area can support an increase in office space totaling approximately 102,600 square feet. Within the Gresham area, the preponderance of class "A" office will locate close to the civic anchors and in the downtown. Office development in Rockwood likely will be limited to neighborhood-serving offices, such as medical, real estate, finance and insurance tenants. In addition, small executive suites serving a host of small office/professional businesses will be good candidates for a Rockwood location.

Office development in the town center will ideally be clustered together in multi-story stand-alone office buildings or as part of mixed-use properties that have ground floor retail or restaurant uses with office in the upper stories.

### Retail

Over the next ten years the Rockwood neighborhood can support an additional 216,205 square feet of retail, restaurant and service space. To optimize chances for recreating itself as a thriving, mixed-use "transit village" and, thereby, altering consumers' current perceptions of the area, the future business mix for Rockwood should depart significantly from the past, i.e., avoid flea markets, strip clubs, check cashing, cigarette stands and related businesses. Additionally, one or more strategic anchors will be important to the district's future vitality. A retail anchor together with a public or institutional anchor would be ideal. Among the opportunities identified during the charrette were a branch location of Mt. Hood Community College, a One-Stop Employment and Training Center, a community/recreation center and a new branch public library to replace the existing Rockwood branch that is reportedly well beyond capacity.

The primary target markets for retail development in the Rockwood are trade area residents and area employees. Identifying businesses that appeal to both markets is key to success. Recommended business types or a suggested business mix are provided based on the study area's potential estimated demand for retail space with consideration for existing uses and attractions and target market characteristics. Over time, changing conditions and circumstances (e.g., characteristics of new residents, redevelopment activity, and availability of land) will impact the recommended business mix. Exhibit RD-8 summarizes Rockwood's target markets and the merchandise/services they would be most likely to purchase.

Equally important to future business development will be the creation and promotion of a clear market identity and position. Rockwood's current retail market position is one of neighborhood and highway convenience goods, services and entertainment, with many 'marginal' businesses based on general structural conditions, low maintenance and the range/quality of merchandise. In the near term, Rockwood will remain a "*neighborhood shopping district*," but should work harder to cater to both local residents and nearby employees. Rockwood may also choose to promote its Latino culture as a unique asset and create special promotions and events that attract consumers from a broader geographic area. Over the long term, Rockwood's market position will evolve with the growth and change of the Gresham community and it should strive to fill a role as a "*high density, mixed-use district convenient to work, dining, entertainment & play.*"

Community image-building, marketing and promotion must be top priority for successful business development to occur. A multi-faceted marketing campaign is needed that will focus on positive community activities, overcome perceptions of serious crime occurrences, encourage joint business promotions and more neighborhood special events and ultimately, focus on available and unique shopping opportunities.

A summary follows of Rockwood's business opportunities together with target consumer markets and their shopping needs and interests, Exhibit RD-8.

- Based on the socioeconomic characteristics, lifestyle profiles, spending activity of trade area households and inner city retail trends, short-term business recruitment efforts should focus on essential goods and services that residents are currently missing in the area. Among the types of retail and services that have the greatest potential of attracting area residents are: a grocery/drugstore, drycleaner/laundry, dollar store, video rental, day care, exercise studio/gym, bakery and an attractive, specialty food store, like La Tapatia, Hispanic grocery store/meat market that will soon 'graduate' from the OAME business incubator into a larger space.
- The types of goods that would be most appealing to trade area residents include: trendy but reasonably priced women's and men's apparel and accessories, teen/children's apparel, infant's apparel, athletic and casual shoes, jewelry, home furnishings & accessories, electronics and infant toys & products. Karina's Fashions, another OAME incubator occupant, is illustrative of the types of specialty apparel stores that would be well supported in Rockwood.
- Attracting restaurants and entertainment should be another initiative for Rockwood. Family restaurants and a greater variety of breakfast, lunch and dining options should be pursued, including a deli, vegetarian, barbeque, as examples. Entertainment establishments such as bar/grilles, nightclubs, sports bar and live music. These must be an alternative to existing operations, for example, 'no smoking,' and without keno machines.
- Employees who work within the Rockwood area are a primary target market for shopping and services as they are in the area for at least eight hours a day, five days a week and, consequently, are likely to shop, run errands and eat out in the community. Area workers will frequently purchase cards, stationery, gifts, drugstore items, books and merchandise. This market segment will also purchase office supplies, jewelry, apparel/accessories, linens, housewares, sporting goods, cosmetics/perfume and arts/crafts. Convenience goods desired by area workers will include baked goods, meals to go and groceries. Area employees will also want banks/financial services, pharmacies, exercise studios, dry cleaners/laundry, mail/packaging and copy centers, video rentals and film processing.

Exhibit RD-8

Primary Target Markets for Retail Development  
Rockwood Study Area

	Primary Target Markets			
	Trade Area Residents Residents	Passers through Visitors	Area Employees	Area Students
<b>Market Size</b>	8,527 live in .5 mile radius. Local trade area population is expanding rapidly. Nearly 126,000 live within a 3-mile radius drive.	Average daily traffic volumes in the Rockwood Triangle are high: Burnside, 14,500, Stark, 22,500 181st, 34,500	Nearly 8,000 employees work within Rockwood study area (designated census tracts);	Approximately 8,500 students at Mt. Hood Community College.
<b>Motivations</b>	Households living within a short drive of or walk to the town center will look to Rockwood for a variety of specialty goods and services, and day-to-day convenience goods and services.	Mostly convenience shoppers (grocery, eating, gas) who would be willing to return to destinations within the area, such as quality restaurants.	Employees who work within the immediate vicinity of the study area are a captive market in the sense that they are in the area for at least eight hours a day, five days a week and, consequently, would be likely to shop, run errands and eat out in the study area if the appropriate businesses were present.	Live and/or go to school in the area. Once dismissed as a "beer-drinking and broke" market, college students today are spending more than ever before with an estimated annual buying power of \$200 billion. College students spend an average of \$287 per month on discretionary items, largely on food and beverages, personal care products and music/CDs.
<b>Goods and Services</b>	Women and Men's Apparel (Trendy, Locally Designed) Shoes Sporting goods Jewelry Home Furnishings Florist/Garden Supplies Bookstore/Magazines Music/CDs Gift/Cards Specialty or Ethnic Market Grocery/Bakery Drugstore Wine/Liquor Store Video/DVD Rental Exercise studio/gym/yoga Film processing Drycleaner/Alterations Hair Salon Barber Shop Day Care Banking Mail/Copy Center Toy Store Variety of Restaurants Bar/Grille/Pub Live Theater/Music/Dance	Convenience Grocery Antiques/Hobby Shops Apparel - Particularly Local and Off-Price Unique Restaurants Gas Ethnic Market	Restaurants/Bars Small Market/Grocery Drugstore Items Mail/Packaging Banks/Financial Services Drycleaners/Alterations Daycare Shoe Repair Exercise studios Film Processing Apparel/Accessories, Music/CDs Books/Magazine Live entertainment Housewares/Gifts	Apparel (Trendy, Vintage, Affordable) Sporting goods Books Tapes/CDs Computers/software Gifts/cards Groceries Cosmetics Ethnic Restaurants Bars/Grille/Pubs Deli Bagel/Bakery Ice Cream/Gelato/Yogurt Health Food/Juice Bar Coffee Pizza Live Music/Theater Health Club/Yoga Dry Cleaning/Laundry Barber/salon Bicycle repair Video rental Film processing

Source: Marketek, Inc.

**APPENDIX I**  
**Tapestry Area Profiles**  
**Lifestyle Groups for Rockwood Local and Greater Trade Areas**  
**Source: ESRI BIS**

**Main Street USA (31.4% of Local and 34.7% of Greater Trade Area HH)**

**Demographic:** *Main Street, USA* slices America's population down the middle. Married couples with and without children counterbalance a growing mix of single households (household size of 2.53 people) and a median age of 35.9 years. Most of these residents are white; some black and Hispanic populations are also represented.

**Socioeconomic:** They earn a comfortable household median income of \$48,000 derived from wages and dividends. One fourth of *Main Street USA* residents receive Social Security benefits. Ten percent earn income from self-employment ventures. Their net worth is \$98,000. *Main Street USA* residents are fairly well educated; more than ten percent hold a bachelor's degree; nearly 30 percent have some college credits. *Main Street USA* residents primarily work in the services and manufacturing industry sectors; more than 29 percent hold professional and management positions.

**Residential:** They own older, single-family houses with a median home value of \$148,500. These neighborhoods are found in the suburbs of smaller metropolitan cities across the United States.

**Preferences:** As the segment name implies, *Main Street USA* residents are average consumers; no real product or service preferences emerge. *Main Street USA* residents frequently use Windows NT and own home networking software. They spend moderate amounts for software. They use the Internet to play games and search for employment; many access the Internet at school or the public library. They use the Yellow Pages to search for computers and furnaces.

As prudent investors, they purchase savings certificates and hold stocks valued above \$75,000. They hold conservative homeowners' or personal property insurance policies.

Big-ticket home improvement purchases include a mattress and box springs and the installation of vinyl replacement windows. They also own snow/leaf blowers and saws. Although not avid gardeners, they like to beautify their yards by purchasing lawn fertilizer with weed control, flower seeds and vegetable plants.

*Main Street USA* residents take vitamins, join diet control organizations, work out on their home stair steppers, and participate in outdoor sports such as baseball, soccer, and bicycling. They take prescription medications for strained muscles. Civic-minded *Main Street USA* residents address public meetings for a cause, work as non-political volunteers and fund-raisers. Others attend adult education classes. Alternative, variety and classic hits are favorite radio formats with *Main Street USA* residents.

**Aspiring Young Families (13.3% of Local and 7.2% of Greater Trade Area HH)**

**Demographic:** Most *Aspiring Young Families* residents are young start-up families, married couples, or single parents with children. Their median age is 29.8 years and they are quite ethnically diverse. They have above average population in all race categories except white.

**Socioeconomic:** Their median income of \$44,900 is derived mostly from wages, dividends, rental and properties. Their median net worth is \$73,100. Most are high school graduates; some have accrued some college credits. Nearly half of the *Aspiring Young Families* work in the services, sales, administration, and government occupations.

**Residential:** *Aspiring Young Families* are attracted to the large, growing metropolitan areas in the South and West; the highest concentrations of these neighborhoods are in California, Florida, and Texas. Approximately half of them have already purchased single-family detached and attached start-up townhouses with median home values of \$125,500. Others live in moderately priced, newer multi-unit buildings. Their average gross rent of \$575 is slightly lower than the U.S. average of \$657.

**Preferences:** The presence of children in the household drives some of the purchases of *Aspiring Young Families*; they buy baby and children's products and toys. Big-ticket home furnishing purchases include headboards and dining room furniture. Electronic purchases include cameras and video/DVD players. *Aspiring Young Families* drink sports drinks and Folgers French Roast coffee. Never far from their phones, *Aspiring Young Families* sign up for call return, call forwarding and three-way calling services.

*Aspiring Young Families* sign up for direct deposit of their payroll checks, bank by phone, and hold new car loans. They hold renters' or property insurance policies. *Aspiring Young Families* spend a lot of time online visiting chat rooms, searching for employment, playing games, researching information about real estate and making travel plans. They participate in exercise programs, take non-prescription diet pills, and often take prescription medications for migraine headaches. They search the Yellow Pages for auto repair services, employment agencies and moving and storage services.

