



**Work Session**

**WS**

**Milwaukie City Council**

## COUNCIL WORK SESSION

City Hall Council Chambers, 10501 SE Main Street  
& Zoom Video Conference ([www.milwaukieoregon.gov](http://www.milwaukieoregon.gov))

## AGENDA

SEPTEMBER 2, 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** find the meeting event on the city calendar at [www.milwaukieoregon.gov](http://www.milwaukieoregon.gov). **Written comments** may be delivered to City Hall or emailed to [ocr@milwaukieoregon.gov](mailto:ocr@milwaukieoregon.gov).

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

**Page #**

**1. Council Goal Update: Affordability – Report (4:00 p.m.)**

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Staff: Emma Sagor, City Manager

**2. Tenant Screening Fee Limit – Discussion (5:30 p.m.)**

Presenters: Will Anderson, Council President, and  
Adam Khosroabadi, Councilor

**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.



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## MINUTES

SEPTEMBER 2, 2025

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

<p><b>Staff Present:</b> Joseph Briglio, Assistant City Manager Mandy Byrd, Development Project Manager Justin Gericke, City Attorney Kelly Lamm, Library Circulation Manager</p>	<p>Peter Passarelli, Public Works Director Emma Sagor, City Manager Scott Stauffer, City Recorder</p>
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**Mayor Batey** called the meeting to order at 4:05 p.m.

### **1. Council Goal Update: Affordability – Report**

**Sagor** introduced the report.

Councilor Stavenjord arrived at the meeting at 4:07 p.m.

**Sagor** and **Passarelli** provided an overview of work done to meet Council's affordability goals, including updating the city's solid waste rates and Consolidated Fee Schedule, and conducting a review of the water and wastewater systems. The group remarked on state funding the city had received to conduct the systems review.

**Sagor** and **Passarelli** noted upcoming utility-related affordability tasks, including reports from Clackamas County Water Environment Services (WES), Portland General Electric (PGE), the consultant's water and wastewater rate report, and staff presentations on utility billing (UB).

**Briglio** reported on the Sparrow Site affordable housing development project, noting the launch of a request for proposal (RFP) process. The group commented on the interest of developers in the project and whether a project open house should be held.

**Sagor** reviewed affordability-related tasks staff would undertake in the fourth quarter (Q4) of 2025, including conducting a bi-annual community survey, analyzing UB exemptions and impervious surface areas. The group remarked on whether the city could help businesses who are less able to reduce their impervious surface area.

**Briglio** reviewed housing actions, including Council discussions on housing and land banking and selecting a developer for the Sparrow Site. The group discussed including businesses in the North Milwaukie Innovation Area (NMIA) in the affordability work.

**Councilor Khosroabadi** discussed Council's affordability work, including the completion of an action plan and advocating for the expansion of low-income assistance programs with regional partners.

**Councilor Khosroabadi** continued to review Council affordability work, including discussions at Council and Budget Committee meetings, coordinating with county and federal agencies, and meeting with neighbors of the Sparrow Site.

The group discussed plans to better publicize the city's low-income utility assistance program and survey customers, other agencies, and utility providers to better understand the need for assistance programs.

**Councilor Khosroabadi** and **Sagor** noted Council's planned affordability work, including coordinating with other agencies and providing feedback on utility rates and land banking strategies in upcoming Council meetings.

The group remarked on whether the city had a liaison to the Milwaukie Community Center. **Councilor Stavenjord** suggested staff work with North Clackamas Parks and Recreation District (NCPRD) staff at the center to advertise assistance programs.

**Councilor Massey** and **Sagor** remarked on whether physical or language barriers kept residents from applying for the utility assistance program.

## **2. Tenant Screening Fee Limit – Discussion**

**Council President Anderson** explained the proposal to adopt tenant protection measures to limit tenant screening fees charged by landlords. **Anderson** suggested that the city should require landlords to accept a standardized affordable screening report and the group remarked on what information a standard report captures.

**Councilor Massey** supported the concept of a standard screening report and suggested any code language requiring a report not be specific to certain reports.

