

# A G E N D A

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**METRO**

## Agenda

MEETING: METRO COUNCIL REGULAR MEETING  
DATE: April 13, 2006  
DAY: Thursday  
TIME: 2:00 PM  
PLACE: Metro Council Chamber

### CALL TO ORDER AND ROLL CALL

#### 1. INTRODUCTIONS

#### 2. CITIZEN COMMUNICATIONS

#### 3. CONSENT AGENDA

3.1 Consideration of Minutes for the March 30, 2006 Metro Council Regular Meeting.

#### 4. ORDINANCES – FIRST READING

4.1 **Ordinance No. 06-1114**, An Ordinance Confirming the Re-Adoption of Metro Code 7.03 (Investment Policy)

4.2 **Ordinance No. 06-1117**, For The Purpose of Dedicating a Metro Open Spaces Property in the Tryon Creek Linkages Target Area.

#### 5. RESOLUTIONS

5.1 **Resolution No. 06-3659**, For the Purpose of Establishing the Oregon Zoo Future Vision Committee. Newman

5.2 **Resolution No. 06-3667**, For the Purpose of Certifying That the Portland Metropolitan Area is in Compliance With Federal Transportation Planning Requirements. Burkholder

5.3 **Resolution No. 06-3668**, For the Purpose of Approving the FY 2007 Unified Planning Work Program. Burkholder

5.4 **Resolution No. 06-3677**, For the Purpose of Accepting the Regional Housing Choice Implementation Strategy recommended by the Housing Choice Task Force Appointed by the Metro Council. Burkholder/  
Liberty

5.5 STIP Comments

6. CHIEF OPERATING OFFICER COMMUNICATION

7. COUNCILOR COMMUNICATION

ADJOURN

**Television schedule for April 13, 2006 Metro Council meeting**

<b>Clackamas, Multnomah and Washington counties, and Vancouver, Wash.</b> Channel 11 -- Community Access Network <a href="http://www.yourtv.org">www.yourtv.org</a> -- (503) 629-8534 2 p.m. Thursday, April 13 (live)	<b>Portland</b> Channel 30 (CityNet 30) -- Portland Community Media <a href="http://www.pcmv.org">www.pcmv.org</a> -- (503) 288-1515 8:30 p.m. Sunday, April 16 2 p.m. Monday, April 17
<b>Gresham</b> Channel 30 -- MCTV <a href="http://www.mctv.org">www.mctv.org</a> -- (503) 491-7636 2 p.m. Monday, April 17	<b>Washington County</b> Channel 30 -- TVC-TV <a href="http://www.tvctv.org">www.tvctv.org</a> -- (503) 629-8534 11 p.m. Saturday, April 15 11 p.m. Sunday, April 16 6 a.m. Tuesday, April 18 4 p.m. Wednesday, April 19
<b>Oregon City, Gladstone</b> Channel 28 -- Willamette Falls Television <a href="http://www.wftvaccess.com">www.wftvaccess.com</a> -- (503) 650-0275 Call or visit website for program times.	<b>West Linn</b> Channel 30 -- Willamette Falls Television <a href="http://www.wftvaccess.com">www.wftvaccess.com</a> -- (503) 650-0275 Call or visit website for program times.

**PLEASE NOTE: Show times are tentative and in some cases the entire meeting may not be shown due to length. Call or check your community access station web site to confirm program times.**

Agenda items may not be considered in the exact order. For questions about the agenda, call Clerk of the Council, Chris Billington, (503) 797-1542. Public hearings are held on all ordinances second read and on resolutions upon request of the public. Documents for the record must be submitted to the Clerk of the Council to be considered included in the decision record. Documents can be submitted by e-mail, fax or mail or in person to the Clerk of the Council. For additional information about testifying before the Metro Council please go to the Metro website [www.metro-region.org](http://www.metro-region.org) and click on public comment opportunities. For assistance per the American Disabilities Act (ADA), dial TDD 797-1804 or 797-1540 (Council Office).

## MINUTES OF THE METRO COUNCIL MEETING

Thursday, March 30, 2006  
Metro Council Chamber

Councilors Present: David Bragdon (Council President), Susan McLain, Robert Liberty, Rex Burkholder, Carl Hosticka, Rod Park, Brian Newman

Councilors Absent:

Council President Bragdon convened the Regular Council Meeting at 2:01 p.m.

### 1. INTRODUCTIONS

There were none.

### 2. CITIZEN COMMUNICATIONS

There were none.

### 3. CONSENT AGENDA

#### 3.1 Consideration of minutes of the March 23, 2006 Regular Council Meetings.

Motion:	Councilor Newman moved to adopt the meeting minutes of the March 23, 2006 Regular Metro Council.
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Vote:	Councilors Burkholder, McLain, Liberty, Park, Newman, and Council President Bragdon voted in support of the motion. The vote was 6 aye, the motion passed with Councilor Hosticka abstaining from the vote.
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### 4. ORDINANCES – SECOND READING

#### 4.1 **Ordinance No. 06-1113**, For the Purpose of Adopting the Annual Budget For Fiscal Year 2006-07, Making Appropriations, and Levying Ad Valorem Taxes, and Declaring an Emergency.

Council President Bragdon noted this ordinance already had a motion on the table. He then opened a public hearing on Ordinance No. 06-1113.

Alexis Dow, Metro Auditor, said she intended to submit amendments to the 2006-07 budget. She noted that Council President Bragdon had ignored her budget and prepared a reduction to her submitted budget. She detailed some of the amendments she would be submitting.

Council President Bragdon closed the public hearing. He then announced that the next budget hearing would be April 27, 2006

#### 4.2 **Ordinance No. 06-1116**, For the Purpose of Amending Metro Code Chapter 7.01 Relating to the Metro Solid Waste Excise Tax.

Motion:	Councilor Park moved to adopt Ordinance No. 06-1116.
Seconded:	Councilor McLain seconded the motion

Councilor Park said this ordinance aligned excise tax code with recommended financial policies and built on the intentions of the consolidation of the General Fund. This ordinance will remove dedication from code and allow the allocation of excise tax during the annual budget process. This change would provide fiscal transparency and flexibility and allow Council to allocate resources where they were most needed. In addition, this facilitated an annual review of programs supported by the Excise Tax to insure these programs were still Council's highest priorities. It conformed Metro to the Financial Industry's "Best Practices" of not dedicating government tax revenues. An amendment to Metro's Financial Policies, consistent with this recommendation, would be forthcoming. This ordinance increased the 10% in Recovery Rate Stabilization Reserve to include all Metro Excise tax generated. There were a few housekeeping changes included in this code revision: It set the effective date of the new Excise Tax per ton rate to coincide with any other changes to the Solid Waste rates on September 1st of each fiscal year. It extended the Regional Recovery Rate used in the per-ton calculations to 2009. Changes would be made to make the calculation of excise tax credits consistent with the Regional System Fee Credits and current practice. These changes would provide for administrative consistency between both the Regional System Fee and Excise Tax credit programs.

Council President Bragdon opened a public hearing on Ordinance No. 06-1116. No one came forward. Council President Bragdon closed the public hearing.

Council President Bragdon thanked Councilor Park for taking the lead. They had discussed this ordinance at Solid Waste Advisory Committee (SWAC). Councilor McLain noted that this ordinance gave this council a larger responsibility as well as flexibility. Council would need to attend much more closely to the budget because of the changes to the Code. She felt this was a change of structure and was not just housekeeping. Councilor Burkholder talked about Winston Churchill and his feelings about keeping the purse strings tied to the elected officials. Councilor Park talked about the history of the changes and urged support.

Vote:

Councilors Park, Hosticka, Burkholder, McLain, Newman, Liberty and Council President Bragdon voted in support of the motion. The vote was 7 aye, the motion passed.
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## 5. RESOLUTIONS

### 5.1 **Resolution No. 06-3680**, For the Purpose of Approving the Year 17 Metro and Local Government Annual Waste Reduction Plan (Fiscal Year 2006-07).

Motion:	Councilor McLain moved to adopt Resolution No. 06-3680.
Seconded:	Councilor Park seconded the motion

Councilor McLain introduced the resolution. She said this would help increase our recycling rate. She talked about the two parts to the program: regional program areas and maintenance of the system programs.

Jennifer Erickson, Solid Waste and Recycling Department, introduced Susan Ziolk, Clackamas County, Solid Waste & Recycling and Scott Keller, City of Beaverton, Solid Waste & Recycling Program Manager and provided a power point presentation on the Year 17 Metro and Local

Government Annual Waste Reduction Plan (Fiscal Year 2006-07)(a copy of the power point presentation is included in the meeting record). She talked about the history, the components and what was new this year about the program. She said this program mimicked the new interim solid waste reduction plan. She talked about the 62% waste reduction goal. Ms. Ziolk highlighted the ClearStream containers at recycling events and the success of the program. She summarized some of the comments received from the citizens.

Councilor McLain thanked Ms. Ziolk for her efforts. She felt that these containers made recycling efforts throughout the region easier. This was a very successful program. It worked well at Clackamas County Fair and would work well in the schools.

Mr. Keller talked about the City of Beaverton recycle at work program. It was important to have a recycle commingle mix. He provided detailed on the “Think outside the box” goals and outreach. Councilor Liberty asked about details of the program and the broader applications to the program. Mr. Keller responded to his question and comment. Mr. Keller said many businesses were recycling and with the commingled system they could put everything together. They valued the partnership with Metro.

Ms. Erickson also noted energy savings and net greenhouse gas reductions because of recycling efforts. She said they brought this program to Solid Waste Advisory Committee (SWAC) this week. She noted some of the questions that were asked at committee. SWAC recommended tightening up their reporting numbers and how they measured the success of the program.

Councilor Burkholder asked about the key obstacles or hurdles to increasing recycling today. Ms. Ziolk said organics program was one area that needed improving. Multi family education and business education required constant maintenance. Mr. Keller said working out the logistics of organics and electronics program presented some challenges. Ms. Erickson added that Metro Central had organics on their work plan. Councilor Liberty asked if they had ever given awards to businesses. Ms. Ziolk talked about the different types of awards. Councilor Park asked about the roll carts and contamination problems with the carts. Ms. Erickson responded to his question. Lee Barrett, Solid Waste and Recycling Department, added his comments. Councilor Hosticka asked how they dealt with glass in the roll carts. Ms. Ziolk responded that the glass was placed on the side of the roll carts. Councilor Liberty said he was curious about yard trimmings. Ms. Erickson responded to his question. Councilor McLain thanked the jurisdictions and Ms. Erickson for their work. She supported this whole-heartedly and felt we could still do better. She felt that the “fork it over” program was very successful. She challenged the Council and citizens to come up with new ideas for recycling. She talked about the targeted grants program. We must continue the performance measures for this program. She urged support.

Vote:

Councilors Park, Hosticka, Burkholder, Newman, McLain, Liberty, and Council President Bragdon voted in support of the motion. The vote was 7 aye, the motion passed.
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5.2 **Resolution No. 06-3684A**, For the Purpose Endorsing Regional Support for Protection of the Endangered Wildlife and its Habitat under the Endangered Species Act

Motion:	Councilor Burkholder moved to adopt Resolution No. 06-3684A.
Seconded:	Councilor Hosticka seconded the motion

Councilor Burkholder clarified the “A” version and the added language in the resolution. He noted Councilor Park had suggested the language. He said currently there was an effort by some in Washington DC to weaken the Endangered Species Act (ESA). He spoke to our own region’s support. H noted reasons for supporting this resolution and all of the region’s current efforts. He urged Council to endorse the resolution, which would be sent to congress.

Council President Bragdon opened a public hearing on Resolution No. 06-3864A.

Christine Caurant, Oregon Natural Resource Council, 5825 N. Greeley Ave Portland OR 97217 said on behalf of the 1.3 million regional citizens she thanked the council for upholding the ESA. She particularly thanked Councilors Burkholder and Park for bringing this resolution forward.

Council President Bragdon closed the public hearing.

Councilor Newman said he would be supporting this resolution. He talked about the endangered species and conservation activities at the Oregon Zoo. Councilor Hosticka said they were talking about the federal ESA that currently existed. Also, he hoped that what we were committing ourselves to was protecting the endangered species and their habitat. Councilor Burkholder said this was supportive of the work Metro does. He noted a friendly amendment clarifying this was the Federal ESA. There was no objection to the friendly amendment. Councilor Park added his comments. Councilor Burkholder said this resolution would be sent to Washington DC with a cover letter.

Vote:

Councilors Park, Hosticka, Burkholder, Newman, McLain, and Council President Bragdon voted in support of the motion. The vote was 6 aye, the motion passed with Councilor Liberty abstaining from the vote.
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Councilor Liberty explained why he was abstaining from the vote.

## 6. CONTRACT REVIEW BOARD

### 6.1 Resolution No. 06-3679, Considering an Amendment to Metro Contract No. 926981, For Metro Central Transfer Station Compactor #2 Refurbishment.

Motion:	Councilor Park moved to adopt Resolution No. 06-3679.
Seconded:	Councilor Hosticka seconded the motion

Councilor Park said recently the Council was alerted by memo of a substantial contract to refurbish the Compactor #2 at the Metro Central Transfer Station, the oldest compactor at the Metro Central Transfer Station. The compactor was originally installed in 1990. The compactor was used currently in a back-up role. The memo received by Council raised some contractual challenges in identifying the costs and direction of the work. This memo was attached to the resolution.

The outside consultant, Team Hydraulics, who completed the most recent Renewal and Replacement Study called for the compactor to be replaced in 2006 at a cost of \$1,000,000. This refurbishment project was intended to provide an extended life on the existing equipment and was budgeted for \$400,000. The contract amount to complete the planned work is \$261,500. This amount was approximately one quarter the estimated cost to replace the compactor. This project was on the Council adopted Capital Improvement Plan for FY 05-06 and was funded out of the

renewal and replacement account. The contract was issued for the first investigative phase and then we proceeded with processing a contract amendment to allow the work to proceed in an orderly manner. The amendment included only the terms originally negotiated and did not reflect any changes from the contract as it was planned. Pursuant to Metro Code Section 2.04.058(b)(2), Council approval was required for any public contract amendment that increased the contract amount more than \$25,000. The extent of the repair work under this contract couldn't be determined until various portions of the compactor are disassembled and inspected. This contract was structured to allow Metro to make informed decisions as to the need or advisability of repairs as the work proceeds. The most critical and expensive systems would be evaluated first so that the project could be terminated if repair of these critical items could not be done cost effectively. While the amendment would provide funds for the total contract price, the amount the contractor was allowed to actually bill for will be controlled by Metro on an item-by-item basis. Councilor Park urged an aye vote.

Councilor Liberty asked if we should continue to own the equipment. Councilor Park responded to his question. Councilor Liberty said he felt the equipment was distinct from the facility. Council President Bragdon and Councilor McLain added their comments.

Vote:

Councilors Park, Burkholder, Newman, McLain, Hosticka, Liberty and Council President Bragdon voted in support of the motion. The vote was 7aye, the motion passed..
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## **7. CHIEF OPERATING OFFICER COMMUNICATION**

Michael Jordan, COO, was not present.

## **8. COUNCILOR COMMUNICATION**

Councilor Newman said he presented the New Look effort to Department of Land Conservation and Development (DLCD). They were very receptive.

Councilor Liberty said they had a Transit Oriented Development (TOD) meeting in Vancouver, Washington this week. He talked about the conversation at the meeting. On Monday they were having a joint meeting of the subcommittees of the Farmland Fairness Committee. He invited the Council to attend.

Councilor Park talked about the DLCD meeting concerning the Industrial Land Remand. The commission had not taken final action because one commissioner was missing. He felt that the presentation and responses from the Commission seemed to be positive. April 12, 2006 the Commission should act on this issue. Councilor Liberty asked if there was potential litigation? Councilor Park said there might be opposition from 1000 Friends of Oregon and City of Cornelius.

## **9. ADJOURN**

There being no further business to come before the Metro Council, Council President Bragdon adjourned the meeting at 3:17 p.m.

Metro Council Meeting

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Prepared by

Chris Billington

Clerk of the Council



**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF MARCH 30, 2006**

<b>Item</b>	<b>Topic</b>	<b>Doc Date</b>	<b>Document Description</b>	<b>Doc. Number</b>
5.1		Power Point Presentation	To: Metro Council From: Jennifer Erickson, Solid Waste and Recycling Department Re: Waste Reduction Plan Power Point Presentation	033006c-01
5.2	"A" version	Resolution No. 06-3684A	<b>Resolution No. 06-3684A</b> , For the Purpose Endorsing Regional Support for Protection of the Endangered Wildlife and its Habitat under the Endangered Species Act	033006c-02

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AN ORDINANCE	)	ORDINANCE NO. 06-1114
CONFIRMING THE RE-ADOPTION OF METRO	)	
CODE 7.03 (INVESTMENT POLICY)	)	Introduced by Michael Jordan, Chief Operating Office in concurrence with Council President Bragdon

WHEREAS, Metro Code Section 7.03 contains the investment policy which applies to all cash-related assets held by Metro; and

WHEREAS, the Investment Advisory Board reviews and approves the Investment Policy for submission to Metro Council; and

WHEREAS, the Investment Advisory Board recommends re-adoption of the Investment Policy; and

WHEREAS, the Investment Advisory Board proposes no change to the Investment Policy; and

WHEREAS, the Investment Manager proposes no change to the Investment Policy; now therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

That Metro Code Chapter 7.03 is re-adopted as attached hereto in Exhibit A.

ADOPTED by the Metro Council this \_\_\_\_\_ day of \_\_\_\_\_, 2006.

\_\_\_\_\_  
David Bragdon, Council President

Attest:

Approved as to Form:

\_\_\_\_\_  
Christina Billington, Recording Secretary

\_\_\_\_\_  
Daniel B. Cooper, Metro Attorney

## CHAPTER 7.03

## INVESTMENT POLICY\*\*

SECTIONS	TITLE
7.03.010	Scope
7.03.020	General Objectives
7.03.030	Standards of Care
7.03.040	Safekeeping and Custody
7.03.050	Suitable and Authorized Investments
7.03.060	Investment Parameters
7.03.070	Reporting
7.03.080	Policy Adoption and Re-Adoption
7.03.090	List of Documents Used in Conjunction with this Policy

\*\*Former Chapter 2.06 (readopted April 9, 1998; amended December 10, 1998; readopted April 15, 1999; readopted April 27, 2000; readopted December 11, 2001; readopted October 3, 2002; renumbered by Ordinance No. 02-976, Sec. 1; readopted June 12, 2003; amended and readopted April 7, 2005, by Ordinance No. 05-1075).

7.03.010 Scope

These investment policies apply to all cash-related assets included within the scope of Metro's audited financial statements and held directly by Metro.

Other than bond proceeds or other segregated revenues, the total of funds pooled for investments ranges from \$60 million to \$100 million with an average of \$80 million. Funds held and invested by trustees or fiscal agents are excluded from these policies; however, such funds are subject to the regulations established by the state of Oregon.

Funds of Metro will be invested in compliance with the provisions of ORS 294.035 to 294.048; ORS 294.125 to 294.145; ORS 294.810; and other applicable statutes. Investments will be in accordance with these policies and written administrative procedures. Investment of any tax-exempt borrowing proceeds and of any debt service funds will comply with the 1986 Tax Reform Act provisions and any subsequent amendments thereto.

(Effective 7/6/05)

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(Ordinance No. 90-365. Amended by Ordinance No. 97-684, Sec. 1; Ordinance No. 02-976, Sec. 1; Ordinance No. 05-1075.)

#### 7.03.020 General Objectives

Due to Metro's fiduciary responsibility, safety of capital and availability of funds to meet payment requirements are the overriding objectives of the investment program. Investment yield targets are secondary.

(a) Safety. Investments shall be undertaken in a manner that seeks to ensure the preservation of principal in the overall portfolio and security of funds and investments. The objective will be to mitigate credit risk and interest rate risk.

(1) Credit Risk. Metro will minimize credit risk, the risk of loss due to the financial failure of the security issuer or backer, by:

- Limiting exposure to poor credits and concentrating the investments in the safest types of securities.
- Pre-qualifying the financial institutions, broker/dealers, and advisers with which Metro will do business.
- Diversifying the investment portfolio so that potential losses on individual securities will be minimized. For securities not backed by the full faith and credit of the federal government, diversification is required in order that potential losses on individual securities would not exceed the income generated from the remainder of the portfolio.
- Actively monitoring the investment portfolio holdings for ratings changes, changing economic/market conditions, etc.

(2) Interest Rate Risk. Metro will minimize the risk that the market value of securities in the portfolio will fall due to changes in general interest rates by:

- Structuring the investment portfolio so that securities mature to meet cash requirements for ongoing operations, thereby avoiding the need

(Effective 7/6/05)

to sell securities on the open market prior to maturity.

- Investing operating funds primarily in shorter-term securities or short-term investment pools.

(b) Liquidity. The investment officer shall assure that funds are constantly available to meet immediate payment requirements, including payroll, accounts payable and debt service.

(c) Yield. The investment portfolio shall be designed with the objective of regularly exceeding the average return on 90-day U.S. Treasury Bills. The investment program shall seek to augment returns above this level, consistent with risk limitations described in this policy and prudent investment principles.

This policy shall not preclude the sale of securities prior to their maturity in order to improve the quality, net yield, or maturity characteristic of the portfolio.

(d) Legality. Funds will be deposited and invested in accordance with statutes, ordinances and policies governing Metro.

Ordinance No. 87-228, Sec. 3. Amended by Ordinance No. 90-365; Ordinance No. 02-976, Sec. 1; Ordinance No. 05-1075.)

#### 7.03.030 Standards of Care

(a) Prudence. The standard of prudence to be applied by the investment officer shall be the "prudent investor" rule: "Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived." The prudent investor rule shall be applied in the context of managing the overall portfolio.

(b) Delegation of Authority. The Chief Operating Officer is the investment officer of Metro. The authority for investing Metro funds is vested with the investment officer, who, in turn, designates the investment manager to manage the day-to-day operations of Metro's investment portfolio, place purchase orders and sell orders with dealers and financial institutions, and prepare reports as required.

(Effective 7/6/05)

(c) Investment Advisory Board (IAB). There shall be an investment advisory board composed of five (5) members.

- (1) Terms of Service. The term of service for citizens appointed to the IAB shall be three (3) calendar years. The term of appointment shall be staggered so that not more than two (2) members' terms expire in any calendar year.
- (2) Appointment. The investment officer shall recommend to the Council for confirmation the names of persons for appointment to the IAB.
- (3) Duties. The IAB shall meet quarterly. The IAB will serve as a forum for discussion and act in an advisory capacity for investment strategies, banking relationships, the legality and probity of investment activities and the establishment of written procedures for the investment operations.

(d) Quarterly Reports. At each quarterly meeting, a report reflecting the status of the portfolio will be submitted for review and comment by at least three (3) members of the IAB. Discussion and comment on the report will be noted in minutes of the meeting. If concurrence is not obtained, notification will be given to the investment officer, including comments by the IAB.

(e) Monitoring the Portfolio. The investment manager will routinely monitor the contents of the portfolio comparing the holdings to the markets, relative values of competing instruments, changes in credit quality, and benchmarks. If there are advantageous transactions, the portfolio may be adjusted accordingly.

(f) Indemnity Clause. Metro shall indemnify the investment officer, chief financial officer, investment manager, staff and the IAB members from personal liability for losses that might occur pursuant to administering this investment policy.

The investment officer, acting in accordance with written procedures and exercising due diligence, shall not be held personally responsible for a specific security's credit risk or market price changes, provided that these deviations are reported to the council as soon as practicable.

(g) Accounting Method. Metro shall comply with all required legal provisions and Generally Accepted Accounting Principles (GAAP). The accounting principles are those contained  
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in the pronouncements of authoritative bodies, including, but not necessarily limited to, the American Institute of Certified Public Accountants (AICPA); the Financial Accounting Standards Board (FASB); and the Government Accounting Standards Board (GASB).

(Ordinance No. 05-1075.)

7.03.040 Safekeeping and Custody

(a) Authorized Financial Dealers and Institutions. The investment officer shall maintain a listing of all authorized dealers and financial institutions that are approved for investment purposes. Financial institutions must have a branch in Oregon. Any firm is eligible to apply to provide investment services to Metro and will be added to the list if the selection criteria are met. Additions or deletions to the list will be made by the investment officer and reviewed by the IAB. At the request of the investment officer, the firms performing investment services for Metro shall provide their most recent financial statements or Consolidated Report of Condition (call report) for review. Further, there should be in place proof as to all the necessary credentials and licenses held by employees of the broker/dealers who will have contact with Metro, as specified by but not necessarily limited to the National Association of Securities Dealers (NASD), Securities and Exchange Commission (SEC), etc. At minimum, the investment officer and the IAB shall conduct an annual evaluation of each firm's qualifications to determine whether it should be on the authorized list.

Securities dealers not affiliated with a Qualified Financial Institution, as defined in ORS 294.035, will be required to have headquarters located in the states of Oregon, Washington or Idaho and, if not headquartered in the state of Oregon, to have an office located in Oregon. Notwithstanding the above, securities dealers who are classified as primary dealers with the New York Federal Reserve Bank are also eligible.

(b) Internal Controls. The investment officer shall maintain a system of written internal controls, which shall be reviewed annually by the IAB and the independent auditor. The controls shall be designed to prevent loss of public funds due to fraud, error, misrepresentation or imprudent actions.

Metro's independent auditor at least annually shall audit investments according to generally accepted auditing standards and this ordinance.

(Effective 7/6/05)

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(c) Delivery vs. Payment. All securities purchased pursuant to this investment policy will be delivered by either book entry or physical delivery to a third party for safekeeping by a bank designated as custodian. Purchase and sale of all securities will be on a payment versus delivery basis. Delivery versus payment will also be required for all repurchase transactions and with the collateral priced and limited in maturity in compliance with ORS 294.035(11).

(d) Safekeeping. The trust department of the bank designated as custodian will be considered to be a third party for the purposes of safekeeping of securities purchased from that bank. The custodian shall issue a safekeeping receipt to Metro listing the specific instrument, rate, maturity and other pertinent information.

Notwithstanding the preceding, an exception to the delivery versus payment policy is made when purchasing State and Local Government Series Securities (SLGS) from the United States Treasury's Bureau of Public Debt to satisfy arbitrage yield restriction requirements of the Internal Revenue Code for tax-exempt bond issues.

(Ordinance No. 05-1075.)

#### 7.03.050 Suitable and Authorized Investments

(Definitions of terms and applicable authorizing statutes are listed in the "Summary of Investments Available to Municipalities" provided by the State Treasurer.)

(a) Investment Types. The following investments are permitted by this policy and ORS 294.035 and 294.810.