In their spare time, *Aspiring Young Families* go dancing, attend the movies, join religious clubs, write or phone radio and TV stations and visit theme parks. They also practice kickboxing, lift weights and attend pro basketball games. They read bridal and airline magazines and watch entertainment television programming. When they eat out, *Aspiring Young Families* prefer family restaurants such as the International House of Pancakes (IHOP), Jack-in-the-Box, Red Robin or Fuddruckers.



***In Style (8.2% of Local and 4.7% of Greater Trade Area HH)***

**Demographic:** Even though they live in the suburbs, *In Style* households favor the lifestyle of city dwellers. These professional couples have careers but few children. Their median age is 37.6 years and they are predominantly white.

**Socioeconomic:** *In Style* households do well for themselves with a median household income of \$64,700 and a median net worth of \$135,700, both of which are 1.4 times the national median. Wages and salaries provide income for 85 percent of these residents; 45 percent also have some form of investment or rental property income. *In Style* residents are very well educated compared to the average U.S. residents; nearly 40 percent hold a college or graduate degree. Employment is high among these residents; nearly half of them hold professional or managerial positions with above average concentrations in the financial services, insurance and technical service industries.

**Residential:** Homeownership is just slightly above average at 70 percent in these neighborhoods; *In Style* residents prefer townhouses to more traditional, single-family homes. More than 75 percent of their homes were built in the last 30 years and carry a median value of \$194,300, 1.4 times the national average. *In Style* neighborhoods are freckled across the South and Gulf Coast; some are found in the Midwest. A concentration of these neighborhoods is also found in Arizona.

**Preferences:** *In Style* residents are computer-savvy; they own and use handheld PDAs, cell phones and utility software. They would probably purchase computer hardware from Dell Computer. Online activities include computer equipment purchases, researching real estate information, tracking investments and planning travel. They use tax preparation software, own mutual fund shares, insured money market accounts through a bank and contribute to 401-k retirement accounts. Looking toward the future, *In Style* residents hold long-term care and disability insurance policies. They do some gardening; however, they leave the lawn care chores to a maintenance service.

Physical fitness is part of their lifestyle; they subscribe to Weight Watchers for diet control, work out in a regular exercise program and take vitamins. They lift weights, practice yoga, play tennis and go scuba diving. Rock concerts, live theater and museum visits fill up leisure time. Domestic travel for business and leisure ranks high for this segment. They read airline magazines; listen to public, news-talk, classical and alternative radio. They subscribe to cable; E! and The Golf Channel are cable programming favorites. They enjoy dining out at Cheesecake Factory, Don Pablo's, and Chili's Grill and Bar. Nordstrom, Ann Taylor, amazon.com and the L.L. Bean catalog are shopping preferences.

### Green Acres (6.0% of Local and 3.2% of Greater Trade Area HH)

**Demographic:** Representing more than three percent of the U.S. population, *Green Acres* ranks second to Tapestry's *Midland Crowd* segment based on total population. The median age for *Green Acres* residents is 39.1 years. Married couples with and without children make up 70 percent of the households in *Green Acres* neighborhoods. This segment is not ethnically diverse; more than 94 percent of these residents are white.

**Socioeconomic:** Median household income is \$60,000; their median net worth is \$114,200. Wages and salaries make up 83 percent of household income. *Green Acres* ranks in Tapestry's top ten segments; 17 percent of households earn income from self-employment ventures. They have above average concentrations of workers in skilled labor and farming occupations; many hold positions in the agriculture, manufacturing, and construction industries.

**Residential:** A little bit country, these *Green Acres* residents live in pastoral settings of developing suburban fringe areas. *Green Acres* residents are ninth in Tapestry's segments for home ownership. Their homes are usually new, and carry a median value of \$162,900; 87 percent live in single-family detached houses. These neighborhoods are found mostly in the Midwest. Vehicles are important to *Green Acres* residents; more than 30 percent of these households own more than three. They are second of Tapestry's segments to own three or more vehicles and third of Tapestry's segments for households with five or more vehicles.

**Preferences:** *Green Acres* residents might buy hiking, backpacking, and hunting apparel. They own motorcycles, kerosene heaters, coal and woodstoves. They buy caffeinated coffee beans and purchase baking supplies. They own education software, allow their children to use their home PCs, and probably bought their home PC by catalog. *Green Acres* residents hold a home equity credit line, own a bank-sponsored money market account, and have boat owner's insurance.

Treadmills and stationary bikes are exercise equipment favorites with *Green Acres* residents; they also take vitamins, and go mountain biking. Landscaping and home improvements are important to *Green Acres* residents; they have contracted for concrete and masonry work and added a deck, porch or patio.

As befitting the segment's name, *Green Acres* residents own chainsaws, drill presses, garden tillers, lawn or garden tractors and will buy vegetable plants. They search the Yellow Pages for sporting goods and building materials. They listen to news/talk radio and read fishing, hunting and motorcycle magazines and own satellite dishes. They eat at Bob Evans, Steak 'n Shake and Big Boy family restaurants. They shop at ShopKo, SuperAmerica and True Value Hardware stores and purchase sports equipment and garden supplies by mail, phone or online.

**International Marketplace (5.5% of Local and 3.7% of Greater Trade Area HH)**

**Demographic:** Located primarily in cities of gateway states on both United States coasts, *International Marketplace* neighborhoods are developing urban markets with a rich blend of cultures and household types. The population is young, with a median age of only 30.6 years. Families with children, either married couples or single parents, represent 45 percent of the households. These neighborhoods are very diverse; 50 percent of the residents are Hispanic; there is also a good representation of Asians, blacks, whites and other races.

**Socioeconomic:** Their median household income of \$40,100 is derived from wages, dividends, rental properties; ten percent work at self-employment ventures; others receive Social Security benefits. Their median net worth is \$87,000. *International Marketplace* residents hold positions in the service, retail, healthcare, sales, administration and government industries.

**Residential:** Most *International Marketplace* residents rent apartments in multi-unit buildings, but they're beginning to look to home ownership; 30 percent have realized the American dream of buying a home. About 80 percent of the housing was built before 1970.

**Preferences:** "Home and hearth" products and financial resources are not the first consumer spending considerations for *International Marketplace* residents. Television also isn't important; they own one TV set. Radio is much more significant; they listen to all-news, urban, Hispanic and CHR radio formats. They rent foreign and classic videos.

*International Marketplace* residents spend time visiting Internet chat rooms and listening to the radio on the 'Net. They drink imported beer and Colombian coffee and buy books at the drug store. They search the Yellow Pages for taxis and locksmiths. They make long-distance calls to a foreign country. They take vitamins and dietary supplements. They practice martial arts. They visit Disneyland, gamble in Las Vegas and Atlantic City, go to the movies and spend time at the beach.

Shopping favorites include Longs Drug Stores, Macy's, Price Costco warehouse store, Lord & Taylor and Marshall's. *International Marketplace* residents eat at family restaurants such as Sizzler Family Steak Houses, El Pollo Loco and Del Taco. *International Marketplace* residents probably wouldn't buy ski clothing, hold a home equity line of credit, listen to country music radio, or own a dog.

### **Old and Newcomers (5.0% of Local and 7.0% of Greater Trade Area HH)**

**Demographic:** *Old and Newcomers* are neighborhoods in transition, populated by renters who are either starting their careers or retiring. The general population index is higher than the U.S. for age groups 20-29 and over 75. The median age of 36.2 years for *Old and Newcomers* neighborhoods splits this age disparity. There are more single person and shared households than families in these neighborhoods. Most of these residents are white with some black and Asian populations.

**Socioeconomic:** *Old and Newcomers'* median household income of \$39,400 is derived from wages, dividends, rental properties, retirement income; almost one-fourth of *Old and Newcomers* receive Social Security benefits. Their median net worth is \$90,700. Some have attended college; nearly 20 percent hold a Bachelor's degree and ten percent have completed graduate school. They work in the service, retail, healthcare, sales, administrative and government industries.

**Residential:** Housing types are varied in these neighborhoods; single-family detached and attached houses compete for space with mid- or high-rise apartment buildings constructed in the 1970s. Median home value is \$139,900.

**Preferences:** Purchases of children's books, osteoporosis medications and long-term-care insurance policies reflect the disparate ages of the residents in *Old and Newcomers* neighborhoods. They take their cars to chain stores for service, drink domestic table wines and buy home office furniture. Technology is important to some of these households; they buy "how-to" computer books to use their home computers more efficiently.

*Old and Newcomers'* financial picture also reflect their age disparities. They own more than \$75,000 of stocks, consult with financial planners and invest in mutual funds. *Old and Newcomers* hold disability and renters' insurance policies. Health-conscious *Old and Newcomers* take ginseng, use prescription medications for dry eyes and buy organic foods. They exercise regularly in programs at the gym. *Old and Newcomers* search the Yellow Pages for landscaping services, churches, veterinarians, and pet shops. They order CDs and videos online. In their spare time, *Old and Newcomers* practice kickboxing and yoga, play racquetball and attend college football games.

Younger *Old and Newcomers* go to the movies about once a month, visit the zoo and gamble in Las Vegas. They listen to classic hits, classical, and Hispanic radio and watch The Golf Channel and MTV2 on television. They shop at Pier 1, Harris-Teeter and Walgreen's stores, order from priceline.com and own a pet cat. Although they don't dine out very often, when they do their favorite restaurants include Tony Roma's, Steak 'n Shake, and Red Robin. When they travel, *Old and Newcomers* carry American Express travelers' checks. *Old and Newcomers* probably wouldn't own a garden tiller, hold a home equity line of credit, buy a home PC at an electronics store, order books by mail or own a satellite dish.

### **Sophisticated Squires (4.8% of Local and 5.9% of Greater Trade Area HH)**

**Demographics:** *Sophisticated Squires* enjoy life in less densely populated areas. This segment is comprised of mostly married couples. More than 40 percent of these households have children; 22 percent have children between the ages of six and 17 years. Of these households, 11 percent have adult children. The median age of the population in *Sophisticated Squires* is 36.8 years; 57 percent of the householders in this segment are between 35 and 54 years of age. This segment is not ethnically diverse; most of these residents are white.

**Socioeconomic:** *Sophisticated Squires* residents are well educated; 23 percent hold a Bachelor's degree. Their median income is just above \$78,000, over \$30,000 more than the U.S. household income median. Wage or salary income is earned by 90 percent of the households, 12 percent higher than the U.S. value. Interest, dividends, or rental income are additional income sources for 48 percent of the households. The median net worth of this segment is \$151,500, more than \$50,000 above the U.S. value. Labor force participation rates are high for males and females. *Sophisticated Squires* hold professional employment positions. The male labor force participation rate is 82 percent and the female rate is 68 percent. Many women are part-time workers; at 62 percent, this figure is slightly higher than the U.S. value of 56 percent.

**Residential:** Concentrated in the Atlantic coast states, 90 percent of these households live in single-family detached houses. This figure is much higher than the U.S. value of 61 percent. Of the households in this segment, 91 percent own their homes; the percentage of housing units occupied by renters is only 8.6 percent. The median value of homes in this segment is \$195,000. About 75 percent of the homes in the area were built before 1989, and 55 percent were built between 1970 and 1989. More than half of these households own two vehicles; 29 percent have three or more vehicles.