**Mayor Batey** and **Council President Anderson** discussed whether there was a preferred report by tenants and affordable housing landlords. The group commented on the risk of giving landlords information to discriminate against low-income tenants.

**Mayor Batey** supported exploring the idea a standard screening report and observed that requiring a report could create an enforcement issue for the city. Council remarked on how a screening report could be required, when in the application process a report should be required, and who – the landlord or tenant – should provide the report.

**Councilor Stavenjord** discussed implanting a new fee to fund a city-facilitated rental screening program. **Sagor** suggested such a fee could be included in changes to the city's business registration code that staff will be working on in 2026. The group remarked on similar fee programs in the region and suggested that Council President Anderson speak to the Community Alliance of Tenants (CAT) about such programs.

**Council President Anderson** summarized that Council was interested in continuing the conversation about a tenant screening fee limit. Council agreed with Anderson and the group remarked on the status of screening fee limits in other states.

**Councilor Stavenjord** and **Council President Anderson** remarked on the letterhead and format Anderson had used on his tenant protections handout. **Mayor Batey** wanted to know how the City of Eugene's fee limit process implementation had gone.

**Councilor Stavenjord** wondered if there could be a tenant and landlord education program to run if a fee limit were adopted.

## **Council Reports**

**Mayor Batey** reported that the Johnson Creek Watershed Council (JCWC) had invited Council to visit a restoration project site. There was Council interest in visiting the site.

**Councilor Massey** reported on a recent Park and Recreation Board (PARB) meeting and **Sagor** shared that the city was hosting an upcoming Metro Community Choice program workshop. **Mayor Batey** remarked on the Metro program.

**Council President Anderson** reported on the latest version of the state legislature's transportation funding package and how state transportation funding would intersect with and impact the city's Transportation System Plan (TSP) update project. **Mayor Batey** and **Anderson** remarked on the status of the TSP project.

**Sagor** reported that the city would be hosting a table at the Milwaukie Rotary's annual fundraising dinner.

**Mayor Batey** remarked on an example Council meals and compensation policy that other cities had created in response to the Oregon Government Ethics Commission (OGE) ruling that required agencies to have policies in place to provide food. **Stauffer, Sagor,** and **Gericke** discussed city conversations in the last six years about compensation and food policies the city had adopted. Staff believed existing city policies already met OGE requirements.

**Gericke** suggested Council may want to look at adopting an updated policy to specifically address OGE's concerns. **Councilor Massey** supported staff looking at adopting a version of the policy that other cities had adopted to make sure the city was covered. **Sagor** noted staff would bring a draft policy back later in the year.

**Stauffer** noted that the City of Gladstone planned to hold a Clackamas Cities Association (CCA) dinner in October.

### **3. Adjourn**

**Mayor Batey** adjourned the meeting at 5:48 p.m.

Respectfully submitted,

  
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Scott Stauffer, City Recorder

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## COUNCIL STAFF REPORT

**To:** Mayor and City Council

**Date Written:** Aug. 22, 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 Quarterly Update**

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### ACTION REQUESTED

Council is asked to review the actions completed in the second quarter (Q2) of calendar year 2025 and discuss the upcoming council and staff actions for third quarter (Q3).

### 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.

[June 3](#): Council reviewed the draft affordability goal action plan, proposing edits to the metrics, implementation partners, goals, and actions.

### ANALYSIS

Council approved three citywide goals at its February 4 regular session meeting. These goals included economic development, parks and greenspace, and affordability. During that discussion, staff agreed to provide Council with a draft action plan update for each goal on a monthly rotation (quarterly basis).

Staff developed the draft affordability goal action plan (Attachment 1), which was discussed and further refined during the June 3 work session. Since that initial conversation, staff and Council have started to implement the actions called out in the plan. Council and staff will review the action plan progress for 2025 Q2 and coordinate on the upcoming 2025 Q3 actions. The topics that will be discussed include the following:

- What additional Council actions need to be added to the Q2 list of completed actions?
- What does Council need to do or collaborate on for Q3 Council actions.
- Are there emerging needs or priorities that need to be added to future quarters?
- Updates on committee assignment work related to affordability.