- (1) U.S. Treasury Bills, Notes, Bonds, Strips  
(Separate Trading of Registered Interest and Principal of Securities) and/or State and Local Government Series Securities (SLGS)
- (2) Securities of U.S. Government Agencies and U.S. Government Sponsored Enterprises
- (3) Certificates of Deposit (CD) from commercial banks in Oregon and insured by the Federal Deposit Insurance Corporation (FDIC)
- (4) Repurchase Agreements (Repo's)
- (5) Banker's Acceptances (BA)

(Effective 7/6/05)

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- (6) Commercial Paper (CP) issued by a financial institution, commercial, industrial or utility business enterprise
- (7) State of Oregon and Local Government Securities with A ratings or better
- (8) State of Oregon Investment Pool
- (9) Market Interest Accounts and Checking Accounts

(b) Collateralization. Deposit-type securities (i.e., Certificates of Deposit) shall be collateralized through the state collateral pool as required by ORS 295.015 and ORS 295.018 for any amount exceeding FDIC coverage, recognizing that ORS 295.015 requires only 25 percent collateralization and ORS 295.018 requires 110 percent collateralization when the institution is notified by the State Treasurer.

(Ordinance No. 05-1075.)

#### 7.03.060 Investment Parameters

(a) Diversification by Maturity. Only investments which can be held to maturity shall be purchased. Investments shall not be planned or made predicated upon selling the security prior to maturity. This restriction does not prohibit the use of repurchase agreements under ORS 294.135(2).

Maturity limitations shall depend upon whether the funds being invested are considered short-term or long-term funds. All funds shall be considered short-term, except those reserved for capital projects (e.g., bond sale proceeds).

##### (1) Short-Term Funds.

- (A) Investment maturities for operating funds and bond reserves shall be scheduled to meet projected cash flow needs. Funds considered short-term will be invested to coincide with projected cash needs or with the following serial maturity:

- 25% minimum to mature under three months
- 75% minimum to mature under 18 months
- 100% minimum to mature under five years

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- (B) Investments may not exceed five (5) years. Investment maturities beyond 18 months may be made when supported by cash flow projections which reasonably demonstrate that liquidity requirement will be met. Maturities beyond 18 months will be limited to direct U.S. Treasury obligations.

(2) Long-Term Funds.

- (A) Maturity scheduling shall be timed according to anticipated need. ORS 294.135 permits investment beyond 18 months for any bond proceeds or funds accumulated for any purpose that the district is permitted by state law to accumulate and hold funds for a period exceeding one (1) year. The maturities should be made to coincide as nearly as practicable with the expected use of the funds.
- (B) Investment of capital project funds shall be timed to meet projected contractor payments. The drawdown schedule used to guide the investment of the funds shall evidence the approval of the investment officer and review of the Chief Financial Officer.

(b) Diversification by Investment. The investment officer will diversify the portfolio to avoid incurring unreasonable risks inherent in over-investing in specific instruments, individual financial institutions, or maturities.

The maximum percentages of the portfolio and the maximum maturities for investments are as follows:

Security	Maximum Percent of Portfolio	Maximum Maturity
U.S. Treasury Bills, Notes, Bonds, Strips and/or State and Local Government Series (SLGS)	100%	
Securities of U.S. Government Agencies and U.S. Government Sponsored Enterprises	100%	

(Effective 7/6/05)

Certificates of Deposit (CD) Commercial Banks in Oregon Insured by FDIC	100%	
Repurchase Agreements (Repo's)	50%	90-day maturity
Bankers Acceptances (BA)	100%	
Commercial Paper (CP) - Issued by a financial institution, commercial, industrial, or utility business enterprise.  For a corporation headquartered in Oregon  For a corporation headquartered outside of Oregon	35%	A-1 and P-1 only, 90-day maturity; A-2 and P-2, A-1/P-2, or A-2/P1, 60-day maturity  A-1 and P-1 only; 90-day maturity
State of Oregon and Local Government Securities with A ratings or better	25%	
State of Oregon Investment Pool	100%	
Market Interest Accounts and Checking Accounts	Minimum necessary for daily cash management efficiency	

(c) Diversification by Financial Institution.

- (1) Qualified Institutions. The investment officer shall maintain a listing of financial institutions and securities dealers recommended by the IAB. Any financial institution and/or securities dealer is eligible to make an application to the

investment officer and upon due consideration and approval hold available funds.

A listing of the eligible institutions shall be held by the investment officer and provided any fiduciary agent or trustee.

- (2) Diversification Requirements. The combination of investments in Certificates of Deposit and Banker's Acceptances invested with any one institution shall not exceed 25 percent of the total available funds or 15 percent of the equity of the institution.

The following limitations avoid over-concentration in securities from a specific issuer or business sector:

Type of Security	Limitation
U.S. Government Treasuries	No limitations
U.S. Government Agencies	Securities of U.S. Government Agencies and U.S. Government Sponsored Enterprises as defined under ORS 294.035 and/or 294.040. No more than 40 percent of the portfolio in any one agency.
Certificates of Deposit - Commercial Banks	No more than the lesser of 25 percent of the total available funds or 15 percent of the equity of the financial institution may be invested with any one institution.
Repurchase Agreements	May be purchased from any qualified institution provided the master repurchase agreement is effective and the safekeeping requirements are met. All repurchase agreements will be fully collateralized by general obligations of the U.S. Government, the agencies and instrumentalities of the United States or enterprises sponsored by the United States government, marked to market.  The investment officer shall not enter into any reverse repurchase agreements.
Bankers Acceptances	Must be guaranteed by, and carried on the books of, a qualified financial institution whose short-term letter of credit rating is rated in the highest category by one or more nationally

(Effective 7/6/05)

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	<p>recognized statistical rating organizations.</p> <p>Qualified institution means:</p> <p>i) A financial institution that is located and licensed to do banking business in the state of Oregon; or</p> <p>ii) A financial institution located in the states of California, Idaho, or Washington that is wholly owned by a bank holding company that owns a financial institution that is located and licensed to do banking business in the state of Oregon.</p> <p>No more than the lesser of 25 percent of the total available funds or 15 percent of the equity of the financial institution may be invested with any one institution.</p>
Commercial Paper	No more than 5 percent of the total portfolio with any one corporate entity.
State and Local Government Securities	No more than 15 percent of the total portfolio in any one local entity.
State of Oregon Investment Pool	Not to exceed the maximum amount established in accordance with ORS 294.810, with the exception of pass-through funds (in and out within 10 days)

(d) Total Prohibitions. The investment officer may not make a commitment to invest funds or sell securities more than 14 business days prior to the anticipated date of settlement of the purchase or sale transaction and may not agree to invest funds or sell securities for a fee other than interest. Purchase of standby or forward commitments of any sort are specifically prohibited.

(e) Adherence to Investment Diversification. Diversification requirements must be met on the day an investment transaction is executed. If due to unanticipated cash needs, investment maturities or marking the portfolio to market, the investment in any security type, financial issuer or maturity spectrum later exceeds the limitations in the policy, the investment officer is responsible for bringing the investment portfolio back into compliance as soon as is practical.

(Effective 7/6/05)

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(f) Competitive Selection of Investment Instruments. Before the investment officer invests any surplus funds, a competitive offering solicitation shall be conducted orally. Offerings will be requested from financial institutions for various options with regards to term and instrument. The investment officer will accept the offering, which provides the highest rate of return within the maturity required and within the prudent investor rule. Records will be kept of offerings and the basis for making the investment decision.

(Ordinance No. 05-1075.)

#### 7.03.070 Reporting

(a) Methods. A transaction report shall be prepared by the investment manager not later than one business day after the transaction, unless a trustee, operating under a trust agreement, has executed the transaction. The trustee agreement shall provide for a report of transactions to be submitted by the trustee on a monthly basis.

Quarterly reports shall be prepared for each regular meeting of the IAB to present historical information for the past 12-month period. Copies shall be provided to the Chief Operating Officer and the Metro Council.

(b) Performance Standards. The overall performance of Metro's investment program is evaluated quarterly by the IAB using the objectives outlined in this policy. The quarterly report which confirms adherence to this policy shall be provided to the Metro Council as soon as practicable.

The performance of Metro's portfolio shall be measured by comparing the average yield of the portfolio at month-end against the performance of the 90-day U.S. Treasury Bill issue maturing closest to 90 days from month-end and the Local Government Investment Pool's monthly average yield.

(Ordinance No. 05-1075.)

#### 7.030.080 Policy Adoption and Re-adoption

(a) The investment policy must be reviewed by the IAB and the Oregon Short-Term Fund Board prior to adoption by the Metro Council. Adoption of this policy supersedes any other previous Council action or policy regarding Metro's investment management practices.

(Effective 7/6/05)

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(b) This policy shall be subject to review and re-adoption annually by the Metro Council in accordance with ORS 294.135.

(Ordinance No. 05-1075.)

7.030.090 List of Documents Used in Conjunction with this Policy

The following documents are used in conjunction with this policy and are available from the investment manager upon request:

- List of Authorized Brokers and Dealers
- List of Primary Dealers
- Calendar of Federal Reserve System Holidays
- Calendar of Local Government Investment Pool Holidays
- Broker/Dealer Request for Information
- Oregon State Treasury's Summary of Liquid Investments Available to Local Governments for Short-Term Fund Investment
- Oregon State Treasury's U.S. Government and Agency Securities for Local Government Investment Under ORS 294.035 and 294.040
- Oregon State Treasury's List of Qualified Depositories for Public Funds
- Attorney General's letter of advice: Certificates of Deposit, ORS 294.035 and ORS 295
- Oregon Revised Statute Chapter 294 - County and Municipal Financial Administration
- Oregon Revised Statute Chapter 295 - Depositories of Public Funds and Securities
- Government Finance Officers Association Glossary of Cash Management Terms

(Ordinance No. 05-1075.)





## STAFF REPORT

### IN CONSIDERATION OF ORDINANCE NO. 06-1114 FOR THE PURPOSE OF CONFIRMING THE RE-ADOPTION OF METRO CODE 7.03 (INVESTMENT POLICY)

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Date: March 24, 2006

Prepared by: Brian Williams

#### BACKGROUND

Metro Code, Chapter 7.03 contains the Investment Policy that applies to all cash-related assets held by Metro. This Investment Policy is being submitted to Council for review and re-adoption in accordance with Section 7.03.160 of Metro Code.

The format of Metro's Investment Policy mirrors the Oregon State Treasury's Sample Investment Policy for Local Governments and the Government Finance Officers Association's (GFOA) Sample Investment Policy. This allows Metro's policy to be readily compared to investment policies of other local governments that have adopted the same GFOA format.

No change to investment policy is proposed as a part of this re-adoption.

#### ANALYSIS/INFORMATION

1. **Known Opposition:** None.
2. **Legal Antecedents:** Metro Code, Chapter 7.03, Investment Policy, Section 7.030.080(b) proscribes that the policy shall be subject to review and re-adoption annually by the Metro Council in accordance with ORS 294.135.

Chapter 7.03 was formerly Chapter 2.06 (readopted April 9, 1998; amended December 10, 1998; readopted April 15, 1999; readopted April 27, 2000; readopted December 11, 2001; readopted October 3, 2002; renumbered by Ordinance No. 02-976, Sec. 1; readopted June 12, 2003; amended and readopted April 7, 2005, by Ordinance No. 05-1075).

3. **Anticipated Effects:** N/A

4. **Budget Impacts:** N/A

**RECOMMENDED ACTION:** Staff recommends re-adoption of Metro Code Chapter 7.03 by Ordinance No. 06 - 1114.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF NAMING METRO	)	ORDINANCE NO. 06-1117
OPEN SPACES PROPERTY IN THE TRYON	)	
CREEK LINKAGES TARGET AREA	)	Introduced by Chief Operating Officer
	)	Michael Jordan, with the concurrence of
	)	Council President David Bragdon

WHEREAS, Metro Area voters approved the Open Spaces, Parks and Streams Bond Measure (Ballot Measure 26-26) on May 16, 1995, which authorized Metro to issue \$135.6 million in general obligation bonds to finance land acquisition and certain park-related capital improvements; and

WHEREAS, on August 10, 1995, the Metro Council, through Resolution 95-2192 "For The Purpose Of Authorizing The Executive Officer To Purchase Property In The Tyron Creek Watershed", authorized the purchase of 11 acres of property (the "Property",) owned by Larry and Nina Lindstrom; and

WHEREAS, in October of 1995, Metro purchased the Property, which is located between SW Pomona Street, SW 39<sup>th</sup> Avenue, SW Coronado Street and SW 43rd Avenue and is part of the headwaters of Arnold Creek, a tributary of Tyron Creek; and

WHEREAS, Chapter 2.16.020 (d) of the Metro Code sets forth a policy for the naming of facilities owned or operated by Metro, stating: "A Metro facility may be named for a deceased person in recognition of the person's significant contribution of effort or money in support of the facility or its construction or mission, in conformance with the adopted policy of Metro Council"; and

WHEREAS, a master plan has not yet been adopted for the Property, but the City of Portland Parks and Recreation Department, which manages the Property and other properties in the Tyron Creek Linkages Target Area for Metro under an Intergovernmental Agreement, has agreed that the Property may be named in accord with Metro's Ordinance governing naming of Metro facilities; and

WHEREAS, Metro has received letters from the Friends of Arnold Creek and the West Portland Park Neighborhood Association and Multnomah County Sheriff Bernie Giusto requesting that the Property be named "Loll Wildwood" in honor of Multnomah County Sheriff Deputy Ernest C. Loll who was shot and killed in the line of duty by the Property over 70 years ago protecting the resource by responding to a report of poaching; now therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

This Ordinance recognizes the important contribution of protecting the natural resources of the Tryon Creek area by Deputy Ernest C. Loll through the dedication and naming in his honor of the 11-acre Metro property, identified in Exhibit A, as "Loll Wildwood".

ADOPTED by the Metro Council this \_\_\_\_\_ day of \_\_\_\_\_, 2006.

\_\_\_\_\_  
David Bragdon, Council President

Attest:

Approved as to Form:

\_\_\_\_\_  
Christina Billington, Recording Secretary

\_\_\_\_\_  
Daniel B. Cooper, Metro Attorney

## **STAFF REPORT**

### **IN CONSIDERATION OF ORDINANCE NO. 06-1117, FOR THE PURPOSE OF NAMING METRO OPEN SPACES PROPERTY IN THE TRYON CREEK LINKAGES TARGET AREA**

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Date: March 15, 2006

Prepared by: Dan Kromer

## **BACKGROUND**

In October of 1995, Metro and the City of Portland's Bureau of Environmental Services (BES) purchased 11 acres of undeveloped property from Larry and Nina Lindstrom to be preserved as open space. The Metro Council authorized the purchase of this property through Resolution 95-2192, "For The Purpose Of Authorizing The Executive Officer To Purchase Property In The Tyron Creek Watershed". Metro retained fee simple interest on the property, which is located between SW Pomona Street, SW 39<sup>th</sup> Avenue, SW Coronado Street and SW 43rd Avenue and is part of the headwaters of Arnold Creek, a tributary of Tyron Creek. Funding for Metro's share (30%) of the purchase came from the Open Spaces, Parks and Streams bond measure passed by voters of the region in 1995. These 11 acres became part of the Tyron Creek Linkages target area as adopted by Council via Resolution 96-2330, "For The Purpose Of Approving A Refinement Plan For Tyron Creek Linkages Target Area As Outlined In The Open Space Implementation Plan".

Recently, a request was received from the West Portland Park Neighborhood Association and the Friends of Arnold Creek, Attachment 1, requesting naming these 11 acres, "Loll Wildwood". The name request is in honor of Multnomah County Sheriff Deputy Ernest C. Loll who was shot and killed in the line of duty around this area over 70 years ago responding to a report of bird poaching. The request also has the support of Multnomah County Sheriff Bernie Giusto, Attachment 2. Presently, there is a monument and plaque located at intersection of SW 39th and SW Arnold Street by the exact site where Deputy Loll was killed.

The above 11-acre site is currently managed as part of the Tryon Creek Linkages by the City of Portland Parks and Recreation Department under an Intergovernmental Agreement with Metro. The area is not presently open for public use but is informally used and cared for by neighbors and other Southwest Portland residents. Since Metro is the 100% owner of the site, Portland Parks and Recreation has agreed that this area may be named in accord with Metro's Ordinance governing naming of Metro facilities.

On May 17, 2001, Metro Council approved Ordinance No. 01-904, "For The Purpose Of Dedicating A Metro Open Spaces Program Acquisition In The Tryon Creek Linkages Target Area", formally dedicating another section of the Tryon Creek Linkages the, "Judy Weyers Greenspace", in honor of the deceased former Metro Councilor and Presiding Officer who represented the district which includes the Tryon Creek Linkages area and who was instrumental in developing and referring the 1995 bond measure.

## **ANALYSIS/INFORMATION**

### **1. Known Opposition**

No known opposition.

## **2. Legal Antecedents**

Metro Code Chapter 2.16 was established to provide a policy for the naming of facilities owned or operated by Metro. Section 2.16.020 (a) states, "Facilities owned by Metro shall be named through adoption of an ordinance by Metro Council". Section 2.16.020 (d), states, "A Metro facility may be named for a deceased person in recognition of the person's significant contribution of effort or money in support of the facility or its construction or mission, in conformance with the adopted policy of Metro Council".

The Open Spaces, Parks and Streams Bond Measure (Ballot Measure 26-26) was passed on May 16, 1995 by area voters authorizing Metro to issue \$135.6 million in general obligation bonds to finance land acquisition and certain park related improvements.

Resolution 95-2192, "For The Purpose Of Authorizing The Executive Officer To Purchase Property In The Tyron Creek Watershed", was approved by Metro Council on August 10, 1995 and authorized the purchase of property owned by Larry and Nina Lindstrom.

Resolution 96-2330, "For The Purpose Of Approving A Refinement Plan For Tyron Creek Linkages Target Area As Outlined In The Open Space Implementation Plan", was adopted by Metro Council on April 26, 1996 creating a refinement plan for the Tyron Creek Linkages target area and identified the 11 acres Metro purchased from the Lindstrom family as part of this area.

Ordinance No. 01-904, "For The Purpose Of Dedication A Metro Open Spaces Program Acquisition In The Tryon Creek Linkages Target Area", approved by Metro Council on May 17, 2001, named another section of the Tryon Creek Linkages to, "Judy Weyers Greenspace", in honor of a deceased former Metro Councilor and Presiding Officer who represented the district which the section was located in.

## **3. Anticipated Effects**

No anticipated effects.

## **4. Budget Impacts**

No budgetary impacts are anticipated from this ordinance.

## **RECOMMENDED ACTION**

Metro staff recommends the adoption of Ordinance 06-1117.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ESTABLISHING THE ) RESOLUTION NO. 06-3659  
OREGON ZOO FUTURE VISION COMMITTEE )  
) Introduced by Metro Councilor Brian  
Newman

WHEREAS, a public zoo located in Portland's Washington Park has operated continuously since 1887, which makes the Oregon Zoo the oldest zoo west of the Mississippi River; and

WHEREAS, the Oregon Zoo is now the most popular paid attraction in the State of Oregon with over 1.3 million visitors annually, an operating budget of \$22.7 million, and a staff of 148 full-time employees and several hundred temporary seasonal employees; and

WHEREAS, the Oregon Zoo was regionalized in 1976 and is owned and operated on behalf of the citizens of the region by Metro and governed by the Metro Council; and

WHEREAS, the zoo is strongly supported by the community through the Oregon Zoo Foundation which has over 40,000 household members and an active and engaged board made up of business and community leaders; and

WHEREAS, voters have supported the zoo by approving property tax levies and general obligation bonds on seven separate occasions since 1954, most recently in 1996 with the approval of the Great Northwest exhibits; and

WHEREAS, the zoo's living collection includes over 1,880 animals representing 270 species of birds, mammals, reptiles, amphibians and invertebrates, including 83 species listed as either endangered or threatened; and

WHEREAS, the Oregon Zoo's mission is "Inspiring our community to create a better future for wildlife," which represents the zoo's commitment to conservation and environmental education; and

WHEREAS, the zoo industry and exhibits have changed significantly over the past decade, but the current master plan that guides improvements and programming at the Oregon Zoo was written in 1990 and is no longer considered a relevant guide to the future of the zoo; and

WHEREAS, the current fiscal model of the zoo is unsustainable, and despite increases in attendance and revenue, Metro has had to reduce staff and expenses at the zoo due to the significant growth of wages, benefits and utility costs; and

WHEREAS, the Metro Council and the Oregon Zoo Foundation Board held a joint meeting on August 1, 2005 to discuss these trends and jointly agreed that a long-range planning effort was necessary to explore the future of the zoo and resolve master planning, programming, and operating challenges;

NOW, THEREFORE, BE IT RESOLVED BY THE METRO COUNCIL THAT,

1. The Metro Council hereby establishes the Oregon Zoo Future Vision Committee to recommend updates to the zoo's master plan, changes to the zoo's conservation and environmental education programs, and operating reforms to address the zoo's systemic fiscal challenges;
2. The Council President has nominated and the Metro Council hereby appoints the committee co-chairs, members, and ex-officio members as set forth in Exhibit A attached hereto and incorporated herein;
3. The Oregon Zoo Future Vision Committee shall meet approximately monthly for 15 months between now and June 30<sup>th</sup>, 2007 to fulfill the committee charge as set forth in Exhibit B attached hereto and incorporated herein, with administrative, technical and research support from Metro staff at the Oregon Zoo, Metro Council Office, Office of Metro Attorney, Office of the Chief Operating Officer, and Finance and Administrative Services Department, as needed.
4. The committee co-chairs shall present to the Metro Council and the Oregon Zoo Foundation Board the committee's recommendations by June 30<sup>th</sup>, 2007.

ADOPTED by the Metro Council this \_\_\_\_\_ day of \_\_\_\_\_, 2006

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David Bragdon, Council President

Approved as to Form:

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Daniel B. Cooper, Metro Attorney

Exhibit A  
Resolution 06-3659

The Oregon Zoo Future Vision Committee is being asked to serve on a short-term basis, beginning in mid April and concluding by June 30<sup>th</sup>, 2007, meeting periodically to make recommendations to update the zoo's master plan, change the zoo's conservation and environmental education programs and operating reforms to address the zoo's systemic fiscal challenges. Metro staff will serve as technical and administrative support to the committee and provide background information.

The following individuals have been identified as committee members. They are:

**Co-Chairs:**

Brian Newman (co-chair)	Metro Councilor
Penny Serrurier (co-chair)	Oregon Zoo Foundation Board President

**Metro/Oregon Zoo Foundation Members:**

David Bragdon	Metro Council President
Robert Liberty	Metro Councilor
Bruce Berning	Oregon Zoo Foundation Board Member
D. Carter MacNichol	Oregon Zoo Foundation Board Member
Donna Morrow	Oregon Zoo Foundation Board Member
C. Kregg Hanson	Oregon Zoo Foundation Board Member

**Citizen Members:**

Sandra McDonough	Portland Business Alliance Director
John Inskeep	IFC Foundation
George Passadore	Wells Fargo Northwest, Former Chief Executive Officer
Walt Pollock	Portland General Electric, Former Vice President

**Ex-officio members:**

Tony Vecchio	Oregon Zoo Director
Jeff Miller	MERC General Manager
Michael Jordan	Metro Chief Operating Officer



Exhibit B  
Resolution 06-3659

**Committee Charge**

The Oregon Zoo Future Vision Committee is charged with crafting recommendations on strengthening and improving the Oregon Zoo consistent with its conservation and environmental education mission. The Committee will be asked to advise the Metro Council and the Oregon Zoo Foundation on the following questions:

- *What should the Oregon Zoo be like in 10 years?*
- *How should the institution change to incorporate public tastes, interests and needs?*
- *How can the zoo better achieve its mission of “inspiring our community to create a better future for wildlife”?*
- *What changes need to be made in the Oregon Zoo’s master plan, programming, and operations to ensure its success and stability in the future?*

Related to those questions, the Oregon Zoo Future Vision Committee will make recommendations on the following:

1. An update of the Oregon Zoo’s master plan to guide physical improvements and new exhibits at the zoo for the next decade. Specifically, the master plan must be designed to be fiscally and environmentally sustainable and responsive to input from OZF members, zoo patrons and the general public. The zoo should continue to inspire and entertain visitors in ways that are consistent with its conservation and environmental education mission. The plan will include a realistic phasing and financing strategy for implementation and operations. Financing strategies could include operating levies, general obligation or revenue bonds, federal and state grants, private fundraising from foundations, businesses and individuals, new enterprise activities, and other financing mechanisms.
2. Changes and improvements to the Oregon Zoo’s conservation and environmental education programming. This may include expanding and/or creating new program activities while reducing and/or eliminating others, as well as identifying new partnerships and financing strategies to fund program activities.
3. A new operations plan and business model to stabilize the Oregon Zoo’s day-to-day maintenance and operations in light of challenging fiscal trends. The committee will look at reducing costs and increasing revenue in order to stabilize the zoo’s finances and should include recommendations on how to make the zoo operations more entrepreneurial in nature.

## **STAFF REPORT**

### **IN CONSIDERATION OF RESOLUTION NO. 06-3659 FOR THE PURPOSE OF CREATING THE OREGON ZOO FUTURE VISION COMMITTEE**

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Date: March 20, 2006

Prepared by: Amelia Porterfield

## **BACKGROUND**

The Oregon Zoo's mission is "Inspiring our community to create a better future for wildlife," which represents the zoo's commitment to conservation and environmental education. The zoo has been an industry leader in these activities.

The zoo industry and exhibits have changed significantly over the past decade, but the current master plan that guides improvements and programming at the Oregon Zoo was written in 1990 and is no longer considered a relevant guide to the future of the zoo.

Additionally, the Zoo has recently seen the need for a new operating model that incorporates the physical site planning with operational needs, revenue and expenses. There is a recognized need for the Zoo to operate in a businesslike, entrepreneurial and innovative manner while maintaining the rigorous standards required by the public agency. The current fiscal model of the zoo is unsustainable, and despite increases in attendance and revenue, Metro has had to reduce staff and expenses at the zoo due to the significant growth of labor and utility costs.

In recognition of these factors, the Metro Council and the Oregon Zoo Foundation Board held a joint meeting on August 1, 2005 to discuss these trends and jointly agreed that a long-range planning effort was necessary to explore the future of the zoo and resolve master planning, programming, and operating challenges.

## **ANALYSIS/INFORMATION**

### **1. Known Opposition:**

There is no known opposition.

### **2. Legal Antecedents:**

Metro Code Chapter 2.19, regarding advisory committees, requires that any official task force be created by the council and appointments be made by the Council President subject to confirmation by the council.

### **3. Anticipated Effects:**

The committee will make recommendations as to updates to the zoo's master plan, changes to the zoo's conservation and environmental education programs, and operating reforms to address the zoo's systemic fiscal challenges.

### **4. Budget Impacts:**

The Council President's proposed 06-07 budget includes \$250,000 for Master Plan work. It is anticipated that there will also be some staff time spent on research and technical support in the Metro Council Office, the Office of the Chief Operating Officer (council intern) and the Oregon Zoo in the remainder of this fiscal year and in 06-07.

### **RECOMMENDED ACTION**

Staff recommends the Chief Operating Officer approve Resolution No. 06-3659.