**Preferences:** Golf is very important to *Sophisticated Squires*; they play golf, attend golfing events, purchase golf clothing, and probably watch The Golf Channel. They also play tennis and go mountain biking. Trying to stay fit, many of them own a treadmill, join Weight Watchers for diet control and take vitamins and dietary supplements. To keep up with their lawn maintenance, *Sophisticated Squires* residents own trimmers and leaf shredders and purchase lawn fertilizer and insecticides. They will also tackle home improvement projects such as painting or installing hardwood floors. They enjoy watching *This Old House* on television. Many have a second mortgage.

They also enjoy photography, dining out, and attending adult education classes. They listen to all-talk, sports and classic hits radio. *Sophisticated Squires* frequently order from the L.L. Bean catalog, buy flowers online, and shop at Sherwin Williams. They are likely to have three or more cellular phones in their household and their children will often use their home PC. They are more likely than any other segment to own a van or minivan.

### **Inner City Tenants (4.1% of Local and 4.3% of Greater Trade Area HH)**

**Demographic:** The multi-cultural *Inner City Tenants* market is a microcosm of urban diversity. Ethnically diverse, the population is divided among whites, blacks, Hispanics and other races. They are young, with a median age of 27.9 years; their household composition reflects their youth. Single persons and single parents make up a large segment of this market—66 percent of all households. *Inner City Tenants* rank sixth of the Tapestry segments for preschoolers; 14.5 percent of all householders are between the ages of 15 and 24 years.

**Socioeconomic:** Median income for *Inner City Tenants* is \$28,600; their median net worth is \$54,300. Wages and salaries provide income for more than 80 percent; seven percent receive public assistance. Although many residents are not highly educated, 23 percent have earned some college credits. This segment ranks near the top of Tapestry's segments for current school enrollment at all levels. Working in service and unskilled labor occupations, *Inner City Tenants* might be employed in food preparation, building maintenance, administrative support and production positions.

**Residential:** *Inner City Tenants* rent apartments in mid- or high-rise buildings. Their median home value of \$93,000 seems high when compared to their income; however, this figure is based on only 17.5 percent of housing units that are owner-occupied. Most households own one vehicle or depend upon other modes of transportation.

**Preferences:** Children's and baby products top the list of purchases in *Inner City Tenants* neighborhoods. Their favorite grocery stores are H.E. Butt and Vons where they might buy children's prepared dinners or canned stews. *Inner City Tenants* will take non-prescription diet pills, join a diet organization club and hold a renter's insurance policy. *Inner City Tenants* surf the Internet at school or the public library. They search the Yellow Pages for employment agencies and pizza places. They use call return services and would probably own one television set.

*Inner City Tenants* enjoy reading science fiction and adventure books. Other pleasures include going to the movies frequently or watching *Ricki*, *Girlfriends* or *Judge Mathis* on TV. Favorite shopping destinations include Dillard's and Lane Bryant. They water ski, play football and basketball and attend college football games.

## MEMORANDUM

**DATE:** November 10, 2004  
**TO:** Rebecca Ocken, City of Gresham  
**FROM:** Alex Dupey, David Knowles  
**SUBJECT:** Existing Conditions Memorandum  
**PROJECT:** Rockwood Town Center Design and Redevelopment Plan  
**PROJECT NO:** ODOT0000-0465

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### INTRODUCTION

The City of Gresham is building a comprehensive strategy to address the existing transportation deficiencies and lack of redevelopment activity within the Rockwood Town Center (RTC). This project, the *Rockwood Town Center Design and Redevelopment Plan*, builds upon previous planning efforts and continued public involvement to help implement a redevelopment strategy for rebuilding Rockwood into a hub for local residents and reverse the cycle of urban degradation seen in recent years.

Previous planning efforts have focused on identifying existing conditions, constraints and barriers, and identifying potential redevelopment alternatives for the Rockwood Triangle area. The existing transportation and pedestrian systems are one of the barriers previous planning efforts have addressed; the City of Gresham has begun to implement some of this work through street improvements near the Rockwood Triangle area. This type of infrastructure improvement is necessary to attract new development, and with the passage of the urban renewal district in fall of 2003, funding may be available to continue this work. The City has already implemented zoning that encourages transit oriented, pedestrian-friendly development.

This technical memorandum—Existing Conditions—is the first in a series of products necessary to define the Rockwood Triangle area. Information gathered for this memorandum will be used as a part of the upcoming design charrette, market analysis, street plan, and implementation measures for the City of Gresham.

### Study Area

Figures 1 and 2 show the study area in relationship to City boundaries and the Urban Renewal District.

The RTC District is a large area within Gresham, encompassing 282 tax lots on approximately 155 acres with an average parcel size of 0.55 acres. While the project area includes the entire RTC, this project focuses on the redevelopment potential of the Rockwood Triangle formed by East Burnside, NE 181st Avenue, and SE Stark Street. The Triangle accounts for about 37 percent (57 acres, 123 parcels) of the RTC District and poses some of the greatest redevelopment challenges in terms of transportation and access, high vacancy rates, and lack of pedestrian amenities. In contrast, the Triangle also has some of the greatest potential with its proximity to light rail, arterial connections, and large vacant buildings where redevelopment could have a significant impact on the project area to become a gathering point for area residents. Unlike many commercial areas, Rockwood already has

a significant number of residential units, offering the potential for developing commercial and retail properties that can support existing residents.

As appropriate, adjacent properties around the Triangle are also included in the analysis.

## **PLANNING FRAMEWORK**

The City of Gresham has planning jurisdiction for the Rockwood area. Local plans must be consistent with regional planning requirements outlined in Metro's Urban Growth Management Functional Plan (Functional Plan) that implements the Regional Framework Plan (Framework Plan), the Regional Urban Growth Goals and Objectives (RUGGOs), and the 2040 Growth Concept (Growth Concept). The following is a summary of the regional and local planning framework as it relates to town center designations.

### **Regional Context**

Metro Council adopted the RUGGOs (land use planning goals and objectives) in 1991, which establish general land-use and transportation policies to manage growth in a way that protects natural resources and facilitates improvements to infrastructure while still maintaining the region's quality of life. Based on the RUGGOs, Metro Council adopted the Growth Concept in 1995, a regional plan that graphically establishes the preferred form of regional growth and development within the Urban Growth Boundary (UGB). Growth should occur inside the current UGB in the form of infill and redevelopment with higher density being developed in areas where it is appropriate.

The 2040 Growth Concept identifies "centers," or areas where higher density residential and commercial development would occur coupled with multimodal transportation options for residents and those working in the area. There are three types of centers:

- The Central City, or Downtown Portland, which is the major regional center functioning as an employment and cultural hub in the metropolitan area;
- Regional Centers that serve large market areas outside the central city connected to it by high-capacity transit and highways;
- Town Centers such as the RTC, that offers local shopping and employment opportunities within a local market area and connected to regional centers by road and transit.

In 1997, Metro adopted the Framework Plan to implement the goals and policies established through the RUGGOs, the Growth Concept, the Metropolitan Greenspaces Master Plan, and the Regional Transportation Plan. The Framework Plan contains policies that guide Metro planning activities. The Framework Plan is the regional equivalent of a comprehensive plan.

The Urban Growth Management Functional Plan implements the Framework Plan, much like a local development ordinance would for a local jurisdiction. The Functional Plan is divided into titles, each corresponding to an area of Metro's jurisdiction under its charter (planning, solid waste, etc.). As with local development codes, the Functional Plan is revised periodically. Title 6: Central City, Regional Centers, Town Centers and Station



Communities is the most applicable to the study area as it identifies development guidelines for town centers, transportation system design guidelines, and level of service criteria.

## **City of Gresham**

### ***City of Gresham Community Development Plan***

The *Central Rockwood Plan* (1998) was adopted as a part of the *City of Gresham Community Development Plan* to implement the Town Center designation. Planned uses within the Rockwood area are mixed use in nature combining medium and high density residential units, commercial and retail space. As described in the Plan, the RTC meets the qualities a Town Center should possess, functioning as a neighborhood gathering place with transportation connections to larger Regional Centers.

### ***City of Gresham Development Code***

Zoning within the RTC has already been implemented to accommodate Town Center style development as required in the *Metro 2040 Design Concept*. The RTC zone is described in Section **4.0410 Rockwood Town Center (RTC)** in the City of Gresham Development Code. Specific site development requirements are described in Attachment A. Primary uses permitted in RTC are retail commercial, services, office uses and housing. Mixed-use developments and various institutional uses (e.g. library, public meeting halls and government facilities) are also permitted.

As described in the *2040 Concept Plan*, town centers should act as gathering places with higher densities than the surrounding neighborhood but still on a scale as to not overshadow those areas. The RTC zone encourages development on a scale and character to support and reinforce the image of a town center, with buildings of at least two stories, oriented to streets and pedestrians, and with parking lots behind or to the sides of buildings.

High-density residential, office, commercial, service and institutional mixed-use development is permitted in the RTC zone provided high density housing also includes a mixed-use component along the street frontage. Mixed-use consists of commercial, office, or community service uses or combinations thereof in combination with residential uses. Mixed-use is required in the Triangle as well as properties abutting streets.

### ***Previous Planning Efforts***

The City of Gresham has completed several planning studies for Rockwood, many of which have already been implemented through development code changes. These include:

- The Central Rockwood Mixed Use Community Development Plan (1995)
- The Central Rockwood Plan (1998)
- The Rockwood Action Plan (1998)
- The Capital Improvement Plan for Central Rockwood (1999)
- The Rockwood Common Planning process (for park and ride redevelopment at 185<sup>th</sup>)

- Stark Street Boulevard Plan (2003)
- Rockwood-West Gresham Urban Renewal Plan (2003)

The *Central Rockwood Mixed-Use Community Development Plan* (1995) was the first in a series of planning efforts to implement “Envision Gresham 2020” planning process and new the Town Center designation. The plan evaluated several redevelopment and transportation alternatives, particularly redevelopment options within the Rockwood Triangle. Redevelopment options proposed in the plan attempt to reinforce the existing development patterns and the nodal character of the Triangle. Preliminary land use regulations were also developed as a part of the process.

*The Central Rockwood Plan* (1998) recommended zoning changes, street improvements, and park areas. Within the study area, the RTC zone was implemented as well as recommendations for future street connections within the triangle area and south of Stark. The *Rockwood Action Plan* (1998) built upon the *Central Rockwood Plan*, but is more broadly focused than land use and transportation. The *Action Plan* addresses community engagement and organization, housing, social services, public safety, business and economic development, transportation, traffic and parking, Triangle redevelopment, parks/open spaces and public facilities, and community image.

*The Capital Improvement Plan for Central Rockwood* (1999) identifies infrastructure needs within Central Rockwood and downtown areas. The plan identifies bicycle and pedestrian needs as well as the need for a park within the Triangle. There are also street, bicycle and pedestrian, sewer, and park improvements identified in the general vicinity of the Triangle.

The *Rockwood Commons Feasibility Study* (2001) evaluated the design and financial feasibility for redeveloping the 185<sup>th</sup> Street park and ride lot as a mixed-use project. The study built upon previous planning efforts in Rockwood including the *Rockwood Action Plan* and the *Central Rockwood Land Use Plan*. Key components of the plan include a small Gresham Police precinct, parking for Tri Met users, a healthcare clinic, educational programs geared toward the area’s residents, childcare, and a public market. Funding for the project was not identified, but a study for a Rockwood urban renewal district was underway at the same time this feasibility study was completed. It was assumed that if the urban renewal district were approved, this funding could be used to develop this catalyst project

*The Stark Street Boulevard Plan* (2003) designed a regional boulevard for the core of the RTC. The project began construction in Spring 2004 with estimated completion in early 2005. The new project will move utilities underground to free sidewalk space, widen existing sidewalks, add street trees and small medians between 181<sup>st</sup> and 190<sup>th</sup>.

