

Work Session

WS

Milwaukie City Council

COUNCIL WORK SESSION

City Hall Council Chambers, 10501 SE Main Street
& Zoom Video Conference (www.milwaukieoregon.gov)

AGENDA

JUNE 3, 2025

Council will hold this meeting in-person and by video conference. The public may come to City Hall, join the Zoom webinar, or watch on the [city's YouTube channel](#) or Comcast Cable channel 30 in city limits. For Zoom login visit <https://www.milwaukieoregon.gov/citycouncil/city-council-work-session-9>. Written comments may be delivered to City Hall or emailed to ocr@milwaukieoregon.gov.

Note: agenda item times are estimates and are subject to change.

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|--|----------|
| 1. Council Goal Update: Affordability – Report (4:00 p.m.)
Staff: Joseph Briglio, Assistant City Manager,
Michael Osborne, Finance Director, and
Peter Passarelli, Public Works Director | 1 |
| 2. Events Update – Report (5:30 p.m.)
Staff: Dan Harris, Events & Emergency Management Coordinator | 9 |
| 3. Adjourn (6:00 p.m.) | |

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Executive Sessions

The City Council may meet in executive session pursuant to Oregon Revised Statute (ORS) 192.660(2); all discussions are confidential; news media representatives may attend but may not disclose any information discussed. Final decisions and actions may not be taken in executive sessions.



COUNCIL WORK SESSION

City Hall Council Chambers, 10501 SE Main Street
& Zoom Video Conference (www.milwaukieoregon.gov)

MINUTES

JUNE 3, 2025

Council Present: Councilors Adam Khosroabadi, Robert Massey, Rebecca Stavenjord, and Council President Will Anderson, and Mayor Lisa Batey

Staff Present: Joseph Briglio, Assistant City Manager
Justin Gericke, City Attorney
Dan Harris, Events & Emergency Management Coordinator

Michael Osborne, Finance Director
Peter Passarelli, Public Works Director
Emma Sagor, City Manager
Scott Stauffer, City Recorder

Mayor Batey called the meeting to order at 4:07 p.m.

1. Council Goal Update: Affordability – Report

Sagor provided background on the development of Council’s affordability action plan and the group discussed the language used in the “why this goal” and “what do we want to accomplish by 2027” sections.

Sagor explained the reasoning for the structure of the affordability metrics. The group discussed the housing related metrics and wondered what the number of housing vouchers used in Milwaukie were and which, if any housing, had 30% area median income (AMI) units. **Council President Anderson** suggested adding language to denote upcoming units to be developed.

Mayor Batey and **Passarelli** discussed the energy efficiency program. The group discussed the five-year annual rolling average rate and its inclusion on the utility metrics.

Sagor explained the development of the “what additional data will inform our understanding” table as a tool to help inform the understanding of the metrics, noting the proposed indicators to assess general affordability: Asset-Limited, Income Constrained, Employed (ALICE) data, population below the federal poverty line, and cost-burdened households. **Sagor** shared that earlier drafts had been refined to improve clarity and usefulness. The group discussed how best to measure success in reducing displacement and preserving affordability and emphasized the importance of metrics that reflect both individual economic progress and the preservation of community character.

Sagor reviewed the utility related metrics tools. **Osborne** noted the process for 2025 utility assistance renewal program. The group discussed Milwaukie’s process for water shutoffs due to nonpayment and gathering data from residents’ other utilities.

Sagor asked if there was any final feedback on the metrics. **Councilor Massey** supported the utility work and noted it would be refined over time. **Mayor Batey** agreed and added that the systems would remain useful beyond the current Council goal.

Sagor reviewed the implementation partners section of the plan. The group discussed assistance programs and how quickly funds were depleted, emphasizing the need to track Milwaukie-specific access and possibly trigger additional support when needed. They also discussed aligning with Clackamas County Community Action Board (CAB) metrics, exploring eviction data to assess long-term housing stability, and using tools like 211 to better understand repeat need and service reach within the city.

Sagor reviewed the action roadmap. The group discussed Councilor roles in advocating for regional utility affordability, including engagement with Metro and Clackamas Water Environmental Services (WES). They considered leveraging public meetings, reconnecting with utility boards, and involving the Community Utility Advisory Committee (CUAC) to support ongoing rate discussions and advocacy planning.

Sagor continued reviewing the roadmap and the group discussed the process for request for proposals (RFP) and timeline for Sparrow Site and the city's land banking strategy.

Council President Anderson noted the absence of implementation timelines for certain housing production strategies (HPS). **Sagor** acknowledged the oversight and emphasized the need for Council direction before populating specific action steps, noting that work would focus on utilities first, with capacity for housing initiatives next year.

Councilor Khosroabadi and **Sagor** noted the importance of community outreach throughout the development of the Sparrow Site.

The group discussed whether to explicitly include the Harrison & Main lot in the affordability goal, emphasizing its potential for affordable housing and the importance of initiating a community conversation and RFP process as part of future planning.

Sagor noted when the next update on the affordability goal would be.

2. Events Update – Report

Harris provided updates on Milwaukie's Juneteenth and Pride events, noting they had been organized in partnership with community leaders, reflected the city's ongoing support for the Black and LGBTQIA+ communities, and that both celebrations had rotated locations in recent years but appeared to have found ideal long-term homes.

Harris provided an update on First Friday events including temporary road closure information. **Mayor Batey** asked about the plan for First Friday locations throughout the season. **Harris** responded that organizers intend to move north on Main Street each month, beginning in South Downtown Plaza, skipping July due to Independence Day, and doubling back in October and avoiding the historic city hall (HCH) bus mall.

Harris provided an update on the Milwaukie Community Events Fund (MCEF) noting which events the fund has been sponsoring.

Harris provided an overview of the upcoming Milwaukie Fest, highlighting events including a movie and live music night on July 11, the Main Street Festival on July 12, and an enhanced Sunday Farmers Market with a children's theme on July 13. Harris described how the Main Street Festival would be divided into four thematic blocks and outlined the timeline for the day. Transportation options were reviewed, with emphasis on walkability, public transit, and adherence to posted parking time limits. The group discussed an idea for pedicabs.

Harris shared that two additional events would take place July 12 alongside the Main Street Festival: the Milwaukie Mile, a one-mile run benefiting the high school cross country teams, and the 19th annual Duck Race at Kellogg Creek Dam, hosted by the Milwaukie Parks Foundation and North Clackamas Watersheds Council (NCWC). **Mayor Batey** noted ducks would be sold in advance and, if available, on event day. The group discussed anticipated end times for Saturday's events.

Harris thanked sponsors, community partners, and the events planning committee. **Councilor Massey** asked how the city was acknowledging sponsors and **Harris** noted

all the ways the sponsors were being showcased on Milwaukie Fest materials. **Mayor Batey** asked if the event still needed volunteers and **Harris** stated there had still been a volunteer shortage and was hoping to recruit more. **Councilor Massey** asked if the Community Emergency Response Team (CERT) would be involved and **Harris** replied that they were going to be involved, but not with traffic.