JOINT RESOLUTION OF THE  
METRO COUNCIL  
AND  
OREGON DEPARTMENT OF TRANSPORTATION

FOR THE PURPOSE OF CERTIFYING THAT	)	RESOLUTION NO. 06-3667
THE PORTLAND METROPOLITAN AREA IS IN	)	
COMPLIANCE WITH FEDERAL	)	Introduced by Michael Jordan, COO in
TRANSPORTATION PLANNING	)	concurrence with Council President Bragdon
REQUIREMENTS	)	

WHEREAS, Substantial federal funding from the Federal Transit Administration and Federal Highway Administration is available to the Portland metropolitan area; and

WHEREAS, The Federal Transit Administration and Federal Highway Administration require that the planning process for the use of these funds complies with certain requirements as a prerequisite for receipt of such funds; and

WHEREAS, Satisfaction of the various requirements is documented in Exhibit A; now, therefore,

BE IT RESOLVED, that the transportation planning process for the Portland metropolitan area (Oregon portion) is in compliance with federal requirements as defined in Title 23 Code of Federal Regulations, Part 450, and Title 49 Code of Federal Regulations, Part 613.

ADOPTED by the Metro Council this \_\_\_\_\_ day of April 2006.

\_\_\_\_\_  
David Bragdon, Council President

Approved as to form:

\_\_\_\_\_  
Daniel B. Cooper, Metro Attorney

APPROVED by the Oregon Department of Transportation this \_\_\_\_\_ day of \_\_\_\_\_  
2006.

\_\_\_\_\_  
Craig Greenleaf  
Transportation Development Administrator

## **Metro Self-Certification**

### **1. Metropolitan Planning Organization Designation**

Metro is the Metropolitan Planning Organization (MPO) designated by the Governor for the urbanized areas of Clackamas, Multnomah and Washington Counties.

Metro is a regional government with six directly elected district councilors and a regionally elected Council President. Local elected officials of general purpose governments are directly involved in the transportation planning/decision process through the Joint Policy Advisory Committee on Transportation (JPACT) (see membership roster). JPACT provides the “forum for cooperative decision-making by principal elected officials of general purpose governments” as required by USDOT and takes action on the Regional Transportation Plan (RTP), the Metropolitan Transportation Improvement Program (MTIP) and the Unified Planning Work Program (UPWP). The Metro Policy Advisory Committee (MPAC) deals with non-transportation-related matters and with the adoption and amendment to the Regional Transportation Plan (RTP). Specific roles and responsibilities of the committees are described on page 2.

### **2. Geographic Scope**

Transportation planning in the Metro region includes the entire area within the Federal-Aid Urban Boundary (FAUB). Metro updated the FAUB and federal functional classification in January 2005 as recommended in Metro’s 2004 Federal Review.

### **3. Agreements**

- a. A basic memorandum of agreement between Metro and the Southwest Washington Regional Transportation Council (RTC) delineates areas of responsibility and coordination. Executed in March 2006, to be updated in 2009.
- b. An agreement between TriMet and Metro implementing the Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21), executed August 2004, to be updated in 2007.
- c. An agreement between ODOT and Metro implementing the TEA-21, executed September 2004, to be updated in 2007.
- d. Yearly agreements are executed between Metro and ODOT defining the terms and use of FHWA planning funds.
- e. Bi-State Coordination Committee Charter – Metro and eleven state and local agencies adopted resolutions approving a Bi-State Coordination Committee Charter in 2004. Some were adopted in late 2003 and the balance in 2004, which triggered the transition from the Bi-State Transportation Committee to the Bi-State Coordination Committee.
- f. An agreement between Metro and the Department of Environmental Quality (DEQ) describing each agency’s responsibilities and roles for air quality planning. Executed August 2004, to be updated in 2007.

- g. Memorandum of Understanding between Metro and Wilsonville outlining roles and responsibilities for implementing TEA-21 was executed June 2005 and will be updated in July 2008.

#### **4. Responsibilities, Cooperation and Coordination**

Metro uses a decision-making structure, which provides state, regional and local governments the opportunity to participate in the transportation and land use decisions of the organization. The two key committees are JPACT and MPAC. These committees receive recommendations from the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC).

##### **JPACT**

This committee is comprised of three Metro Councilors; nine local elected officials including two from Clark County, Washington, and appointed officials from ODOT, TriMet, the Port of Portland and DEQ. All transportation-related actions (including federal MPO actions) are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration. Final approval of each item, therefore, requires the concurrence of both bodies. As recommended by Metro's 2004 Federal Review, JPACT has designated a Finance Subcommittee to explore transportation funding and finance issues in detail, and make recommendations to the full committee.

JPACT will be undertaking a bylaw review also recommended in Metro's 2004 Federal Review.

##### **Bi-State Coordination Committee**

Based on a recommendation from the I-5 Transportation & Trade Partnership Strategic Plan, the Bi-State Transportation Committee became the Bi-State Coordination Committee in early 2004. The Bi-State Coordination Committee was chartered through resolutions approved by Metro, Multnomah County, the cities of Portland and Gresham, TriMet, ODOT, the Port of Portland, RTC, Clark County, C-Tran, Washington State Department of Transportation (WSDOT) and the Port of Vancouver. The Committee is charged with reviewing all issues of bi-state significance for transportation and land use. A 2003 Memorandum of Understanding (MOU) states that JPACT and the RTC Board "shall take no action on an issue of bi-state significance without first referring the issue to the Bi-State Coordination Committee for their consideration and recommendation."

##### **MPAC**

This committee was established by the Metro Charter to provide a vehicle for local government involvement in Metro's planning activities. It includes eleven local elected officials, three appointed officials representing special districts, TriMet, a representative of school districts, three citizens, two non-voting Metro Councilors, two Clark County, Washington representatives and a non-voting appointed official from the State of Oregon. Under the Metro Charter, this committee has responsibility for recommending to the Metro Council adoption of or amendment to any element of the Charter-required RTP.

The Regional Framework Plan was adopted on December 11, 1997 and addresses the following topics:

- Transportation
- Land use (including the Metro Urban Growth Boundary (UGB))
- Open space and parks
- Water supply and watershed management
- Natural hazards
- Coordination with Clark County, Washington
- Management and implementation

In accordance with this requirement, the transportation component of the Regional Framework Plan developed to meet federal transportation planning regulations, the Oregon Transportation Planning Rule and Metro Charter requirements that require a recommendation from both MPAC and JPACT. This ensures integration of transportation with land use and environmental concerns.

## **5. Metropolitan Transportation Planning Products**

### **a. Unified Planning Work Program**

JPACT, the Metro Council and the Southwest Washington RTC adopt the UPWP annually. It fully describes work projects planned for the Transportation Department during the fiscal year and is the basis for grant and funding applications. The UPWP also includes federally funded major projects being planned by member jurisdictions. These projects will be administered by Metro through intergovernmental agreements with ODOT and the sponsoring jurisdiction. As required by Metro's 2004 Federal Review CMS and RTP update tasks were expanded in the UPWP narratives. Also, Metro identified Environmental Justice tasks in the UPWP in Title VI/Environmental Justice and individual program narratives.

### **b. Regional Transportation Plan**

The 2000 RTP was adopted in August 2000, culminating a two-phase, five-year effort to reorient the plan to Metro's 2040 Growth Concept. The updated plan contains a new emphasis on implementing key aspects of the 2040 land use plan with strategic transportation infrastructure improvements and programs. The plan is fully organized around these land use goals, with modal systems for motor vehicles, transit, freight, bicycles and pedestrians geared to serve the long-term needs called for in the 2040 plan.

The 2000 RTP also includes a new level of detail, prescribing a number of new performance measures and system design standards for the 25 cities and 3 counties in the Metro region to enact. These include: new requirements for local street connectivity; modal orientation in street design; 2040-based level-of-service policy for sizing roads; targets for combined alternative modes of travel; and, parking ratios for new developments. The plan contains nearly 900 individual projects totaling \$7.2 billion in system improvements, and a corresponding series of financing scenarios for funding these projects. It also calls for more than a dozen corridor studies to define specific projects for many of the major corridors where more analysis is needed to determine which improvements best respond to expected demand.

JPACT and the Metro Council approved the RTP 2004 Federal Update on December 11, 2003. The 2004 update was limited in scope, and does not attempt to revisit the requirements of the Oregon Transportation Planning Rule. The update included "housekeeping" amendments to reflect fine-tuning of the various modal system maps, as recommended by local cities and counties through transportation plans adopted since the last RTP update in August 2000. The 2004 RTP includes new policy text that establishes two tiers of industrial areas ("regionally significant" and "local") for the purpose of transportation planning and project funding.

The 2004 update also provided an updated set of financially constrained projects. The total revenue base assumed in the 2004 RTP for the road system is approximately \$4.3 billion, with \$2.16 billion for freeways, highways and roads, \$1.67 billion for transit and the balance for planning, bike, pedestrian, transportation demand management, system management and other similar programs. In addition to the financially constrained system, the 2004 Federal Update identifies a larger set of projects and programs for the "Illustrative System," which is nearly double the scale and cost of the financially constrained system. The illustrative system represents the region's objective for implementing the Region 2040 Plan.

Finally, a new map has been added to Chapter 1 of the RTP that identifies the MPO Planning Boundary. This boundary defines the area that the RTP applies to for federal planning purposes. The boundary includes the area inside Metro's jurisdictional boundary, the 2003 UGB and the 2000 census defined urbanized area boundary for the Portland metropolitan region. FHWA and FTA approved the 2004 RTP and the associated air quality conformity determination on March 5, 2004.

Resolution Number 03-3380A adopted the RTP to meet federal requirements for long-range planning. FHWA approved Air Quality conformity determination on March 3, 2004. Metro adopted Resolution 04-1045A to meet state planning goals on July 8, 2004. The document was published with both the July 8 2004 adoption date and the March 5, 2004 federal approval date as required by Metro's 2004 Federal Review.

Work has begun on the 2008 RTP update. Tasks related to the update are outlined in the 2006-07 UPWP. As required by Metro's 2004 Federal Review the RTP update will address operating and maintenance costs paid by member jurisdictions.

#### **c. Metropolitan Transportation Improvement Program**

The MTIP was updated in Summer 2005 and incorporated into the 2004-07 State Transportation Improvement Program (STIP). The 2005 update includes projects or project phases with prior funding commitments and allocated \$50 million of Surface Transportation Program (STP) and Congestion Mitigation/Air Quality Program (CMAQ). The adopted MTIP features a program approved for three-years of projects and a fourth "out-year." The first year of projects are considered the priority year projects. Should any of these be delayed, projects of equivalent dollar value may be advanced from the second and third years of the program without processing formal Transportation Improvement Program (TIP) amendments. This flexibility was adopted in response to ISTEA (now TEA-21) planning requirements. The flexibility reduces the need for multiple amendments throughout the year. As recommended in Metro's 2004 Federal Review, the MTIP webpage was linked to ODOT's STIP page.



## **6. Planning Factors**

Currently, Metro's planning process addresses the seven TEA-21 planning factors in all projects and policies. Table 1 below describes this relationship. The TEA-21 planning factors are:

1. Support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity and efficiency;
2. Increase the safety and security of the transportation system for motorized and non-motorized users;
3. Increase the accessibility and mobility options available to people and for freight;
4. Protect and enhance the environment, promote energy conservation and improve quality of life;
5. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight;
6. Promote efficient management and operations; and
7. Emphasize the preservation of the existing transportation system.

In 2005, the Safe, Accountable, Flexible, Efficient Transportation Equity Act (SAFETEA-LU) added transportation security as a separate factor. Metro will address this factor in the current update to the Regional Transportation Plan, scheduled for completion in early 2008. Table 2 outlines Metro's response to the new SAFETEA-LU planning provisions.

**Table 1: TEA-21 Planning Factors**

<b>Factor</b>	<b>System Planning (RTP)</b>	<b>Funding Strategy (MTIP)</b>	<b>High Capacity Transit (HCT)</b>
1. Support Economic Vitality	<ul style="list-style-type: none"> <li>• RTP policies linked to land use strategies that promote economic development.</li> <li>• Industrial areas and intermodal facilities identified in policies as “primary” areas of focus for planned improvements.</li> <li>• Comprehensive, multimodal freight improvements that link intermodal facilities to industry are detailed for 20-year plan period.</li> <li>• Highway LOS policy tailored to protect key freight corridors.</li> <li>• RTP recognizes need for freight linkages to destinations beyond the region by all modes.</li> </ul>	<ul style="list-style-type: none"> <li>• All projects subject to consistency with RTP policies on economic development and promotion of “primary” land use element of 2040 development such as centers, industrial areas and intermodal facilities.</li> <li>• Special category for freight improvements calls out the unique importance for these projects.</li> <li>• All freight projects subject to funding criteria that promote industrial jobs and businesses in the “traded sector.”</li> </ul>	<ul style="list-style-type: none"> <li>• HCT plans designed to support continued development of regional centers and central city by increasing transit accessibility to these locations.</li> <li>• HCT improvements in major commute corridors lessen need for major capacity improvements in these locations, allowing for freight improvements in other corridors.</li> </ul>
2. Increase Safety	<ul style="list-style-type: none"> <li>• The RTP policies call out safety as a primary focus for improvements to the system.</li> <li>• Safety is identified as one of three implementation priorities for all modal systems (along with preservation of the system and implementation of the region’s 2040-growth management strategy).</li> </ul>	<ul style="list-style-type: none"> <li>• All projects ranked according to specific safety criteria.</li> <li>• Road modernization and reconstruction projects are scored according to relative accident incidence.</li> <li>• All projects must be consistent with regional street design guidelines that provide safe designs for all modes of travel.</li> </ul>	<ul style="list-style-type: none"> <li>• Station area planning for proposed HCT improvements is primarily driven by pedestrian access and safety considerations.</li> </ul>

**Table 1: TEA-21 Planning Factors**

<b>Factor</b>	<b>System Planning (RTP)</b>	<b>Funding Strategy (MTIP)</b>	<b>High Capacity Transit (HCT)</b>
3. Increase Accessibility	<ul style="list-style-type: none"> <li>• The RTP policies are organized on the principle of providing accessibility to centers and employment areas with a balanced, multi-modal transportation system.</li> <li>• The policies also identify the need for freight mobility in key freight corridors and to provide freight access to industrial areas and intermodal facilities.</li> </ul>	<ul style="list-style-type: none"> <li>• Measurable increases in accessibility to priority land use elements of the 2040-growth concept is a criterion for all projects.</li> <li>• The MTIP program places a heavy emphasis on non-auto modes in an effort to improve multi-modal accessibility in the region.</li> </ul>	<ul style="list-style-type: none"> <li>• The planned HCT improvements in the region will provide increased accessibility to the most congested corridors and centers.</li> <li>• Planned HCT improvements provide mobility options to persons traditionally underserved by the transportation system.</li> </ul>
4. Protect Environment and Quality of Life	<ul style="list-style-type: none"> <li>• The RTP is constructed as a transportation strategy for implementing the region's 2040-growth concept. The growth concept is a long-term vision for retaining the region's livability through managed growth.</li> <li>• The RTP system has been "sized" to minimize the impact on the built and natural environment.</li> <li>• The region has developed an environmental street design guidebook to facilitate environmentally sound transportation improvements in sensitive areas, and to coordinate transportation project development with regional strategies to protect endangered species.</li> <li>• The RTP conforms to the Clean Air Act.</li> </ul>	<ul style="list-style-type: none"> <li>• The MTIP conforms to the Clean Air Act.</li> <li>• The MTIP focuses on allocating funds for clean air (CMAQ), livability (Transportation Enhancement) and multi- and alternative modes (STIP).</li> <li>• Bridge projects in lieu of culverts have been funded through the MTIP to enhance endangered salmon and steelhead passage.</li> <li>• "Green Street" demonstration projects funded to employ new practices for mitigating the effects of storm water runoff.</li> </ul>	<ul style="list-style-type: none"> <li>• Light rail improvements provide emission-free transportation alternatives to the automobile in some of the region's most congested corridors and centers.</li> <li>• HCT transportation alternatives enhance quality of life for residents by providing an alternative to auto travel in congested corridors and centers.</li> </ul>

**Table 1: TEA-21 Planning Factors**

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
4. Protect Environment and Quality of Life (cont)	<ul style="list-style-type: none"> <li>• Many new transit, bicycle, pedestrian and TDM projects have been added to the plan in recent updates to provide a more balanced multi-modal system that maintains livability.</li> <li>• RTP transit, bicycle, pedestrian and TDM projects planned for the next 20 years will complement the compact urban form envisioned in the 2040 growth concept by promoting an energy-efficient transportation system.</li> <li>• Metro coordinates its system level planning with resource agencies to identify and resolve key issues.</li> </ul>		
5. System Integration/ Connectivity	<ul style="list-style-type: none"> <li>• The RTP includes a functional classification system for all modes that establishes an integrated modal hierarchy.</li> <li>• The RTP policies and Functional Plan* include a street design element that integrates transportation modes in relation to land use for regional facilities.</li> <li>• The RTP policies and Functional Plan include connectivity provisions that will increase local and major street connectivity.</li> <li>• The RTP freight policies and projects address the intermodal connectivity needs at major freight terminals in the region.</li> <li>• The intermodal management system identifies key intermodal</li> </ul>	<ul style="list-style-type: none"> <li>• Projects funded through the MTIP must be consistent with regional street design guidelines.</li> <li>• Freight improvements are evaluated according to potential conflicts with other modes.</li> </ul>	<ul style="list-style-type: none"> <li>• Planned HCT improvements are closely integrated with other modes, including pedestrian and bicycle access plans for station areas and park-and-ride and passenger drop-off facilities at major stations.</li> </ul>

**Table 1: TEA-21 Planning Factors**

<b>Factor</b>	<b>System Planning (RTP)</b>	<b>Funding Strategy (MTIP)</b>	<b>High Capacity Transit (HCT)</b>
	links in the region.		
6. Efficient Management & Operations	<ul style="list-style-type: none"> <li>• The RTP policy chapter includes specific system management policies aimed at promoting efficient system management and operation.</li> <li>• Proposed RTP projects include many system management improvements along regional corridors.</li> <li>• The RTP financial analysis includes a comprehensive summary of current and anticipated operations and maintenance costs.</li> </ul>	<ul style="list-style-type: none"> <li>• Projects are scored according to relative cost effectiveness (measured as a factor of total project cost compared to measurable project benefits).</li> <li>• TDM projects are solicited in a special category to promote improvements or programs that reduce SOV pressure on congested corridors.</li> <li>• TSM/ITS projects are funded through the MTIP.</li> </ul>	<ul style="list-style-type: none"> <li>• Proposed HCT improvements include redesigned feeder bus systems that take advantage of new HCT capacity and reduce the number of redundant transit lines.</li> </ul>
7. System Preservation	<ul style="list-style-type: none"> <li>• Proposed RTP projects include major roadway preservation projects.</li> <li>• The RTP financial analysis includes a comprehensive summary of current and anticipated operations and maintenance costs.</li> </ul>	<ul style="list-style-type: none"> <li>• Reconstruction projects that provide long-term maintenance are identified as a funding priority.</li> </ul>	<ul style="list-style-type: none"> <li>• The RTP financial plan includes the 20-year costs of HCT maintenance and operation for planned HCT systems.</li> </ul>
8. Increase Security of Transportation System	<ul style="list-style-type: none"> <li>• Will address in 2008 RTP update</li> </ul>		

\* *Functional Plan = Urban Growth Management Functional Plan, an adopted regulation that requires local governments in Metro's jurisdiction to complete certain planning tasks.*

## **7. Public Involvement**

Metro maintains a proactive public involvement process that provides complete information, timely public notice, and full public access to key decisions. Metro supports early and continuing involvement of the public in developing its policies, plans and programs. Public Involvement Plans are designed to both support the technical scope and objectives of Metro studies and programs while simultaneously providing for innovative, effective and inclusive opportunities for engagement. Every effort is made to employ broad and diverse methods, tools and activities to reach potentially impacted communities and other neighborhoods and to encourage the participation of low-income and minority citizens and organizations.

All Metro UPWP studies and projects that have a public involvement component require a Public Involvement Plan (PIP) that meets or exceeds adopted public involvement procedures. Included in individualized PIPs are strategies and methods to best involve a diverse citizenry. Some of these may include special public opinion survey mechanisms, translation of materials for non-English speaking members of the community, citizen working committees or advisory committee structures, special task forces, web instruments and a broad array of public information materials. Hearings, workshops, open houses, charrettes and other activities are also held as needed.

The MTIP relies on early program kick-off notification, inviting input on the development of criteria, project solicitation, project ranking and the recommended program. Workshops, informal and formal opportunities for input as well as a 45-day+ comment period are repetitive aspects of the MTIP process. By assessing census information, block analysis is conducted on areas surrounding each project being considered for funding to ensure that environmental justice principles are met and to identify where additional outreach might be beneficial.

TPAC includes six citizen positions that are geographically and interest area diverse and filled through an open, advertised application and interview process. TPAC makes recommendations to JPACT and the Metro Council. Metro Council adopted Metro's Transportation Public Involvement Policy on June 10, 2004 by Resolution Number 04-3450.

Title VI – In June 2005, Metro completed and submitted its Title VI Plan to the FTA and FHWA. This plan is now being implemented through updates to Metro's RTP and MTIP, and through corridor planning activities in the region.

Environmental Justice – The intent of environmental justice (EJ) practices is to ensure that the needs of minority and disadvantaged populations are considered and that the relative benefits/impacts of individual projects on local communities are thoroughly assessed and vetted. Metro continues to expand and explore environmental justice efforts that provide early access to and consideration of planning and project development activities. Metro's EJ program is organized to communicate and seek input on project proposals and to carry those efforts into the analysis, community review and decision-making processes. In addition, Metro recently established an agency diversity action team. The team is responsible for identifying opportunities to collaboratively develop and implement sustainable diversity initiatives across and throughout the agency. Metro's diversity efforts are most evident in three areas: Contracts and Purchasing, Community Outreach, and Recruitment and Retention.

## **8. Disadvantaged Business Enterprise**

A revised Disadvantaged Business Enterprise (DBE) program was adopted by the Metro Council in June 1997 (Ordinance No. 97-692A); 49CFR 26 allows recipients to use the DBE goal of another recipient in the same market. Metro's Executive Officer approved an overall DBE annual goal in accordance with ODOT. This goal was established utilizing ODOT's methodology to determine DBE availability of "ready, willing and able" firms for federally funded professional and construction projects. The current goal is 13.36 percent.

Metro's DBE program was reviewed and submitted to FTA in August 1999 and is awaiting formal approval. Metro currently piggybacks on ODOT's DBE program.

## **9. Americans with Disabilities Act**

The Americans with Disabilities Act (ADA) Joint Complementary Paratransit Plan was adopted by the TriMet Board in December 1991 and was certified as compatible with the RTP by Metro Council in January 1992. The plan was phased in over five years and TriMet has been in compliance since January 1997. Metro approved the 1997 plan as in conformance with the RTP. FTA audited and approved the plan in summer 1999.

## **10. Lobbying**

Annually Metro certifies compliance with 49 CFR 20 through the FTA TEAM system.

**Table 2: Metro's Response to New SAFTEEA-LU Provisions**

<b>SAFTETEA-LU Provision for all MPO's</b>	<b>Metro Response</b>
<i>Consult/Coordinate with planning officials responsible for planned growth, economic development, environmental protection, airport operations, and freight movement</i>	<p>Metro's transportation planning and land-use planning functions are within the same department and coordinate internally.</p> <ul style="list-style-type: none"> <li>• Metro consults MPAC on land-use activities.</li> <li>• Metro is a member of Regional Partners for Economic Development and endorsed the Consolidated Economic Development Strategy (CEDS).</li> <li>• Metro has implemented a fish and wildlife habit protection program through regulations, property acquisition, education and incentives.</li> <li>• Metro has a standing committee to coordinate with public agencies with environmental protection responsibility.</li> <li>• The Port of Portland manages the airport and is represented on both TPAC and JPACT.</li> <li>• Metro is developing a freight master plan and is forming a freight advisory committee</li> </ul>
<i>Promote consistency between transportation improvements and State and local planned growth and economic development</i>	Metro transportation and land-use planning is subject to approval by the Oregon Department of Land Conservation and Development.
<i>Give safety and security due emphasis as separate planning factors</i>	Metro will address security and safety as individual factors in the current update to the RTP schedule for completion in 2008. Additionally, Metro staffs the Regional Emergency Management Group (REMG). The group brings together local emergency managers to plan responses to security concerns and natural hazards.
<i>Discuss in the transportation plan potential environmental mitigation activities to be developed in consultation with Federal, State, and tribal wildlife, land management, and regulatory agencies</i>	Will be incorporated into the 2008 update to RTP.
<i>Consult with State and local agencies responsible for land use management, natural resources, environmental protection, conservation, and historic preservation in development of the transportation plan</i>	Will be incorporated into the 2008 update to RTP.



**Table 2: Metro's Response to New SAFETEA-LU Provisions**

<b>SAFETEA-LU Provision for all MPO's</b>	<b>Metro Response</b>
<i>Include operation and management strategies to address congestion, safety, and mobility in the transportation plan</i>	Metro has established a Regional Transportation Options Committee as a subcommittee of TPAC to address demand management. The TransPort Committee is a subcommittee of TPAC to address ITS and operations.
<i>Develop a participation plan in consultation with interested parties that provides reasonable opportunities for all parties to comment on transportation plan</i>	Metro has public involvement policy for regional transportation planning and funding activities to support and encourage board-based public participation in development and review of Metro's transportation plans. The Transportation Planning Public Involvement Policy was last updated in June 2004.
<i>Employ visualization techniques to describe plan and make information available (including transportation plans) to the public in electronically accessible format such as on the Web.</i>	On a regular basis, Metro employs visualization techniques. Examples include: <ul style="list-style-type: none"> <li>• RTP document is available on Metro's website</li> <li>• RTP flyers</li> <li>• MTIP document is available on Metro's website</li> <li>• GIS maps to illustrate planning activities</li> <li>• Video simulation of light rail on the Portland Mall and 1-205 Corridor</li> </ul>
<i>Update the plan at least every 4 years in non-attainment and maintenance areas, 5 years in attainment areas</i>	Initial RTP update completed by will be completed by March 2008.
<i>Update the TIP at least every 4 years, include 4 years of projects and strategies in the TIP</i>	Initiated MTIP and STIP update for August 2007
<i>SAFETEA-LU includes a new requirement for a "locally developed, coordinated public transit/human services transportation plan" to be eligible for formula funding under three FTA grant programs (5310,5316,5317) It is not clear yet who will be responsible for these plans.</i>	Metro participates on the Special Transportation Fund Advisory Committee and Regional Transportation Coordinating Council of the Elderly and Disabled Transportation Plan. A coordinated human services and public transportation plan is under development by those committees and will be integrated into the 2008 RTP update.

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 06-3667 FOR THE PURPOSE OF CERTIFYING THAT THE PORTLAND METROPOLITAN AREA IS IN COMPLIANCE WITH FEDERAL TRANSPORTATION PLANNING REQUIREMENTS

Date: March 23, 2006

Presented by: Andrew C. Cotugno

## BACKGROUND

Federal transportation agencies (Federal Transit Administration [FTA] and Federal Highway Administration [FHWA]) require a self-certification that our planning process is in compliance with certain federal requirements as a prerequisite to receiving federal funds. The self-certification documents that we have met those requirements and is considered yearly at the time of Unified Planning Work Program (UPWP) approval. Required self-certification areas include:

- Metropolitan Planning Organization (MPO) designation
- Geographic scope
- Agreements
- Responsibilities, cooperation and coordination
- Metropolitan Transportation Planning products
- Planning factors
- Public Involvement
- Title VI
- Disadvantaged Business Enterprise (DBE)
- Americans with Disabilities Act (ADA)

Each of these areas is discussed in Exhibit A to Resolution No. 06-3667.