### STAFF RECOMMENDATION

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

### ATTACHMENTS

1. Affordability Goal Action Plan (last updated August 25, 2025)

Council Goal **Action Plan**

Last Updated:  
8/27/2025

**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 (approximately 2,038 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.*

How will we measure success?

	<i><b>BASELINE</b> (as of Dec 31 '24)</i>	<i><b>End of 2025</b></i>	<i><b>End of 2026</b></i>	<i><b>End of 2027</b></i>	<i><b>Target</b></i>
<i>Affordable housing-related metrics</i>					
<b>Income-restricted units built</b> <i>Number of new income restricted housing units built in Milwaukie by tenure and % area median income (AMI) served</i> <i>Also track units in the pipeline</i>	<b>Total units:</b> Rental: 292 Ownership: 0 30% AMI: 70 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
<b>Middle housing units built</b> (note that this is a mix of market rate/affordable and home ownership/rental)	<b>17</b>				
<b>Milwaukie residents utilizing housing vouchers</b>	<b>Request Submitted</b>				
<b>Awareness of housing assistance programs</b> <i>Percent of residents who state they are aware of housing assistance or affordability programs as gathered through the bi-annual community survey</i>	<b>No data</b>	<i>Establish baseline in fall '25 survey</i>			<b>Upward trend</b>
<i>Utility-related metrics</i>					
<b>Annual rate of utility fee increases</b> <i>5-Year annual rolling average rate change for average single family residential account (based on 6 CCF water consumption)</i>	<b>Total 1.79%</b> <i>Water 1.93%</i> <i>WW 1.83 %</i> <i>Storm 0.50%</i> <i>SAFE 4.82%</i> <i>SSMP 4.78%</i>				<b>5-Year Rolling Average is Stable or Decreases</b>

<b>Awareness of utility assistance programs</b> <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	Establish baseline in fall '25 survey			Upward trend
<b>Energy Efficiency Program Participation</b> <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 earns 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, childcare, 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 household (HH) income compared to area median HH income	Is Milwaukie's median HH income consistent with other jurisdictions in the Portland Metro?	Comparing median HH incomes across jurisdictions within the same metro area provides detailed analysis of inequality, opportunity, and planning needs, which isn't always apparent in metro-wide data or stand-alone jurisdiction data.	Milwaukie: \$82,422 \$47,031 per capita  Portland-Vancouver-Hillsboro Metro: \$94,573 \$50,158 per capita  Beaverton: \$94,279 \$52,054 per capita  Oregon City: \$94,648 \$42,810 per capita				American Community Survey (ACS)		

Economic mobility	Is Milwaukie offering children the best chance to rise out of poverty? Where should investments be made to improve opportunities in areas where they are lacking?	Studying economic mobility in Milwaukie can help leaders: <ul style="list-style-type: none"><li>ID neighborhoods with disproportionately low mobility in order to spotlight areas for investment resources</li><li>ID “high opportunity” neighborhoods for affordability strategies/incentives</li><li>Overlay mobility maps with local schools, jobs, health, grocery, to help target resources</li><li>Monitor neighborhood trends to measure the impact of policies over time</li></ul>	Verifying					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.	\$1,703 as of November 2024, a 3.5% increase from November 2023					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 or new customers sign up for utility service, 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.	No data					NEW/ proposed Utility Survey	
Eviction data	To what extent is rental housing reliable, stable, and secure, and how frequent are evictions in Clackamas County?	Monitoring eviction data helps inform policy makers of patterns of displacement or gentrification, as well as monitoring affordability pressures within specific neighborhoods.	Verifying					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.	XXX					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.	\$5,000	\$5,000				City finance	

<b>Milwaukie Utility Customers Enrolled in Utility Assistance Program</b>	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.	228	119			City finance	
<b>Milwaukians who have received notice of potential shut off of electric or gas service due to non-payment</b>	How many households are struggling to pay their electric and gas bills?	Objective data to help understand the challenges that residents are having in paying the utilities that the city does not manage but does have influence.	Request to PGE & NW Natural				PGE/NW Natural	
<b>Milwaukians enrolled in Low Income Energy Program (LIEP)</b>	How many households qualify and are taking advantage of this program?	The number of qualifying households compared to the number of households that are utilizing the program provides an understanding of the potential demand for the program and the need for more marketing/education.	Request to PGE				PGE	