Sagor thanked and acknowledged Harris' work on Milwaukie Fest. **Harris** stated that as this is the first year, it will be a learning experience. The group commented on promoting the event.

3. Adjourn

Mayor Batey adjourned the meeting at 6:05 p.m.

Respectfully submitted,

A handwritten signature in dark ink, reading "Nicole Madigan", is written over a horizontal line.

Nicole Madigan, Deputy City Recorder

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COUNCIL STAFF REPORT

To: Mayor and City Council

Date Written: May 20, 2025

Reviewed: Emma Sagor, City Manager

From: Peter Passarelli, Public Works Director,
Joseph Briglio, Assistant City Manager and
Michael Osborne, Finance Director

Subject: **Affordability Goal Discussion**

ACTION REQUESTED

Council is asked to discuss the draft affordability goal action plan and provide direction for staff.

HISTORY OF PRIOR ACTIONS AND DISCUSSIONS

[January 31](#) – [February 1](#), 2025: Council held a two-day retreat for the purposes of reviewing feedback and survey results associated with possible goals, as well as deliberating and confirming the top three for 2025-2027.

[February 4](#): Council formally adopted economic development, parks and greenspace, and affordability as the city's three goals for 2025-2027.

ANALYSIS

Council approved three citywide goals during its regular session meeting on February 4. These goals included economic development, parks and greenspace, and affordability. During that discussion, staff agreed to provide the Council with a draft action plan for each goal on a monthly rotation that began with economic development in April and parks and greenspace in May.

Staff have developed the draft affordability goal action plan found in Attachment 1 for this initial discussion. This action plan was developed based on discussion at Council's recent goal setting retreat. The intent is to refine this document during the work session on June 3.

The questions staff are seeking Council direction on during this work session are as follows:

- Does the action plan accurately reflect why this goal was selected and the high-level deliverables Council wants to accomplish by 2027?
- Do the performance benchmarks and milestones included in the action plan feel realistic and meaningful to Council? Are there other metrics you want us to track?
- Are there implementation partners that are not included?
- What changes would Council like to make to the Action Roadmap?
 - Note: The later years of this roadmap are intentionally less detailed to allow for Council to provide direction along the way. Staff propose using this roadmap as our template for quarterly updates to Council on goal progress. Each quarter, we will update the roadmap with what has been accomplished and refine the actions for the following quarters to ensure we remain on track.

BUDGET, CLIMATE, EQUITY, & WORKLOAD IMPACTS

None.

STAFF RECOMMENDATION

This is a discussion item. Staff are seeking direction and confirmation.

ATTACHMENTS

1. Draft Affordability Goal Action Plan

Council Goal **Action Plan**

Last Updated:
5/30/2025

AFFORDABILITY: Identify opportunities to provide utility relief and support more income-restricted housing development in Milwaukie.

Why this goal?

Milwaukie residents face increasing financial pressures from rising housing costs, utility bills, and other essentials. According to the City’s 2023–2043 Housing Capacity Analysis, approximately 52% of renter households are cost-burdened, spending more than 30% of their income on housing, utilities, and related costs; and about 26% are severely cost-burdened, allocating over 50% of their income to these costs. While the city has taken action to support the development of affordable housing options in the city and reduce the growth in utility rates over time, macroeconomic pressures still make these costs burdensome to many Milwaukians. This goal reflects the city's commitment to addressing affordability through targeted utility assistance, equitable investments, and policies that stabilize housing and utility costs for residents most in need.

What do we want to accomplish by 2027?

- Expand the city's income-restricted housing inventory.
- Institutionalize affordability as a policy lens for future decision making, including understanding how governmental efficiency affects affordability for ratepayers.
- Equip residents with knowledge and access to available housing and utility cost support.
- Integrate affordability strategies into budget and land use planning
- Identify new affordability tools that support Milwaukians most in need while ensuring sustainable resources for future city investments

How will we measure success?

	BASELINE (as of Dec 31 '24)	End of 2025	End of 2026	End of 2027	Target
Affordable housing-related metrics					
Income-restricted units built <i>Number of new income restricted housing units built in Milwaukie by tenure and % area median income (AMI) served</i>	Total units: Rental: 292 Ownership: 0 30% AMI: 0 60% AMI: 164 80% AMI: 128 100-120% AMI: 0				[Staff identifying target from our HPS or HCAI]
Awareness of housing assistance programs <i>Percent of residents who state they are aware of housing assistance or affordability programs as gathered through the bi-annual community survey</i>	No data	<i>Establish baseline in fall '25 survey</i>			Upward trend
Utility-related metrics					
Annual rate of utility fee increases (adjusted for inflation) <i>5-Year annual rolling average rate change for average single family residential account (based on 6 CCF water consumption)</i>	Total 1.79% <i>Water 1.93% WW 1.83 % Storm 0.50% SAFE 4.82% SSMP 4.78%</i>				5-Year Rolling Average is Stable or Decreases
Awareness of utility assistance programs <i>Percent of residents who state they are aware of utility assistance or affordability programs as gathered through the bi-annual community survey</i>	No data	<i>Establish baseline in fall '25 survey</i>			Upward trend
Energy Efficiency Program Participation <i>Number of income-qualified households participating in weatherization and energy efficiency programs</i>	XX				Upward trend

What additional data will inform our understanding?								
Data	Question	Indicator	2024	2025	2026	2027	Source	Frequency
General affordability metrics								
Milwaukie population that is Asset-Limited, Income Constrained, Employed (ALICE)	What proportion of Milwaukie residents are below the ALICE threshold?	ALICE was created by the United Way of Northern New Jersey to highlight the population that earn more than the poverty level, but less than its basic survival budget. It considers household composition and geographic location across a range of monthly cost categories, including housing, child care, food, transportation, and more.	45% (2022 data)				ALICE data from Clackamas County CAB	
Milwaukie population below the federal poverty line	What proportion of Milwaukie residents are below the federal poverty line?	The Federal Poverty Guidelines are federally set "poverty lines" that indicate the minimum amount of annual income that an individual / family needs to pay for essentials, such as housing, utilities, clothing, food, and transportation. These guidelines are based on the size of a household and the state in which one resides.	7% (2022 data)				Census	
Milwaukie population that is cost burdened	What proportion of Milwaukie residents are considered cost-burdened?	Households that are cost-burdened spend more than 30% of their income on housing, utilities, and related costs. Households that are severely cost-burdened allocate over 50% to these costs.	52% of renter households are cost burdened 26% of renter households are severely cost burdened				Census	
Affordable housing-related metrics								
Multi-Family Vacancy Rate	Is Milwaukie's residential vacancy rate consistent across all AMI levels?	Vacancy rates can inform our understanding of supply and demand, with low vacancy rates indicating high demand (and perhaps lack of supply) of residential units at certain price points, versus high vacancy rates indicating too much supply at certain price points.	All vacancy: 8.2% Market Rate Only: 8.4% Affordable: 3.0% Senior: 2.2%				CoStar	
Changes in Residential Rents and Home Prices	Are rents increasing and leading to gentrification? Where are upward rent pressures greatest, and is this affecting naturally occurring affordable housing?	Changes in residential rents and home prices can shed light on areas at risk of displacement/gentrifying. High or increasing property values and rental rates can attract investors who end up displacing Milwaukie residents that can no longer afford to stay. Increasing property values and rents can signal a need to devote additional resources to preserving naturally occurring affordable housing amid market pressures.					CoStar	
Housing Choice Decision Making	Are Milwaukians making housing decisions based on choice or inability to afford living here?	When Milwaukie residents decide to relocate, understanding the factors leading to that relocation will illustrate the extent to which residents are empowered to exercise housing choice versus being priced out of desirable neighborhoods due to lack of affordability.					NEW proposed Utility Survey	
Utility-related metrics								