*The Burnside/Stark Mixed-Use Concept Plan* (2002) evaluated four alternatives for redeveloping the Stark/Burnside junction. A financial feasibility analysis found that improved access to Burnside and Stark is essential for the area’s redevelopment, small service oriented businesses are viable and affordable high density housing is viable (market rate housing is not feasible). The market analysis also determined that successful redevelopment of the area is predicated on increased pedestrian and vehicle access.

*The Rockwood-West Gresham Urban Renewal Plan* is an urban renewal plan for commercial, industrial, and mixed-use/residential areas of Rockwood, including the Town Center. The plan establishes a funding mechanism

for projects within the district. The urban renewal district is anticipated to generate approximately \$92 million revenue for Rockwood redevelopment.

As a part of the plan, existing infrastructure deficiencies and economic needs were identified, particularly for the RTC. The plan also includes urban design guidelines for the RTC, Burnside and Stark corridors, 181<sup>st</sup>, the Banfield Corporate Park, and the industrial area north of I-84.

## EXISTING CONDITIONS

### Existing Land Use

The Triangle is dominated by commercial and auto oriented businesses, intermixed with high-density apartment complexes. Gresham planning staff conducted a foot survey of the Triangle to identify vacant and partially vacant tax lots and buildings. The results are shown in Figure 3 and described in Table 1. Overall, 123 parcels were surveyed within the triangle and areas immediately adjacent to 181<sup>st</sup>, Burnside and Stark. The surveyed area was approximately 57 acres, or about 37 percent of the RTC's 155 acres. The majority (64 percent) of the 123 surveyed tax lots are fully occupied, but nearly 20 percent of buildings in and near the Triangle are at least partially vacant and almost seven percent are completely vacant. Vacant lots and parking areas account for about nine percent of the surveyed area, however, some of this parking is used by existing businesses and one parcel is a Tri Met park and ride.

**Table 1. Vacant/Partially Vacant Tax lots in the Rockwood Triangle Area (Foot Survey)**

<b>Existing Use</b>	<b>Number of Tax lots</b>	<b>Total Acres</b>	<b>Percent of Rockwood Triangle</b>
Occupied Building	95	36.3	64.0%
Partially Vacant Building	4	11.3	19.9%
Vacant Building	7	3.9	6.9%
Vacant Lot	7	1.1	1.9%
Parking	10	4.1	7.2%
<b>Total</b>	<b>123</b>	<b>57</b>	<b>100%</b>

*Source: City of Gresham, 2004*

Table 2 shows the types of existing uses found in the Triangle according to Gresham's GIS data. The area is dominated by commercial uses, which includes restaurants, retail, and limited professional uses. The majority of commercial uses are auto dependent, such as fast food restaurants, auto parts etc. According to the GIS data, residential units comprise about 16 percent of the acreage in the Triangle, although the foot survey found that single family uses may be lower than shown in Table 2 with multifamily residential accounting for a greater percentage of residential uses. Areas that once may have been single family homes have likely been demolished and converted to apartments or homes have been converted to multifamily units.

One difference between Table 1 and Table 2 is that parking areas are identified as commercial uses in the GIS data, while the foot survey counts parking as a separate category. Parking lots may be converted to different uses provided there is adequate parking available for local businesses and residences.

**Table 2. Existing Land Uses in the Rockwood Triangle Area (GIS Data)**

<b>Existing Use</b>	<b>Number of Tax lots</b>	<b>Total Acres</b>	<b>Percent of Rockwood Triangle</b>
Commercial	83	46	81.1%
Multifamily	9	1.5	2.6%
Single Family	24	7.4	13.1%
Vacant	7	1.8	3.2%
<b>Total</b>	<b>123</b>	<b>57</b>	<b>100%</b>

*Source: City of Gresham*

### **Ownership**

Ownership is shown in Figure 4.

There are 282 parcels in the RTC, the majority in individual ownership, making consolidation difficult for redevelopment. Within the RTC, there are 32 parcels one-acre or larger and 10 parcels one-acre or larger within the Triangle. Average parcel size in the RTC is 0.55 acres, which is slightly larger than an average parcel size of 0.46 acres within the Triangle. Figure 4 illustrates the largest parcels in the RTC. The landowner with the largest amount of land is the Portland Lutheran Association, which owns one 10-acre parcel and one 4.3-acre parcel near Stark and 182<sup>nd</sup>. While there are few vacant parcels in the RTC, there are some larger parcels where the current building is vacant or partially vacant, the most notable is the Fred Meyer site located in the heart of the Triangle and owned by EFlow Investment Trust. There are also several parcels south of Stark that are underused and of a size where redevelopment could be feasible. One of these parcels is currently a parking lot.

### **Architectural Style**

Buildings in the Triangle and adjacent areas are typical commercial structures, generally tilt up or masonry construction oriented toward automobile uses. There are also several apartment buildings in the Triangle vicinity. Most of these appear to have been constructed in the last 25 to 30 years with some older single family residences on the periphery.

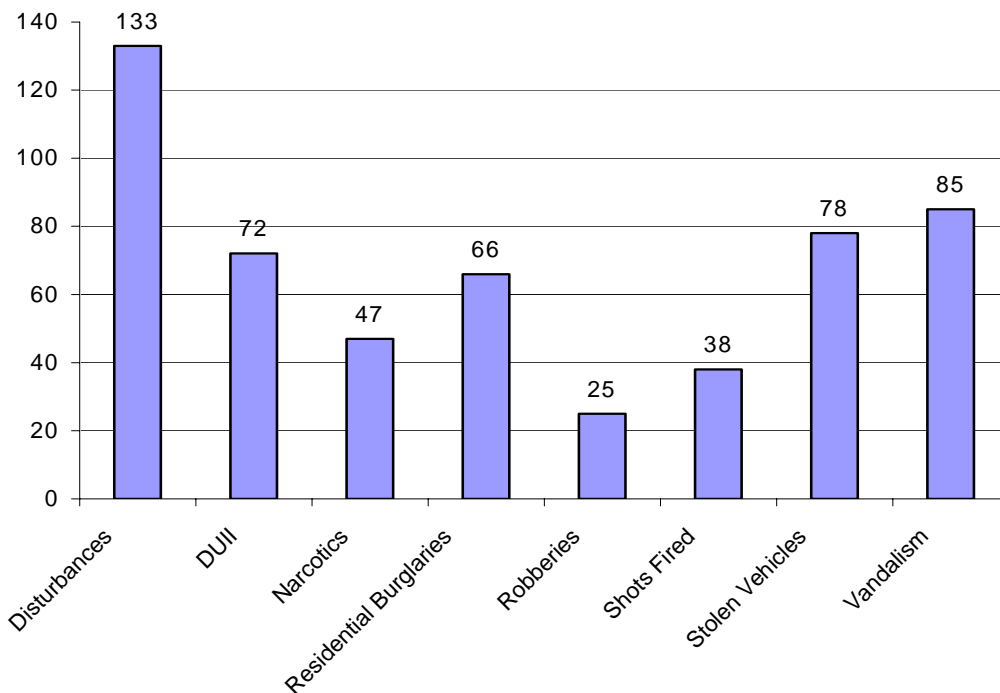
Overall, there is little structural interest within the Triangle that residents and visitors would be attracted to. There is no defined gathering space, large parking lots used by adjacent buildings are numerous, and pedestrian access is limited by existing traffic patterns and a lack of pedestrian amenities. While the Rockwood area supports residential uses, the architecture of the area is not conducive to gathering, as a Town Center is envisioned to do.

### **Crime in Rockwood**

Chart 1 shows the number of reported crimes within the RTC. The majority of reported crimes have occurred within the vicinity of the Triangle or along the transportation corridors. Burnside and Stark were the locations of the majority of traffic or vehicle related crimes in the RTC.

Of the 544 reported crimes, disturbances account for approximately 24 percent of crimes in the Rockwood area. Disturbances within the RTC are generally assaults or domestic disturbances. Other reported crimes in the Rockwood area include vandalism (16 percent), stolen vehicles (14 percent), drunk driving (13 percent) and burglaries (12 percent). Narcotics, robberies, and reports of shots fired account for the remaining crime reported in the area. Crime in the Rockwood area accounts for approximately 11 percent of all crime in the city, although drunk driving, robberies, and shots fired account for at least 15 percent of those types of crimes citywide.

**Chart 1. Reported Crimes within the Rockwood Town Center (2002-2003)**



### **Transportation System**

The RTC has a system of arterials, boulevards, and collectors that form the major components of the transportation system and are shown in Figure 5. Burnside and 181<sup>st</sup> Avenues are identified as arterials and are also identified in the *Gresham Transportation System Plan (TSP)* (2002) as the National Highway System connection between I-84 and US 26. The TSP traffic analysis described the 2020 traffic conditions along this connection as severely congested due to the north/south traffic between I-84 and US 26. The City is conducting a

study to evaluate all potential north/south links between I-84 and US 26 to provide a more direct route and reduce congestion.

Halsey (between 162<sup>nd</sup> and 192<sup>nd</sup> Avenues), Glisan Avenue, 182<sup>nd</sup> Avenue (south of Burnside) and Stark Street are all identified as arterials. Halsey Street from 192<sup>nd</sup> to the east and 162<sup>nd</sup> Avenue are both arterials. Rockwood also has several collectors serving the area that include 171<sup>st</sup>, 192<sup>nd</sup> and 194<sup>th</sup> Avenues.

Average daily traffic (ADT) varies by the street classification. Not surprisingly, ADT is highest in the Rockwood area on 181<sup>st</sup> Avenue from I-84 to Burnside, where the number of vehicles averages approximately 34,000 per day. This traffic filters down to other arterials, particularly Burnside where ADT is between 14,500 and 19,500 vehicles per day. ADT is higher south of Rockwood as more vehicles enter Burnside and connect with US 26.

Major arterials bear a heavy traffic load. 182<sup>nd</sup> Avenue south of Burnside accommodates between 24,000 and 27,000 vehicles per day. East/west arterials also have heavy traffic, with ADT on Stark at approximately 22,500 vehicles per day, Halsey at approximately 16,500 vehicles per day, and Glisan at approximately 14,500 vehicles per day. As traffic increases, the TSP projects that intersections along these arterials, particularly intersections with Burnside, will be near or over capacity by 2020.

As a part of the TSP planning process, the City of Gresham also developed a list of substandard street within the city. Within the Rockwood area, several streets were identified and are shown in Table 3. Recent road construction has included Yamhill Street, which was the first “green street” constructed in Gresham.