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
<div>2025</div> <div>FOCUS: Planning and analysis to identify the most impactful actions</div>	<div>CY-Q2</div> <div>Apr - Jun</div>	<div><b>Utility Actions</b></div> <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>✓ Begin work with consultant on utility cost of service rate design for water and wastewater</div></div> <div><b>Housing Actions</b></div> <div><div>✓ Draft affordable housing code improvements as part of the Housing Production Strategy</div></div>	<div><b>General Actions</b></div> <div><div>✓ Complete goal action plan</div><div>✓ Align city's action plan with Community Advisory Board (CAB)'s strategic plan</div><div>✓ Share updates on committee assignment work related to affordability</div></div> <div><b>Utility Actions</b></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>❑ 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></div> <div><b>Housing Actions</b></div> <div><div>✓ Hold study session on affordable housing models to better understand opportunities and constraints</div></div>

	CY – Q3 Jul - Sept	<p><b>Utility Actions</b></p> <ul style="list-style-type: none"> <li>✓ Schedule annual update with WES (October 21)</li> <li>✓ Schedule PGE executive team presentation to Council (November, exact date TBD)</li> <li>□ Conduct utility cost of service study rate design work for water and wastewater               <ul style="list-style-type: none"> <li>○ Status update:                   <ul style="list-style-type: none"> <li>▪ Milwaukie qualifies for State Safe Drinking Water Revolving Loan fund; incorporating this opportunity into rate design</li> <li>▪ Staff relaying feedback from Budget Committee (interest in rebates, expanding enrollment in low-income utility assistance program, setting fund maximums, &amp; realistic CIP budgeting) to consultant to inform further rate design</li> <li>▪ Staff working with consultant to incorporate potential Kellogg CIP impacts to rate design</li> </ul> </li> </ul> </li> <li>□ Educate Council on utility billing process, including utility relief options and utilization of relief programs (September 9)</li> <li>□ Prepare draft code updates to reflect needed utility billing efficiencies (September 16)</li> <li>□ Conduct Customer Account Audit to ensure proper account classifications</li> <li>□ 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.)</li> </ul> <p><b>Housing Actions</b></p> <ul style="list-style-type: none"> <li>✓ Launch Sparrow affordable housing development RFP</li> </ul>	<p><b>General Actions</b></p> <ul style="list-style-type: none"> <li>□ Share updates on committee assignment work related to affordability</li> </ul> <p><b>Utility Actions</b></p> <ul style="list-style-type: none"> <li>✓ Define Council's affordability priorities and principles (August BC meetings)</li> <li>□ Generate rebate/discount/exemption ideas for further analysis with the CUAC (September CUAC meeting)</li> </ul> <p><b>Housing Actions</b></p> <ul style="list-style-type: none"> <li>✓ Conduct walking meeting of Sparrow site with neighbors in conjunction with staff leads (August 26)</li> <li>□ Adopt affordable housing code incentives (HPS Item E)</li> <li>□ Hold work session on tenant screening fee limits (September 2)</li> </ul>
	CY – Q4 Oct - Dec	<p><b>General Actions</b></p> <ul style="list-style-type: none"> <li>□ Conduct bi-annual community survey and gather baseline data related to affordability metrics and other topics (including composting and bulky waste day participation)</li> </ul> <p><b>Utility Actions</b></p> <ul style="list-style-type: none"> <li>□ Conduct cost/benefit analysis of rebate/discount/exemption ideas generated by the CUAC and prepare update for November meetings</li> <li>□ Update stormwater impervious surface area data for utility billing</li> <li>□ Conduct work session(s) with Council to discuss proposed code changes for utility billing efficiencies (November 18)</li> </ul> <p><b>Housing Actions</b></p> <ul style="list-style-type: none"> <li>□ Conduct work session to discuss increasing high-density housing capacity (HPS Item D) (October 21)</li> <li>□ Conduct work session to discuss Land Banking Strategy with City Council, including continued discussion on future goals for Harrison/Main site (November 18)</li> <li>□ Select developer for affordable housing at the Sparrow site</li> </ul>	<p><b>General Actions</b></p> <ul style="list-style-type: none"> <li>□ Share updates on committee assignment work related to affordability</li> <li>□ Tour Clackamas Service Center</li> </ul> <p><b>Utility Actions</b></p> <ul style="list-style-type: none"> <li>□ Provide direction on:               <ul style="list-style-type: none"> <li>○ Utility billing code updates</li> <li>○ Utility rates and relief strategies to include in budget development based on cost/benefit analysis at November BC meeting</li> </ul> </li> </ul> <p><b>Housing Actions</b></p> <ul style="list-style-type: none"> <li>□ Provide direction on:               <ul style="list-style-type: none"> <li>○ Next steps with increasing high-density housing capacity (HPS Item D)</li> <li>○ Land bank strategy (HPS Item A)</li> </ul> </li> </ul>