Utility customers at risk of disconnection because of non-payment	What is the monthly average of customers that receive a shut-off notice because of lack of payment?	While other cities typically issue a shutoff notice after 1 or 1.5 months of no payment, the city does not move to shut-off service until 75 days of no payment. City staff also aim to work with all customers to develop payment plans or connect them to utility assistance to avoid shut-offs. Tracking customers at risk of disconnection will help plan proactively for future utility assistance budgeting needs.					City finance	
Utility assistance dollars distributed per year	How much budget does the city allocate for utility assistance annually?	Monitoring total dollars distributed through assistance programs each year helps assess the scale of city support, its growth over time, and how well it aligns with demand and need.					City finance	
Milwaukie Utility Customers Enrolled in Utility Assistance Program	How many households are enrolled in the city's Utility Assistance Program?	Customers enrolled in this program receive a reduced monthly charge for Water, Sewer, Storm, and Street utility charges. To qualify for the reduced rate utility program, a customer must not exceed current gross annual income levels established by the Housing Choice Voucher Program, which are established by the federal government annually.					City finance	

Implementation partners

COUNCIL LEAD:

Councilor Adam Khosroabadi

STAFF LEAD:

- Joseph Briglio, Assistant City Manager
- Peter Passarelli, Public Works Director
- Michael Osborne, Finance Director
- Mandy Byrd, Development Project Manager

SUPPORTING DEPARTMENTS:

- City Manager's Office
- Public Works Department
- Community Development
- Finance Department
 - Community Utility Advisory Committee

EXTERNAL PARTNERS:

- Clackamas County
 - Community Action Board
- Portland General Electric (PGE)
- Northwest Natural (NWN)
- Developers
- Energy Trust of Oregon
- Community Energy Project
- St Vincent DePaul
- United Way
- Metro

Action Roadmap

YEAR/FOCUS	QUARTER	STAFF ACTIONS	COUNCIL ACTIONS
2025 FOCUS: Planning and analysis to identify the most impactful actions	CY-Q2 Apr - Jun	<ul style="list-style-type: none">✓ Review and discuss solid waste rate study with council✓ Review and update the fee schedule as part of financial stability strategy.✓ Draft affordable housing code improvements as part of the Housing Production Strategy□ Conduct utility cost of service study rate design work for water and wastewater□ Launch Sparrow affordable housing development RFP	<ul style="list-style-type: none">✓ Select and appoint new Budget / Community Utility Advisory Committee (CUAC) members to fill vacancies✓ Adopt updated fee schedule□ Complete goal action plan□ Advocate with Metro/Regional Waste Advisory Committee for solid waste rate design transparency□ Hold study session on affordable housing models to better understand opportunities and constraints□ Share updates on committee assignment work related to affordability
	CY - Q3 Jul - Sept	<ul style="list-style-type: none">□ Continue conducting utility-rate design work for water and wastewater□ Prepare draft code updates to reflect needed utility billing efficiencies.□ Conduct Customer Account Audit to ensure proper account classifications□ Develop SOP for updating utility customer accounts going forward based on changes to customer characteristics (Impervious surface area changes, SAFE and SSMP business changes, changes in meter size, etc.)□ Conduct bi-annual community survey and gather baseline data related to affordability metrics and other topics (including composting and bulky waste day participation)	<ul style="list-style-type: none">□ Define Council's affordability priorities and principles, in collaboration with the CUAC (August CUAC/BC meetings)□ Generate rebate/discount/exemption ideas for further analysis with the CUAC (August CUAC/BC meetings)□ Adopt affordable housing code incentives (HPS Item E)□ Share updates on committee assignment work related to affordability
	CY - Q4 Oct - Dec	<ul style="list-style-type: none">□ Conduct cost/benefit analysis of rebate/discount/exemption ideas generated by the CUAC/BC and prepare update for November meetings□ Update stormwater impervious surface area data for utility billing□ Conduct work session(s) with Council to discuss proposed code changes for utility billing efficiencies□ Conduct work session to discuss increasing high-density housing capacity (HPS Item D)□ Conduct work session to discuss Land Banking Strategy with City Council□ Present data from bi-annual community survey□ Select developer for affordable housing at the Sparrow site	<ul style="list-style-type: none">□ Provide direction on:<ul style="list-style-type: none">○ Utility billing code updates○ Next steps with increasing high-density housing capacity (HPS Item D)○ Land bank strategy (HPS Item A)□ Review cost/benefit analysis of affordability strategies and implications for rates and CIP (November CUAC/BC meetings)□ Provide direction on utility rates and relief strategies to include in budget development based on cost/benefit analysis□ Share updates on committee assignment work related to affordability

<div>2026</div> <div>FOCUS: Implementation and awareness raising</div>	Annual goal review and performance measure data report		
	CY – Q1 Jan - Mar	<ul style="list-style-type: none">□ Develop proposed FY27-28 budget that incorporates direction given on CIP priorities, utility rates and relief strategies from BC/CUAC□ Conduct work session discussion about SDC/other fee waivers and affordable housing (HPS Item B)□ Implement affordable housing code incentives (HPS Item E)□ Continue work to prepare for Sparrow development	<ul style="list-style-type: none">□ Provide direction on SDC/other fee waivers for affordable housing□ Adopt a new code to improve utility billing efficiencies□ Share updates on committee assignment work related to affordability
	CY – Q2 Apr – Jun	<ul style="list-style-type: none">□ Review and discuss solid waste rate study with council□ Review and update fee schedule□ Evaluate the feasibility of a Revolving Loan Fund for Homeownership Assistance using CET (HPS Item H)□ Continue to track and update Council on State Pre-Approved Plan Sets for ADUs and Middle Housing and provide update if needed (HPS Item F)□ Continue work to prepare for Sparrow development; construction beginning in summer '26 or spring '27	<ul style="list-style-type: none">□ Adopt FY 27-28 budget□ Adopt fee schedule changes□ Share updates on committee assignment work related to affordability
	CY – Q3 Jul - Sept	<ul style="list-style-type: none">□ Prepare for and implement any utility relief strategies adopted as part of the FY 27-28 budget□ Develop communication strategy for informing Milwaukians about housing and utility relief resources□ Present feasibility and strategy for a first-time buyer Revolving Loan Fund (HPS Item H)	<ul style="list-style-type: none">□ Provide Direction on a Revolving Loan Fund Program□ Share updates on committee assignment work related to affordability
	CY – Q4 Oct - Dec	<ul style="list-style-type: none">□ Launch communication strategy for informing Milwaukians about housing and utility relief resources	<ul style="list-style-type: none">□ Share updates on committee assignment work related to affordability
<div>2027</div> <div>FOCUS: Institutionalize affordability programs</div>	Annual goal review and performance measure data report		
	CY – Q1 Jan - Mar	<ul style="list-style-type: none">□ Continue implementation of communications strategy□ Evaluate Multiple-Unit Limited Tax Exemption Program (HPS Item C)□ Implement pre-approved plan sets for ADUs and Middle Housing Typologies (HPS Item F)	<ul style="list-style-type: none">□ Continue advocacy.□ Plan for institutionalization of affordability work□ Share updates on committee assignment work related to affordability
	CY – Q2 Apr – Jun	<ul style="list-style-type: none">□ Review and update fee schedule□ Review and discuss solid waste rate study with council□ Evaluate Multiple-Unit Limited Tax Exemption Program (HPS Item C)	<ul style="list-style-type: none">□ Adopt fee schedule changes□ Adopt Revolving Loan Strategy□ Share updates on committee assignment work related to affordability