## ANALYSIS/INFORMATION

1. **Know Opposition-** No known opposition
2. **Legal Antecedents-** This resolution certifies that the Portland metropolitan area is in compliance with federal transportation planning requirements as defined in Title 23 of Code of Federal Regulations, Part 450 and Title 49, of the Code of Federal Regulations, Part 613.
3. **Anticipated Effects-** Approval will mean that grants can be submitted and contracts executed so work can commence on July 1, 2006, in accordance established Metro priorities.
4. **Budget Impacts-** Approval of this resolution is a companion to the UPWP. It is a prerequisite to receipt of federal planning funds and is, therefore, critical to the Metro budget. The UPWP matches projects and studies reflected in the proposed Metro budget submitted by the Metro Chief Operating Officer to the Metro Council. The UPWP is subject to revision in the final adopted Metro budget.

## RECOMMENDED ACTION

Approve Resolution No. 06-3667; certifying that the Portland metropolitan area is in compliance with federal transportation planning requirements.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE FY )  
2007 UNIFIED PLANNING WORK )  
PROGRAM )

RESOLUTION NO. 06-3668

Introduced by Michael Jordan, COO in  
concurrence with Council President Bragdon

WHEREAS, The Unified Planning Work Program (UPWP) as shown in Exhibit A, describes all federally-funded transportation planning activities for the Portland-Vancouver metropolitan area to be conducted in FY 2007; and

WHEREAS, The FY 2007 UPWP indicates federal funding sources for transportation planning activities carried out by Metro, Southwest Washington Regional Transportation Council, Oregon Department of Transportation, TriMet, City of Wilsonville SMART, the Port of Portland and the local jurisdictions; and

WHEREAS, Approval of the FY 2007 UPWP is required to receive federal transportation planning funds; and

WHEREAS, The FY 2007 UPWP is consistent with the proposed Metro budget submitted to the Metro Council; now, therefore,

BE IT RESOLVED, that the Metro Council hereby declares:

1. That the FY 2007 UPWP is adopted.
2. That the FY 2007 UPWP is consistent with the continuing, cooperative and comprehensive planning process and is given positive Intergovernmental Project Review action.
3. That Metro's Chief Operating Officer is authorized to apply for, accept and execute grants and agreements specified in the UPWP.
4. That staff shall update the UPWP budget figures, as necessary, to reflect the final Metro budget.

ADOPTED by the Metro Council this \_\_\_\_\_ day of April 2006.

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David Bragdon, Council President

Approved as to form:

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Daniel B. Cooper, Metro Attorney



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# **FY 2006-07**

# **Unified Planning Work Program**

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## **Transportation Planning in the Portland/Vancouver Metropolitan Area**

Metro

City of Portland

City of West Linn

City of Wilsonville (SMART)

Clackamas County

Multnomah County

Washington County

Port of Portland

TriMet

Oregon Department of Transportation

Southwest Washington Regional Transportation Council

Draft

March 23, 2006



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**FY 2006-07**

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## **Unified Planning Work Program**

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Transportation Planning in the  
Portland/Vancouver Metropolitan Area

Metro  
City of Portland  
City of West Linn  
City of Wilsonville (SMART)  
Clackamas County  
Multnomah County  
Washington County  
Port of Portland  
TriMet  
Oregon Department of Transportation  
Southwest Washington Regional Transportation Council





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## **2006-2007 Unified Planning Work Program Funding Summary**

### **Projects of Regional Significance Funding Summary**

**FY 2006-07  
PORTLAND AND METROPOLITAN AREA  
UNIFIED PLANNING WORK PROGRAM  
OVERVIEW**

**INTRODUCTION**

Metro is the metropolitan planning organization (MPO) designated for the Oregon portion of the Portland/Vancouver urbanized area, covering 25 cities and 3 counties. It is Metro's responsibility to meet the requirements of Safe, Accountable, Flexible, and Efficient Transportation Equity Act - A Legacy for Users (SAFETEA-LU), the Land Conservation and Development Commission (LCDC) Transportation Planning Rule (TPR-Rule 12) and the Metro Charter for this MPO area. In combination, these requirements call for development of a multi-modal transportation system plan, integrated with land use plans for the region, with an emphasis on implementation of a multi-modal transportation system, which reduces reliance on the single-occupant automobile and is consistent with financial constraints.

The Unified Planning Work Program (UPWP) primarily includes the transportation planning activities of Metro and other area governments with reference to transportation planning activities, for fiscal year July 1, 2006 through June 30, 2007. Unless otherwise noted, all program objectives are on-going tasks.

**DECISION-MAKING PROCESS**

Metro is governed by a directly elected council in accordance with a voter-approved charter. The Metro Council is comprised of six districts and a Council President elected district-wide. The Chief Operating Officer, appointed by the Metro Council, leads day-to-day operations.

Metro uses a decision-making structure that provides state, regional and local governments the opportunity to participate in the transportation and land use decisions of the organization. The two key committees are the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Policy Advisory Committee (MPAC). These committees are comprised of elected and appointed officials and receive technical advice from the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC).

**JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION**

JPACT is chaired by a Metro Councilor and include two additional Metro Councilors; nine locally-elected officials (including two from Clark County, Washington) and appointed officials from Oregon Department of Transportation (ODOT), TriMet, Port of Portland and Department of Environmental Quality (DEQ). All transportation-related actions (including federal MPO actions) are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration. Final approval of each item, therefore, requires the concurrence of both bodies.

**BI-STATE**

The Bi-State Coordination Committee was chartered through resolutions approved by Metro, Multnomah County, the cities of Portland and Gresham, TriMet, ODOT, the Port of Portland, the Southwest Washington Regional Transportation Council (RTC), Clark County, C-Tran, Washington State Department of Transportation (WSDOT) and the Port of Vancouver. The Committee is charged with reviewing all issues of bi-state significance for transportation and land use. A 2003 Memorandum of Understanding (MOU) states that JPACT and the RTC Board "shall

take no action on an issue of bi-state significance without first referring the issue to the Bi-State Coordination Committee for their consideration and recommendation.”

### **METRO POLICY ADVISORY COMMITTEE**

MPAC was established by Metro Charter to provide a vehicle for local government involvement in Metro’s growth management planning activities. It includes eleven locally-elected officials, three appointed officials representing special districts, TriMet, a representative of school districts, three citizens, two Metro Councilors (with non-voting status), two officials from Clark County, Washington and an appointed official from the State of Oregon (with non-voting status). Under Metro Charter, this committee has responsibility for recommending to the Metro Council adoption of, or amendment to, any element of the Charter-required Regional Framework Plan.

The Regional Framework Plan was adopted in December 1997 and addresses the following topics:

- Transportation
- Land Use (including the Metro Urban Growth Boundary (UGB))
- Open Space and Parks
- Water Supply and Watershed Management
- Natural Hazards
- Coordination with Clark County, Washington
- Management and Implementation

In accordance with this requirement, the transportation plan developed to meet SAFETEA-LU, the LCDC Transportation Planning Rule and Charter requirements was developed with input from both MPAC and JPACT. This ensures proper integration of transportation with land use and environmental concerns.

### **TRANSPORTATION POLICY ALTERNATIVES COMMITTEE**

TPAC is comprised of technical staff from the same jurisdictions as JPACT plus six citizen members, and makes recommendations to JPACT.

### **METRO TECHNICAL ADVISORY COMMITTEE**

MTAC is comprised of technical staff from the same jurisdictions as MPAC and citizens members from various advocacy groups and makes recommendations to MPAC on land use related matters.

### **PLANNING PRIORITIES FACING THE PORTLAND REGION**

SAFETEA-LU, the Clean Air Act Amendments of 1990 (CAAA), the LCDC Transportation Planning Rule, the Oregon Transportation Plan, the Metro Charter, the Regional 2040 Growth Concept and Regional Framework Plan, in combination, have created a policy direction for the region to update land use and transportation plans on an integrated basis and to define, adopt and implement a multi-modal transportation system. Major land use planning efforts underway include:

- A re-evaluation of the 2040 Growth Concept
- Implementation of changes to local comprehensive plans to comply with the Regional Framework Plan
- Natural resource and habitat protection planning to implement the State’s Goal 5
- Planning for UGB expansion areas, especially in Damascus and industrial areas

These federal, state and regional policy directives also emphasize development of a multi-modal transportation system. Major efforts in this area include:

- Implementation of the Regional Transportation Planning (RTP)
- Development of a financing strategy for the RTP
- Update to the State Transportation Improvement Plan (STIP) and Metropolitan Transportation Improvement Program (MTIP) for the period 2006-2009
- Implementation of projects selected through the STIP/MTIP updates
- Multi-modal refinement studies in the corridors of Highway 217, South Transit Corridor, the I-5/99W Corridor and Sunrise Corridor
- Land use and transportation concept plan for the Damascus area

Finally, these policy directives point toward efforts to reduce vehicle travel and vehicle emissions, in particular:

- The state goal to reduce vehicle miles traveled (VMT) per capita
- Targeting transportation investments to leverage the mixed-use, land use areas identified within the Regional 2040 Growth Concept
- Adopted maintenance plans for ozone and carbon monoxide with establishment of emissions budgets to ensure future air-quality violations do not develop
- Adoption of targets for non-single occupant vehicle travel in RTP and local plans
- Publication of the RTP update to implement the Regional 2040 Growth Concept
- A new five-year strategic plan for Regional Travel Options
- Chartering of a new TPAC subcommittee, TRANSPORT, to oversee multi-modal ITS operations



JOINT RESOLUTION OF THE  
METRO COUNCIL  
AND  
OREGON DEPARTMENT OF TRANSPORTATION

FOR THE PURPOSE OF CERTIFYING THAT	)	RESOLUTION NO. 06-3667
THE PORTLAND METROPOLITAN AREA IS IN	)	
COMPLIANCE WITH FEDERAL	)	Introduced by Councilor Rex Burkholder
TRANSPORTATION PLANNING	)	
REQUIREMENTS	)	

WHEREAS, Substantial federal funding from the Federal Transit Administration and Federal Highway Administration is available to the Portland metropolitan area; and

WHEREAS, The Federal Transit Administration and Federal Highway Administration require that the planning process for the use of these funds complies with certain requirements as a prerequisite for receipt of such funds; and

WHEREAS, Satisfaction of the various requirements is documented in Exhibit A; now, therefore,

BE IT RESOLVED, that the transportation planning process for the Portland metropolitan area (Oregon portion) is in compliance with federal requirements as defined in Title 23 Code of Federal Regulations, Part 450, and Title 49 Code of Federal Regulations, Part 613.

ADOPTED by the Metro Council this \_\_\_\_\_ day of April 2006.

\_\_\_\_\_  
David Bragdon, Council President

Approved as to form:

\_\_\_\_\_  
Daniel B. Cooper, Metro Attorney

APPROVED by the Oregon Department of Transportation this \_\_\_\_\_ day of \_\_\_\_\_  
2006.

\_\_\_\_\_  
Craig Greenleaf  
Transportation Development Administrator





### **PROGRAM**

The Regional Transportation Plan (RTP) serves as a policy and investment blueprint for long-range improvements to the region's transportation system. The RTP is updated regularly to ensure compliance with state and federal regulations, and to reflect evolving travel and economic trends and any subsequent changes in the region's transportation needs. The 2004 RTP established necessary updates to the projects and policies to ensure continued compliance with federal regulations. Local transportation plans in the region must conform to the RTP under provisions of the Oregon Transportation Planning Rule (TPR). Metro provides ongoing technical and policy support for local transportation planning activities. The RTP Program also includes corridor studies conducted in cooperation with the state and local jurisdictions and the Transit Planning program. Transit supports Metro's effort to identify and promote multiple transportation choices that easily access all areas of the region.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The RTP responds to both state and federal mandates, but also carries out a broad range of regional planning objectives for implementing the 2040 Growth Concept. The following are mandates for the upcoming fiscal year:

RTP Update: an update began in Fall 2005, with completion of federal requirements anticipated in late 2007, prior to the March 5, 2008 lapse date for the current RTP. Amendments identified in local and regional corridor planning efforts will be incorporated as well as a new horizon year of 2035 for project planning and systems analysis. It also will re-establish conformity with air quality regulations, and all other planning factors called out in federal regulations and in corrective actions identified in the 2004 federal triennial review that have not already been addressed through separate actions. The update will include the Safe, Accountable, Flexible, and Efficient Transportation Equity Act - A Legacy for Users (SAFETEA-LU) planning provisions. This update will include development of a new financially constrained transportation system that will become the basis for upcoming funding allocations. The update will also implement "New Look" policies resulting from the upcoming re-evaluation of the 2040 Growth Concept.

Local Transportation System Plan (TSP) Support: Metro will continue to work closely with local jurisdictions during the next fiscal year to ensure regional policies and projects are enacted through local plans. This work element will include the following activities:

- Professional support for technical analysis and modeling required as part of local plan updates;
- Professional support at the local level to assist in development of local policies, programs and regulations that implement the RTP;
- Written and spoken testimony in support of proposed amendments to local plans;
- Provide public information and formal presentations to local government committees, commissions and elected bodies as well as interested citizen, civic and business groups on the RTP.

Management Systems: the federally mandated Congestion Management Process (CMP) was first incorporated into the RTP, as part of the 2000 update, and the CMP will be expanded as part of the upcoming update to incorporate new recommendations from the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA). The updated RTP will implement a CMP Roadmap that responds to federal corrective actions identified during the 2004 triennial review. Key activities for FY 2006-07 will be to create processes that incorporate CMP information into planning activities, initiate system monitoring based upon management-system performance measures, complete local project review for consistency with the CMP and ongoing data collection, and input to keep the CMP current. As part of the CMP work program, Metro will also establish a steering group of key CMP partners, including Portland State University, Oregon Department of Transportation (ODOT), TriMet and other major transportation providers.

Regional Transportation and Information: A transportation "annual report" will be prepared detailing key RTP policies and strategies. The report will list information and data commonly requested by the public and media, including supporting text and graphics. Data collected, as part of the CMP will also be

incorporated into this report. The report will include a user-friendly, public-release version, which will be electronically accessible on the web as well as a Technical Appendix. This objective will be completed in coordination with the 2040 Performance Indicators project.

Public Involvement: Metro will continue to provide an ongoing presence with local citizen, civic and business groups and other stakeholders interested in the RTP as well as public agencies involved in local plan updates. To ensure early access and engagement into the current RTP update, a kick-off full-day Scoping Workshop involving representatives from throughout the region is being planned. The workshop will help to communally inform stakeholders about the constrained resources available to address the broad spectrum of transportation needs and will begin to identify criteria and a process for “budgeting for outcomes” as related to the prioritization of projects in the RTP update. Among other best practices that will be employed, on-going public involvement efforts will also include an integrated electronic web site, the use of survey instruments and other on-line forums to ensure easy access to transportation and other planning issues.

Transit Planning: Metro will assist public, non-profit organizations and local jurisdictions that provide public transit service in development of their short- medium- and long-range transit plans including:

- Assisting transit operators in meeting service requirements mandated by the Americans with Disabilities Act (ADA), Title VI the Civil Rights Act and other federal requirements;
- Providing guidance to transit operators and local jurisdictions regarding potential federal, state and local funding sources;
- Assisting transit providers in implementation of the Tri-County Elderly and Disabled (E&D) Transportation Plan and related elements of the RTP;
- Coordinating right-of-way management issues with the other agency and local jurisdiction members of the Willamette Shoreline Consortium.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- Metro Committee for Citizen Involvement (MCCI)
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Regional Transportation Council (RTC) of metropolitan Clark County, Washington
- Adjacent planning organizations, including Mid-Willamette Area Commission on Transportation (MWACT) and Northwest Area Commission on Transportation (NWACTION)
- Area Transit providers
- FHWA
- FTA
- ODOT
- TriMet
- Willamette Shoreline Consortium
- Metro Freight Advisory Committee
- Organizations involved with minority and non-English speaking residents

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Expand the web presence of the RTP to include a public forum and implementation tools;
- Coordinate and provide technical assistance in local transportation system plan development and adoption;
- Continue to coordinate regional corridor refinement plans identified within the RTP with ODOT's Corridor Studies;
- Maintain project and financial plan database consistent with changes in population and employment forecasts, travel-demand projections for people and goods, cost (including Operations and

## REGIONAL TRANSPORTATION PLAN

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- Maintenance) and revenue estimates and amendments to local comprehensive plans. Produce a corresponding "annual report" highlighting key information and trends;
- Participate with local jurisdictions involved in implementation and development of local transportation system plans;
  - Initiate a CMP steering group to oversee CMP program development, and incorporation of CMP data into the RTP process;
  - Approval of a consultant team and work program for the 2008 RTP;
  - Organize and facilitate meetings of the Willamette Shoreline Consortium as needed;
  - Coordination with TriMet, Lake Oswego, and Portland as necessary to facilitate operation of the Willamette Shore Trolley and manage and maintain the right-of-way;
  - Participation with the Special Transportation Fund Advisory Committee and Regional Transportation Coordinating Council of the Elderly and Disabled Transportation Plan as a SAFETEA-LU compliant, coordinated human services and public transportation plan integrated into the 2007 RTP update;
  - Continue to work with the Special Transportation Fund Advisory Committee to advise TriMet as the governing body on the use of State of Oregon Special Transportation Formula and Discretionary Funds;
  - Prepare detailed work programs, budgets and schedules for various transit planning related activities;
  - Manage transit related studies in accordance with defined work programs, budgets and schedules;
  - Assist TriMet, Ride Connection and other paratransit providers in developing and implementing productivity improvements;
  - Serve as liaison with FTA;
  - Manage federal grant funding and execute intergovernmental agreements as needed;
  - Consultation on an air quality conformity determination of any amendments to the existing plan and the 2007 RTP update;
  - Will discuss environmental mitigation activities in the RTP update as required by SAFETEA-LU;
  - Will Consult with land use management, natural resources, environmental protection, conservation, and historic preservation as required by SAFETEA-LU.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

During the current fiscal year the 2004 RTP document was published for distribution to interested members of the public and regional agency partners. An RTP Technical Appendix was also completed for regional distribution. In late 2005, staff worked with ODOT to develop an RFP for the public outreach component of the next RTP update, and began consultant solicitation and selection in December and January of 2005-06.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 439,824	PL	\$ 555,940
Interfund Transfers	\$ 148,026	STP/ODOT Match	\$ 91,085
Materials & Services	\$ 310,500	ODOT Support	\$ 77,054
<i>Printing and Postage- \$41,000</i>		Section 5303	\$ 86,991
<i>Consultant Contract- \$236,500</i>		TriMet	\$ 39,114
<i>Other Program Costs- \$33,000</i>		Metro	\$ 53,816
Computer	\$ 5,650		
<b>TOTAL</b>	<b>\$ 904,000</b>	<b>TOTAL</b>	<b>\$ 904,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	4.6
<b>TOTAL</b>	<b>4.6</b>

## **GREEN STREETS PROGRAM**

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### **PROGRAM**

The Green Streets program began in FY 2000-01 to address the growing conflict between good transportation design, planned urbanization in developing areas and the need to protect streams and wildlife corridors from urban impacts. Key elements of the program include:

- A regional database of culverts on the regional transportation system with rankings according to their relative impacts on fish passage;
- Stream crossing guidelines for new streets that reflect tradeoffs between stream protection and an efficient, connected street system;
- The Green Streets Handbook, which establishes "best practice" design solutions for managing storm runoff from streets.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Green Streets was initiated in response to the federal Endangered Species Act listing of salmon and steelhead in the late 1990s. The listing affects the Metro region because of spawning habitat that exists within the urban area, and because the region straddles the Columbia and Willamette River migratory routes that encompass most of the Pacific Northwest. The response from Metro is to:

- Continue to expand and update the regional database of culverts, stream and wildlife resources;
- Continue to update ranking information for culverts on relative fish blockage that can be used to allocate regional funding for retrofit projects;
- Continue to Green Streets design principles and projects through Metro's Metropolitan Transportation Improvement Program (MTIP), including demonstration projects for street retrofits and culvert replacements on the regional transportation system;
- Sponsor future Green Streets workshops that spotlight successful projects in the region;
- Promote Green Streets principles among practicing professionals and interested citizens involved in local project development;
- Promote stream crossing guidelines in local transportation plans that address tradeoffs between stream protection and an efficient, multi-modal transportation system;
- Periodically update the *Green Streets* handbook to reflect recent trends and new science on best management practices for managing urban storm water runoff on public streets;
- Continue public outreach and education to promote Green Streets design principles and projects.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Environmental Community

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Evaluate SAFETEA-LU implications for Green Streets program and incorporate needed program refinements into the 2035 RTP and next printing of the Green Streets handbook;
- Continue to distribute the *Green Streets* handbook to local officials and interested citizens;
- Implement Green Street design principles through the MTIP process;
- Identify and fund needed culvert retrofits on the regional system through the MTIP process;
- Conduct outreach and training activities to promote the Green Streets program;
- Develop an expanded online presence for the Green Streets program on Metro's web site;
- Work with TPAC and Water Resources Policy Advisory Committee (WRPAC) to develop a long-term action plan for culvert retrofits and forward final recommendations as amendments to the 2000 Regional Transportation Plan (RTP) to JPACT, MPAC and the Metro Council.

## **GREEN STREETS PROGRAM**

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### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

The Green Streets project builds upon the 1996-97 Regional Street Design project and complements the RTP program. Like the "Creating Livable Streets" handbook from the street design project, the Green Streets program helps guide future transportation improvements in the region to support the 2040 Growth Concept, sustainable environmental practices for stormwater management and the Oregon Salmon Recovery Plan.

During FY 2005-06 Metro added engineering staff resources to assist in better implementing the Green Streets design principles and project recommendations through the MTIP program and local programs. The expanded program continues to include distribution of the *Green Streets* handbook, education and outreach to promote the program and local design support for project planning that incorporates the design principles.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 23,050	PL	\$ 17,828
Interfund Transfers	\$ 6,950	STP/ODOT Match	\$ 15,408
Materials & Services	\$ 5,000	Metro	\$ 1,764
<b>TOTAL</b>	<b>\$ 35,000</b>	<b>TOTAL</b>	<b>\$ 35,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	0.2
<b>TOTAL</b>	<b>0.2</b>

## **LIVABLE STREETS PROGRAM**

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### **PROGRAM**

The program implements Regional Transportation Plan (RTP) design policies for major streets and includes ongoing involvement in local transportation project conception, funding and design.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Metro has traditionally participated in local project-development activities for regionally funded transportation projects. During FY 2006-07, the Livable Streets Program will more closely focus those activities on projects that directly relate to implementation of Region 2040 land use components, including "boulevard" projects funded through the Metropolitan Transportation Improvement Program (MTIP). The program also involves ensuring that local system plan and design codes are updated to support regional design objectives.

In early 2006, Metro added engineering staff to enhance technical outreach and advocacy for the program. The enhanced Livable Streets Program will include more extensive public outreach, special workshops and tours, awards program for project recognition, technical support for local design efforts and involvement in local project conception with the goal of improving the quality and scope of projects submitted for MTIP funding.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Environmental Community

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Implement regional street-design policy by participating in local project development and design activities, including technical advisory committees, design workshops and charrettes as well as formal comment on proposed projects;
- Sponsor a boulevard design workshop that spotlights successful projects in the region, and promotes livable streets principles among practicing professionals and interested citizens involved in local project development;
- Ensure that local plans and design codes adequately accommodate regional design objectives through the local Transportation System Plan (TSP) review process;
- Expand Metro's web-based resources for livable streets implementation;
- Implement the proposed Livable Streets enhancement activities, should supplemental funding be allocated;
- Provide leadership in the professional engineering community on innovative designs and the transportation/land use connection.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

In FY 2003-04, the second edition of the 1997 "Creating Livable Streets" handbook was printed, providing updated design guidelines for implementation of the Livable Streets Program. In 2002, the complementary "Green Streets" and "Trees for Green Streets" were developed, and subsequently published in 2003. These tools continued to be the focus of outreach and advocacy efforts in FY 2005-06. Throughout the life of the program, staff has focused on implementation of regional street design policies and objectives at the local project-development level.

## LIVABLE STREETS PROGRAM

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### **BUDGET SUMMARY**

**Requirements:**

Personal Services	\$	50,646
Interfund Transfers	\$	16,354
Materials & Services	\$	13,000

**Resources:**

PL	\$	5662
STP/ODOT Match	\$	41,951
ODOT Support	\$	22,082
Section 5303	\$	5,000
Metro	\$	5,305

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<b>TOTAL</b>	<b>\$</b>	<b>80,000</b>	<b>TOTAL</b>	<b>\$</b>	<b>80,000</b>
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**Full-Time Equivalent Staffing**

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Regular Full-Time FTE	0.47
<b>TOTAL</b>	<b>0.47</b>

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## **2040 PERFORMANCE INDICATORS**

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### **PROGRAM**

The Performance Measures program completes the second half of Metro's effort to evaluate past policies, especially the 2040 Growth Concept. The program ensures that a small number of outcome measurements of all relevant topics relating to "how are we doing" are addressed.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Metro is required both by state law (ORS 197.301) and Title 9 of Metro's Urban Growth Management Functional Plan to complete performance measures. These measures are intended to gauge progress towards Metro's 2040 Growth Concept while still addressing concerns such as housing affordability, acres of parks per capita and other measures. The requirements also mention corrective actions where the Metro Council finds issues in need of addressing. Possible corrective actions could be explored in those areas where targets and actual performance diverge. This work effort would measure progress in achieving better communities including safe, stable neighborhoods, the ability to get from here to there, access to nature, clean air and water, resources for the future, and a strong regional economy.

In cooperation with the Data Resource Center, the first performance measures were completed in 2002. These measures included those mandated by the state and are related primarily to factors assessing the region's Urban Growth Boundary (UGB). FY 2006-07 work includes further refinement of outcome measures and development of an ongoing monitoring and data-collection system, including expanded monitoring or congestion measures as part of Metro Congestion Management Process (CMP). A semi-annual publication will be developed in support of major projects and key decision points to help the region to better understand how we have done. Metro will be able to update public interests and concerns with how our region should manage growth. Annual publications on transportation measures will be issued as part of the CMP program.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Ensure a broad and complete understanding of how the region is doing;
- Meet federal CMP requirements;
- Develop a sustainable system for monitoring and updating performance measure data;
- Create an annual update on transportation performance and periodic updates on other measures.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

Continued program development and data collection were completed in FY 2005-06, including development of a CMP "roadmap" in response to federal requirements. Summary documents were not published during this fiscal year.