**Table 3. Substandard Streets with the Rockwood Town Center Area**

<b>Street Name</b>	<b>From</b>	<b>To</b>	<b>Estimated Cost</b>
SE 177 <sup>th</sup>	SE Mill Ct.	Lincoln	\$266,000
NE Couch	NE 172 <sup>nd</sup>	NE 176 <sup>th</sup>	\$252,000
NE Couch St.	NE 169 <sup>th</sup>	NE 172 <sup>nd</sup>	\$42,000
NE Pacific St.	NE 174 <sup>th</sup>	NE 177 <sup>th</sup>	\$109,200
SE Mill	SE 174 <sup>th</sup>	SE 176 <sup>th</sup>	\$28,000
SE Marie	SE 182 <sup>nd</sup>	830 ft. west of 182 <sup>nd</sup>	\$232,400
NE 191 <sup>st</sup>	NE Couch	NE Glisan	\$288,400
NE Couch	NE 220 <sup>th</sup>	NE 223 <sup>rd</sup>	\$140,000
SW 25 <sup>th</sup>	SW 190 <sup>th</sup>	East	\$168,000
NE Davis	NE 184 <sup>th</sup>	NE 188 <sup>th</sup>	\$154,000
NE Couch	NE 191 <sup>st</sup>	NE 192 <sup>nd</sup>	\$95,200
SE Ash	SE 181 <sup>st</sup>	East	\$168,000
NW Ash	NW 172 <sup>nd</sup>	400' west	\$112,000
SE 197 <sup>th</sup>	SE Stark	E Burnside	\$252,000
197 <sup>th</sup>	Burnside.	Stark	\$146,000
NE Davis	184 <sup>th</sup>	188 <sup>th</sup>	\$154,000

Source: City of Gresham, 2004

**Transit**

Transit routes are shown in Figure 6.

Rockwood is served by light rail and bus service. MAX runs along Burnside Street with stops at 172<sup>nd</sup> Avenue and 181<sup>st</sup> Avenue with trains running every seven to 10 minutes. A park and ride (181<sup>st</sup> Avenue) is located within the Triangle, providing parking for those using MAX to commute work or catch one of several buses that stop at the Rockwood Transit Center at 188<sup>th</sup> Avenue near Stark Street. Buses serving the area and stopping at the Rockwood Transit Center include:

- #20 (Stark) runs every 15 minutes;
- #25 (Glisan) runs from 7:00 AM to 6:00 PM every hour;
- #27 (Market/Main) runs from 7:00 AM to 6:00 PM every hour;
- #82 (Eastman/182<sup>nd</sup>) runs from 7:00 AM to 6:00 PM every hour; and
- #87 (Airport Way/181<sup>st</sup>) runs during the AM and PM commute every 30 minutes.

Tri Met rider surveys show that Rockwood area buses are underutilized, primarily because of its proximity to MAX and the relatively infrequent routes (with the exception of #20) with buses running only every 30 minutes to one hour with the #87 only running every 30 minutes during the AM/PM commutes. A 1999 parking study also found that during peak hours, the park and ride is underutilized, with only 45 percent of the parking spaces occupied. Light rail service is, not surprisingly, the most frequent transit service in the study area and the most heavily used. Of the two stops near the Triangle, ridership is the highest at the 181<sup>st</sup> Street stop, averaging nearly 2,000 on/off trips daily (eastbound and westbound). 172<sup>nd</sup> Avenue sees less use with about 1,200 on/off trips daily. The Tri Met survey also shows that of the 12 east Multnomah County MAX stops (east of Gateway), 181<sup>st</sup> Avenue ranks 9<sup>th</sup> and 172<sup>nd</sup> ranks 11<sup>th</sup> in total activity.

While ridership is not as high as other east Multnomah County stops, MAX is the most heavily used of transit options and the fastest to downtown Portland with travel times from downtown Gresham to downtown Portland taking approximately 36 minutes.

### ***Activities in and Near Rockwood***

The Rockwood has several events throughout the year at various venues, although most events occur at Vance Park located south of Yamhill on 182<sup>nd</sup> Avenue and outside of the RTC. Ongoing events include Loaves and Fishes, which offers free meals to seniors on Tuesdays, Wednesdays, and Thursdays at the United Methodist Church (178<sup>th</sup> and Stark) and the Rockwood International Marketplace located at the Kaiser Complex near the Ruby Junction LRT stop. The Winter Fair is held at the Rockwood Library and Las Posadas is held at several locations in the area. Both events occur during the fall and winter.

Vance Park is the location for several events and public activities including the Winter Wonderland Walk (December), the Community Garden (year-around), Celebration of Cultures (August), and the Vance Park Concert Series (Saturday afternoons in September).

Although there are several activities in the area, Rockwood Town Center does not have a defined gathering space. Most events occur in Vance Park, churches and public buildings and parking lots. Rockwood residents have expressed a desire to find a location for a long-term farmer's market and bringing other events now located

Rebecca Ocken, City of Gresham  
November 10, 2004  
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outside of the area into Rockwood such as the National Night Out and the Cinco de Mayo Festival. Both of these events already have financial sponsors.

Attachments: Attachment A: Uses Permitted and Development Requirements for Rockwood Town Center  
Attachment B: Figures 1 - 7

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Project Number: ODOT0000-0465



# ATTACHMENT A

**Table A-1. Uses Permitted In the Rockwood Town Center**

Use Categories:	Rockwood Town Center
<i>Commercial Uses:</i>	
Offices, Clinics, Retail Trade, Retail Service, Business Service,	P
Auto-Dependent Use <sup>1</sup> , Outdoor Commercial,	L
Mini-Storage Facilities	NP
<i>Residential Uses</i>	
Attached Dwellings on a Single Lot <sup>3</sup> , Single Family Attached Dwellings <sup>3</sup> , Accessory Dwelling, Residential Facilities	P
Two-Unit Attached Dwelling, Single-Family Dwelling (Detached), Residential Homes,	NP
Industrial Uses	NP
Mixed-Use Development <sup>3</sup>	P
Temporary Uses	P
Accessory Structures	P
Interim Office Uses	NP
Temporary Health Hardship Dwelling <sup>4</sup>	L
Home Occupations	P
<i>Community Service Uses:</i>	
Type I	P
Type II	P
Type III <sup>2</sup>	P

1. In the Town Center district, auto-dependent uses are limited to sites fronting on major or principal arterial streets.
2. Solid waste transfer stations, solid waste landfills, campgrounds, and golf courses are not permitted in the Town Center District or in the Station Centers District
3. Within the area identified on the Appendix 9.000 Map (Rockwood Town Center Mixed Use Area), attached dwellings on a single lot and single-family attached dwelling lots with frontage on Stark, Burnside, Pine, Ash, Oak and Couch Streets and on 181<sup>st</sup> Avenue shall develop commercial or community service uses, or combinations thereof, along the entire length of the street frontage, except the portion thereof required for access. These non-residential uses shall occupy at least the ground floor of any new building and shall have main entrances directly on the street. A development proposal may be exempted from this standard upon an affirmative finding that the street frontage has insufficient dimensions, such as in the case of flag lots or irregular shaped parcels, whereby it is physically impracticable to develop commercial or community service uses. Housing developed for persons with special needs is exempted from the mixed-use requirement. This is housing for persons with “special needs” consistent with the definition of the most recent “Consolidated Action Plan” as approved by the U.S. Department of Housing and Urban Development.
4. Temporary health hardship dwelling is permitted in conjunction with an existing single-family detached structure, subject to the standards in Section 10.1300.

**Table A-2. Development Requirements for the Rockwood Town Center**

	<b>Rockwood Town Center</b>
(A) <i>Minimum Lot Size</i>	10,000 square feet for residential; none for commercial and mixed-use <sup>7</sup>
(B) <i>Minimum Street Frontage</i>	100 feet for residential; none for commercial and mixed use <sup>11</sup>
(C) <i>Minimum Lot Width/Depth Ratio</i>	.5 : 1 for residential; none for commercial and mixed use <sup>7</sup>
(D) <i>Minimum Floor Area Ratio (FAR)</i>	.5 : 1
(E) <i>Minimum Residential Density</i>	18 units/ acre for attached single-family dwellings; 20 units/acre for attached dwellings
(F) <i>Maximum Residential Density</i>	Unlimited inside Stark/ Burnside/ 181st Ave. Triangle; 40 units/acre elsewhere
(G) <i>Minimum Building Setbacks</i>	0 feet front, side and rear for commercial, mixed-use, and community service uses; 5 feet front and street-side, 0 feet interior side, 15 feet rear for residential <sup>1</sup>
(H) <i>Maximum Building Setbacks</i>	<u>Commercial &amp; Mixed-Use:</u> 10 feet front and streetside <sup>2</sup> None for interior side and rear. Residential: 20 feet front; None for interior side and rear; 20 feet streetside <sup>3</sup>
(I) <i>Minimum Building Height</i>	2 stories
(J) <i>Maximum Building Height</i>	None <sup>8</sup>
(K) <i>Transit Design Criteria and Standards Apply</i>	Yes <sup>6</sup>
(L) <i>Minimum Off-Street Parking Required</i>	None required for commercial uses; 1 space/ unit for residential <sup>9</sup>
(M) <i>Maximum Off-Street Parking Permitted</i>	As provided in Section 9.0851 for commercial; 2 spaces/ unit for residential <sup>3,4</sup>
(N) <i>Screening and Buffering Required</i>	No, except where abutting Transit LDR, or CMF, or CMU <sup>10</sup>
(O) <i>Clear Vision Area Required</i>	Yes <sup>5</sup>

*1 Minimum setbacks for single-family attached dwellings are:*

*(a) Front Yard:*

*(i) Front façade = 5 feet*

*(ii) Front Porch = 5 feet*

*(iii) Garage = 18 feet*

*(iv) As an alternative to the setbacks listed above, the setback for the entire front façade, including the garage, may be reduced to 5 feet. In no case shall the garage setback distance be between 5 feet and 18 feet, and the garage shall not be closer to the street property line than any other portion of the front façade of the building.*

*(b) Side Yard:*

*(i) Interior = 5 feet for any side of a dwelling structure that is not a common wall with another dwelling structure;*

*(ii) Street side (corner lot): Façade = 6 feet; Porch = 6 feet; Garage with access from street side = 18 feet.*

*(c) Rear Yard = 10 feet if there is no alley; 6 feet if there is an alley.*

- 2 A maximum front or streetside setback of up to 20 feet may be permitted when enhanced pedestrian spaces and amenities are provided.*
- 3 There is no maximum parking limitation for single-family attached dwelling units.*
- 4 For commercial uses, when included in a mixed-use development, the maximum amount of off-street parking shall be as provided in Section 9.0850 for each commercial use.*
- 5 Conformance with clear vision standards of Section 9.0200 shall be required only for developments with direct access to an arterial street.*
- 6 Ground floor window standards for commercial buildings on transit streets (Section 7.0210) do not apply to residential developments*
- 7 Minimum lot size and lot width/depth ratio standards do not apply to lots or parcels created for attached single family dwellings. Minimum lot dimensions for single-family attached dwelling lots are as follows:*
  - Width at building line*
    - Interior Lot 16 feet (lots of less than 22 feet in width shall take access from an alley or from a shared access)*
    - Corner Lot 16 feet where it abuts an alley*
    - 25 feet where there is no alley or shared access*
  - Depth 0 feet - all developments that include single family attached dwellings shall receive both land division approval to create lots for the single family attached dwellings as required in Section 6.0001, and site design review approval as required in Section 7.0001.*
- 8 The maximum building height shall be reduced to 35 feet for any building containing dwelling units when located adjacent to an LDR or TLDR district, as provided in Section 7.0201(K).*
- 9 The standards of Section 4.0440 shall apply for single-family attached dwellings.*
- 10 Screening and buffering are not required for attached single-family dwellings abutting the LDR or TLDR district.*
- 11 Minimum street frontage for single family attached dwellings shall be 16 feet, except corner lots shall be 25 feet as measured from the corner radius end point to the property corner if there is an alley or shared access, and 32 feet from the corner radius end point to the property corner if there is no alley or shared access. A reduction in the minimum street frontage may be approved when the applicant can document compliance with Section 10.1520 of the Community Development Code.*

## **ATTACHMENT B: FIGURES**



## Rockwood Town Center Redevelopment Plan

### MEMORANDUM

To: Andrew Johnson, ODOT TGM  
From: Rebecca Ocken, City of Gresham  
Date: June 30, 2005  
Re: Burnside Level of Service Analysis

As noted in Task 7: Local Street Plan, Sub Task 3: Burnside Analysis, the City of Gresham conducted preliminary assessment on the initial feasibility of converting Burnside Road from 181<sup>st</sup> to the Stark/Burnside intersection from a four lane Regional Boulevard to a two lane Community Boulevard.