	CY – Q3 Jul - Sept	<ul style="list-style-type: none">□ Conduct biannual community survey and utilize it to evaluate effectiveness of communications strategy and other efforts	<ul style="list-style-type: none">□ Share updates on committee assignment work related to affordability
	CY – Q4 Oct - Dec		<ul style="list-style-type: none">□ Report on 3-year Goal progress and provide direction for ongoing operationalization affordability work□ Share updates on committee assignment work related to affordability work

DRAFT

From: [Lisa Batey](#)
To: [City Council](#); [Michael Osborne](#); [Peter Passarelli](#)
Subject: new Oregonian article on ALICE rates across Oregon
Date: Tuesday, June 3, 2025 3:19:51 PM

OCR: Please put this article in today's work session packet.

All: FYI (a "gift" article that you should be able to open without Oregonian subscription)

<https://www.oregonlive.com/business/2025/06/poverty-stats-understate-oregon-financial-hardship-by-factor-of-3-report-says.html?gift=6d2509bf-bc4f-4ad2-ab7d-e8d3a4952786>

Lisa M. Batey, Mayor (she/her)
City of Milwaukie
E-mail: bateyl@milwaukieoregon.gov
Message line: 503-786-7512

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BUSINESS

Poverty stats understate Oregon financial hardship by factor of 3, report says

Published: Jun. 01, 2025, 7:03 a.m.

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The Oregonian Oregon Insight

This is Oregon Insight, a weekly look at the numbers behind the state economy from The Oregonian. AP Photo



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By [Mike Rogoway](#) | [The Oregonian/OregonLive](#)

Oregon poverty rates are near historic lows, with fewer than 1 in 9 residents living below the federal poverty line.

But critics have long complained that the government's classification formula is far too narrow. To qualify as impoverished, a single person anywhere in the U.S. can earn no more than \$15,480 annually — a figure that, while low anywhere, goes further in lower-cost states than it might in Oregon.

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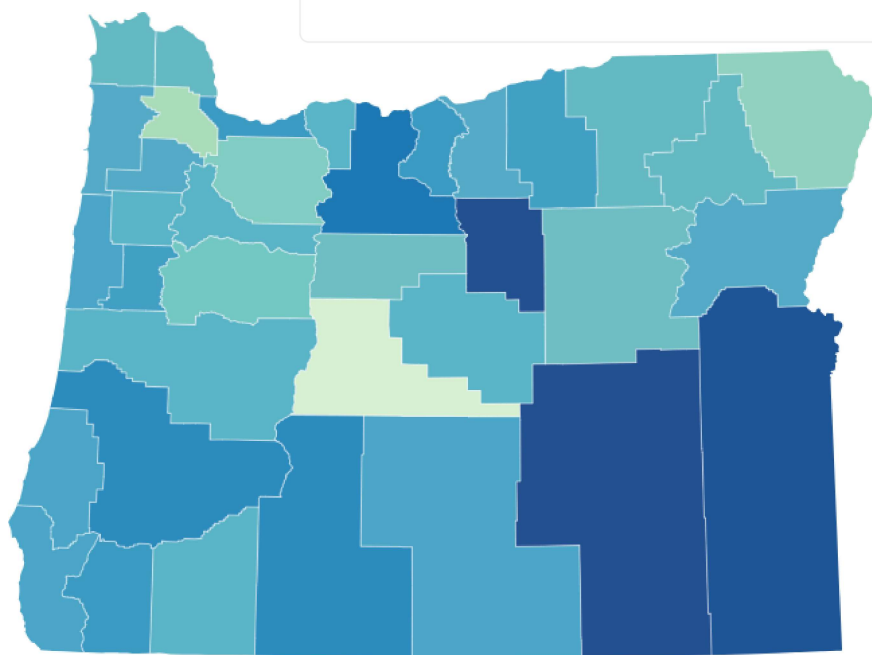


The United Way has a separate metric, which it calls ALICE (“Asset Limited, Income Constrained, Employed.”) It calculates the cost of housing, childcare, food, transportation, healthcare and other essentials in individual states and counties. The study then compares that total with local income and data and statistics on personal assets to see what share of households can’t afford those basics.

By the ALICE metric, 42% of Oregon households didn’t make enough to cover the necessities in 2023, the most recent data available. That’s triple the number that are below the federal poverty line.

Financial hardship by county

The United Way compared household income against the costs of living in counties across the state. Overall, the study's authors estimate 42% of Oregon households are experiencing financial hardship.



2023 data

Source: [United Way](#) • [Get the data](#)



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The share of Oregonians under the ALICE threshold is equal to the national rate and little changed since 2010. Incomes have risen considerably during that time, but by the United Way's reckoning, expenses have risen just as fast.

The cost of getting by for a typical Oregon family of four is \$7,380 a month, or \$88,560 a year, according to the United Way's estimates. The biggest expenses are:

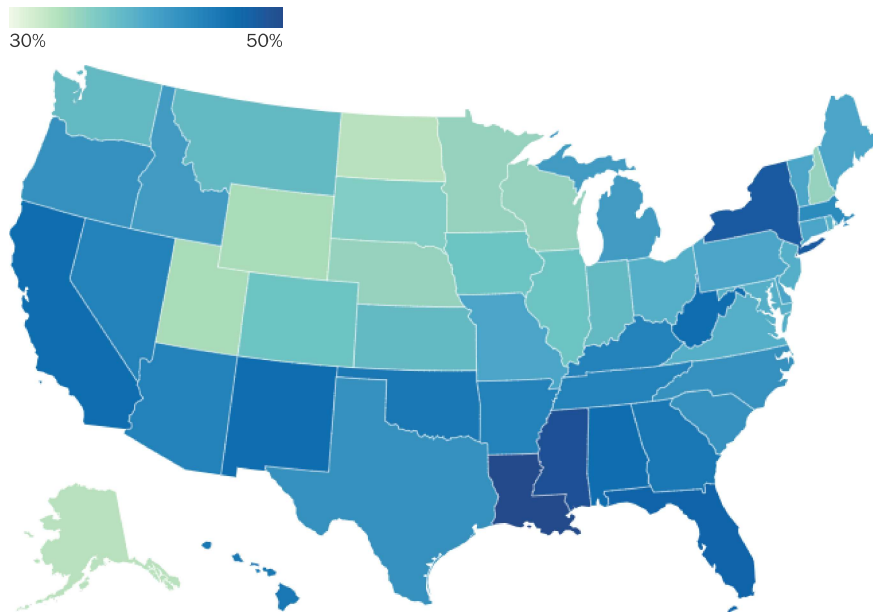
- Childcare: \$1,504 a month
- Food: \$1,402 a month
- Housing: \$1,383 a month

The United Way calculates that nearly 740,000 Oregon households don't earn enough to cover basic costs. (The state's median household income – households of all sizes – is about \$80,000 annually.)