## 2040 PERFORMANCE INDICATORS

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### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	82,767
Interfund Transfers	\$	26,773
Materials & Services	\$	30,000
Computer	\$	460

#### **Resources:**

PL	\$	106,528
STP/ODOT Match	\$	11,998
ODOT Support	\$	15,232
Section 5303	\$	3,477
TriMet	\$	520
Metro	\$	2,245

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<b>TOTAL</b>	<b>\$</b>	<b>140,000</b>
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<b>TOTAL</b>	<b>\$</b>	<b>140,000</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	0.86
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<b>TOTAL</b>	<b>0.86</b>
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### **PROGRAM**

The 2004 Federal Update to the Regional Transportation Plan (RTP) identified hundreds of needed improvements throughout the region, including numerous capacity improvements and system-management projects aimed at relieving congestion in chronic traffic “hot spots.” The RTP is also largely unfunded, which means that congestion-relief projects may not proceed in a timely manner. The Regional Mobility Program seeks to monitor both recurring (chronic) and non-recurring congestion and its ongoing effects on livability and the regional economy, the degree to which delayed improvements are compounding these effects, and develop multi-modal strategies for coping with the gap in needed improvements.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Regional Mobility Program encompasses federal mandates to maintain “congestion management” and “intelligent transportation” systems. This work implements the Congestion Management Process (CMP) Road Map required as part of the 2004 federal certification review. These programs are already largely incorporated into the RTP and include:

- Inventory of Congestion Hot Spots: Staff will work closely with Transportation Policy Alternatives Committee (TPAC), Oregon Department of Transportation (ODOT), the Port of Portland, and local jurisdictions to develop and maintain an inventory of known congestion hot spots. This element will be conducted in concert with data inventory requirements of the Congestion Management System;
- Ranking of Congestion Hot Spots: Metro will work with TPAC, ODOT and local jurisdictions to develop ranking criteria for evaluating the relative magnitude of known congestion hot spots, including measures addressing safety, system mobility and relative accessibility. These criteria will be used to develop a ranked list of congestion relief projects, incorporating existing RTP projects and others identified through this effort;
- Congestion Action Plan: Working with the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council, develop an action plan for implementing multi-modal congestion relief projects, including specific funding strategies for unfunded improvements. This work may be coordinated with a proposed regional transportation funding initiative in 2008;
- Public Involvement: All activities require early, ongoing and responsive public involvement techniques, consistent with Metro public involvement policies. Newly-developed procedures to address environmental justice issues will be applied to this effort.

The TransPort Committee guides the region’s intelligent transportation activities. The committee is a multi-agency group of system providers involved in implementing intelligent transportation policy and operations as recommended by SAFETEA-LU. In early 2005, the role of this group as a Subcommittee of TPAC was formalized.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- TPAC
- JPACT
- Oregon Transportation Commission
- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- TriMet

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Establish a CMP Management Team as well as technical and stakeholder committees to implement the CMP roadmap and to address issues such as data, performance measures and the identification of congestion problem areas;
- Conduct regional CMT training in partnership with the FHWA;

## **REGIONAL MOBILITY PROGRAM – CONGESTION MANAGEMENT – ITS**

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- In coordination with work on the 2040 Performance Indicators Report and the periodic Existing Conditions Report, conduct an assessment of appropriate and feasible performance measures based on the importance of ongoing evaluation of congestion and communication with stakeholders, including the general public, elected officials and the business community;
- Develop new public information tools regarding where, when and especially why congestion occurs; prepare and map an inventory of congestion hot spots that affect the regional transportation system;
- Develop criteria for ranking congestion hot spots. In tandem, implement a system for differentiating the appropriate type of response to each congestion problem: policies/programs, projects, and real-time management/operations techniques. Prepare a ranked list of proposed congestion relief initiatives that improve movement of people and goods for review by JPACT and Metro Council;
- Support JPACT and the Metro Council in their efforts to implement a financial strategy for completing improvements in a timely manner;
- Continue to develop new innovations in congestion monitoring as part of evolving the region's congestion management strategy;
- Expand Metro's involvement with the TransPort Committee
- Support implementation of the FHWA Demonstration Grant regarding "Regional Concepts of Transportation Operations".

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

The RTP seeks to reduce reliance upon the automobile and promote use of alternative modes of transportation. The RTP also recognizes that different congestion measures should be applied in different areas. Since 2000, the peak-hour congestion standard in the RTP is relaxed in densely developed areas with high-quality transit, for example, since these areas are less dependent upon motor vehicles as a means of travel. A higher standard is retained in major statewide "through-traffic" corridors and key-freight connections. The RTP also contains congestion management criteria that are used to screen all projects in the plan. These criteria have been used for two updates since 2000, and have resulted in a marked shift in project composition and a new emphasis on multi-modal solutions.

In 2004, the FHWA and FTA identified needed enhancements to the region's CMP program as a corrective action. In response, Metro developed a CMP "Roadmap" that describes an enhanced scope for fulfilling the requirement. As part of this work, Metro has formed a CMP Management Team as well as a technical committee that includes Metro, ODOT, the Portland State University Center for Transportation Research and other major transportation providers. Metro will work closely with FHWA to advance the implementation of the CMP "roadmap", with regular coordination meetings and project updates.

In 2005, the FHWA awarded the Portland region a special two-year grant to demonstrate a new management tool: the Regional Concept of Transportation Operations. Metro and the City of Portland will jointly administer the project, with the goal of closely integrating the program with the CMP program. In late 2005, Metro and the City recruited a project manager; work began in earnest in December 2005.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 55,197	PL	\$ 56,795
Interfund Transfers	\$ 18,243	STP/ODOT Match	\$ 24,834
Materials & Services	\$ 45,100	ODOT Support	\$ 19,277
Computer	\$ 460	Section 5303	\$ 3,000
		TriMet	\$ 9816
		Metro	\$ 5,278
<b>TOTAL</b>	<b>\$ 119,000</b>	<b>TOTAL</b>	<b>\$ 119,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	0.55
<b>TOTAL</b>	<b>0.55</b>

### **PROGRAM**

Metro is responsible for periodic legislative updates to the metropolitan Urban Growth Boundary (UGB). The UGB encompasses 25 cities and the urban portions of Multnomah, Clackamas and Washington counties. In addition to the updates, Metro also considers smaller requests from individual applicants to amend the UGB. In both cases, the Metro Code requires analysis of the proposed potential impacts on the regional transportation system. This work is generally conducted within Metro, or involves Metro review of private contractor work. Because transportation is often a driving force behind or against a particular boundary proposal, the transportation analysis is a critical step in amending the UGB.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Metro Council directed transportation support for UGB planning activities include:

- Developing and refining regional transportation networks for affected areas for the purpose of transportation demand modeling and analysis;
- Conducting transportation demand modeling and analysis of affected areas, and preparing summaries of potential impacts of urbanization in potential expansion areas on regional transportation;
- Identifying improvements to the regional transportation system needed to serve potential UGB expansion areas;
- Coordinating necessary updates to the Regional Transportation Plan (RTP) and Metropolitan Transportation Improvement Program (MTIP), as needed, to implement UGB decisions.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Ongoing general support and coordination with UGB planning activities;
- Coordination between the upcoming 2004-06 update to the RTP with UGB planning activities ensuring work efficiencies and project consistency between efforts;
- Develop and analyze transportation scenarios for Metro's "New Look" update to the 2040 Growth Concept.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

Metro has conducted numerous periodic reviews of the UGB, most since the 2040 Growth Concept was adopted in 1996. In each case, some degree of transportation analysis was completed as part of fully addressing applicable state administrative rules and Metro Code requirements. The most recent review occurred as part of expanding the UGB to include the Damascus area in Clackamas County. In this example the transportation analysis was conducted as part of a concurrent update to the RTP update. Because of the cost and complexity of completing transportation analyses, Metro attempts to coordinate RTP updates with UGB amendments to the degree possible.

## URBAN GROWTH BOUNDARY EXPANSION AREA PLANNING

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### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	16,443
Interfund Transfers	\$	4,557

<b>TOTAL</b>	<b>\$</b>	<b>21,000</b>
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#### **Resources:**

Section 5303	\$	19,921
Metro	\$	1,079

<b>TOTAL</b>	<b>\$</b>	<b>21,000</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	0.15
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<b>TOTAL</b>	<b>0.15</b>
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### **PROGRAM**

Metro completed the Region 2040 plan nearly a decade ago in an effort to frame a long-term vision for urban growth in the region. The 2040 plan subsequently shaped every aspect of planning in the metropolitan region, from Metro's regional policies to local zoning codes.

During the next year, Metro will be completing an update to the long-term vision with a “New Look” plan that revisits critical 2040 provisions, and updates regional growth policy accordingly. Like the 2040 plan, the New Look will establish a long-term blueprint for urban growth in the region that shapes Urban Growth Boundary (UGB) decisions and all other planning activities that follow.

To support this activity, Metro will conduct an extensive transportation analysis that evaluates the relative merits of different growth scenarios, and helps identify key transportation improvements needed to serve as the backbone of the future transportation system. This work will also shape the concurrent update to the Regional Transportation Plan (RTP).

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

In 2004, the Metro Council formally delayed a planned update to the RTP in order to focus staff resources and public attention on the 2060 "Big Look" planning activities. The project includes:

- Developing and refining conceptual future transportation networks for varying growth scenarios to model and analyze transportation demand;
- Conducting transportation demand modeling and analysis of varying growth scenarios, and preparing summaries of potential impacts of each scenario on regional transportation;
- Identifying major improvements to the regional transportation system needed to serve varying growth scenarios and a preferred future growth scenario;
- Conduct a concurrent update to the RTP that draws from the New Look work, and identifies improvements needed to implement the first 20 years of the new 50-year vision.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- Metro Committee for Citizen Involvement (MCCI)
- Transportation Policy Alternatives Committee (TPAC)
- Metro Technical Advisory Committee (MTAC)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Policy Advisory Committee (MPAC)
- Northwest Area Commission on Transportation (NWACT)
- Mid-Willamette Area Commission on Transportation (MWACT)
- Salem-Keizer Metropolitan Planning Organization (MPO)
- SW Regional Transportation Council (RTC)
- Organizations involved with minority and non-English speaking residents

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Complete the development, analysis and reporting on transportation issues and effects on growth for the New Look scenarios;
- Coordination between the concurrent RTP update and New Look planning.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

In FY 2005-06, Metro began background work to update regional models to cover the expanded area that will be considered in the New Look, and to test new transportation models that will be used for the first time on this project and the RTP update. Metro also developed detailed, coordinated work plans for the RTP update and New Look that fully integrate these complex efforts.

## NEW LOOK @ 2040– TRANSPORTATION SUPPORT

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### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	191,780
Interfund Transfers	\$	59,920
Computer	\$	2,300

#### **Resources:**

PL	\$	59,543
STP/ODOT Match	\$	135,132
ODOT Support	\$	2,274
Section 5303	\$	32,456
TriMet	\$	1,380
Metro	\$	23,215

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<b>TOTAL</b>	<b>\$</b>	<b>254,000</b>	<b>TOTAL</b>	<b>\$</b>	<b>254,000</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	1.91
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<b>TOTAL</b>	<b>1.91</b>
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### **PROGRAM**

The Metropolitan Transportation Improvement Program (MTIP) is a critical tool for implementing the Regional Transportation Plan (RTP) and 2040 Growth Concept. The MTIP is a multi-year program that allocates federal and state funds available for transportation system improvement purposes in the Metro region. Updated every two years, the MTIP allocates funds to specific projects, based upon technical and policy considerations that weigh the ability of individual projects to implement regional goals. The MTIP is also subject to federal and state air quality requirements, and a determination is made during each allocation to ensure that the updated MTIP conforms to air quality laws. These activities require special coordination with staff from Oregon Department of Transportation (ODOT) and other regional, county and city agencies as well as significant public-involvement efforts.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The MTIP is entering the fourth year of a major reorganization of both the policy and database components. The objective of the MTIP reorganization is to emphasize tangible, built results where citizens will see Metro regional growth management programs in action through transportation improvements. MTIP allocations have been increasingly judged against their ability to help implement the 2040 Growth Concept. This has been accomplished through a system of technical scoring and special project categories that place emphasis on 2040 centers, industry and ports.

The program relies on a complex database of projects and funding sources that must be maintained on an ongoing basis to ensure availability of federal funds to local jurisdictions. The two-year updates set the framework for allocating these funds. The Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) monitors this process closely, to ensure that federal funds are being spent responsibly, and in keeping with federal mandates for transportation and air quality. Metro also partners closely with the State of Oregon to coordinate project selection and database management with the State Transportation Improvement Program (STIP).

In 2006, Metro will continue to transition into a new role of guiding project development for planning activities funded through the MTIP, at the request of ODOT. This new activity will involve expanding Metro's professional capabilities to include a licensed professional engineer, and establishing project oversight protocols to guide our review.

### **STAKEHOLDERS**

- Metro Council
- Regional partner agencies and members of the public
- FHWA
- FTA
- ODOT
- Metro Committee for Citizen Involvement (MCCI)
- Joint Policy Advisory Committee on Transportation (JPACT)
- Transportation Policy Alternatives Committee (TPAC)
- Oregon Transportation Commission
- Organizations involved with minority and non-English speaking residents

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

The following are MTIP program objectives for FY 2006-07:

MTIP/STIP Update: Metro will begin the Priorities 2008-11 update; implementing updated MTIP policies and project review criteria for the next funding cycle. The updated MTIP will be published in complete and executive summary formats. Continued conformity with federal air quality standards will be demonstrated. The timing of this update will also bring the Metro program into alignment with the STIP.



## **METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM**

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Database Maintenance: Metro will provide ODOT and local jurisdictions essential funding information to better schedule project implementation activities. Metro will also monitor past and current funding allocations and project schedules managing cost variations from initial project estimates, and produce quarterly reports. Reports will document funding authorizations, obligations and reserves by funding category and jurisdiction. Metro will also produce an annual report required by FHWA that reflects current costs, schedules, priorities, actual appropriations and other actions approved throughout the year. The annual report will address progress and/or delays in implementing major projects as mandated by Intermodal Surface Transportation Efficiency Act (ISTEA).

Other MTIP activities for FY 2006-07:

- Develop a long-term program to diversify funding opportunities beyond the current scope of federal funds, implementing regional policy through a combination of transportation and other funding sources on an ongoing basis;
- Develop a local partnership initiative, to provide improved linkage between local capital improvement plans (LCIP) and the MTIP and determine what combination of funding and regulatory incentives would be most effective in drawing local funds toward regional policy goals;
- Create a public-awareness program in coordination with Metro and agency communications staff to promote regional policies at the time of project construction and completion, including public signage, dedication activities and a significantly-expanded web resource on projects built with MTIP funds;
- Conduct a block analysis on the areas surrounding each project submitted for funding consideration to ensure that environmental justice principles are met and to identify where additional outreach might be beneficial;
- Expand the MTIP public awareness program to include greater more integrated use of electronically accessible formats such as the web, integration of more visualization techniques, greater use of specific printed materials with well defined distribution plans (such as identifying freight specific projects to more fully engage the freight community in the MTIP process) , and possibly a short video for use by public access broadcasters;
- Work with ODOT and Metro's Data Resource Center to develop broad agency and public electronic access to a common MTIP database;
- Continue to update the MTIP hardware/software platform to improve production of specialized report formats, cross connection with ODOT data sources and other database refinements;
- Continue to coordinate inter-agency consultation on air quality conformity as required by federal and state regulations. Conduct full public outreach (including notification), reports and public hearings that are required as part of the conformity process;
- Adopt a new project development role to provide oversight of project planning activities funded through the MTIP;
- Continue to implement the recommendations of TPAC to improve the on-budget/on-schedule delivery of local project programming;
- Conduct environmental justice analysis for the Transportation Priorities and ODOT project prioritization process and the 2008-11 MTIP.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

In early 2002, a major update of MTIP policies and review criteria was launched to reorganize the MTIP to create a high profile, positive process for allocating federal funds, and reinforcing the region's commitment to implement the 2040 Growth Concept and RTP. This policy framework has since been implemented through the 2004-07 and 2006-09 MTIP project selection processes.

FY 2005-06 saw completion of the Priorities 2006-09 update to the MTIP and allocation of \$52 million in transportation funds to regional projects. The 2006-09 update included a demonstration of ongoing conformity with air quality laws. In January 2005, FHWA and FTA staff review identified a number of corrective actions, which were incorporated into this updated MTIP. A final draft of the updated MTIP was published in December 2005. Metro also published an accompanying MTIP brochure illustrating the projects funded through the 2006-09 program for general public education.

## METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM

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### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	343,010
Interfund Transfers	\$	107,931
Materials & Services	\$	22,000
Computer	\$	13,058

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<b>TOTAL</b>	<b>\$</b>	<b>485,999</b>
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#### **Resources:**

PL	\$	162,999
STP/ODOT Match	\$	182,975
ODOT Support	\$	14,784
Section 5303	\$	13,307
TriMet	\$	85,448
Metro	\$	26,486

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<b>TOTAL</b>	<b>\$</b>	<b>485,999</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	3.64
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<b>TOTAL</b>	<b>3.64</b>
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### **PROGRAM**

In keeping with federal laws, regulations and policies recipients of federal dollars must address the following fundamental environmental justice principles:

- Avoid, minimize or mitigate disproportionately high and adverse human-health and environmental effects, including social and economic effects, on minority populations and low-income populations;
- Ensure full and fair participation by all potentially-affected communities in the transportation decision-making process;
- Prevent the denial of, reduction in or significant delay in the receipt of benefits by minority and low-income populations.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Title VI of the 1964 Civil Rights Act and related regulations; The President's Executive Order on Environmental Justice; the United States Department of Transportation (USDOT) Order; the Federal Highway Administration (FHWA) Order; and Goal 1 of Oregon's Statewide Planning Goals and Guidelines.

Under FHWA and Federal Transit Administration (FTA) guidelines, Metropolitan Planning Organization (MPO) need to:

- Enhance their analytical capabilities to ensure the long-range transportation plan and transportation improvement program comply with Title VI;
- Identify residential, employment and transportation patterns of low-income and minority populations so their needs can be identified and addressed, and the benefits and burdens of transportation investments can be fairly distributed;
- Evaluate and, where necessary, improve their public-involvement processes to eliminate participation barriers and engage minority and low-income populations in transportation decision making.

The majority of work to ensure compliance with the above will be done within the individual program/project work plans. However, broad community data collection, outreach and qualitative evaluation methods will be developed and employed to assist the Planning Department, as a whole, to effectively comply with the spirit and letter of the guidelines. In addition, recognizing that an ever-growing majority of citizens in the region are using electronically accessible formats such as the web, improved and expanded use of this medium will be implemented. This will include expanded use of visualization techniques to help further describe plans and make information more easily understood. TriMet does separate Title VI outreach.

Metro has also established an agency diversity action team. The team is responsible for identifying opportunities to collaboratively develop and implement sustainable diversity initiatives across and throughout the agency. Metro's diversity efforts are most evident in three areas: Contracts and Purchasing, Community Outreach, and Recruitment and Retention.

### **STAKEHOLDERS**

Specific stakeholders are identified per program or project area. However, generally speaking stakeholders include residents and businesses in close proximity to or potentially impacted by a specific project or program. This would include community representatives and/or organizations speaking on behalf of low-income or minority populations.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

Census 2000 information provides the foundation from which staff can assess aspects of projects or programs that may be of interest or have potential impact or benefit to minority and/or low-income populations. This, combined with community outreach efforts such as stakeholder interviews, helps us to better engage appropriate communities in effective communication and decision-making processes. This on-going program helps to identify the location of traditionally underserved and/or non-English speaking members of the community. It works in tandem with organizations, schools, businesses or other

## **ENVIRONMENTAL JUSTICE AND TITLE VI**

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community assets that might help engage those traditionally unaware of or disconnected from the making of public policy. It also helps to identify where the use of translators or translated information, might be helpful. As discussed in the Metropolitan Transportation Improvement Program narrative, Metro will conduct environmental justice analysis for the Transportation Priorities and ODOT project prioritization process and the 2008-11 MTIP.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

A comprehensive Title VI/Environmental Justice plan was published in June 2005, and included mapping analysis and procedures for implementing the Title VI policy. Metro provided the plan to the FHWA and FTA in July 2005, in response to federal certification requirements. Metro also completed a Title VI analysis as part of the 2006-09 Metropolitan Transportation Improvement Program (MTIP) update that was completed in late 2005.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 11,551	PL	\$ 15,000
Interfund Transfers	\$ 3,449		
<b>TOTAL</b>	<b>\$ 15,000</b>	<b>TOTAL</b>	<b>\$ 15,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	0.1
<b>TOTAL</b>	<b>0.1</b>

## **TRANSPORTATION MODEL IMPROVEMENT PROGRAM (TRANSIMS)**

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### **PROGRAM**

The TRANSIMS project is a US Department of Transportation (USDOT) research program intended to develop new travel demand modeling paradigms for use in assessing the transportation system response to policy issues. Portland is the chosen site for the model development activities and test applications. Metro has served on the research team with Federal Highway Administration (FHWA) and other consulting firms since the project conception.

During the next phase of the project, Metro will serve as a resource to provide local data to the project consultant team and to review periodic model results during the calibration efforts.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The USDOT entered into a contractual agreement with Metro to fund the research work.

### **STAKEHOLDERS**

- USDOT (FHWA)
- Several consulting firms
- Metro Planning Department
- Agencies involved in modeling in the U.S. have an interest in this work, as the results will potentially influence future model specifications

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Provide local data to the consultant team, as necessary;
- Serve as a resource to review intermittent model results and assess their reasonableness.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Networks and all the required roadway attributes have been prepared for use in the micro-simulation assignment;
- Prototype assignments have been run to identify anomalies, to optimize the assignment process, and to test the reasonableness of the results;
- Preliminary demand model forms were developed and tested;
- The demand model serves as the seed for the remaining work elements.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 29,266	TRANSIMS – FHWA	\$ 32,000
Interfund Transfers	\$ 8734	Metro	\$ 8,000
Materials & Services	\$ 2,000		
<b>TOTAL</b>	<b>\$ 40,000</b>	<b>TOTAL</b>	<b>\$ 40,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	0.3
<b>TOTAL</b>	<b>0.3</b>

## **MODEL DEVELOPMENT PROGRAM**

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### **PROGRAM**

The Research and Model Development Program includes work elements necessary to keep the travel demand model responsive to issues that emerge during transportation analysis. The major subject areas within this activity include surveys and research, model enhancement, model maintenance, and statewide and national professional involvement.

The activity is very important because the results from travel demand models are used extensively in the analysis of transportation policy and investment.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Federal Highway Administration (FHWA) and Environmental Protection Agency (EPA) require that project modeling be carried out using techniques and modeling tools that meet certain guidelines. Failure to meet the guidelines may result in project analysis conclusions that may not meet federal approval.

### **STAKEHOLDERS**

- Metro Planning Department
- Oregon Department of Transportation (ODOT)
- Port of Portland
- Cities and counties of this region
- Private sector clients

### **OBJECTIVES, PRODUCTS, DELIVERABLES**

#### Survey and Research

- Travel Behavior Survey: A household activity survey will be conducted in FY 2006-07. The data collection work elements are defined in a separate program. In this program, data from the survey will be analyzed to produce summaries of various travel characteristics (trip frequencies, travel patterns, and mode shares).
- Freight Data Collection: Continue to participate on a regional committee to advise and comment on the freight data collected during FY 2005-06.

#### Model Enhancements

- Personal Transport Model: Continue the enhancement of the algorithms used to estimate travel decisions. Use the early survey data and the elements derived from the TRANSIMS demand model research to conceptualize an enhanced model form. In addition, the demand model will be updated to be compliant with the North American Industry Classification System (NAICS) employment data.
- Regional Freight Model: Update the regional freight model using the full complement of the data collected during the Phase 2 Freight Data Collection effort. The origin and destination freight data is being collected during FY 2005-06.
- Linkage to Metroscope: Continue to enhance the data interfaces between the transport model and the land-use allocation model (Metroscope).
- New Modeling Software: Complete the transition to the new travel demand modeling software. Particular focus will be placed on implementing micro simulation capabilities.

#### Model Maintenance

- Modeling Network Attributes: Review and update, as necessary, the modeling network assumptions (e.g., uncongested speeds, vehicle throughput capacities, transit line itineraries).

#### Statewide and National Professional Involvement

- Oregon Modeling Steering Committee (OMSC): Participate on the OMSC. Staff currently serves as the chair for this committee.
- Transportation Research Board (TRB) Committees: Serve on TRB committees that help shape national planning guidelines. Examples include the Transportation Planning Applications Committee and the Innovations in Freight Modeling Committee.

## MODEL DEVELOPMENT PROGRAM

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- National Panels: Serve on national committees as warranted. Including, Travel Model Improvement Program Review Panel, the task force to assess the State of the Practice of Metropolitan Area Travel Forecasting, and the Panel on Assessing Transit System User Benefits. In addition, peer review panels that assess the functionality of the travel demand models used in other regions.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

#### Survey and Research

- Travel Behavior Survey: Participated on a statewide committee to coordinate the implementation of a statewide travel behavior survey.
- Freight Data Collection: Participated on a regional committee to advise and comment on the survey objectives and survey process.

#### Model Enhancements

- Personal Transport Model: Updated the travel demand model to better address the special characteristics found in the streetcar market share.
- Freight Model: Updated the regional freight model based upon the information captured in the early phases of the freight data collection project.
- New Modeling Software: The Visum/Vissim software (marketed by PTV America) was purchased in FY 2005-06. Auto and transit functionality was developed with regard to equilibrium and dynamic (temporal) assignment processes.
- Linkage to Metroscope: A simplified transport model (a.k.a., the Metroscope transport model) was created for use with Metroscope. The simplified transport model runs much more quickly and is less data intensive than the full transport model. The modeling tool was integrated with a new Metroscope application software.

#### Model Maintenance

- Modeling Network Attributes: Reviewed and updated, as necessary, the modeling network assumptions (e.g., uncongested speeds, vehicle throughput capacities, transit line itineraries). The volume delay functions were updated to account for individual turn and through move capacities (versus a single intersection approach capacity). This new approach was made possible because of enhanced capabilities in the Visum software. The 2039 zone system was fully integrated into project use.

#### Statewide and National Professional Involvement

- Oregon Modeling Steering Committee: Staff currently serves as the chair for this committee.
- Transportation Research Board Committees: Served on TRB committees that help shape national planning guidelines. Examples include the Transportation Planning Applications Committee and the Innovations in Freight Modeling Committee.
- National Panels: Served on national committees including the Travel Model Improvement Program Review Panel, the task force to assess the State of the Practice of Metropolitan Area Travel Forecasting, and the Panel on Assessing Transit System User Benefits. Participated on peer review panels that assessed travel demand models used in other regions (e.g., Puget Sound Regional Council model review).

## MODEL DEVELOPMENT PROGRAM

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### **BUDGET SUMMARY**

**Requirements:**

Personal Services	\$	212,821
Interfund Transfers	\$	78,219
Materials & Services	\$	11,960

**Resources:**

PL	\$	136,700
STP/ODOT Match	\$	120,192
ODOT Support	\$	2,994
Section 5303	\$	21,418
TriMet	\$	2,851
Metro	\$	18,845

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<b>TOTAL</b>	<b>\$</b>	<b>303,000</b>	<b>TOTAL</b>	<b>\$</b>	<b>303,000</b>
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**Full-Time Equivalent Staffing**

Regular Full-Time FTE	2.3
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<b>TOTAL</b>	<b>2.3</b>
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## **SYSTEM MONITORING**

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### **PROGRAM**

The System Monitoring Program maintains and updates an inventory of transportation related data necessary to benchmark characteristics of the transportation system. The work elements consist of the compilation of regional data, the review and interpretation of national reports, and the processing of data requests.