The City contracted with Metro to run a level of service analysis as well as a select link study. The volume information is for 2010 projections with pm two-hour volume plots/ The resulting data sheets are attached. Jay McCoy, the City of Gresham's Traffic Engineer reviewed the data sheets with the following results.

Table 1 notes the three primary intersections within the Rockwood Town Center that were evaluated for level of service following the reduction of capacity on Burnside by one travel lane in each direction from 181<sup>st</sup> to the Stark/Burnside intersection.

Intersection	Existing Capacity		Reduced Capacity	
	V/C	LOS	V/C	LOS
181 <sup>st</sup> /Burnside	1.10	F	1.01	E
181 <sup>st</sup> /Stark	1.10	D	1.07	E
Burnside/Stark	1.33	D	1.64	F

Based on this preliminary assessment, the intersection of concern is Burnside/Stark. The reduced level of service will call for additional study, which will be conducted through the Stark Street Boulevard Project Phase II. Design is funded through MTIP and will begin this year.

The initial study area was discussed at the November 16, 2004 TAC meeting. The results of this study were presented at the May 10 TAC meeting.

Most recently, discussions have been opened between the City Gresham and Multnomah County regarding transferring jurisdiction of the roads within the City of Gresham. Currently, the Multnomah County has jurisdiction over all major arterials within the City of Gresham. It is estimated that by year's end that jurisdiction will be transferred to the City of Gresham thereby eliminating the need for County review or approval.

**Rockwood Town Center  
Redevelopment Plan  
Public Outreach Schedule**

<b>Technical Advisory Committee Meeting Schedule 3rd Tuesday of the month 10:00 to 12:00 Conference Room 2A</b>	
<b>Date</b>	<b>Agenda Topic</b>
✓ Thursday, September 28, 2004	Public Outreach Plan (Task 2), Existing Conditions (Task 3), Evaluation Criteria (Task 5)
✓ October 13-16, 2004	Market Analysis (Task 4), Alternatives Development (Task 6), Local Street Plan (Task 7)
✓ Tuesday, November 16, 2004	Market Analysis (Task 4), Charrette Results - Alternatives Development (Task 6) and Local Street Plan (Task 7)
✓ Tuesday, December 21, 2004	No meeting
✓ Tuesday, January 18, 2005	No meeting
✓ Tuesday, February 15, 2005	No meeting
✓ Tuesday, March 15, 2005	No meeting
✓ Tuesday, May 20, 2005	Alternative Evaluation (Task 8), Selection and Refinement (Task 9) Implementation Strategies (Task 10)

<b>Rockwood Action Plan Implementation Committee Meeting Schedule First Wednesday of the Month 7:00 to 9:00 Gresham City Hall</b>	
<b>Date</b>	<b>Meeting Topic</b>
✓ Wednesday, October 6, 2004	Existing Conditions, Evaluation Criteria
✓ October 13 through the 16, 2004	Design Charrette
✓ Wednesday March 2, 2005	Market Analysis, Charrette Review, Selection and Refinement
✓ Thursday, May 26, 2005	Final Plan and Implementation Strategies

<b>Council Transportation Advisory Committee Meeting Schedule First Thursdays of the Month 6:30 to 8:30 Gresham City Hall</b>	
<b>Date</b>	<b>Meeting Topic</b>
✓ Thursday, October 7, 2004	Existing Conditions, Evaluation Criteria
✓ October 13 through the 16, 2004	Design Charrette
✓ Thursday, March 3, 2004	Charrette Review, Alternative Selection and Refinement with focus on street plan

<b>Gresham Redevelopment Commission Advisory Committee 2<sup>nd</sup> Wednesday of the Month</b>	
<b>Date</b>	<b>Meeting Topic</b>
✓ Wednesday, October 13, 2004	Design Charrette
✓ Wednesday, February 9, 2005	Design Charrette results
✓ Thursday, May 26, 2005	Final Plan and Implementation Strategies

**Public Meeting/Design Charette Schedule**

- ✓ Wednesday through Saturday October 13<sup>th</sup> through October 16<sup>th</sup>, 2004

**Gresham City Council/Redevelopment Commission Review**

- ✓ October 13-16, 2004 Design Charrette
- ✓ Thursday, January 27, 2005 – Selection and Refinement
- ✓ Thursday, May 26, 2005 – Final Plan and Implementation Strategies

**Gresham Planning Commission**

- ✓ March 14, 2005

**Rockwood Neighborhood Association**

- ✓ Thursday, October 7
- ✓ Thursday February 15

**Other**

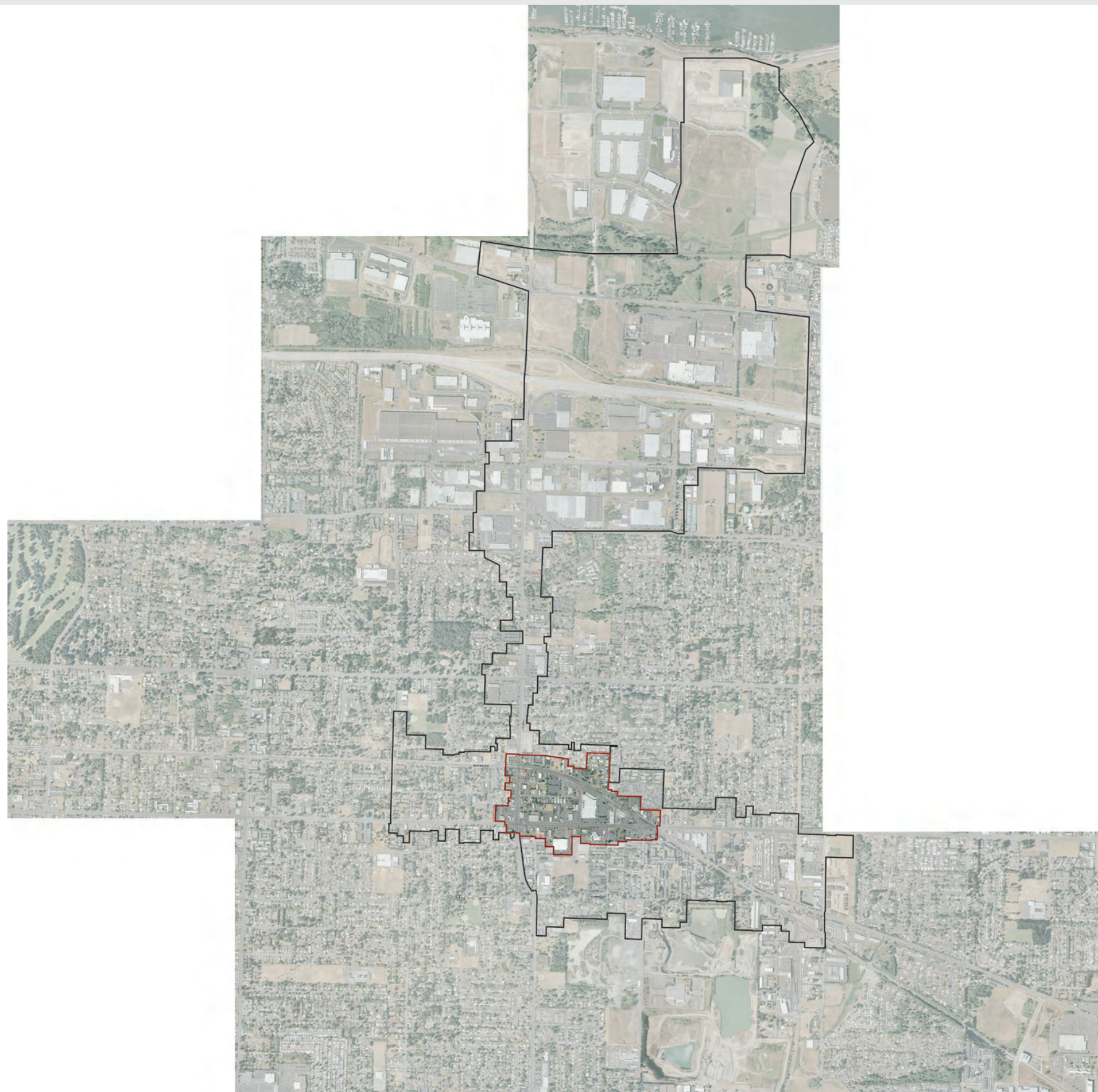
- ✓ Housing Citizen Advisory Committee, January 13, 2005
- ✓ Soropotimists, February 17, 2005
- ✓ Rockwood Apartment Managers, April 19, 2005
- ✓ Weed and Seed Steering Committee, April 21, 2005

# ROCKWOOD

TOWN CENTER  
REDEVELOPMENT PLAN

## CONTEXT [FIGURE 1]

- Project Boundary
- Urban Renewal Boundary



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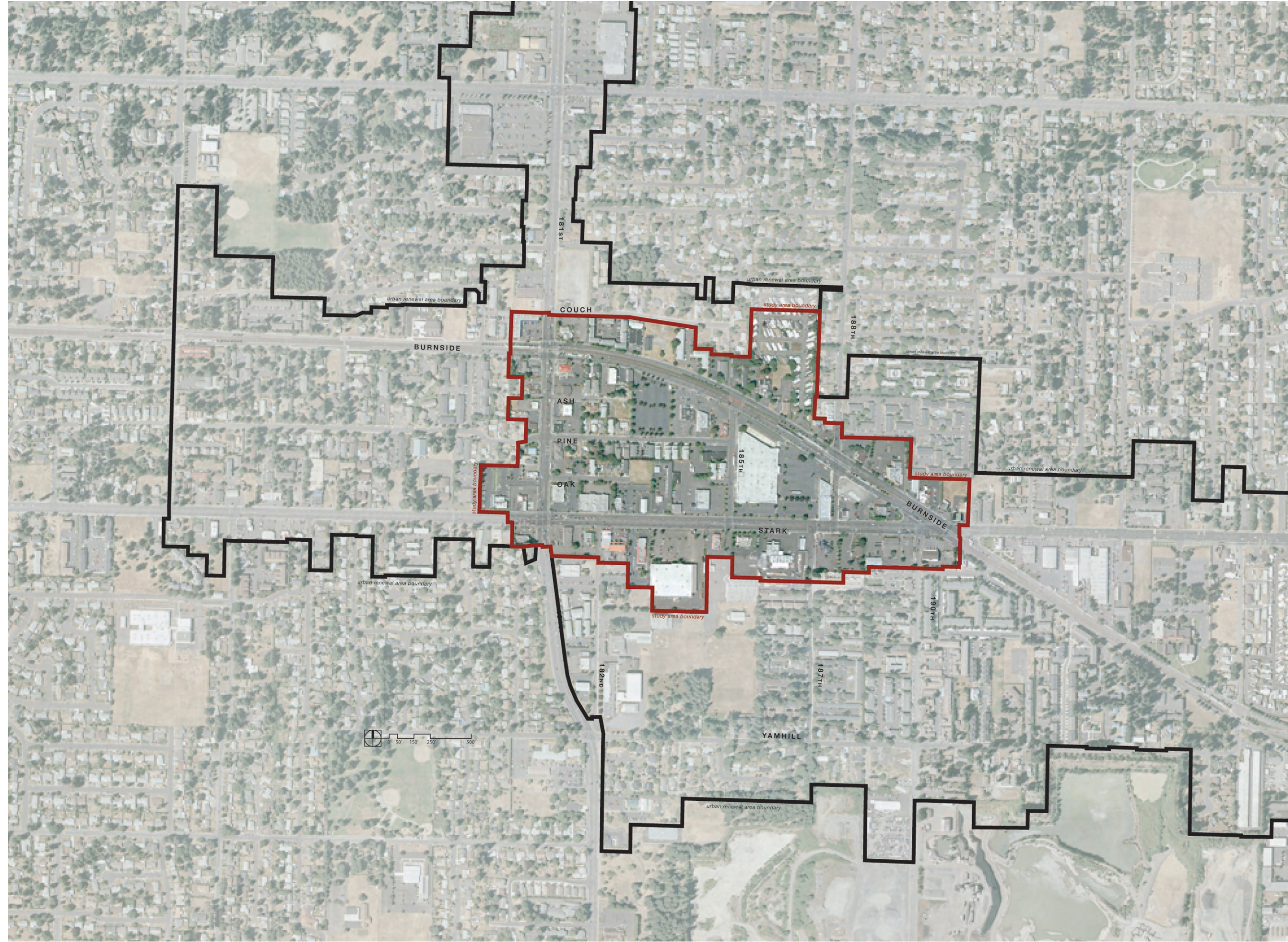


