

Design Overlay Zone Assessment

NOVEMBER 2016

Updated April 2017



Project Overview

The Bureau of Planning and Sustainability, in collaboration with the Bureau of Development Services, hired the Seattle office of Portland-based Walker Macy to undertake an independent and comprehensive review of the City's design overlay zones, including the design review process, tools and results.

The goals of the Design Overlay Zone Assessment (DOZA) are to:

- Document and assess how the design overlay zones affect the quality of development.
- Provide stakeholders a chance to offer feedback about the current design review system.
- Identify how the structure, regulations, guidelines, administration and enforcement of the design overlay zones affect outcomes.
- Identify changes to the design review system that can increase its effectiveness, efficiency and impact.

DOZA results in a set of recommendations that will inform future projects affecting:

- Community Design Guidelines
- Community Design Standards (33.218)
- Central City Fundamental Design Guidelines
- The processes and tools used to administer these regulations.

Design Overlay Basics

The purpose of the **design overlay zone (d-overlay)** is to ensure the conservation, enhancement and continued vitality of the scenic, architectural or cultural values of each design district or area and to promote quality development near transit facilities.

There are two tracks for projects required to undergo design review:

1. The **nondiscretionary** track uses clear and objective *Community Design Standards* found in the Portland Zoning Code.
2. Projects located in the Central City and Gateway Plan Districts, large projects and projects that desire greater flexibility go through a **discretionary** Land Use Review track, which uses *discretionary design guidelines* and may include a public hearing at the Design Commission.

Phases of Work

With the support of staff, project consultant Walker Macy proceeded through the following phases:

- 1. Research** (May – June 2016): Analyze the current set of regulations and processes in the d-overlay and how they fit together. Research best practices from other cities, including discretionary design review and the application of nondiscretionary design standards.
- 2. Assessment** (June – November 2016): Conduct a three-part assessment, including site analysis, focus group interviews and questionnaires, resulting in a consolidated list of issues to address. Design Commission Briefings on Phase II occurred on September 22, 2016 and November 17, 2016.
- 3. Preliminary Recommendations and Workshop** (October 2016 – February 2017): Outline a set of preliminary recommendations to address each of the issues in Phase 2 and solicit public feedback.
- 4. Final Recommendations** (February – April 2017): Refine the proposal based on public input, and present the final set of recommendations to Design Commission, Planning and Sustainability Commission and City Council. The final recommendations will inform future amendments to the design overlay zones.

Next Steps

Implementation of Recommendations: Amend applicable zoning, review criteria and processes that implement the design overlay zones.

DOZA | PROJECT TIMELINE



Contact

For more information about the Design Overlay Zone Assessment project, visit our website at www.portlandoregon.gov/bps/DOZA or contact Lora Lillard at 503-823-7721 or lora.lillard@portlandoregon.gov.

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Findings

The consultant team's findings are based on stakeholder interviews, site evaluations for over seventy built projects, a citywide questionnaire and research of the review criteria and processes that implement the city's design overlay zones.

1. Portland is recognized as national model for good urban design, but is in need of a major "refresh".

Achieving place-specific results in the built environment is perhaps being discouraged by the current procedures and standards of design review.



2. The current d-overlay does not necessarily guarantee good design; good design can occur regardless of its presence.

Application of the d-overlay should not be assumed to be the universally appropriate and beneficial.



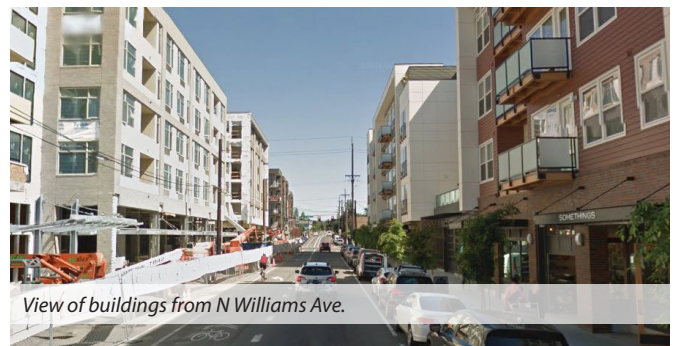
3. Although community support for thoughtful design is strong, the perception of whether new buildings exhibit good design is widely mixed.