In addition, the program specifically identifies and summarizes viable information that is useful to monitor and assess the Metro transportation goals and objectives.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Model applications require the use of quality data. Federal officials scrutinize the data used in the model during project analysis. One such item is travel costs (i.e., operating cost per mile, parking costs, transit fares). In addition, model applications must be carefully validated to observed data for example traffic counts, vehicle miles traveled-VMT) measurements and transit patronage. This ensures that the model is operating correctly. Thus, the key data elements must be continually retrieved in a comprehensive manner to ensure federal endorsement of the Metro modeling practices.

In addition, the Metro Council desires to regularly produce a document that provides indicators to benchmark the performance of the regional goals and objectives. This program collects data that addresses the transportation elements.

Traffic count data (auto, trucks) are collected at Metro's request by regional jurisdictions. Budget limitations within those agencies often impede their ability to capture the count information. This situation compromises the availability of the benchmark data and influences the quality of the Metro travel demand model.

### **STAKEHOLDERS**

There are two stakeholder groups. The first includes regional policy makers and administrators that desire to 1) track the evolution of transportation characteristics in the metropolitan area, and 2) compare the regional characteristics to other cities.

The other benefit group includes all agencies that require use of the travel demand model. The benefit is derived from the fact that key information (travel cost and count data) has been utilized to help produce a reliable model.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Collect and compile regional system monitoring data (vehicle and truck counts, VMT, transit patronage, travel costs by mode, and parking costs);
- Coordinate with Portland State University and the Intelligent Transportation Society (ITS) Laboratory to ensure the collection of ITS data that are meaningful and useful to Metro and its regional partners;
- Assemble data from reports that compare statistics from cities throughout the United States;
- Provide response to system performance data requests (e.g., traffic counts, VMT, VMT per capita);
- Support the Metro Performance Measure program. Identify measures that provide meaningful information. Prepare tables, graphs and summaries that can be integrated into a Metro-wide document.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Coordinated collection of auto and truck count data useful to Metro Planning Department programs (e.g., count data from the regional jurisdictions) and enter the data in a computerized database;
- Compiled Highway Performance Monitoring System (HPMS) vehicle counts from Oregon Department of Transportation (ODOT);
- Established a web site that summarizes VMT and VMT per capita;

## SYSTEM MONITORING

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- Compiled TriMet patronage information;
- Collected parking cost information for key areas within the central city;
- Reviewed and commented on key documents that pertain to comparisons of national system performance (e.g., Texas Transportation Institute – Urban Mobility Report, FHWA – Federal Highway Statistics, FHWA – HPMS Summary Report);
- Provided information to those seeking system performance data (e.g., traffic counts, VMT, VMT per capita);
- Assembled Transportation system performance data for inclusion into the next Metro Performance Measure document.

## **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 77,868	PL	\$ 19,099
Interfund Transfers	\$ 25,132	STP/ODOT Match	\$ 55,017
		Section 5303	\$ 20,000
		Metro	\$ 8,884
<b>TOTAL</b>	<b>\$ 103,000</b>	<b>TOTAL</b>	<b>\$ 103,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	0.82
<b>TOTAL</b>	<b>0.82</b>

## **TECHNICAL ASSISTANCE PROGRAM**

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### **PROGRAM**

The purpose of the Technical Assistance program is to provide transportation data and modeling services for projects that are of interest to local entities. Clients to this program include regional jurisdictions, TriMet, the Oregon Department of Transportation (ODOT), the Port of Portland, private sector businesses and the general public. In addition, the client agencies can use funds from this program to purchase and maintain copies of the transportation modeling software used by Metro. A budget allocation defines the amount of funds that is available to each regional jurisdiction for these services.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

US Department of Transportation (USDOT) protocols require the preparation of future year travel forecasts to analyze project alternatives. Similarly, modeling is required by the Environmental Protection Agency (EPA) in project analysis to quantify emissions in air quality analysis. Thus, the provision of modeling services must be available to clients for their project needs.

### **STAKEHOLDERS**

- Regional jurisdictions (cities and counties)
- TriMet
- ODOT
- Port of Portland
- Private sector businesses
- General public

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Provide data and modeling services to regional jurisdictions and agencies;
- Provide data and modeling services to private consultants and other non-governmental clients;
- Provide funds to the local governmental agencies to purchase and maintain transportation modeling software.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Provide data and modeling services to regional jurisdictions and agencies (e.g., City of Portland – Central City Plan Update);
- Provide data and modeling services to private consultants and other non-governmental clients (e.g., future forecast volumes, trip distribution patterns and mode share characteristics);
- Modeling software has been purchased for five governmental agencies (ODOT Region 1, City of Portland, City of Gresham, Clackamas County, Multnomah County, and Washington County).

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 55,076	STP	\$ 36,489
Interfund Transfers	\$ 15,331	ODOT Support	\$ 27,000
Computer	\$ 5,659	TriMet	\$ 8,400
		Metro	\$ 4177
<b>TOTAL</b>	<b>\$ 76,066</b>	<b>TOTAL</b>	<b>\$ 76,066</b>

### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	0.54
<b>TOTAL</b>	<b>0.54</b>

## **HOUSEHOLD SURVEY**

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### **PROGRAM**

The Household Survey Program requires that funds be earmarked for the purpose of conducting a regional travel behavior survey. The last survey was conducted in 1994. The data are instrumental in identifying behavioral relationships with regard to travel decisions.

The survey will be administered over five years at a total cost of approximately \$1.3 million. Regional funding partners (Metro, Oregon Department of Transportation - ODOT, TriMet, and the Southwest Washington Regional Transportation Council) are participants in the financing of the survey. This project will be conducted in two phases in fiscal years 2007 and 2008 and then it will move into a longitudinal study. . During the first two years, a 6000 household cross-sectional survey will be administered. Using a panel of 1,000 households sampled from the cross-sectional, a three-year longitudinal panel will then be conducted. The same 1,000 households will be interviewed repetitively in years three, four, and five.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Federal Highway Administration (FHWA), Federal Transportation Administration (FTA), and Environmental Protection Agency (EPA) require that project analysis be carried out using methods and modeling tools that meet certain guidelines. Failure to meet the guidelines may result in project analysis conclusions that do not meet federal approval. Given that the most recent survey data are twelve years old, the survey data needs to be updated since it serves as the underpinning for the model relationships. Not having recent data may raise concerns during Metro's Metropolitan Planning Organization (MPO) certification proceedings.

### **STAKEHOLDERS**

- Metro
- ODOT
- TriMet
- Port of Portland
- The cities and counties of the region
- Private sector clients

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- During the first two phases, 6,000 cross-sectional surveys will be conducted for the purpose of capturing a "snapshot" of current travel characteristics and to capture data to update the regional travel demand model. Approximately 5,000 of the survey households will be sampled from the Oregon portion of the region. 1,000 households will be selected from Clark County.
- Years two through five will use a 1,000 household longitudinal panel to obtain data to better understand traveler response to change (e.g., household or work location, infrastructure, household composition, income, urban development, etc.). In the longitudinal panel surveys, the same households will be interviewed yearly to identify the changes through time.
- A survey advisory committee will be formed to guide the endeavor.
- As data is collected from the cross-sectional survey and the longitudinal panel survey, documents will be prepared that summarize the findings.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

Metro has significant experience in conducting surveys. Surveys were fielded in 1977, 1985, and 1994. As in 1994, Metro is working together with the other MPOs in the state and the ODOT Transportation Planning Analysis Unit to conduct a survey that covers the entire state. A common contractor and survey form will be used to ensure data compatibility and to maximize the efficient use of the financial resources.

## HOUSEHOLD SURVEY

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### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	19,796
Interfund Transfer	\$	5,518
Materials & Services	\$	424,686

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<b>TOTAL</b>	<b>\$</b>	<b>450,000</b>
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#### **Resources:**

PL	\$	175,000
TriMet HHS	\$	75,000
ODOT HHS	\$	125,000
RTC HHS	\$	75,000

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<b>TOTAL</b>	<b>\$</b>	<b>450,000</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	0.2
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<b>TOTAL</b>	<b>0.2</b>
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### **PROGRAM**

The Data Resource Center (DRC) performs the following primary activities:

- Data Collection: maintains an inventory of socioeconomic and land related geographic data (Regional Land Information System - RLIS), which are the foundation for providing services to the DRC's array of clients, including local governments, business and the public. Primary data is collected for land use and transportation planning, solid waste management, performance measures and the transport and land use models.
- Model Development: responsible for development and maintenance of the regional population and employment forecast model and the growth-simulation model – MetroScope.
- Forecasting: the DRC is responsible for providing forecasts of population and employment. This model is an econometric representation of the regional economy and is used for mid-range (5-10 years) and long-range (10-30 years) forecasts.
- Client Services: technical assistance and Geographical Information System (GIS) products and services to internal Metro programs, jurisdictions, TriMet, the Oregon Department of Transportation (ODOT) and Storefront customers (private-sector businesses and the general public). The DRC Storefront provides services and products to subscribers and non-subscribers. Subscribers include local jurisdictions that have entered into intergovernmental agreements with Metro. Non-subscribers are primarily business and citizen users.
- Performance measures: databases are maintained and statistics provided for monitoring the performance of Metro's policies and growth management programs.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Metropolitan Planning Organization (MPO) mandates include long range and detailed demographic and employment forecasts (Federal Highway Administration (FHWA) Forecast Certification Process). Travel demand studies require valid forecasts that are a primary input to the transport model. State periodic review requirements for the Portland metropolitan area include extensive forecast, land information and research capabilities.

Metro's Urban Growth Boundary (UGB) administrative mandates are a primary reason for the collection and maintenance of the land information in RLIS. In addition, the MPO data collection and forecasting mandates for transportation planning dictate the maintenance of population and employment data for the bi-state region.

### **STAKEHOLDERS**

Internal stakeholders are transportation planning, growth management, parks planning and solid waste management. External are citizens, local governments, utilities and businesses.

- Metro planners and modelers
- Local governments
- Business
- Citizens

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Use the 2035 forecast of population and employment to provide services for transportation modeling, such as corridor planning projects;
- Use the newly streamlined version of MetroScope to produce 2050 scenarios for the New Look project. This will include providing model scenario results in the form of graphics (charts and graphs), maps and 3-D renderings and fly-throughs;
- Develop a new database structure that will house Metropolitan Transportation Improvement Program (MTIP) and Regional Transportation Plan (RTP) project data and system maps. The database will be housed at Metro, but maintained through a cooperative partnership with local jurisdictions to ensure that the project information is maintained in a timely manner.

## DATA, GROWTH MONITORING

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### ACCOMPLISHMENTS OF THIS PROGRAM TO DATE

- Allocation of pop/emp to census tract and Transportation Analysis Zone (TAZ) for the transport model using MetroScope;
- Forecast of pop/emp for bi-state region to 2035;
- Allocation of pop/emp to census tract and TAZ for the transport model using MetroScope;
- Completion of the 2035 forecast of population and employment and its distribution to TAZ's by MetroScope. This is a primary data input to the transport model;
- Automation the MetroScope to eliminate need for manual functions and to include an embedded transport model to reduce the time required to produce growth scenarios;
- Update of population by census tract and block group to the current year from 2000;
- Update of employment to mapped locations for current year.

The following activities are conducted annually and have been or are being accomplished:

- Maintain the information in RLIS, providing quarterly updates to subscribers;
- Annually update key census items such as population by census tract;
- Annually update employment at the place of work with state Employment Division records (will occur in March);
- Annually purchase aerial photography;
- Purchase building permit records monthly.

### BUDGET SUMMARY

#### **Requirements:**

Personal Services	\$	686,967
Interfund Transfers	\$	220,740
Materials & Services	\$	205,793
<i>Aerial Photo Contract- \$130,000</i>		
<i>Computer Software etc- \$37,000</i>		
<i>Computer Maintenance- \$33,600</i>		
<i>Other Program Costs- \$4,693</i>		
<b>TOTAL</b>	<b>\$</b>	<b>1,113,500</b>

#### **Resources:**

PL	\$	107,888
ODOT Support	\$	15,000
Section 5303	\$	80,336
TriMet	\$	37,500
Metro	\$	872,776

<b>TOTAL</b>	<b>\$</b>	<b>1,113,500</b>	<b>TOTAL</b>	<b>\$</b>	<b>1,113,500</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	6.5
<b>TOTAL</b>	<b>6.5</b>

## **MANAGEMENT AND COORDINATION/GRANTS MANAGEMENT**

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### **PROGRAM**

Grants Management and Coordination provides overall ongoing department management and includes Metro's Metropolitan Planning Organization (MPO) role. Overall department administration includes budgeting, UPWP, contracts, grants, and personnel. It also includes staff to meet required needs of the Joint Policy Advisory Committee on Transportation (JPACT), Transportation Policy Alternatives Committee (TPAC), Metro Technical Advisory Committee (MTAC), Bi-State Coordination Committee, Regional Freight Committee, Regional Travel Options (RTO) Subcommittee, Housing Choice Task Force (HCTF), and Metro Council. As an MPO, Metro is both regulated by federal planning requirements, and a direct recipient of federal transportation grants. The purpose of the MPO is to ensure that federal programs unique to urban areas are effectively implemented. The MPO program also includes coordination and consultation with state and federal regulators.

JPACT serves as the MPO for the region in a unique partnership that requires joint action with the Metro Council on MPO matters. The MPO purpose is to ensure that federal programs unique to urban areas are effectively implemented.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

As an MPO, Metro participates in periodic coordination meetings with the other MPOs and major transit providers in the state. These meetings are a principal source of new information on state and federal regulations affecting MPOs, and provide opportunity for the different urban areas to compare strategies for addressing common transportation problems.

Metro is periodically subject to federal certification review, whereupon the agency must demonstrate compliance with federal transportation planning requirements, including the Safe, Accountable, Flexible, and Efficient Transportation Equity Act - A Legacy for Users (SAFETEA-LU). The MPO program is also responsible for publishing an annual Unified Planning Work Program (UPWP) for the region, and monthly and quarterly reports to state and federal officials documenting our progress in completing the work program. Among these responsibilities is the requirement to establish air quality findings for Metro's transportation planning efforts that demonstrate continued conformity with the federal Clean Air Act. This air quality conformity work is a major component of Metro's MPO program.

Provide support to JPACT, TPAC, MTAC, Bi-State Committee, Regional Freight Committee, and subcommittees to ensure coordination between state, regional, and local transportation and land-use plans and priorities. These committees and subcommittees meet transportation and land-use coordination provisions outlined in SAFETEA-LU.

Provide overall department management, including: budget; personnel; materials; services and capital expenditures. Monitor and ensure grants and contracts compliance including OMB A-133 Single Audit. Provide information to the public. Participate in periodic coordination meetings with other state MPOs and transit agencies. Also, maintain active memberships and support in national organizations such as Cascadia, American Public Transportation Association (APTA), and the Association of Metropolitan Planning Organizations (AMPO) as available funds allow.

### **STAKEHOLDERS**

- Federal, state and local funding agencies
- Metro Council
- Local jurisdictions
- TPAC
- JPACT



## **MANAGEMENT AND COORDINATION/GRANTS MANAGEMENT**

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### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Prepare and manage the department budget, personnel, programs and products.
- FY 2007-08 UPWP/Self Certification.
- Prepare documentation to FHWA, FTA and other funding agencies such as quarterly narrative and financial reports.
- Send monthly progress reports to TPAC.
- Produce meeting minutes, agendas and documentation.
- Execute, administer and monitor contracts, grants and agreements.
- Complete a periodic review with FHWA and FTA on UPWP progress.
- Complete Federal Certification.
- Single audit responsibility for Planning grants.
- Continue to monitor current air quality conformity regulations and evaluation practices, as applicable to MPO conformity requirements.
- Continue to participate in MPO coordination meetings.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

This is an ongoing program.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 399,978	PL	\$ 408,518
Interfund Transfers	\$ 198,791	STP/ODOT Match	\$ 201,560
Materials & Services	\$ 42,498	Section 5303	\$ 7,947
Computer	\$ 1,564	Metro	\$ 24,806
<b>TOTAL</b>	<b>\$ 642,831</b>	<b>TOTAL</b>	<b>\$ 642,831</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	3.83
<b>TOTAL</b>	<b>3.83</b>

### **PROGRAM**

This project is a follow up to the I-205/Portland Mall Light Rail Project Final Environmental Impact Statement (FEIS) completed in FY 2004-05. This activity will be funded through an Intergovernmental Agreement (IGA) with TriMet as part of their intergovernmental coordination for Final Design and Construction of the project. Tasks will include Federal Transit Administration (FTA) coordination and new starts reporting, implementation of the project's funding plan, development of the FTA-required Before and After Study and other tasks as required. This will be the start of a multi-year IGA with TriMet that will likely run through FY 2009-10 when construction of the I-205 and Portland Mall segments are complete.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

- This project implements the Region 2040 Plan and the Regional Transportation Plan (RTP), which include policies to connect the central city, and regional and town centers together with high capacity transit, which is typically light rail.
- As the region's Metropolitan Planning Organization (MPO), Metro has responsibility for the region's long-range transportation planning, including transit. Recently signed memoranda of agreement outlining Metro's planning responsibilities and relationship with Oregon Department of Transportation (ODOT) and TriMet help to cement Metro's role as the lead agency for the federal transportation planning projects, particularly News Starts projects.

### **STAKEHOLDERS**

- Metro Council
- Central City, SE Portland and Clackamas County neighborhoods
- City of Portland
- Downtown business community – LID participants
- Clackamas and Multnomah Counties
- FTA
- ODOT
- TriMet
- Joint Policy Advisory Committee on Transportation (JPACT)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Support TriMet in the completion of Final Design and in preparation for a Full Funding Grant Agreement with FTA;
- Provide assistance to ensure that the mitigation plans in the FEIS are implemented in the Final Design and construction of the project;
- Provide travel forecasting support for the annual FTA New Starts Program submittal as well as strategic and technical support for the required cost-effectiveness calculations.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- February 1998 – South/North DEIS Locally Preferred Alternative selected, which included the Portland Mall;
- 1999 – 2001 – South Corridor Transportation Alternatives Study evaluates non-light rail options in the corridor, which leads to a public outcry to add light rail to the study in both the Milwaukie and I-205 segments;
- 2002 – 2003 – South Corridor Supplemental DEIS includes a Phase 1 I-205 alignment for light rail between Gateway and Clackamas Regional Centers as well as light rail on the Portland Mall;
- January 2004 – Amended SDEIS for downtown Portland Mall and I-205 LRT Project, solidifying mode, terminus, station location and alignment decision on the Portland Mall segment;
- December 2004 – I-205/Portland Mall Light Rail Project (South Corridor Phase I) Final Environmental Impact Statement published in the Federal Register;
- October 2005 – TriMet receives Final Design approval from FTA.

## I-205/MALL LRT CORRIDOR

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### **BUDGET SUMMARY**

<b>Requirements:</b>			<b>Resources:</b>		
Personal Services	\$	20,238	TriMet IGA	\$	28,000*
Interfund Transfers	\$	7,762			
<b>TOTAL</b>	<b>\$</b>	<b>28,000</b>	<b>TOTAL</b>	<b>\$</b>	<b>28,000</b>
<hr/>					
<u>Full-Time Equivalent Staffing</u>					
Regular Full-Time FTE		0.2			
<b>TOTAL</b>		<b>0.2</b>			

\* Budget and amount of IGA to be determined

### **PROGRAM**

The Milwaukie Light Rail Supplemental Draft Environmental Impact Statement (SDEIS) project advances Phase 2 of the Locally Preferred Alternative (LPA) for the South Corridor Light Rail Project. Environmental work for the Willamette River Crossing, the Lincoln Street portion of the alignment needs to be updated from the original 1998 South/North Draft Environmental Impact Statement (EIS). A potential new alignment through Milwaukie also requires revision of the LPA selected in April 2003.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project implements the Region 2040 Plan and the Regional Transportation Plan (RTP) which include policies to connect the central city and regional and town centers together with high capacity transit, which is typically light rail.

As the region's Metropolitan Planning Organization (MPO), Metro has responsibility for the region's long-range transportation planning, including transit. Recently signed memoranda of agreement outlining Metro's planning responsibilities and relationship with Oregon Department of Transportation (ODOT) and TriMet help to cement Metro's role as the lead agency for the federal transportation planning projects, particularly New Starts projects.

### **STAKEHOLDERS**

- Metro Council
- Central City, SE Portland and Milwaukie neighborhoods
- City of Milwaukie
- City of Portland
- Clackamas County
- Multnomah County
- Federal Transit Administration (FTA)
- ODOT
- TriMet
- Joint Policy Advisory Committee on Transportation (JPACT)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Begin environmental analysis for the Milwaukie Light Rail Project SDEIS;
- Publish Notice of Intent in the *Federal Register*;
- Prepare appropriate FTA New Starts submittal;
- Complete Definition of Alternatives;
- Complete Biological Assessment for the Caruthers Bridge;
- Complete evaluation of alternatives including financial, transportation, social, energy, economic and environmental criteria and measures;
- Prepare travel demand forecasts;
- Develop and undertake public involvement program;
- Coordinate with the FTA and federal resource agencies.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- February 1998 – Milwaukie Light Rail Project included in South/North Draft EIS Locally Preferred Alternative;
- 1999-2001 – South Corridor Transportation Alternatives Study evaluates non-light rail options in the corridor, which leads to a public outcry to add light rail to the study in both the Milwaukie and I-205 segments;
- 2002-2003 – South Corridor SDEIS revisits Milwaukie alignment over Hawthorne Bridge. Metro Council adopts new LPA that includes the Caruthers Bridge and Lincoln Street alignments in the central city as well as a new Kellogg Lake terminus in Milwaukie, April 2003;

## MILWAUKIE LIGHT RAIL PROJECT SDEIS

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- January 2004 – Amended SDEIS for downtown Portland Mall alignment is published that includes reference to and confirmation of the Phase 2 LPA, with the recognition that additional environmental work would be required in the Milwaukie Corridor when the project is advanced;
- December 2004 – I-205/Portland Mall Light Rail Project (South Corridor Phase I) Final EIS published in the *Federal Register*.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 564,296	TriMet IGA*	\$ 1,492,000
Interfund Transfers	\$ 165,056		
Materials & Services	\$ 750,000		
Consultant Contract(s)- \$750,000	\$ 12,648		
Computer	\$		
<b>TOTAL</b>	<b>\$ 1,492,000</b>	<b>TOTAL</b>	<b>\$ 1,492,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	5.8
<b>TOTAL</b>	<b>5.8</b>

\* Anticipated

## **STREETCAR TECHNICAL METHODS AND SYSTEM PLAN**

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### **PROGRAM**

As part of SAFETEA-LU, the region received \$3 million to advance the Streetcar program, which included funding for advancement of Streetcar technical methods and a system plan as well as to advance the Eastside Transit Project and the Lake Oswego to Portland Transit Corridor Project into the National Environmental Protection Act (NEPA) process. The technical methods will assist the Federal Transit Administration (FTA) in the development of guidance for travel demand forecasting and economic development methodologies for the Small Starts funding program. In FY 2005-06, initial work was done to evaluate potential approaches for this work, funded through the Eastside Transit Project and Lake Oswego to Portland Transit Corridor Project Alternatives Analyses. The Streetcar System Plan will evaluate potential alignments and extensions to the existing system and will serve as input into the Regional Transportation Plan update.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

- As the region's Metropolitan Planning Organization (MPO), Metro has responsibility for the region's long-range transportation planning, including transit. A recently signed memoranda of agreement outlining Metro's planning responsibilities and relationship with Oregon Department of Transportation (ODOT) and TriMet help to cement Metro's role as the lead agency for federally-funded transit and transportation planning projects, particularly FTA New Starts projects.
- As part of SAFETEA-LU, the region received \$3 million to advance the Streetcar program, which would include funding for advancement of Streetcar technical methods as well as to advance the Eastside Transit Project and the Lake Oswego to Portland Transit Corridor Project into the NEPA process.
- Also as part of SAFETEA-LU, TriMet received a \$4 million authorization to develop a domestic streetcar prototype.

### **STAKEHOLDERS**

- Metro Council
- Cities of Portland and Lake Oswego
- Clackamas and Multnomah County
- Portland Streetcar, Inc.
- Eastside Transit Project Advisory Committee
- Lake Oswego to Portland Transit Project Advisory Committee
- FTA
- TriMet
- ODOT
- Central Eastside Industrial Council
- Lloyd Business Association and TMA
- Private development community
- Downtown and central eastside workers and residents
- Joint Policy Advisory Committee on Transportation (JPACT)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Develop a Streetcar System Plan for the region and provide input into the Regional Transportation Plan update;
- Develop technical methods for travel forecasting that fully explain the ridership patterns of the Streetcar mode to assist FTA in the evaluation of Small Starts projects;
- Develop technical methods for evaluating the impact of Streetcar on development patterns and measuring the economic development potential of the Streetcar mode to assist FTA in the evaluation of Small Starts projects.

## STREETCAR TECHNICAL METHODS AND SYSTEM PLAN

### ACCOMPLISHMENTS OF THIS PROGRAM TO DATE

- The first segment of the Portland Streetcar from NW 23<sup>rd</sup> to Portland State University was opened in August 2001. During the late 1990s, the City of Portland constructed an initial operating segment for the Portland Streetcar project. The alignment provides service to NW 23<sup>rd</sup> Avenue shopping, Good Samaritan Medical Center, the Pearl District, the West End of downtown, and Portland State University. The double-tracked line is 2.4 miles end-to-end with 32 stop locations.
- Portland Streetcar is a part of the City's growth management and neighborhood livability strategy. Reduced vehicle-miles-traveled per capital provides associated environmental benefits, energy conservation and urban land-use efficiencies.
- In 2005, Eric Hovee Inc. was retained to develop a correlation between the presence of the Portland Streetcar and Central City development patterns. This study recommended potential methods to show causality between the streetcar and intensity of development that form the basis of the current work program
- In 2005, PB Consult was retained to evaluate the travel demand forecasting methods to be used to evaluate the Streetcar mode. Several sub-mode adjustments were made to Metro's travel forecasting model as a result.
- An FTA Alternatives analysis was completed and a Locally Preferred Alternative selected for both the Eastside and Portland to Lake Oswego Transit Projects in federal FY 2005-06.