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Financial hardship by state

The United Way compared household income against the costs of living in all 50 states and the District of Columbia. The study's authors estimate 42% of American households are financially strained, the same share as in Oregon.



2023 data

Source: [United Way](#) • [Get the data](#)



Rural and urban households in Oregon have roughly the same rate of households below the ALICE threshold. But there is significant variation among other groups and professions.

Single women with children, and Oregon adults under age 25, have the highest percentages of people below the ALICE threshold – both about 70%. A little more than 60% of Black Oregonians are among the working poor, the United Way estimates.

Fast-food workers, retail cashiers and cooks are the Oregon professions with the highest share of employees among the working poor, according to the United Way, all above 50%.

RECOMMENDED

'Before he locks us up': Oregon couple will return to Mexico to avoid Trump's deportation threat [Jun. 1, 2025, 6:00 a.m.](#)

Oregon bill removes time limits for sex abuse lawsuits: 'Justice for what happened to you should never have an expiration date' [Jun. 2, 2025, 5:28 p.m.](#)

"Workers below the ALICE Threshold often perform the jobs that keep our economy functioning smoothly — they are child care providers, food service workers, cashiers, personal care aides, delivery drivers, and more," the United Way writes in its report on Oregon poverty. "Their stories capture the systemic and structural barriers to financial stability, and the struggles and resilience of families experiencing financial hardship."

This is Oregon Insight, The Oregonian's weekly look at the numbers behind the state's economy. [View past installments here.](#)

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Cardiologists: How to Quickly Lose a Hanging Tummy

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Council Goal **Action Plan**

Last Updated:
6/3/2025

AFFORDABILITY: Identify opportunities to provide utility relief and support more income-restricted housing development in Milwaukee.

Why this goal?

Milwaukee residents face increasing financial pressures from rising housing costs, utility bills, and other essentials. According to the City's 2023–2043 Housing Capacity Analysis, approximately 52% of renter households are cost-burdened, spending more than 30% of their income on housing, utilities, and related costs; and about 26% are severely cost-burdened, allocating over 50% of their income to these costs. As the city experiences economic revitalization, upward pressures on housing and rent costs are also expected to grow, increasing the risk if displacement of existing residents. While the city has taken action to support the development of affordable housing options in the city and reduce the growth in utility rates over time, macroeconomic pressures still make these costs burdensome to many Milwaukians. This goal reflects the city's commitment to addressing affordability through targeted utility assistance, equitable investments, and policies that stabilize housing and utility costs for residents most in need. The goal is focused on housing and utilities, areas where the city has power to influence costs for local residents; other household costs such as groceries are out of the scope of this goal.

What do we want to accomplish by 2027?

- Expand the city's income-restricted housing inventory and preserve existing affordable housing stock.
- Institutionalize affordability as a policy lens for future decision making, including understanding how governmental efficiency affects affordability for ratepayers.
- Equip residents with knowledge and access to available housing and utility cost support.
- Integrate affordability strategies into budget and land use planning.
- Identify new affordability tools that support Milwaukians most in need while ensuring sustainable resources for future city investments.
- Ensure displacement and gentrification pressures are analyzed and included in policy conversations about development and growth.

Commented [ES1]: Contextualize with number

Commented [ES2]: Add an action to the action plan about bringing an expert to talk about effective antidisplacement strategies cities can implement.

How will we measure success?

	BASELINE (as of Dec 31 '24)	End of 2025	End of 2026	End of 2027	Target
Affordable housing-related metrics					
Income-restricted units built Number of new income restricted housing units built in Milwaukee by tenure and % area median income (AMI) served <u>Also track units in the pipeline</u>	Total units: Rental: 292 Ownership: 0 30% AMI: 0 60% AMI: 164 80% AMI: 128 100-120% AMI: 0				367 units at <30% AMI 276 units at 30-50% AMI 362 units at 50-80% AMI 343 units at 80-120% AMI 322 HH at >120% AMI = 1,670 total new units needed by 2043
Middle housing units built					
Milwaukee residents utilizing housing vouchers					
Awareness of housing assistance programs Percent of residents who state they are aware of housing assistance or affordability programs as gathered through the bi-annual community survey	No data	Establish baseline in fall '25 survey			Upward trend
Utility-related metrics					
Annual rate of utility fee increases (adjusted for inflation) 5-Year annual rolling average rate change for average single family residential account (based on 6 CCF water consumption)	Total 1.79% Water 1.93% WW 1.83 % Storm 0.50% SAFE 4.82% SSMP 4.78%				5-Year Rolling Average is Stable or Decreases

Commented [ES3]: Double check if Hillside Manor has any 30% AMI units

Awareness of utility assistance programs Percent of residents who state they are aware of utility assistance or affordability programs as gathered through the bi-annual community survey	No data	Establish baseline in fall '25 survey					Upward trend
Energy Efficiency Program Participation Number of income-qualified households participating in weatherization and energy efficiency programs	XX						Upward trend

Commented [ES4]: Track Milwaukian participation in city-led programs (Community Energy Project) as well as county-led programs

What additional data will inform our understanding?								
Data	Question	Indicator	2024	2025	2026	2027	Source	Frequency
General affordability metrics								
Milwaukie population that is Asset-Limited, Income Constrained, Employed (ALICE)	What proportion of Milwaukie residents are below the ALICE threshold?	ALICE was created by the United Way of Northern New Jersey to highlight the population that earn more than the poverty level, but less than its basic survival budget. It considers household composition and geographic location across a range of monthly cost categories, including housing, child care, food, transportation, and more.	45% (2022 data)				ALICE data from Clackamas County CAB	
Milwaukie population below the federal poverty line	What proportion of Milwaukie residents are below the federal poverty line?	The Federal Poverty Guidelines are federally set "poverty lines" that indicate the minimum amount of annual income that an individual / family needs to pay for essentials, such as housing, utilities, clothing, food, and transportation. These guidelines are based on the size of a household and the state in which one resides.	7% (2022 data)				Census	
Milwaukie population that is cost burdened	What proportion of Milwaukie residents are considered cost-burdened?	Households that are cost-burdened spend more than 30% of their income on housing, utilities, and related costs. Households that are severely cost-burdened allocate over 50% to these costs.	65% of renter households are cost burdened (2024 data) 26% of renter households are severely cost burdened (2024 data)				Census	
Milwaukie median income compared to area median income								
Economic mobility							Opportunity Atlas	
Affordable housing-related metrics								
Multi-Family Vacancy Rate	Is Milwaukie's residential vacancy rate consistent across all AMI levels?	Vacancy rates can inform our understanding of supply and demand, with low vacancy rates indicating high demand (and perhaps lack of supply) of residential units at certain price points, versus high vacancy rates indicating too much supply at certain price points.	All vacancy: 8.2% Market Rate Only: 8.4% Affordable: 3.0% Senior: 2.2%				CoStar	