The process of shaping implementation tools, such as the d-overlay, has not been linked closely enough to community-driven urban design.



4. The current system doesn't recognize the varied impacts of different scales of development.

Thresholds for larger projects, such as those that occupy half-blocks and entire blocks, could be restructured to ensure that such projects receive greater scrutiny both through design review and by involving the public in the review process.



5. The d-overlay has benefited the Central City but other areas less so.

Guidelines applicable to the Central City could use some updating but the more serious issues are associated with other areas.

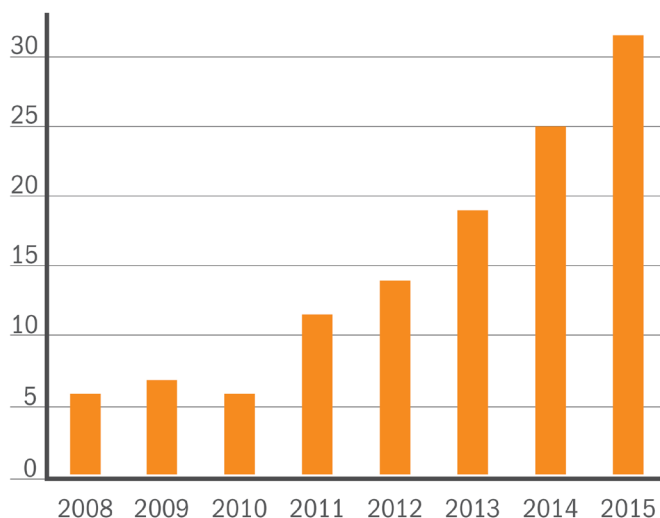


6. Standards and guidelines applied to areas outside the Central City may be impeding good urban design.

Parts of Portland outside the Central City would greatly benefit from revising, consolidating and simplifying review criteria, as well as recognizing contextual differences.

7. The recent high volume of projects has thwarted good intentions.

There is a need to adopt ways of reducing the workload, managing the workload better, and incorporating public comments more effectively.



■ number of type III design review development proposals

8. There has been a shift away from the “Big Picture” and toward details and minutiae in Design Commission deliberations.

The amount of time spent discussing specific building components is not allowing sufficient discussion of issues of context and the public realm.



9. An attitude of collaboration is important in having successful design outcomes.

All participants in the process — City staff, Design Commission and design teams — should exhibit a greater spirit of collaborative problem-solving and mutual respect.



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FINAL RECOMMENDATIONS

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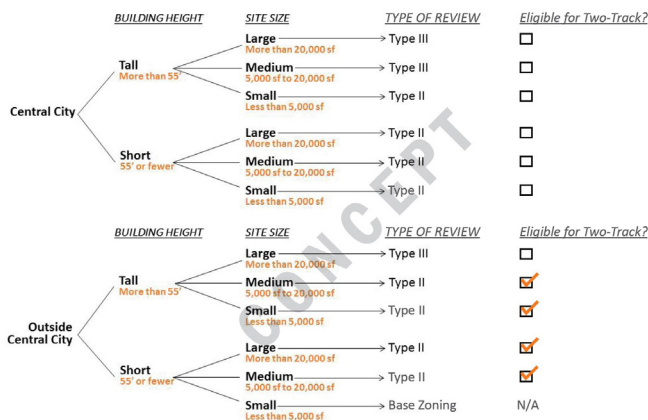
Final Recommendations

The DOZA consultant team's final recommendations can be found in full in the DOZA Final Report. The Bureau of Planning and Sustainability (BPS) and the Bureau of Development Services (BDS) will work together to implement future amendments to the Zoning Code, design guidelines and review procedures for the design overlay zones.