### BUDGET SUMMARY

Requirements:		Resources:	
Personal Services	\$ 51,030	FTA Streetcar grant	\$ 794,110
Interfund Transfers	\$ 36,019	Metro	\$ 10,000
Materials & Services	\$ 807,950	Local Jurisdiction Match	\$ 90,889
<i>Consultant Contract(s)- \$510,725</i>			
<i>City of Portland IGA- \$221,000</i>			
<i>Other Program Costs- \$16,225</i>			
<b>TOTAL</b>	<b>\$ 894,999</b>	<b>TOTAL</b>	<b>\$ 894,999</b>

<u>Full-Time Equivalent Staffing</u>	
Regular Full-Time FTE	0.4
<b>TOTAL</b>	<b>0.4</b>

### ALTERNATIVE ANALYSIS & STREETCAR PROGRAMS SUMMARY - by Grant

	FY 06	FY 07	TOTAL
<b>Total FTA SAFETEA-LU Streetcar Earmark</b>	<b>\$750,000</b>	<b>\$2,234,278</b>	<b>\$2,984,278</b>
Eastside Transit Alternatives Analysis	\$550,000	\$547,354	\$1,097,354
Lake Oswego to Portland AA/DEIS	\$200,000	\$892,814	\$1,092,814
Streetcar Methods and System Plan	\$0	\$794,110	\$794,110
<b>Total MTIP FY 05-06 Grant</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$300,000</b>
Lake Oswego to Portland AA	\$300,000	\$0	\$300,000
<b>Total MTIP FY 06-07 Grant</b>	<b>\$688,000</b>	<b>\$0</b>	<b>\$688,000</b>
Lake Oswego to Portland AA	\$688,000	\$0	\$688,000
<b>TOTAL</b>	<b>\$1,738,000</b>	<b>\$2,234,278</b>	<b>\$3,972,278</b>

### **PROGRAM**

This project will build upon the completion of the Willamette Shoreline Alternatives Analysis (AA) in FY 2005-06. Promising alternatives advanced from the AA would connect the South Waterfront area of the Central City to the Lake Oswego town center. The Draft Environmental Impact Statement (DEIS) will advance the project to the point where application may be made to the Federal Transit Administration (FTA) for the Project Development phase of the Small Starts funding program.

The Alternatives Analysis evaluated use of the Jefferson Branch rail line, owned by the Willamette Shoreline Consortium, as a potential transit route, as well as Highway 43 and other local roadways. A bicycle and pedestrian trail was also considered within the envelope of the Jefferson Branch right-of-way and possibly on local streets.

This activity is the second step in the federal transit planning process. In order to be eligible for federal funding, the project must be selected through a thorough analysis of promising alternatives and their environmental impacts and must receive FTA approvals to move into subsequent phases of project development.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

- As the region's Metropolitan Planning Organization (MPO), Metro has responsibility for the region's long-range transportation planning, including transit. Recently signed memoranda of agreement outlining Metro's planning responsibilities and relationship with Oregon Department of Transportation (ODOT) and TriMet help to cement Metro's role as the lead agency for federally-funded transit and transportation planning projects, particularly FTA New Starts and Small Starts projects.
- As part of SAFETEA-LU, the region received \$3 million to advance the Streetcar program, which would include funding for advancement of Streetcar technical methods as well as to advance the Eastside Transit Project and the Lake Oswego to Portland Transit Corridor Project into the National Environmental Protection Act (NEPA) process.
- The Region 2040 Plan, the Regional Transportation Plan (RTP), City of Portland Plans for North Macadam, and Lake Oswego Redevelopment plans all call for improved transit service in the Macadam/Highway 43 corridor between the central city and the Lake Oswego Town Center.
- The Willamette Shoreline Consortium, formed in 1985, managed the acquisition of the Jefferson Branch rail line and has been operating historic trolley service on the line. The Consortium also manages maintenance of the line to ensure it remains an active rail alignment for future enhanced transit service.
- The City of Lake Oswego is developing a Foothills District Refinement Plan for an urban renewal district in the Foothills area adjacent to the Jefferson Branch rail alignment that anticipates a high level of transit service.

### **STAKEHOLDERS**

- Metro Council
- City of Portland
- Portland Streetcar, Inc.
- City of Lake Oswego
- FTA
- TriMet
- ODOT
- Clackamas County
- Multnomah County
- Citizens adjacent to, users of and those potentially impacted by transit and/or trail improvements in the corridor
- Joint Policy Advisory Committee on Transportation (JPACT)
- Metro Parks and Greenspaces (trail component)
- Metro Committee for Citizen Involvement (MCCI)



## **LAKE OSWEGO TO PORTLAND CORRIDOR (Willamette Shoreline)**

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- Business and civic organizations
- Private industry and the public

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Initiate a DEIS for the Lake Oswego to Portland Transit Corridor;
- Implement a public participation plan that provides opportunities for all parties to comment, employs visualization techniques and other best practices to help describe alternatives and options and uses enhanced electronically accessible information formats, such as on-line survey instruments and the Web;
- Successfully develop a funding strategy that makes use of local funds, and federal "Small Starts" funding included in SAFETEA-LU;
- Ensure that the project is properly positioned for federal review and advancement into the Project Development phase of the Small Starts program.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- First segment of the Portland Streetcar from NW 23<sup>rd</sup> to Portland State University was opened in August 2001. The double-tracked line is 2.4 miles end-to-end with 32 stop locations. RiverPlace streetcar extension was completed in May 2005. Extensions are planned to SW Gibbs and SW Bancroft as well as to the Lloyd District and Central Eastside over the Broadway Bridge;
- Completion of a corridor study background report that includes compilation, summarizations and analysis of historical transportation and land-use issues plans and policies along the corridor;
- Establishment and implementation of a 20-member Project Advisory Committee who represent the communities, residents, businesses and interest groups in the travel corridor between Lake Oswego and Portland;
- Definition of a wide-range of alternatives to be considered during the Scoping Process and the development of a visually descriptive geographic overview packet of Highway 43 and Willamette Shore railway right-of-way.

### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	361,922
Interfund Transfers	\$	120,858
Materials & Services	\$	530,000
<i>Consultant Contract(s)- \$410,000</i>		
<i>City of Portland IGA- \$110,000</i>		
<i>Other Program Costs- \$10,000</i>		
Computer	\$	3,220

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<b>TOTAL</b>	<b>\$</b>	<b>1,016,000</b>
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#### **Resources:**

FTA Streetcar Grant	\$	898,197
Local Match	\$	102,803
Metro	\$	15,000

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<b>TOTAL</b>	<b>\$</b>	<b>1,016,000</b>
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#### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	3.92
<b>TOTAL</b>	<b>3.92</b>

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**LAKE OSWEGO TO PORTLAND CORRIDOR (Willamette Shoreline)**

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**ALTERNATIVE ANALYSIS & STREETCAR PROGRAMS SUMMARY - by Grant**

	<b>FY 06</b>	<b>FY 07</b>	<b>TOTAL</b>
<b>Total FTA SAFETEA-LU Streetcar Earmark</b>	<b>\$750,000</b>	<b>\$2,234,278</b>	<b>\$2,984,278</b>
Eastside Transit Alternatives Analysis	\$550,000	\$547,354	\$1,097,354
Lake Oswego to Portland AA/DEIS	\$200,000	\$892,814	\$1,092,814
Streetcar Methods and System Plan	\$0	\$794,110	\$794,110
<b>Total MTIP FY 05-06 Grant</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$300,000</b>
Lake Oswego to Portland AA	\$300,000	\$0	\$300,000
<b>Total MTIP FY 06-07 Grant</b>	<b>\$688,000</b>	<b>\$0</b>	<b>\$688,000</b>
Lake Oswego to Portland AA	\$688,000	\$0	\$688,000
<b>TOTAL</b>	<b>\$1,738,000</b>	<b>\$2,234,278</b>	<b>\$3,972,278</b>

## **EASTSIDE TRANSIT ALTERNATIVE ANALYSIS**

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### **PROGRAM**

This project will advance the Locally Preferred Alternative selected as part of the FY 2005-06 federal Alternatives Analysis (AA) into a Documented Categorical Exclusion or Environmental Assessment, depending on the Federal Transit Administration's (FTA) determination of the appropriate National Environmental Protection Act (NEPA) review. The AA evaluated alternative transit modes and alignments to connect downtown Portland to the Lloyd District and Central Eastside. Alternatives included a no-build option, bus circulator and streetcar alternatives, including three minimum operable segments. The proposed streetcar alternative would be an extension of the existing Portland Streetcar alignment over the Broadway Bridge to the Lloyd District, extending south through the Central Eastside to OMSI, and eventually connecting with a new Caruthers light rail bridge when Milwaukie light rail is constructed to complete the Streetcar loop into Downtown.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

- As the region's Metropolitan Planning Organization (MPO), Metro has responsibility for the region's long-range transportation planning, including transit. A recently signed memoranda of agreement outlining Metro's planning responsibilities and relationship with Oregon Department of Transportation (ODOT) and TriMet help to cement Metro's role as the lead agency for federally-funded transit and transportation planning projects, particularly FTA New Starts projects.
- The Region 2040 Plan, the Regional Transportation Plan (RTP) and various City of Portland plans including the Central City Plan (1986) and the Central City Transit Plan (1994) call for improved internal Central City circulation for workers, residents, and visitors.
- In federal FY 2005-06, Metro Council selected a Locally Preferred Alternative to advance into the NEPA process.
- As part of SAFETEA-LU, the region received \$3 million to advance the Streetcar program, which would include funding for advancement of Streetcar technical methods as well as to advance the Eastside Transit Project and the Lake Oswego to Portland Transit Corridor Project into the NEPA process.

### **STAKEHOLDERS**

- Metro Council
- City of Portland
- Portland Streetcar, Inc.
- Eastside Transit Project Advisory Committee
- FTA
- TriMet
- Central Eastside Industrial Council
- Lloyd Business Association and Transportation Management Area (TMA)
- Private development community
- Downtown and central eastside workers and residents
- Joint Policy Advisory Committee on Transportation (JPACT)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Complete documented Categorical Exclusion (CE) or Environmental Assessment (EA) for the Eastside Transit Project;
- Successfully develop a funding strategy that makes use of local funds, and federal "Small Starts" funding included in SAFETEA-LU;
- Ensure that the project is properly positioned for federal review and approval to advance into the Project Development phase of the Small Starts funding program.

## EASTSIDE TRANSIT ALTERNATIVE ANALYSIS

### ACCOMPLISHMENTS OF THIS PROGRAM TO DATE

- First segment of the Portland Streetcar from NW 23<sup>rd</sup> to Portland State University was opened in August 2001. During the late 1990s, the City of Portland constructed an initial operating segment for the Portland Streetcar project. The alignment provides service to NW 23<sup>rd</sup> Avenue shopping, Good Samaritan Medical Center, the Pearl District, the West End of downtown and Portland State University. The double-tracked line is 2.4 miles end-to-end with 32 stop locations.
- Portland Streetcar is a part of the City's growth management and neighborhood livability strategy. Reduced vehicle-miles-traveled per capital provides associated environmental benefits, energy conservation and urban land-use efficiencies.
- Portland Streetcar currently is providing over 2,000,000 rides per year. Since 1997, nearly 5,300 new units of multi-family housing have been built within 2-3 blocks of the streetcar and there has been over 3.5 million square feet of non-residential space developed.
- The RiverPlace streetcar extension is under construction.
- Extensions are planned to SW Gibbs and SW Bancroft as well as to the Lloyd District and Central Eastside over the Broadway Bridge.
- Portland Streetcar, Inc, after two years of public outreach and development with a project steering committee, developed an alignment that was adopted by Portland City Council on June 25, 2004.
- Metro entered into a contract with Portland Streetcar, Inc. in FY 2004-05 to develop the work program and perform the federal alternatives analysis for the project.
- An FTA Alternatives analysis was completed and a Locally Preferred Alternative selected in federal FY 2005-06.

### BUDGET SUMMARY

#### Requirements:

Personal Services	\$	128,856
Interfund Transfers	\$	43,445
Materials & Services	\$	437,700
<i>Consultant Contract- \$45,475</i>		
<i>City of Portland IGA- \$387,000</i>		
<i>Other Program Costs- \$5,225</i>		

#### Resources:

FTA Streetcar grant	\$	547,354
Local match	\$	62,647

<b>TOTAL</b>	<b>\$</b>	<b>610,001</b>	<b>TOTAL</b>	<b>\$</b>	<b>610,001</b>
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#### Full-Time Equivalent Staffing

Regular Full-Time FTE	1.22
<b>TOTAL</b>	<b>1.22</b>

### ALTERNATIVE ANALYSIS & STREETCAR PROGRAMS SUMMARY - by Grant

	FY 06	FY 07	TOTAL
<b>Total FTA SAFETEA-LU Streetcar Earmark</b>	<b>\$750,000</b>	<b>\$2,234,278</b>	<b>\$2,984,278</b>
Eastside Transit Alternatives Analysis	\$550,000	\$547,354	\$1,097,354
Lake Oswego to Portland AA/DEIS	\$200,000	\$892,814	\$1,092,814
Streetcar Methods and System Plan	\$0	\$794,110	\$794,110
<b>Total MTIP FY 05-06 Grant</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$300,000</b>
Lake Oswego to Portland AA	\$300,000	\$0	\$300,000
<b>Total MTIP FY 06-07 Grant</b>	<b>\$688,000</b>	<b>\$0</b>	<b>\$688,000</b>
Lake Oswego to Portland AA	\$688,000	\$0	\$688,000
<b>TOTAL</b>	<b>\$1,738,000</b>	<b>\$2,234,278</b>	<b>\$3,972,278</b>

## **PROJECT DEVELOPMENT**

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### **PROGRAM**

The program implements multi-modal Regional Transportation Plan (RTP) projects and policies for major transportation corridors. It involves ongoing involvement in local and regional transit and roadway project conception, funding, and design.

Metro has traditionally participated in local project-development activities for regionally funded transportation projects. In recent years, the Project Development program has focused on projects that directly relate to completion of planning and project development activities in regional transportation corridors outlined in the RTP. A few of these corridors already had major planning efforts underway under separate budget lines. However, for the bulk of the corridors, project development is still needed. This program coordinates with local and state planning efforts to ensure consistency with regional projects, plans, and policies. It will also support initiation of new corridor planning efforts to be led by Metro or others.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

As provided by the State Transportation Planning Rule (TPR), Metro is required to complete a regional Transportation System Plan, which identifies the need for transportation facilities and their function, mode and general location. The 2000 RTP calls for completion of 18 specific corridor refinements and studies for areas where significant needs were identified but which require further analysis before a specific project can be developed. Section 660-012-0025 of the TPR requires prompt completion of corridor refinements and studies.

In FY 2000-01, the Corridor Initiatives Program prioritized completion of the corridor plans and refinements. Per that recommendation, Metro initiated and led corridor studies for the Powell/Foster and Highway 217 corridors in the 2002-2005 time period. In 2005, Metro, again consulted with regional jurisdictions to identify the next priority corridor(s) for commencement of planning work. Based on the outcome of that consultation, in Fall 2005, the Corridor Refinement Work Plan was updated to reflect current and new efforts and responsibilities. Over the next five years, the work plan, which was approved by the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council, calls for commencement of major new planning efforts on the East Multnomah County I-84/US 26 Connector, the Outer Southwest Area, I-205 and I-405 corridors and regional high capacity transit and tolling system plans.

### **STAKEHOLDERS**

- Project partners include Oregon Department of Transportation (ODOT), Federal Highway Administration (FHWA), TriMet and associated counties and cities;
- Business dependent on the corridor including those directly within the corridor, those who utilize it for freight and those whose employees rely on the corridor to reach work;
- Commuters who travel to or through the corridor for work, shopping or to reach leisure destinations;
- Residents of the area and neighborhood associations within or adjacent to the corridor.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Ensure consistency with regional plans and policies related to major transportation corridors by participating in local planning and project development activities, including technical advisory committees, workshops and charrettes as well as formal comment on proposed projects;
- Implement the Corridor Initiatives Project strategy in the RTP through monitoring ongoing planning activities and working with other jurisdictions to initiate new corridor efforts;
- Participate in the development of project not yet funded by other grants or contracts;
- Participate in ODOTs' Oregon Innovative Partnerships Program (OIPP), which is seeking private partners to help develop transportation facilities. In FY 2006-07 this will focus on completing scoping work for proposals from private firms on I-205 and Sunrise Corridors;

## PROJECT DEVELOPMENT

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- Develop and Implement public participation plans that provide opportunities for all parties to comment. Employ visualization techniques, electronically accessible formats such as on-line survey instruments and the Web and other best practices to help reach potentially impacted, minority and non-English speaking, or other interested residents in future selected corridors;
- Fully explore safety and community access/development considerations and other key factors in selected transportation corridors.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

(Most of these projects started under this program, but many evolved into independent studies)

- Corridor Initiatives Project prioritized the multi-modal corridors outlined in the 2000 RTP (2001);
- Corridor Refinement Work Plan adopted into RTP (2002);
- Received TGM grant for Phase I Powell/Foster Corridor study (2002);
- Powell Foster Phase I completed (2003);
- Completed Highway 217 Corridor study (2005);
- Travel forecasting and FTA liaison for Washington County Commuter Rail project (2001-present);
- Participation in eastside streetcar and I-405 loop studies (2004-2005);
- Scoping and grant applications for I-5/99W project (2003-present);
- Participation in scoping, funding, travel analysis and advisory committees for Sunrise Corridor (2003-present);
- Update of Corridor Priorities Work Plan (2005);
- Participated in the development of Columbia River Crossing Project;
- Worked with ODOT OIPP on work plan development and negotiations with private consortium (OTIG) for proposals on I-205 and Sunrise corridors.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 32,402	STP/ODOT Match	\$ 38,584
Interfund Transfers	\$ 10,598	Metro	\$ 4,416
<b>TOTAL</b>	<b>\$ 43,000</b>	<b>TOTAL</b>	<b>\$ 43,000</b>

### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	0.3
<b>TOTAL</b>	<b>0.3</b>

## **NEXT CORRIDOR**

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### **PROGRAM**

This work program is designed to complete the corridor refinement planning needed on the next priority corridor as defined by the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council. The 2000 Regional Transportation Plan (RTP) identified a significant transportation need in 18 corridors but specified that additional work was needed before a specific project could be implemented. In FY 2005-06, this program focused on completing the Highway 217 Corridor study and commencing the next multi-modal alternatives analysis. Work is intended to conclude in FY 2006-07 with selection of preferred alternative(s), including a financing and phasing plan, for adoption by JPACT and Metro Council. Alternatives will be developed to the point that they can proceed directly into National Environmental Protection Act (NEPA) and preliminary engineering.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

As provided by the Transportation Planning Rule (TPR), Metro is required to complete a regional Transportation System Plan, which identifies the need for transportation facilities and their function, mode, and general location. The 2000 RTP calls for completion of 18 corridor refinements and studies for areas where significant needs were identified but which require further analysis before a specific project can be developed. Section 660-012-0025 of the TPR requires prompt completion of corridor refinements and studies.

In FY 2000-01, the Corridor Initiatives Program prioritized completion of the corridor plans and refinements. Per that recommendation, Metro initiated and led corridor studies for the Powell/Foster and Highway 217 corridors.

In Winter 2005, Metro again consulted with regional jurisdictions to identify the next priority corridor(s) for commencement of planning work. Based on the consultation, in Fall 2005, JPACT and Metro Council approved a corridor planning work plan update, which calls for initiation of five new corridor plans in the next five years (see Project Development narrative). In Winter 2006, Metro will commence work on one or more corridor planning efforts. Candidates include the I-205 South; the Outer Southwest Area (including a regional tolling system plan); and East Multnomah County I-84/US 26 Connector corridors as well as a regional transit system plan.

### **STAKEHOLDERS**

- Project partners include ODOT, Federal Highway Administration (FHWA), TriMet and associated counties and cities;
- Business who are dependent on the corridor including those directly within the corridor, those who utilize it for freight, and those whose employees rely on the corridor to reach work;
- Commuters who travel to or through the corridor for work, shopping, or to reach leisure destinations;
- Residents of the area and neighborhood associations within or adjacent to the corridor.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Complete scoping of study;
- Issue consultant contracts;
- Complete background and existing conditions analyses;
- Identify initial range of alternatives for study;
- With advisory committees, establish goals and objectives for the corridor;
- Commence travel modeling and concept design for initial alternatives;
- Develop and Implement a public participation plan that provides opportunities for all parties to comment, employs visualization techniques, electronically accessible formats such as on-line survey instruments and the Web and other best practices to help reach potentially impacted, minority and non-English speaking, or other interested residents in the selected corridor;
- Fully explore safety and community access/development considerations and other key factors in the selected transportation corridor.

## NEXT CORRIDOR

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### ACCOMPLISHMENTS OF THIS PROGRAM TO DATE

- Completed Phase I Powell/Foster Corridor study (2003);
- Completed Highway 217 Corridor study (2005);
- With Transportation Policy Alternatives Committee (TPAC) subgroup, review priorities and identified potential next corridor study candidates (2005);
- JPACT and Metro Council approved corridor planning work plan update (Fall 2005);
- Select corridor for next study – (Winter 2006);
- Develop scope and initiate contracting (Spring 2006).

### BUDGET SUMMARY

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 268,629	PL	\$ 110,955
Interfund Transfers	\$ 80,294	STP/ODOT Match	\$ 179,475
Materials & Services	\$ 348,050	ODOT Support	\$ 12,000
Consultant Contract(s) -\$269,000		Section 5303	\$ 81,226
Other Program Costs- \$79,050		Next Corridor STP*	\$ 250,000
Computer	\$ 6,026	Next Corridor Match	\$ 28,614
		Metro	\$ 40,729
<b>TOTAL</b>	<b>\$ 702,999</b>	<b>TOTAL</b>	<b>\$ 702,999</b>

<b>Full-Time Equivalent Staffing</b>	
Regular Full-Time FTE	3.06
<b>TOTAL</b>	<b>3.06</b>

\* Anticipated



## **BI-STATE COORDINATION**

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### **PROGRAM**

The Bi-State Coordination Committee was created in April 2004, through a transition from the Bi-State Transportation Committee. The Bi-State Coordination Committee is chartered by member agencies on both sides of the Columbia River including the cities of Vancouver and Battle Ground, Washington and Portland and Gresham, Oregon; Multnomah and Clark counties; the ports of Vancouver and Portland; TriMet and CTRAN; Washington State Department of Transportation and Oregon Department of Transportation; and Metro. The Committee reviews, discusses and makes recommendations about transportation and land use issues of bi-state significance.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

- Code of Federal Regulations, Title 23, Chapter 1, Subchapter I, Section 134, Metropolitan Planning at subsection (d) (1) Coordination in Multi-state Areas says: "The Secretary shall encourage each Governor with responsibility for a portion of a multi-state metropolitan area and the appropriate metropolitan planning organizations to provide coordinated transportation planning for the entire metropolitan area."
- Metro Resolution No. 99-2778, For the Purpose of Establishing a Bi-State Committee of the JPACT and the Southwest Washington RTC. (Southwest Washington RTC Resolution No. 05-99-11 is identical in its resolves).
- Metro Resolution No. 03-3388, For the Purpose of Endorsing a Bi-State Coordination Committee to Discuss and Make Recommendations about Land Use, Economic Development, Transportation and Environmental Justice Issues of Bi-State Significance.
- Resolutions by the City of Portland, Port of Portland, TriMet and Multnomah County in support of the formation of a Bi-State Coordination Committee (Resolutions in support were also passed by sister agencies/entities in southwest Washington).
- Through Metro Council, coordinate with partners in southwest Washington about land use and transportation issues of bi-state significance.

### **STAKEHOLDERS**

- Metro Council
- Cities of Portland and Vancouver
- Multnomah and Clark County
- Ports of Portland and Vancouver
- TriMet
- CTRAN

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

Objectives of this program include providing a forum for discussion of:

- Coordination of federal funding preferences for the bi-state area;
- Large land use plan amendments as they are proposed;
- Coordination with I-5 Columbia River Crossing;
- Freight rail issues;
- Transportation Demand Management (TDM) measures on transportation facilities of mutual interest;
- Other issues of bi-state significance as they may emerge.

Products/Deliverables will include:

- Making recommendations to the Joint Policy Advisory Committee on Transportation (JPACT) or other agencies about land use and transportation issues of bi-state significance;
- Completing an Annual Report.

## BI-STATE COORDINATION

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### ACCOMPLISHMENTS OF THIS PROGRAM TO DATE

- Determined that the two Metropolitan Planning Organization (MPO) forecasts of future jobs and housing should be coordinated and that 2030 should be the forecast horizon year for bi-state transportation projects;
- Made recommendations concerning alternatives for the I-5 Delta Park Project;
- Provided additional time for discussion and coordination of issues concerning the I-5 Columbia River Crossing;
- Discussed high occupancy vehicle lanes on I-5 in southwest Washington;
- Kept local officials up to date on heavy rail/freight movement in the bi-state area;
- Discussed the Cost of Congestion Report and possible actions to address this issue;
- Discussed the West Coast Corridor Coalition and implications for the Bi-State area.

A detailed description of Bi-State Coordination Committee work in a month-by month format is available in the Committee's 2005 Annual Report.

### BUDGET SUMMARY

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 15,354	STP/ODOT Match	\$ 29,844
Interfund Transfers	\$ 6,647	Metro	\$ 2,157
Materials & Services	\$ 10,000		
<b>TOTAL</b>	<b>\$ 32,001</b>	<b>TOTAL</b>	<b>\$ 32,001</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	0.18
<b>TOTAL</b>	<b>0.18</b>

### **PROGRAM**

This program manages the identification of the region's freight system; policies and project needs and includes them in Regional Transportation Plan (RTP). The program updates the RTP's Regional Freight System plan that provides guidance to affected municipalities and counties in accommodation of freight on the regional transportation system. It provides coordination with local, state, and federal plans so that freight plans remain consistent throughout the region. It ensures that prioritized freight requests are competitively considered within federal, state, and regional funding programs. It will also allow continued freight data collection, analysis, education, and coordination within the region. Combining these elements, the program endeavors to identify 'trouble points' in the transportation system, proposed potential capacity improvements and identifies potential funding sources. Note that the level of effort identified is contingent upon receipt of continued Metropolitan Transportation Improvement Plan (MTIP) funding.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Safe, Accountable, Flexible, and Efficient Transportation Equity Act - A Legacy for Users (SAFETEA-LU) requires Metropolitan Planning Organizations (MPO) to meet eight planning factors including planning for people and freight and supporting economic vitality by enabling global competition, productivity, and equity. In support of Oregon's Statewide Planning Goals 9 and 12, the Transportation Planning Rule (TPR) requires Transportation System Plans (TSP) to identify the "needs for movement of goods and services to support industrial and commercial development." Further, the 2040 growth concept identifies the importance of industrial activity to the region by establishing special industrial districts as a priority land use.

RTP Policy 15.0, Regional Freight System, requires Metro to "provide efficient, cost-effective and safe movement of freight in and through the region" by identifying freight needs and projects to resolve them. TPR 660-012-0020, Elements of TSPs, requires consistency between local, regional, state, and federal functional classifications. The RTP Freight Policies 15.0 and 15.1 specifically direct Metro to work with local jurisdictions and state agencies to meet federal mandates for the intermodal and congestion management systems, to identify projects and to coordinate plans. RTP Policy 15.1, Regional Freight System Investments, specifically directs Metro to "protect and enhance public and private investments in the freight network" by seeking opportunities for public private partnerships and encouraging public funding of freight investments.