Changes in Residential Rents and Home Prices	Are rents increasing and leading to gentrification? Where are upward rent pressures greatest, and is this affecting naturally occurring affordable housing?	Changes in residential rents and home prices can shed light on areas at risk of displacement/gentrifying. High or increasing property values and rental rates can attract investors who end up displacing Milwaukie residents that can no longer afford to stay. Increasing property values and rents can signal a need to devote additional resources to preserving naturally occurring affordable housing amid market pressures.					CoStar	
Housing Choice Decision Making	Are Milwaukians making housing decisions based on choice or inability to afford living here?	When Milwaukie residents decide to relocate <u>or new customers sign up for utility service</u> , understanding the factors leading to that relocation will illustrate the extent to which residents are empowered to exercise housing choice versus being priced out of desirable neighborhoods due to lack of affordability.					NEW proposed Utility Survey	
Eviction data							County	
Utility-related metrics								
Utility customers at risk of disconnection because of non-payment	What is the monthly average of customers that receive a shut-off notice because of lack of payment?	While other cities typically issue a shutoff notice after 1 or 1.5 months of no payment, the city does not move to shut-off service until 75 days of no payment. City staff also aim to work with all customers to develop payment plans or connect them to utility assistance to avoid shut-offs. Tracking customers at risk of disconnection will help plan proactively for future utility assistance budgeting needs.					City finance	
Utility assistance dollars distributed per year	How much budget does the city allocate for utility assistance annually?	Monitoring total dollars distributed through assistance programs each year helps assess the scale of city support, its growth over time, and how well it aligns with demand and need.					City finance	
Milwaukie Utility Customers Enrolled in Utility Assistance Program	How many households are enrolled in the city's Utility Assistance Program?	Customers enrolled in this program receive a reduced monthly charge for Water, Sewer, Storm, and Street utility charges. To qualify for the reduced rate utility program, a customer must not exceed current gross annual income levels established by the Housing Choice Voucher Program, which are established by the federal government annually.					City finance	
Milwaukians who have received notice of potential shut off of electric or gas service due to non-payment								

- Commented [ES5]: Consider ways to reach renters
- Commented [ES6R5]: "Welcome to Milwaukie" package?

Milwaukians enrolled in Low Income Energy Program (LIEP)								
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Implementation partners

COUNCIL LEAD:

Councilor Adam Khosroabadi

STAFF LEAD:

- Joseph Briglio, Assistant City Manager
- Peter Passarelli, Public Works Director
- Michael Osborne, Finance Director
- Mandy Byrd, Development Project Manager

SUPPORTING DEPARTMENTS:

- City Manager's Office
- Public Works Department
- Community Development
- Finance Department
 - Community Utility Advisory Committee

EXTERNAL PARTNERS:

- Clackamas County
 - Community Action Board
- Portland General Electric (PGE)
- Northwest Natural (NWN)
- Developers
- Energy Trust of Oregon
- Community Energy Project
- St Vincent DePaul
- United Way
- Metro
- 211

Action Roadmap

YEAR/FOCUS	QUARTER	STAFF ACTIONS	COUNCIL ACTIONS
2025 FOCUS: Planning and analysis to identify the most impactful actions	CY-Q2 Apr - Jun	<div><div>✓ Review and discuss solid waste rate study with council</div><div>✓ Review and update the fee schedule as part of financial stability strategy.</div><div>✓ Draft affordable housing code improvements as part of the Housing Production Strategy</div><div><div>❑ Conduct utility cost of service study rate design work for water and wastewater</div><div>❑ Launch Sparrow affordable housing development RFP</div><div>❑ Schedule annual update with WES</div></div></div>	<div><div>✓ Select and appoint new Budget / Community Utility Advisory Committee (CUAC) members to fill vacancies</div><div>✓ Adopt updated fee schedule</div><div><div>❑ Complete goal action plan</div><div>❑ Align city's action plan with Community Advisory Board (CAB)'s strategic plan</div></div><div><div>❑ Advocate with Metro/Regional Waste Advisory Committee for solid waste rate design transparency (lead: Councilor Massey)</div><div>❑ Advocate with WES for wastewater treatment rate design transparency (lead: Councilor Khosroabadi)</div><div>❑ Hold study session on affordable housing models to better understand opportunities and constraints</div><div>❑ Share updates on committee assignment work related to affordability</div></div></div>
	CY - Q3 Jul - Sept	<div><div>❑ Continue conducting utility-rate design work for water and wastewater</div><div>❑ Educate Council on utility billing process, including utility relief options and utilization of relief programs</div><div>❑ Prepare draft code updates to reflect needed utility billing efficiencies.</div><div>❑ Conduct Customer Account Audit to ensure proper account classifications</div><div>❑ Develop SOP for updating utility customer accounts going forward based on changes to customer characteristics (Impervious surface area changes, SAFE and SSMP business changes, changes in meter size, etc.)</div><div>❑ Conduct bi-annual community survey and gather baseline data related to affordability metrics and other topics (including composting and bulky waste day participation)</div></div>	<div><div>❑ Define Council's affordability priorities and principles, in collaboration with the CUAC (August CUAC/BC meetings)</div><div>❑ Generate rebate/discount/exemption ideas for further analysis with the CUAC (August CUAC/BC meetings)</div><div>❑ Adopt affordable housing code incentives (HPS Item E)</div><div>❑ Share updates on committee assignment work related to affordability</div><div>❑ Conduct walking meeting of Sparrow site with neighbors in conjunction with staff leads</div><div>❑ Tour Clackamas Service Center</div></div>

	CY – Q4 Oct - Dec	<div><div></div><div><div><div>❑ Conduct cost/benefit analysis of rebate/discount/exemption ideas generated by the CUAC/BC and prepare update for November meetings</div><div>❑ Update stormwater impervious surface area data for utility billing</div><div>❑ Conduct work session(s) with Council to discuss proposed code changes for utility billing efficiencies</div><div>❑ Conduct work session to discuss increasing high-density housing capacity (HPS Item D)</div><div>❑ Conduct work session to discuss Land Banking Strategy with City Council, including continued discussion on future goals for Harrison/Main site</div><div>❑ Present data from bi-annual community survey</div><div>❑ Select developer for affordable housing at the Sparrow site</div></div></div></div> <div><div></div><div><div><div>❑ Provide direction on:<div><div>○ Utility billing code updates</div><div>○ Next steps with increasing high-density housing capacity (HPS Item D)</div><div>○ Land bank strategy (HPS Item A)</div></div></div><div>❑ Review cost/benefit analysis of affordability strategies and implications for rates and CIP (November CUAC/BC meetings)</div><div>❑ Provide direction on utility rates and relief strategies to include in budget development based on cost/benefit analysis</div><div>❑ Share updates on committee assignment work related to affordability</div></div></div></div>
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Commented [ES7]: Put milestones for H/M project onto this action plan