# ROCKWOOD

TOWN CENTER  
REDEVELOPMENT PLAN

STUDY AREA [FIGURE 2]

- Project Boundary
- Urban Renewal Boundary



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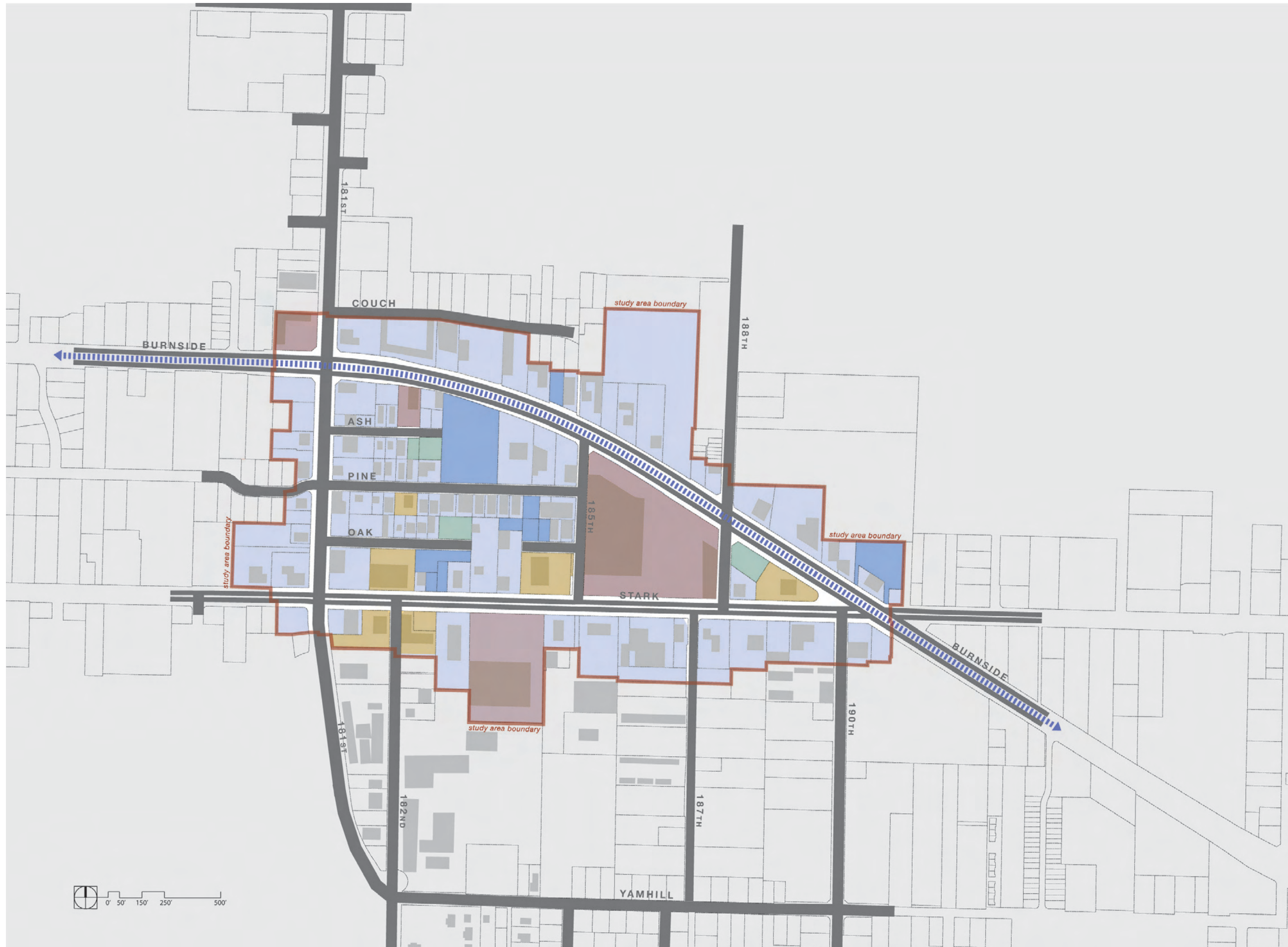
# ROCKWOOD

## TOWN CENTER

### REDEVELOPMENT PLAN

### VACANCY [FIGURE 3]

-  Vacant Building
-  Vacant Lot
-  Partially Vacant
-  Parking



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
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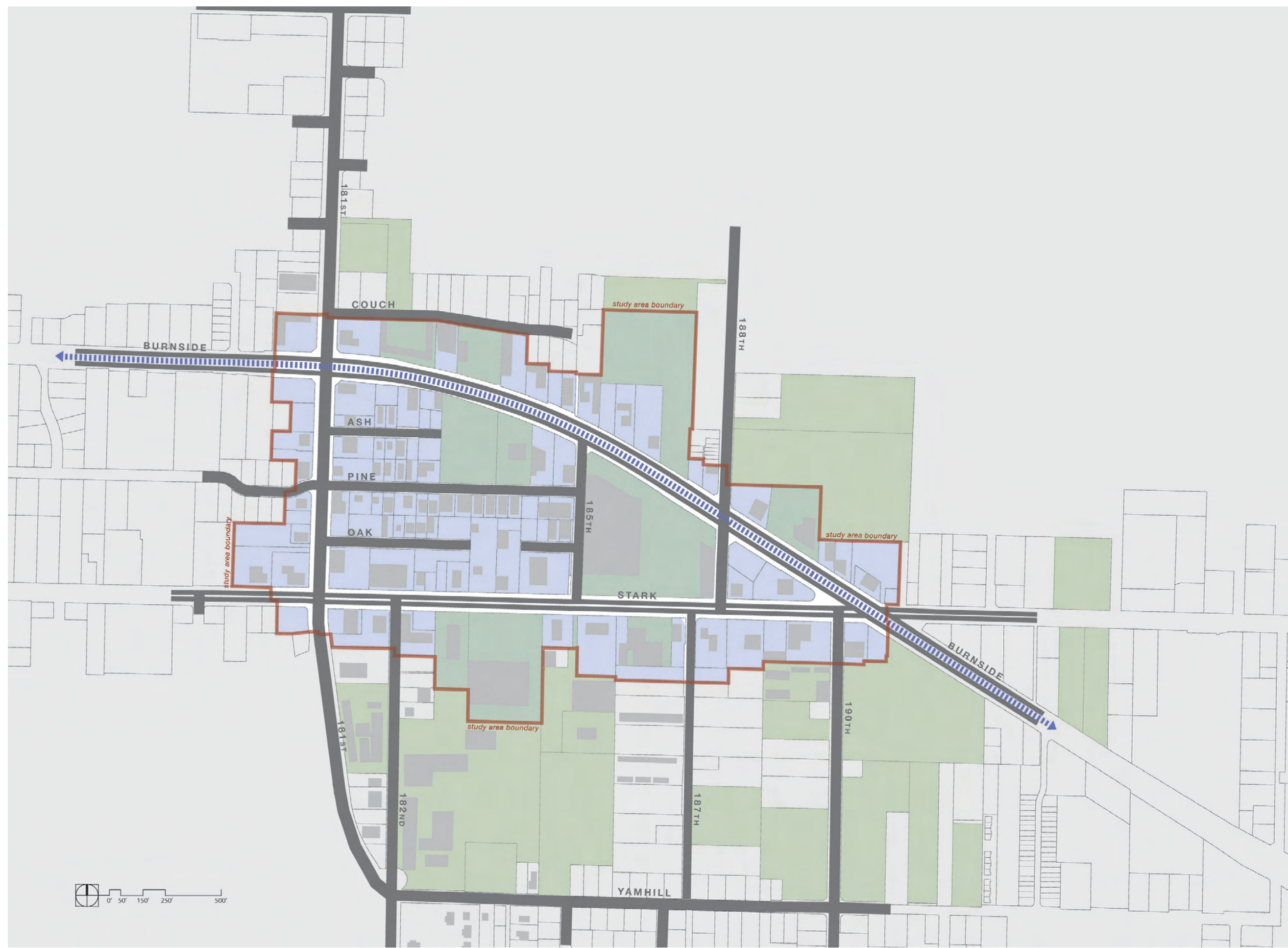
# ROCKWOOD