2026

FOCUS: Implementation and awareness raising

Annual goal review and performance measure data report			
CY – Q1 Jan - Mar	<ul style="list-style-type: none"><li>□ Present data from bi-annual community survey</li><li>□ Develop proposed FY27-28 budget that incorporates direction given on CIP priorities, utility rates and relief strategies from BC/CUAC</li><li>□ Conduct work session discussion about SDC/other fee waivers and affordable housing (HPS Item B)</li><li>□ Implement affordable housing code incentives (HPS Item E)</li><li>□ Continue work to prepare for Sparrow development</li></ul>	<ul style="list-style-type: none"><li>□ Provide direction on SDC/other fee waivers for affordable housing</li><li>□ Adopt a new code to improve utility billing efficiencies</li><li>□ Share updates on committee assignment work related to affordability</li></ul>	
CY – Q2 Apr – Jun	<ul style="list-style-type: none"><li>□ Review and discuss solid waste rate study with council</li><li>□ Review and update fee schedule</li><li>□ Evaluate the feasibility of a Revolving Loan Fund for Homeownership Assistance using CET (HPS Item H)</li><li>□ 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)</li><li>□ Continue work to prepare for Sparrow development; construction beginning in summer '26 or spring '27</li></ul>	<ul style="list-style-type: none"><li>□ Adopt FY 27-28 budget</li><li>□ Adopt fee schedule changes</li><li>□ Share updates on committee assignment work related to affordability</li></ul>	
CY – Q3 Jul - Sept	<ul style="list-style-type: none"><li>□ Prepare for and implement any utility relief strategies adopted as part of the FY 27-28 budget</li><li>□ Develop communication strategy for informing Milwaukians about housing and utility relief resources</li><li>□ Present feasibility and strategy for a first-time buyer Revolving Loan Fund (HPS Item H)</li></ul>	<ul style="list-style-type: none"><li>□ Provide Direction on a Revolving Loan Fund Program</li><li>□ Share updates on committee assignment work related to affordability</li></ul>	
CY – Q4 Oct - Dec	<ul style="list-style-type: none"><li>□ Launch communication strategy for informing Milwaukians about housing and utility relief resources</li></ul>	<ul style="list-style-type: none"><li>□ Share updates on committee assignment work related to affordability</li></ul>	