<div>2026</div> <div>FOCUS: Implementation and awareness raising</div>	Annual goal review and performance measure data report		
	CY – Q1 Jan – Mar	<div><div></div> Develop proposed FY27-28 budget that incorporates direction given on CIP priorities, utility rates and relief strategies from BC/CUAC</div> <div><div></div> Conduct work session discussion about SDC/other fee waivers and affordable housing (HPS Item B)</div> <div><div></div> Implement affordable housing code incentives (HPS Item E)</div> <div><div></div> Continue work to prepare for Sparrow development</div>	<div><div></div> Provide direction on SDC/other fee waivers for affordable housing</div> <div><div></div> Adopt a new code to improve utility billing efficiencies</div> <div><div></div> Share updates on committee assignment work related to affordability</div>
	CY – Q2 Apr – Jun	<div><div></div> Review and discuss solid waste rate study with council</div> <div><div></div> Review and update fee schedule</div> <div><div></div> Evaluate the feasibility of a Revolving Loan Fund for Homeownership Assistance using CET (HPS Item H)</div> <div><div></div> Continue to track and update Council on State Pre-Approved Plan Sets for ADUs and Middle Housing and provide update if needed (HPS Item F)</div> <div><div></div> Continue work to prepare for Sparrow development; construction beginning in summer '26 or spring '27</div>	<div><div></div> Adopt FY 27-28 budget</div> <div><div></div> Adopt fee schedule changes</div> <div><div></div> Share updates on committee assignment work related to affordability</div>
	CY – Q3 Jul – Sept	<div><div></div> Prepare for and implement any utility relief strategies adopted as part of the FY 27-28 budget</div> <div><div></div> Develop communication strategy for informing Milwaukians about housing and utility relief resources</div> <div><div></div> Present feasibility and strategy for a first-time buyer Revolving Loan Fund (HPS Item H)</div>	<div><div></div> Provide Direction on a Revolving Loan Fund Program</div> <div><div></div> Share updates on committee assignment work related to affordability</div>
	CY – Q4 Oct – Dec	<div><div></div> Launch communication strategy for informing Milwaukians about housing and utility relief resources</div>	<div><div></div> Share updates on committee assignment work related to affordability</div>
<div>2027</div> <div>FOCUS: Institutionalize affordability programs</div>	Annual goal review and performance measure data report		
	CY – Q1 Jan – Mar	<div><div></div> Continue implementation of communications strategy</div> <div><div></div> Evaluate Multiple-Unit Limited Tax Exemption Program (HPS Item C)</div> <div><div></div> Implement pre-approved plan sets for ADUs and Middle Housing Typologies (HPS Item F)</div>	<div><div></div> Continue advocacy.</div> <div><div></div> Plan for institutionalization of affordability work</div> <div><div></div> Share updates on committee assignment work related to affordability</div>
	CY – Q2 Apr – Jun	<div><div></div> Review and update fee schedule</div> <div><div></div> Review and discuss solid waste rate study with council</div> <div><div></div> Evaluate Multiple-Unit Limited Tax Exemption Program (HPS Item C)</div>	<div><div></div> Adopt fee schedule changes</div> <div><div></div> Adopt Revolving Loan Strategy</div> <div><div></div> Share updates on committee assignment work related to affordability</div>

	CY – Q3 Jul - Sept	<div><input type="checkbox"/> Conduct biannual community survey and utilize it to evaluate effectiveness of communications strategy and other efforts</div>	<div><input type="checkbox"/> Share updates on committee assignment work related to affordability</div>
	CY – Q4 Oct - Dec		<div><input type="checkbox"/> Report on 3-year Goal progress and provide direction for ongoing operationalization affordability work</div> <div><input type="checkbox"/> Share updates on committee assignment work related to affordability work</div>

DRAFT

COUNCIL STAFF REPORT

To: Mayor and City Council
Emma Sagor, City Manager

Date Written: May 20, 2025

Reviewed: Jordan Imlah (as to form), Strategic Engagement Team Supervisor, and
Gabriela Santoyo Gutierrez, Equity and Inclusion Coordinator, and
Katie Gavares, Climate and Natural Resources Manager

From: Dan Harris, Events & Emergency Management Coordinator

Subject: **Milwaukie Fest Update**

ACTION REQUESTED

Council is asked to receive a briefing on the progress of Milwaukie Fest planning, as well as community-led events.

HISTORY OF PRIOR ACTIONS AND DISCUSSIONS

[November 5, 2024](#): Council received an update on the progress of winter events planning and an outline of Milwaukie Fest.

[February 11](#): Council received an update on the progress of Milwaukie Fest planning and the recently concluded winter events season.

ANALYSIS

The city produces a lively calendar of annual events including summer and winter celebrations. The city also coordinates with community groups to support events taking place in Milwaukie.

Community-Led Events

Since 2021, the city's events program has expanded to develop and support a variety of events primarily or entirely organized by community members to celebrate historically underserved communities in Milwaukie.

Juneteenth & Pride

Milwaukie's Juneteenth celebration will be held in Ball-Michel Park on June 14 from 11 a.m. - 3 p.m. The city's Pride celebration will be held on June 21 from 11 a.m. - 2 p.m. in Scott Park. Both celebrations will feature food, activities, and live music. People of all ages and backgrounds are welcome to join the celebrations.

Milwaukie Community Events Fund (MCEF)

The MCEF was established at the beginning of the current fiscal year to provide seed funding for culturally specific community events. Applications are reviewed twice each year by the city's Equity Steering Committee (ESC).

To date, the fund has supported five community celebrations for groups including people living with traumatic brain injuries, immigrants, indigenous North Americans, and Ukrainian refugees.

Milwaukie Fest

Milwaukie Fest is the city's newest annual celebration, now scheduled for the second weekend in July. The festival is intended to highlight the many things that make The Dogwood City of the West such a wonderful place to live.

Friday, July 11 will feature a celebration at Ardenwald Elementary. The North Clackamas Parks and Recreation District and the Milwaukie Arts Committee are actively collaborating with the city's events program to program an evening of music, games, and a free showing of *Despicable Me 4* to kick off the weekend.

Saturday, July 12 brings a summer fair to Main Street. Four blocks of Main Street will close from 10 a.m. - 5 p.m. for a fair. Highlights include six hours of children's programming outside of Key Bank, a pop-up skating area courtesy of Stronger Skatepark, and Milwaukie's own Pacific Northwest Blue Collar Wrestling, which will fill the Plaza of Champions from 1:30-5 p.m.

Saturday will also include the second-annual running of the Milwaukie Mile, live music continuing at several businesses into the evening, and the return of the always-popular Milwaukie Parks Foundation Duck Race at Kellogg Dam.

The event concludes Sunday with a super-sized farmers market produced by Celebrate Milwaukie, Inc. This market will feature children's activities, extra live entertainment, special offerings from vendors, and possibly a cherry-pie baking contest.