## TOWN CENTER

### REDEVELOPMENT PLAN

#### OWNERSHIP [FIGURE 4]

-  Parcels over 1 acre in area
-  Parcels inside the project boundary



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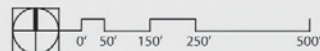
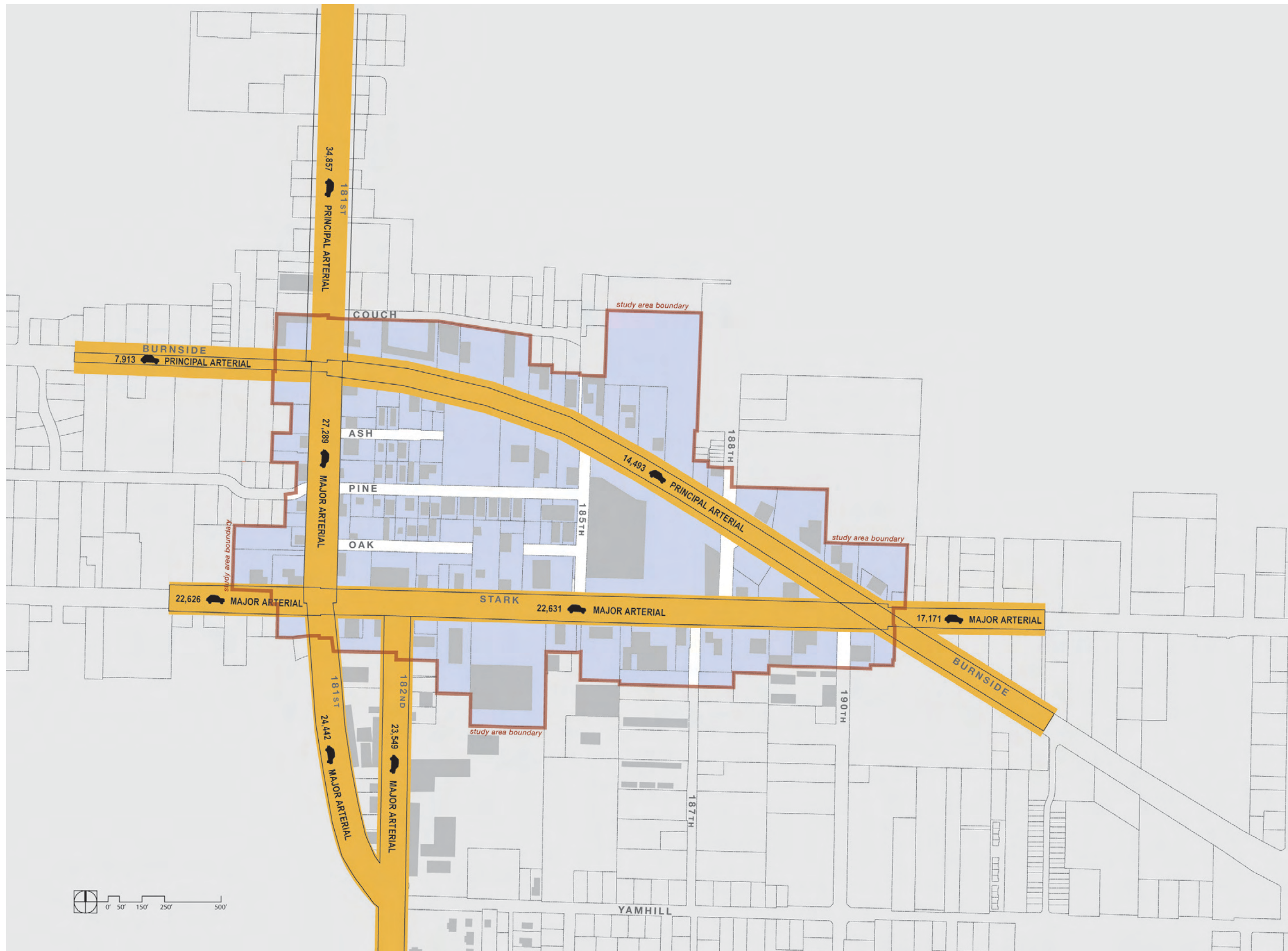
# ROCKWOOD

## TOWN CENTER

### REDEVELOPMENT PLAN

#### AUTO VOLUME [FIG. 5]

 Traffic Volume [represents daily average maximum]

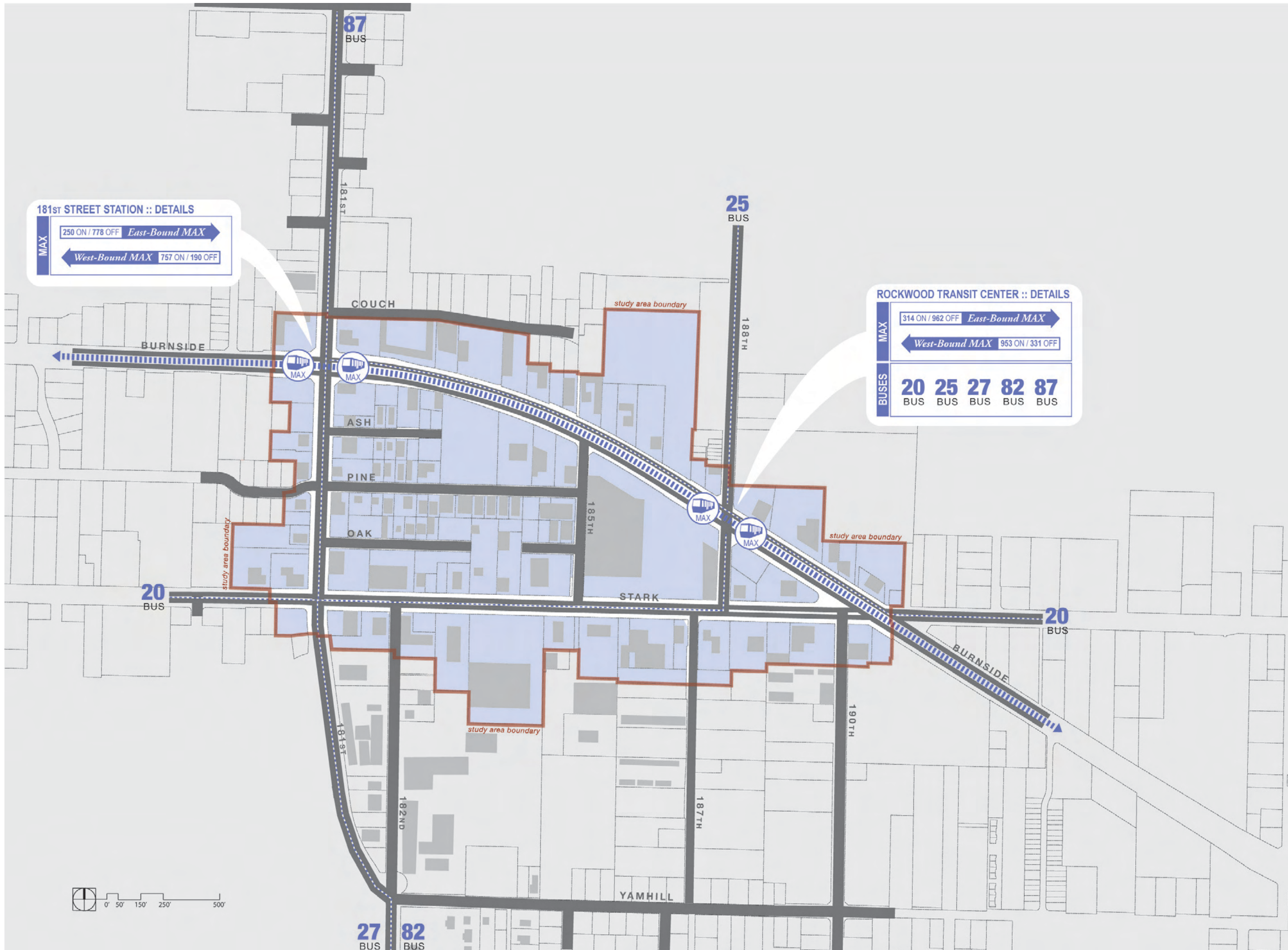


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# ROCKWOOD TOWN CENTER REDEVELOPMENT PLAN

## TRANSIT [FIGURE 6]



**181ST STREET STATION :: DETAILS**

MAX

250 ON / 778 OFF *East-Bound MAX* →

← *West-Bound MAX* 757 ON / 190 OFF

**ROCKWOOD TRANSIT CENTER :: DETAILS**

MAX

314 ON / 962 OFF *East-Bound MAX* →

← *West-Bound MAX* 953 ON / 331 OFF

BUSES

**20 25 27 82 87**  
BUS BUS BUS BUS BUS

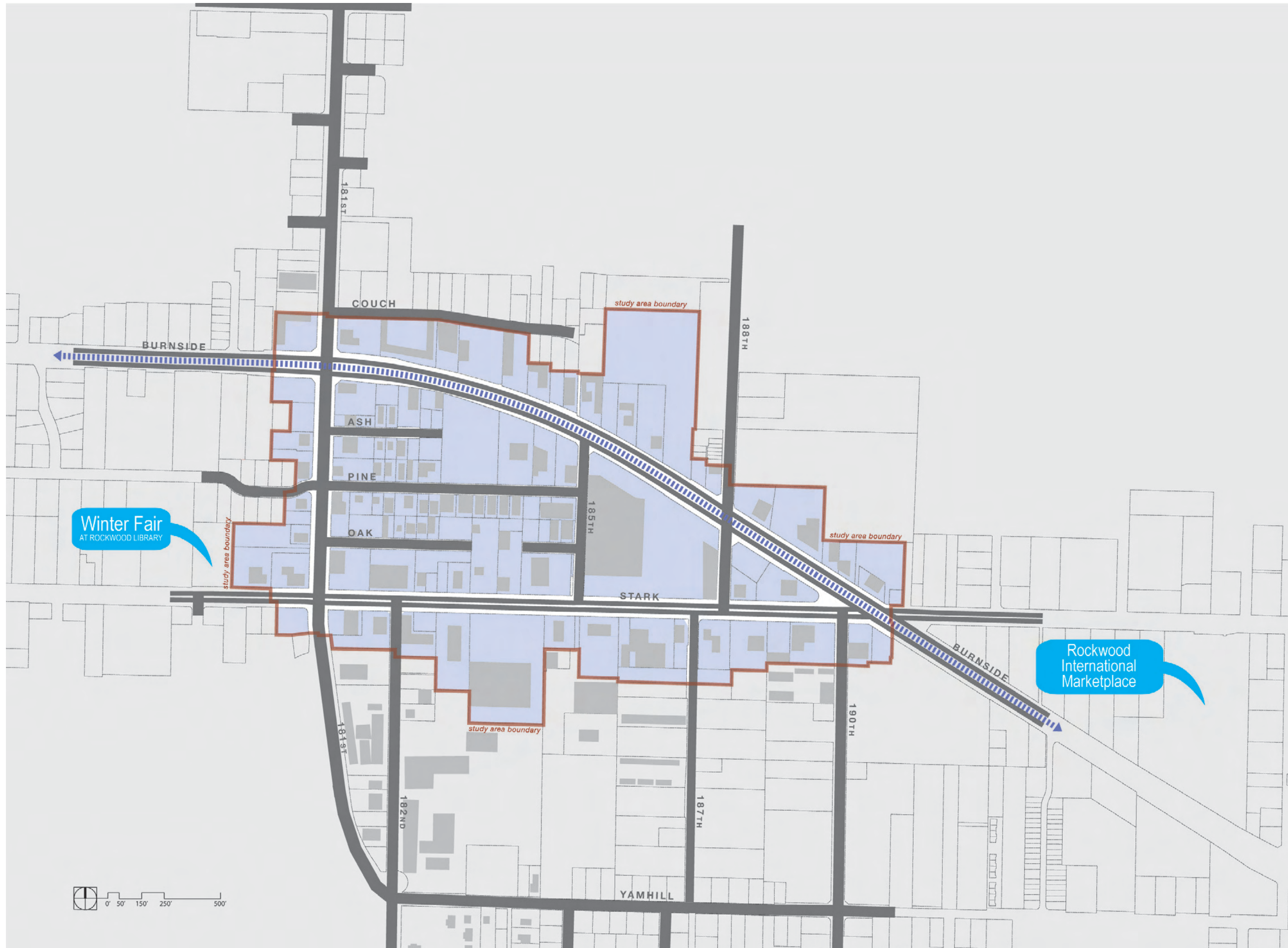
- MAX Light Rail
- MAX Station Platform
- Bus Routes

NOTE: Eastbound and Westbound MAX ridership statistics represent daily averages.



# ROCKWOOD TOWN CENTER REDEVELOPMENT PLAN

## ACTIVITIES [FIGURE 7]



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