A | Processes

1. Adjust the thresholds for design review to provide a high level of review for larger projects in d-overlay districts, but lessen the level of review for smaller projects. <priority>

- Restructure the thresholds based on two geographies: 1) Central City and 2) Neighborhoods: Inner, Western and Eastern — including Gateway.
- Modify thresholds for design review to reflect a tiered approach based on the magnitude of change.



2. Improve the review processes with a charter, better management of meetings, and training for both the Design Commission and staff.

- Adopt a new charter for the Design Commission. <priority>
- Manage Commission meetings more effectively. <priority>
- Provide training for staff.
- Convene regular Design Commission retreats.

3. Align the City's review process with an applicant's typical design process.

- Organize the City's review process to correspond to a project's typical design process.
- Focus deliberations. <priority>
- Require DARs for Type III reviews for larger projects in the Central City.
- Expect collaborative attitude from all participants.

STAGE	SUBJECT	SUBMITTALS
Pre-App (with staff)	Pre-design	<ul style="list-style-type: none"> Site & Program Issues Identification Services/Utilities
DAR (see note; with Design Commission)	Early Schematic Design	<ul style="list-style-type: none"> Context Analysis Initial Concepts Configuration Massing Overall Site Plan
First Review (with Design Commission)	End of Schematic Design	<ul style="list-style-type: none"> Concept Elevations Ground Level Public Spaces Public Involvement Update
Decision Review (if necessary, with Design Commission)	End of Design Development	<ul style="list-style-type: none"> Complete Design Refined Design Materials Details Exterior Lighting
Building Permit (with staff)	Construction Documents	<ul style="list-style-type: none"> CDs

4. Better communicate the role of urban design and the d-overlay tool.

- Improve public information and education. <priority>
- Hold applicant orientation "primers" on a regular basis.

5. Improve the public involvement system.

- a. Post large signs noting impending reviews. <priority>
- b. Increase mailed notices for Type II and Type III reviews.
- c. Require applicants to document community input.
- d. Ensure inclusivity in the decision-making process.

6. Monitor and evaluate these amendments.

- a. Document where changes are occurring and what the impacts are. The analysis should be evaluated by BPS, BDS, Design Commission, and Planning and Sustainability Commission.
- b. Formalize the annual reporting in the Design Commission's "State of Design."

7. Consider establishing more than one Design Commission, following a period of evaluation.



Translated into contemporary buildings, the base/middle/top approach can result in an awkward or visually weak architectural expression.

B | Tools - General

1. General: Clarify and revise the purpose and scope of the d-overlay.

- a. Revise the purpose statement for d-overlay to reflect current thinking.
- b. Simplify d-overlay terminology.
- c. Clarify the scope of design review.

2. General: Sync the standards and guidelines.

- a. Use a parallel structure for standards and guidelines.
- b. Combine the standards and guidelines into one document.
- c. Create a consistent format.
- d. Separate out historic review criteria.

3. General: Use the three tenets of design to simplify, consolidate and revise the standards and guidelines. <priority>

- a. Respond to context.
- b. Elevate the public realm.
- c. Expand "quality and permanence."

4. General: Broaden "base/middle/top" to encompass other design approaches.

5. General: Recognize the unique role of civic buildings in urban design.

6. Community Design Standards (CDS): Ensure that the CDS add value to recently adopted base zoning codes. <priority>

7. Community Design Standards: Provide for optional ways of meeting standards. <priority>

8. Community Design Standards: Craft appropriate standards for the Gateway area.

9. Community Design Guidelines: In recrafting the Community Design Guidelines, recognize the changing nature of the city.

10. Community Design Guidelines: Collate special district design guidelines into one citywide set.

11. Central City Fundamental Design Guidelines: Make refinements and revisit some of the guidelines.

12. Central City Fundamental Design Guidelines: Collate the subdistrict guidelines into the Central City Fundamental Design Guidelines.