The city continues to recruit volunteers for the event. Anyone interested in bringing Milwaukie Fest to life should visit milwaukieoregon.gov/events/milwaukie-fest for more information.

BUDGET IMPACT

The events program is funded in the existing biennial budget. Due to the generous support of numerous community groups and Milwaukie businesses, no supplemental event budget requests are anticipated for this biennium.

CLIMATE IMPACT

City events use recyclable and biodegradable food containers wherever possible. This includes encouraging vendors to avoid non-biodegradable packaging. The city's provision of additional bicycle parking, and positioning of the Saturday and Sunday Milwaukie Fest events near the Jackson St. bus mall and the downtown Milwaukie MAX stop all help to discourage the use of private motor vehicles to attend the event. Although sincere efforts are made to minimize the climate impact of city events, these large-scale events require significant energy for sound, food preparation, and operational needs.

EQUITY IMPACT

Milwaukie Fest will include amenities to encourage participation from people of all ability levels, including shaded resting areas to prevent heat-related illnesses, and wide, unobstructed pathways to facilitate the use of mobility assistance devices. The city is actively recruiting vendors, performers, and tabling groups to present the diverse story of our community to festival attendees.

WORKLOAD IMPACT

Milwaukie Fest is not expected to generate any additional workload for city staff not already accounted for in existing work plans.

COORDINATION, CONCURRENCE, OR DISSENT

The climate and natural resources, library, city recorder, and water teams are already planning to participate actively at Milwaukie Fest. The event's traffic control plan has been reviewed and approved by Engineering and MPD.

ATTACHMENTS

None.

Events Update

Dan Harris (they/them)

Events & Emergency
Management Coordinator

events@milwaukieoregon.gov



Juneteenth & Pride

Juneteenth

June 14

11 to 3

Ball-Michel Park

Pride

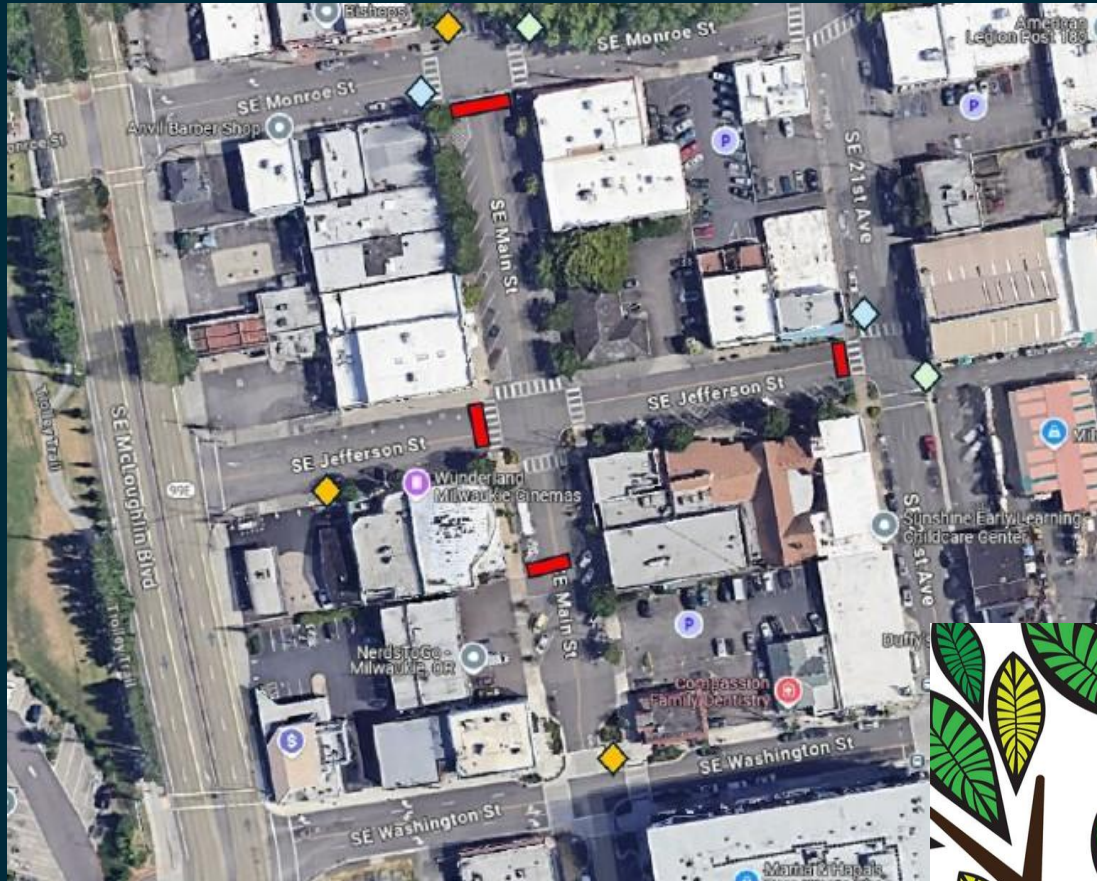
June 21

11 to 2

Scott Park



First Friday



June 6
5 to 8
Jefferson @ Main



Milwaukie Community Events Fund



Current Events in Production:

Ukrainian Theater & Improve Experience
TBA

Resilient Seed Healing Farm Herb Class
July 2025

Bing in the New Year:
December 31

Web: milwaukieoregon.gov/events/mcef

Milwaukie Fest

July 11

Movie in the Park & Live Music (first night of Porch Fest)

- Huge thanks to NCPRD!!!

July 12

Main St Festival

July 13

Enhanced Farmers Market



Milwaukie Fest

Kids' Zone

Singers, Storytellers, Puppets, Yo-Yo University, Luna's Ice Cream

City Life

45 Vendors, City Departments, Community Groups

Let's Get Moving

Milwaukie Jazzercise & Stronger Skatepark

Plaza of Champions

Bria Kam, Milwaukie School of Guitar, PNW Blue Collar Wrestling



Milwaukie Fest

Mass Transit

- Park & Rides
 - Tacoma/Johnson Creek
 - Northern Main St
 - SE Park Ave
- MAX & Bus Stations

Bike

- Extra Bike Parking at Jackson & Main

Parking

- Jackson & Main
- Across from City Hall
- Old Pietro's Lot
- Street Spaces around Downtown



Sponsors

Major Sponsors

- Beer Store Milwaukie
- Celebrate Milwaukie, Inc.
- Cha Cha Cha Milwaukie
- Made in Milwaukie
- Milwaukie School of Guitar
- North Clackamas Parks and Recreation District
- Pfriem Family Brewers
- Rotary Club of Milwaukie
- Spoke & Word Books
- TriMet

Supporting Sponsors

- COUNTRY Financial
- Darkhorse Comics
- Downtown Alliance of Milwaukie
- Milwaukie Elks



Planning Committee

- Cierra Cook
- Chris Haberman
- Luis Diaz
- Rob Cambell
- Rosie Herboth
- Teresa Haberman
- Tyler King





Events Update

Dan Harris (they/them)

Events & Emergency
Management Coordinator

events@milwaukieoregon.gov