Annual goal review and performance measure data report			
<div>2027</div> <div>FOCUS: Institutionalize affordability programs</div>	<div>CY – Q1</div> <div>Jan - Mar</div>	<ul style="list-style-type: none"> <li>Continue implementation of communications strategy</li> <li>Evaluate Multiple-Unit Limited Tax Exemption Program (HPS Item C)</li> <li>Implement pre-approved plan sets for ADUs and Middle Housing Typologies (HPS Item F)</li> </ul>	<ul style="list-style-type: none"> <li>Continue advocacy.</li> <li>Plan for institutionalization of affordability work</li> <li>Share updates on committee assignment work related to affordability</li> </ul>
	<div>CY – Q2</div> <div>Apr – Jun</div>	<ul style="list-style-type: none"> <li>Review and update fee schedule</li> <li>Review and discuss solid waste rate study with council</li> <li>Evaluate Multiple-Unit Limited Tax Exemption Program (HPS Item C)</li> </ul>	<ul style="list-style-type: none"> <li>Adopt fee schedule changes</li> <li>Adopt Revolving Loan Strategy</li> <li>Share updates on committee assignment work related to affordability</li> </ul>
	<div>CY – Q3</div> <div>Jul - Sept</div>	<ul style="list-style-type: none"> <li>Conduct biannual community survey and utilize it to evaluate effectiveness of communications strategy and other efforts</li> </ul>	<ul style="list-style-type: none"> <li>Share updates on committee assignment work related to affordability</li> </ul>
	<div>CY – Q4</div> <div>Oct - Dec</div>		<ul style="list-style-type: none"> <li>Report on 3-year Goal progress and provide direction for ongoing operationalization affordability work</li> <li>Share updates on committee assignment work related to affordability work</li> </ul>



**WS 1. 9/2/25  
Presentation**

# Affordability Goal Update

2025 Q2 & Q3

WORK SESSION | SEPTEMBER 2, 2025



# Q2 Staff Accomplishments

*April - June*



# Utility Actions

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- ✓ Reviewed and discussed solid waste rate study with council

Completed with Fee Schedule updates in June 2025.

- ✓ Reviewed and updated fee schedule as part of financial stability strategy

Done annually in June as part of the yearly review

- ✓ Began work with consultant on utility cost of service rate design for water and wastewater

Currently in process and evaluating future rates w/ CUAC





# Housing Related Actions

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- ✓ Draft affordable housing code improvements as part of the Housing Production Strategy





# Q3 Staff Plans

*July - September*



# Utility Actions

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- ✓ Schedule annual update with WES (October 21)
- ✓ Schedule PGE executive team presentation to Council (November, exact date TBD)
- ❑ Conduct utility cost of service study rate design work for water and wastewater
  - Adjusting assumptions - follow up with CUAC/BC in Nov
- ❑ Educate Council on utility billing process, utility relief options, and utilization of relief programs (September 9)
- ❑ Prepare draft code updates to reflect needed utility billing efficiencies (September 16)
- ❑ Continue Customer Account Audit to ensure proper account classifications and update utility customer accounts characteristics (impervious surface area changes, SAFE and SSMP business changes, changes in meter size, etc.)



# Housing Actions

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- ✓ *Launch Sparrow affordable housing development RFP*



## RFP schedule:

- |  |                      |
|--|----------------------|
| • Release of RFP                               | August 15, 2025      |
| • Proposals due                                | October 22, 2025     |
| • Initial evaluation of proposals complete     | November 12, 2025    |
| • Developer interviews (if held)               | November 13-21, 2025 |
| • Posting of notice of intent to award project | November 25, 2025    |
| • Project award authorized by City Council     | December 16, 2025    |





# **Q4 Staff Preview**

*October - December*



# Q4: October - December

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## General Actions

- ☐ Conduct bi-annual community survey and gather baseline data related to affordability metrics and other topics (including composting and bulky waste day participation)

## Utility Actions

- ☐ Conduct cost/benefit analysis of rebate/discount/exemption ideas generated by the CUAC and prepare update for November CUAC/BC meetings
- ☐ Update stormwater impervious surface area data for utility billing
- ☐ Continue work session(s) with Council to discuss proposed code changes for utility billing efficiencies (November 18)





# Q4: October - December

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## Housing Actions

- ☐ Conduct work session to discuss increasing high-density housing capacity (HPS Item D) (October 21)
- ☐ Conduct work session to discuss Land Banking Strategy with City Council, including continued discussion on future goals for Harrison/Main site (November 18)
- ☐ Select developer for affordable housing at the Sparrow site





# Q2 Council Accomplishments

*April - June*



# April – June 2025

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## General Actions

- ✓ Complete goal action plan
- ✓ Align city's action plan with Community Advisory Board (CAB)'s strategic plan
- ✓ Share updates on committee assignment work related to affordability





# April – June 2025

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## Utility Actions

- ✓ Selected and appointed new Budget / Community Utility Advisory Committee (CUAC) members to fill vacancies
- ✓ Adopted updated fee schedule
- ✓ Advocated with Metro/Regional Waste Advisory Committee for solid waste rate design transparency (lead: Councilor Massey)
- ✓ Advocated with WES for wastewater treatment rate design transparency (lead: Councilor Khosroabadi)

## Housing Actions

- ✓ Held study session on affordable housing models to better understand opportunities and constraints





# Q3 Council Plans

*July - September*



# Q3: July – September

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## General Actions

- ☐ Share updates on committee assignment work related to affordability

## Utility Actions

- ✓ Discuss Council's affordability priorities and principles (August BC meeting)
- ☐ Generate rebate/discount/exemption ideas for further analysis with the CUAC (September CUAC meeting)

## Housing Actions

- ✓ Conduct walking meeting of Sparrow site with neighbors in conjunction with staff leads (August 26)
- ☐ Adopt affordable housing code incentives (HPS Item E)
- ☐ Hold work session on tenant screening fee limits (September 2)



# TAKE-AWAYS: AFFORDABILITY PRINCIPLES FROM AUG. BC

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## DISCUSSION

- Our affordability goal should include **both supporting those in greatest need AND limiting overall rate increases** for all customers; balance matters
- The City should work to **expand enrollment in existing utility assistance programs** before looking to deepen utility relief discounts
- Strategies BC agrees **city should prioritize:**
  - Review and potentially set maximum reserves
  - Realistic Capital budget planning
  - Expand incentives/disincentives based on consumption behavior that could relieve cost





# Q4 Council Preview

*October - December*



# Q4: October - December

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## General Actions

- ☐ Share updates on committee assignment work related to affordability
- ☐ Tour Clackamas Service Center

## Utility Actions

- ☐ Provide direction on:
  - ☐ Utility billing code updates
  - ☐ Utility rates and relief strategies to include in budget development based on cost/benefit analysis at November BC meeting

## Housing Actions

- ☐ Provide direction on:
  - ☐ Next steps with increasing high-density housing capacity (HPS Item D)
  - ☐ Land bank strategy (HPS Item A)





# Capping Tenant Screening Fees

## Proposed Code

- 1 Require landlords either allow 1-3 city approved portable tenant screening reports or
- 2 Charge a Screening Fee (Capped at \$10)
- 3 Require landlords include screening information on listing

## THIRD-PARTY SCREENING OPTIONS

TransUnion SmartMove

MyScreeningReport

Zillow

## SIMILAR PROPOSALS

### City of Eugene (2022)

- \$10 Screening Fee Cap
- In the event of non-compliance, tenants can file a complaint with the city.
- The cap was challenged in Thorin v. City of Eugene. On February 20, 2025 the Oregon Supreme Court upheld Eugene's ordinance.

### House Bill 3974 (2025)

- \$20 Screening Fee Cap
- Allows tenants to process their own screening through a third party.

### Other States

Colorado, California, Illinois, and Washington, require landlords to allow portable tenant screening reports

## BREAKDOWN OF SCREENING COSTS

Estimated Cost Breakdown Per Applicant Screening Report	
Description	Cost
Credit Check without FICO Score	\$3.50
Credit Check with FICO Score	\$5.50
Oregon Criminal Records Search (per name)	\$1.25
Washington Criminal Records Search (per name)	\$1.25
Criminal Records Search in many counties (per name)	\$1-5
Criminal Records Search in Texas (per name)	\$3.25
Criminal Records Search in Alabama (per name)	\$9.99
Criminal Records Search in Colorado (per name)	\$10
Criminal Records Search in Michigan (per name)	\$10
Criminal Records Search in Massachusetts (per name)	\$25
Criminal Records Search in Tennessee (per name)	\$65
Labor Cost	\$15.95*-\$50+
Additional Costs: Software, Equipment, Training, Facilities, Admin, & etc.	\$+
<b>Total Cost</b>	<b>\$21.95-155.50+</b>