### **STAKEHOLDERS**

- Metro Council
- TPAC
- JPACT
- Metro Planning (RTP)
- Cities and counties within the region including Clark County, Washington
- Federal Highway Administration (FHWA)
- ODOT
- Ports of Portland and Vancouver
- Businesses, including freight shippers and carriers, distribution companies, manufacturers, retailers and commercial firms
- Oregon Trucking Association and other business associations including the Westside Economic Alliance, the Columbia Corridor Association, and the Portland Business Alliance
- Metro area residents and neighborhood associations

## REGIONAL FREIGHT PLAN

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### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Working with the Port of Portland and ODOT, complete the Regional Freight Data Collection Study;
- Complete Transportation Growth Management work required for Regional Freight Plan, including recommendations regarding street design, classification and other policy changes and network and project proposals for freight;
- Continue to work with Oregon Freight Advisory Committee to identify statewide freight project needs and seek support for funding of priorities;
- Participate in the Portland Freight Committee and the Portland Freight Master Plan project, meeting new SAFETEA-LU provisions for coordination of freight movement;
- Track projects with significant implications for freight movement such as the I-5 Columbia Crossing, I-205 and the Sunrise Corridor projects;
- Participate in the Port of Portland led Oregon Rail Users League, which is identifying key rail priorities and advocating for funding with the State Legislature;
- Coordinate information regarding freight needs in support of freight funding proposals being developed by the State Legislature;
- Work with the Port of Portland and private interests to explore methods to increase private sector participation in rail funding;
- Work with agencies and private interests to identify key multi-modal priorities, secure appropriate private matching funds and ensure that they are competitively considered under state freight funding programs.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Established regional freight network and policies as part of 2000 RTP and updated for 2003 RTP;
- Partnered (with Port) on Commodity Flow Study and Updates;
- Developed regional truck model and incorporated updates to reflect new commodity forecasts;
- Updated truck model to incorporate results of Freight Data Collection Study;
- Established and led the Regional Freight Committee, comprised of 13 local, regional and state agencies;
- Developed the freight category and criteria for MTIP;
- Led regional freight project prioritization effort (2003-04) as part of OTIA III, which resulted in the region obtaining significant funding for freight projects;
- Participated in State and federal freight model development programs;
- Member of Freight Data Users Group and Portland and Oregon Freight Advisory Committees;
- Active participant in local freight planning efforts such as the St. Johns Truck Study, the Sandy Boulevard study and the I-5 rail capacity analysis;
- Participated in ORULE and CONNECT Oregon committees;
- Entered into contract for Transportation Growth Management Grant for Regional Freight Plan;
- Complete consultant scope and initiate Regional Freight Plan work.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 207,410	PL	\$ 1,956
Interfund Transfers	\$ 65,010	STP/ODOT Match	\$ 108,368
Materials & Service	\$ 95,200	Freight STP	\$ 75,000
Consultant Contract(s) - \$87,050		Metro	\$ 33,676
Other Program Costs - \$8,150		TGM Grant	\$ 150,000
Computer	\$ 1,380		
<b>TOTAL</b>	<b>\$ 369,000</b>	<b>TOTAL</b>	<b>\$ 369,000</b>

### **Full-Time Equivalent Staffing**

Regular Full-Time FTE	2.08
<b>TOTAL</b>	<b>2.08</b>

## **REGIONAL TRANSPORTATION PLAN FINANCING**

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### **PROGRAM**

This program works with the business community, the Joint Policy Advisory Committee on Transportation (JPACT), and the Metro Council to develop expanded funding for transportation improvements to implement the Regional Transportation Plan (RTP) and Regional Framework Plan. This program could include formulating a proposal for the 2007 Oregon legislature and a regional ballot measure for voters to consider in 2008.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Working with the project lead agency or interest group, Metro staff will support RTP-related finance efforts to:

- Work with the RTP update and New Look efforts to identify projects which are important to the region's economy;
- Create linkage between the long-term vision for Metropolitan Transportation Improvement Program (MTIP) funding allocations and the implementation of priority RTP improvements;
- Establish an array of transportation finance options;
- Evaluate options for feasibility and ability to address the finance shortfalls;
- Establish an outreach program to gain public input on key issues and strategies;
- Help coordinate a regional finance request to the 2007 Oregon Legislature;
- Work with the business community and local governments to determine the viability of a regional transportation ballot measure.

### **STAKEHOLDERS**

- Metro Council
- Oregon Department of Transportation (ODOT)
- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- TriMet
- JPACT
- Business Community
- General Public
- Association of Counties (AOC)
- League of Cities (LOC)
- American Automobile Association (AAA)
- Oregon Trucking Association

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Work with key stakeholders to develop a proposal for the 2007 Oregon Legislature that will be supported by the business community and local governments;
- Develop regional priorities for funding from federal sources, including recommendations from the Transportation Investment Task Force and the JPACT Finance Committee;
- Coordinate with funding strategies for TriMet's Transit Investment Plan;
- Work with local partners, the public and business community to set project priorities and seek funding alternatives/solutions at the federal, state, regional and local level;
- Facilitate regional consensus on priority projects to seek state and federal authorization and appropriations.

### **ACCOMPLISHMENTS**

In July 2002, the business community took the lead in regional discussions on transportation finance through the Transportation Investment Task Force. This program provides Metro staff support for these efforts in FY 2005-06, oriented toward implementing key elements of the RTP Priority System. These efforts do not include lobbying activities of any kind. A nationally recognized consultant has recently

## REGIONAL TRANSPORTATION PLAN FINANCING

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completed an analysis of the cost of congestion in the Portland Metro region. This work is fostering renewed interest in seeking additional funds for projects at the 2007 session of the Oregon Legislature and possibly a regional ballot measure in 2008.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 135,786	PL	\$ 193,996
Interfund Transfers	\$ 42,754	STP/ODOT Match	\$ 7,929
Materials & Services	\$ 168,000	ODOT Support	\$ 17,303
Consultant Contract(s)- \$150,000		Sec 5303	\$ 31,667
Other Program Costs- \$18,000		TriMet	\$ 39,971
Computer	\$ 460	Metro	\$ 56,134
<b>TOTAL</b>	<b>\$ 347,000</b>	<b>TOTAL</b>	<b>\$ 347,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	1.23
<b>TOTAL</b>	<b>1.23</b>

## **REGIONAL TRAVEL OPTIONS**

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### **PROGRAM**

The Regional Travel Options (RTO) program is the region's Transportation Demand Management (TDM) strategy for reducing reliance on the automobile. The program has been funded for nearly 20 years, and has grown to include a variety of regional partners and outreach programs proven to reduce travel demand and encourage alternatives to driving alone. Since the early 1990s, the program has provided a daily reduction of 10,700 auto trips and daily Vehicle Miles Traveled (VMT) reduction of 79,400 miles, or the equivalent capacity to 10 highway lane miles. The program is also central to the region's efforts to maintain "attainment" status with federal air quality requirements. The program's effectiveness in meeting these goals monitored on an ongoing basis through a system of detailed evaluations of individual components and employer surveys, and is documented in bi-annual reports published by Metro.

The Metro Council approved a new strategic plan for the RTO program in 2004, shifting the lead role for managing the program from TriMet to Metro. The updated program places a major emphasis on marketing, and will be augmented by a recently funded state TDM program. Most of the RTO program activities are carried out by public agency partners or consultant contracts, and are administered by Metro. The key components of the RTO program are:

- Program administration
- Collaborative marketing program
- Regional rideshare - vanpool program
- Transportation Management Association program
- 2040 Initiatives Grant program
- Evaluation program

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The 2004 RTO Strategic Plan was approved by Metro Council resolution, and provides the framework for RTO policy development and program activities. The RTO Subcommittee of Transportation Policy Alternatives Committee (TPAC) serves as the technical committee for RTO policy development.

The RTO program is an economic development tool for regional centers and industrial areas. RTO strategies support economic growth in centers by freeing up land currently used for parking for jobs and housing. The program increases the capacity of current transportation infrastructure by providing and promoting alternatives to driving alone – carpooling, vanpooling, riding transit, bicycling, walking, and telecommuting.

The RTO program works directly with employers to find the best travel options for their employees through TriMet's Employer Outreach Program and local transportation management associations (TMAs). Services provided through the RTO program, such as carpool matching, vanpools and transit pass program ensure access to jobs for low-income residents of the region.

### **STAKEHOLDERS**

- Metro Council
- Federal Transit Administration (FTA)
- Federal Highway Administration (FHWA)
- RTO service providers (TriMet, Wilsonville SMART, van pool vendors and others)
- RTO Subcommittee and TPAC
- Joint Policy Advisory Committee on Transportation (JPACT)
- Private industry and the public

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Continued implementation of the RTO Strategic Plan;
- Continued policy development and evaluation in partnership with RTO Subcommittee;

## REGIONAL TRAVEL OPTIONS

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- Completion of 2004-2005 Annual Report;
- Development and implementation of a marketing campaign to raise public awareness of travel options and encourage people to reduce single-occupancy vehicle trips. The campaign will include television, radio and outdoor advertising, earned media and community outreach.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Completion of 2002 RTO Annual Report;
- Completion of 2004 RTO Strategic Plan;
- Completion of 2003 RTO Annual Report;
- Completion of 2004 Travel Behavior Barriers and Benefits Research;
- Completion of 2005 Rideshare Market Research and Implementation Plan.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 313,457	ODOT/STP	\$ 37,946
Interfund Transfers	\$ 100,386	FY 05 CMAQ*	\$ 1,073,507
Materials & Services	\$ 1,693,158	ODOT Transit	\$ 825,000
<i>Marketing Consultant- \$825,000</i>		BETC Match	\$ 133,494
<i>Other Contracts- \$586,808</i>		Metro	\$ 2,054
<i>Other Program Costs- \$281,350</i>		Bike There	\$ 35,000
<b>TOTAL</b>	<b>\$ 2,107,001</b>	<b>TOTAL</b>	<b>\$ 2,107,001</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	4.0
<b>TOTAL</b>	<b>4.0</b>

\* CMAQ Allocated through 04-07 MTIP Process



### **PROGRAM**

This project, led by Washington State Department of Transportation (WSDOT) and Oregon Department of Transportation (ODOT) is evaluating alternatives for improving transit, highway and freight access across the Columbia River on I-5. Metro's participation is funded through an Intergovernmental Agreement with WSDOT. Metro would provide a variety of services to the project including project review and decision-making as Metropolitan Planning Organization (MPO) for the Portland region, Federal Transit Administration (FTA) coordination, travel demand forecasting, review of land use forecasts, issues and assumptions, development of project funding scenarios, day-to day project committee support, and congestion pricing and tolling technical review.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

- This program is included in the long-range transportation plans of both Metro and Southwest Washington Regional Transportation Council (RTC), the SW Washington MPO, with the Metro 2000 Regional Transportation Plan (RTP) making specific recommendations for a Corridor Refinement Plan in the I-5 bi-state corridor.
- This program builds upon the recommendations of the *Strategic Plan of the I-5 Transportation and Trade Partnership* from 2004. Metro and other local, regional and state agencies including the cities of Portland and Vancouver, the ports of Portland and Vancouver, ODOT, WSDOT, RTC, TriMet, and C-Tran endorsed the recommendations of the Partnership.
- Metro's 2005 *Cost of Congestion Study* identified substantial costs incurred by private industry and the public from delays on the highway network. The I-5 corridor has long been recognized as the worst bottleneck for congestion in the region.
- Other relevant antecedents to the project include the I-5 Trade Corridor Study, the Interstate MAX Light Rail Transit (LRT) Project, and the South/North LRT Project Draft Environmental Impact Statement, led by Metro, which evaluated a LRT line that would span the Columbia River.
- Metro is performing services under an Intergovernmental Agreement with WSDOT, which was signed in Fiscal Year 2006 and which covers work to be performed through Fiscal Year 2007.

### **STAKEHOLDERS**

- Metro Council
- RTC Board
- WSDOT - Washington Governor's Office
- Federal Transit Administration (FTA)
- Federal Highway Administration (FHWA)
- ODOT - Oregon Transportation Commission
- Bi-State Committee
- Cities of Portland and Vancouver
- Multnomah and Clark Counties
- Ports of Portland and Vancouver
- Business and civic organizations
- Private industry and the public

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- FTA coordination, including the preparation of materials for the FTA's Annual New Starts Ranking process;
- 2030 travel demand forecasts and documentation;
- 2030 land use forecasts, issues and assumptions;
- Project funding analysis, including development of project funding scenarios;
- Congestion pricing and tolling technical review and documentation.

**ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Project initiated as a federal Alternatives Analysis in 2005;
- Purpose and Need, Evaluation Criteria, and Problem Definition approved by project committees and FTA and FHWA in 2006;
- Alternative components screened in early 2006;
- Detailed Definition of Alternatives developed in mid- 2006;
- The project will complete the federal Alternatives Analysis phase of project development, which will result in a handful of alternatives to be carried into a Draft Environmental Impact Statement.

**BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 566,881	WSDOT	\$ 782,000
Interfund Transfers	\$ 161,439		
Materials & Services	\$ 50,000		
Consultant Contract(s) \$50,000			
Computer	\$ 3,680		
<b>TOTAL</b>	<b>\$ 782,000</b>	<b>TOTAL</b>	<b>\$ 782,000</b>

<b><u>Full-Time Equivalent Staffing</u></b>	
Regular Full-Time FTE	5.35
<b>TOTAL</b>	<b>5.35</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

### **CITY OF PORTLAND – RED ELECTRIC RECONNAISSANCE STUDY**

The study will determine how the Red Electric Line might be incorporated into a continuous regional network of safe and convenient off-street bicycle and pedestrian routes.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Portland Parks and Recreation, along with the Portland Office of Transportation, is performing an evaluation of the Red Electric Trail Line. The City will determine whether a multi-use trail could be constructed along this long-abandoned rail alignment and propose conceptual design solutions to any constraints that include right-of-way (ROW) issues, traffic, environmental zoning, and private property. The Red Electric is one of three routes at the east end of the Fanno Creek Greenway that will connect the Tualatin River to the Willamette River. Metro managed a multi-jurisdictional study of the Fanno Creek Greenway that resulted in the *Fanno Creek Greenway Trail Action Plan* that was completed in January 2003. It focused on gaps in the other two routes, neither of which will serve both pedestrians and bicyclists.

### **STAKEHOLDERS**

- Portland Parks
- Portland Office of Transportation (bikes, pedestrians, traffic, policy, planning, engineering)
- SW Trails Group
- SW Neighborhood Associations
- City of Portland Pedestrian Advisory Committee
- Willamette Pedestrian Coalition
- Bicycle Transportation Alliance
- City of Portland Bicycle Advisory Committee
- Neighboring property owners
- Washington County

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Investigate topography, vegetation, development, land use/zoning, property ownership and ROW delineation along the abandoned Red Electric rail alignment;
- Propose conceptual design solutions to any constraints revealed in site investigation;
- Present results of site investigation and design alternatives to neighbors and interested citizens for their input;
- Provide preliminary cost estimates for acquisition, design and construction of an approximately 4.5-mile, multi-modal trail between Willamette River and Garden Home Community Center;
- Identify funding opportunities and propose plan for implementation.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

In previous years, Metro and its regional partners have cooperated in planning the overall regional trail system and constructing initial bicycle and pedestrian improvements. Southwest Portland is particularly challenging for non-motorized traffic because the topography is rugged and the street system incomplete. Portland's Office of Transportation identified this route in the *Southwest Urban Trails Plan*. The Red Electric Line could potentially provide an east-west alternative transportation corridor for southwest Portland that connects to downtown Portland.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services (PP&R)	\$ 110,000	Regional STP	\$ 135,000
Materials and Services (PDOT)	\$ 40,000	PP&R Match	\$ 15,000
<b>TOTAL</b>	<b>\$ 150,000</b>	<b>TOTAL</b>	<b>\$ 150,000</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CITY OF PORTLAND - DIVISION STREETSCAPE & RECONSTRUCTION PROJECT: SE 6<sup>TH</sup> - SE 60<sup>TH</sup>** (formerly Division Street Study: SE 10<sup>th</sup> – SE 60<sup>th</sup>)

The Division Streetscape & Reconstruction Project will develop a plan for Division Street between SE 6<sup>th</sup> Ave and SE 60<sup>th</sup> Ave that identifies transportation, streetscape, green street and pavement improvements in the public right-of-way and establishes a blueprint for future infrastructure maintenance and investment. The project will make recommendations to improve the pedestrian environment, access to transit, and safety for all modes through sidewalk and crossing improvements, signalization, alternative vehicle lanes and on-street parking configurations, and innovative stormwater management facilities. The project will also develop and implement a public participation strategy to foster a collaborative and informed decision-making process with agencies and the community working in partnership.

With the plan in place, preliminary engineering and construction can take place for Phase 1 implementation of the Division Streetscape and Reconstruction Project between SE 6<sup>th</sup> Ave and SE 39<sup>th</sup> Ave funded with \$2.45 million of federal transportation funds and City of Portland Transportation System Development Charge funds. The roadway pavement is in serious disrepair and is due to be reconstructed and resurfaced. Although a substantial portion of the funds are necessary for the roadway reconstruction and resurfacing, some of the funding will be directed toward transportation and streetscape improvements that will foster the character of the main street.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project is identified in the *Transportation System Plan* of the City of Portland and is the next step in implementing the City of Portland's 2003-2005 TGM-funded *Division Green Street / Main Street Plan*. The project will be carried out and managed by the Project Management Division of the Portland Office of Transportation.

### **STAKEHOLDERS**

- Portland Office of Transportation (PDOT)
- Portland Bureau of Environmental Services (BES)
- Portland Office of Sustainable Development (OSD)
- Portland Parks and Recreation (PPR)
- Portland Bureau of Planning (BOP)
- TriMet
- Metro
- Portland Public Schools (PPS)
- Central Eastside Industrial Council (CEIC)
- Division-Clinton Business Association (DCBA)
- Division Vision Coalition
- Southeast Uplift District Coalition (SEUL)
- Hosford-Abernethy Neighborhood (HAND)
- Richmond Neighborhood
- Mt. Tabor Neighborhood
- South Tabor Neighborhood
- City of Portland Bicycle Advisory Committee (BAC)
- City of Portland Pedestrian Advisory Committee (PAC)

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

#### Major Outcomes

- A planning process fundamentally grounded in the vision, goals and objectives of Division Green Street / Main Street Plan (2006).
- Implementation of a public participation strategy that provides a foundation for participants to engage in a meaningful way and builds consensus towards solutions;
- A plan for infrastructure maintenance and improvements in the public right-of-way supports a pedestrian-friendly, economically vibrant and environmentally sustainable main street.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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- Raise awareness within the community around transportation choices that include walking, cycling and transit.

### **Key Deliverables**

- A public participation strategy that values the community's contribution to the decision-making process. The strategy will engage people through a variety of venues, activities and media, and emphasize providing clear information, building trust, and facilitating open dialog.
- An opportunities and constraints analysis based on an inventory of the street's conditions, community values and available resources.
- Design principles to guide decision-making and measure results.
- Produce a corridor concept plan, with a focus on the transportation system.
- Identify corridor transportation alternatives, and a process to analyze and evaluate the alternatives.
- A final streetscape and reconstruction plan for Division Street that reflects the community's goals and values, and that works within the City's policy framework.
- Selection of improvements for Phase 1 construction that meet the project's budget.
- Implementation strategies for completing the Division Streetscape and Reconstruction Plan in the years ahead.

## **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

The project is intended to help support Division Street's 2040 Main Street designation. The Portland Office of Transportation identified the project in its *Transportation System Plan* that was adopted in October 2002. The project will be a follow-up to the 2003-2005 TGM-funded Division Green Street/Main Street land use and transportation study that is scheduled for adoption by Portland's City Council in early 2006.

## **BUDGET SUMMARY**

<b>Requirements:</b>			<b>Resources:</b>		
Personal Services (PDOT)	\$	150,000	Regional STP	\$	215,352
Professional Services	\$	75,000	PDOT match	\$	24,648
Materials & Services	\$	15,000			
<b>TOTAL</b>	<b>\$</b>	<b>240,000</b>	<b>TOTAL</b>	<b>\$</b>	<b>240,000</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CITY OF PORTLAND – INTERSTATE TRAVELSMART PROJECT**

The Interstate TravelSmart Project is a no-build (“soft policy”) project to reduce car trips and improve the efficiency of our transportation infrastructure in the Interstate Corridor. The City of Portland seeks to implement TravelSmart around four of the new light rail stations at Kenton, Lombard, Portland Boulevard and Killingsworth. The project was designed to coincide with the startup of Interstate MAX. In addition, it will complement changes in transit service improvements to bike and pedestrian facilities that are planned for the startup.

The TravelSmart approach uses survey techniques to identify individuals who want help in using travel alternatives. The project links these people with experts in biking, walking, and transit and provides the information and training needed to get them where they want to go without driving alone. TravelSmart focuses exclusively on those who want travel assistance. TravelSmart employs an intensive personalized dialogue that rewards existing users, provides information and incentives to those who are interested and schedules home visits if desired. The program has been used successfully to reduce car travel in 13 European countries and in Australia. A pilot project in SW Portland reduced car trips by 9 percent; vehicle miles traveled by 12 percent.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

TravelSmart is identified in the *Transportation System Plan* of the City of Portland as part of its Transportation Demand Management and Parking Plan. The Transportation Options Division will carry out the project.

This project is consistent with TriMet’s Transportation Improvement Plan, which designates the Interstate Corridor as one of five local focus areas. The Interstate Corridor is also targeted by the Portland Development Commission; the Portland Office of Transportation and TriMet in a Memorandum of Understanding entered into in May 2002. This agreement provides for development of the Interstate Avenue Access Plan to provide a coordinated process to improve access, leverage public and private investments and promote mobility options in the Corridor.

### **STAKEHOLDERS**

- TriMet
- Interstate Corridor residents
- Kenton, Piedmont, Arbor Lodge, Overlook, Humboldt, King, Boise, and Eliot Neighborhood Associations

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

#### Phase I:

- Project Design – of work plan, project design and after-survey analyses.
- Project Setup – Organization of resources, preparation and printing of information and materials, office set up, recruitment and training of staff, database completed.
- Conduct Before-Survey Target Area – Random sample of households in the target area.
- Conduct Before-Survey Control Group – Random sample of households in the control group.
- TravelSmart Individualized Marketing Campaign – Households (11,000 participants) are segmented into those who are willing to change their travel behavior, those who are already regular users, and those who are not interested or unable to use alternative modes more frequently. Interested households receive ongoing motivation, encouragement and support, and there is no further contact with those who are not interested.
- One Year After-Survey – A random sample of households in the target area and a random sample of households in the control group are surveyed and analyzed.

#### Phase II:

- Conduct Before In-Depth Survey – Hour-long interviews with randomly selected individuals to determine barriers and potential for shifting trips to environmentally friendly modes of travel.

## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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- Conduct Before In-Depth Control Group Survey – Hour-long interviews with randomly selected individuals in the Control Group.
- Materials, Rewards, Incentives – Design and produce materials for individualized marketing campaign, purchase of incentives and rewards.
- Individualized Marketing Campaign – 3,000 additional participants within the target area.
- Conduct Home Visits – Approximately 5 percent of participants.
- Conduct After In-Depth Survey – In-depth survey and analysis completed to compare with previous survey results and findings.

## ACCOMPLISHMENTS OF THIS PROGRAM TO DATE

The construction of Interstate MAX offers a unique opportunity to increase the efficiency of this infrastructure investment. The Interstate TravelSmart Project is an effective tool to train and educate citizens about Interstate MAX, local connecting bus service, biking, walking and smart use of the auto. This corridor is an ideal place to implement TravelSmart. It has accessible transit, walkable and bikeable streets; it has destinations such as places of employment, schools and commercial areas, relatively flat terrain, and connectivity between streets. In addition to containing a regional transportation corridor, the targeted area contains a Community Main/Community Corridor (Killingsworth), and regional Main Street (Interstate), and two Community Corridors (Portland Boulevard and Lombard Street).

This project provides a demand management benefit for the Interstate MAX corridor and station communities. It is distinguished from TriMet's demand management program in several ways. It is an individualized marketing program targeted to a specific geographic area and a new major transportation service improvement. TravelSmart is effective in addressing all trip purposes rather than focusing on the employee commute trip that is typical of other demand management programs. TravelSmart has a specific program follow-up and identified project conclusion date.

## BUDGET SUMMARY

Requirements:		Resources:	
Phase I			
Personal Services	\$ 300,000	Regional STP	\$ 300,000
Materials & Services	\$ 30,000	Match	\$ 30,000
<b>TOTAL Phase I</b>	<b>\$ 330,000</b>	<b>TOTAL</b>	<b>\$ 330,000</b>
Requirements:		Resources:	
Phase II			
Personal Services	\$ 200,365	Regional STP	\$ 200,365
Materials & Services	\$ 22,935	Match	\$ 22,935
<b>TOTAL Phase II</b>	<b>\$ 223,300</b>	<b>TOTAL</b>	<b>\$ 223,300</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CITY OF PORTLAND – MLK JR. BOULEVARD TURN LANES: COLUMBIA TO LOMBARD**

The MLK Columbia Transportation Improvement Plan will develop a package of improvements for that are in the vicinity of Martin Luther King Jr. Blvd from NE Columbia to NE Killingsworth Streets. The improvements could include:

- A grade separation of NE 11th Ave.;
- Improvements to the intersections at NE Columbia and NE Killingsworth St.;
- Roadway geometry improvements on NE Columbia NE Killingsworth St.;
- Signal improvements;
- Installation of new traffic signals;
- Development of new public rights of way;
- Storm water management associated with new construction.

The improvements will be identified following a detailed analysis of the existing conditions and full assessment of the current future transportation needs in the corridor.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project is identified in the Transportation System Plan of the City of Portland, the Regional Transportation Plan and the Port of Portland Transportation Improvement Program. The project will be carried out and managed by the Project Management Division of the Portland Office of Transportation.

### **STAKEHOLDERS**

- Portland Office of Transportation
- Portland Bureau of Environmental Services
- TriMet
- City of Portland Freight Advisory Committee
- Port of Portland
- Union Pacific/Southern Pacific Railroad
- Oregon Department of Transportation (ODOT)
- Columbia Corridor Association

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

Problem Definition and Project Identification:

- Prepare existing and future conditions report using field observation, transportation modeling, traffic analysis and stakeholder surveys;
- Using existing and future conditions analysis develop a comprehensive prioritized list of potential transportation issues;
- Wide range of possible solutions to identified transportation issues;
- Alternatives Development and Analysis;
- Using agreed upon criteria screen the wide range of alternatives to a narrower range of alternatives.
- Conduct fatal flaw level analysis on the wide range of alternatives;
- Select a narrow range of Alternatives to advance to Alternatives Analysis and determine the appropriate process to meet the requirement of the National Environmental Policy Act;
- Identify a series of operational and maintenance improvements to be implemented in the short-term using existing agency resources.

Project Development:

- Begin Preliminary Engineering on alternatives identified above. (This task will be dependent on adequate financing and complexity of the selected alternative.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

This is a new program intended to implement the recommendations of the Columbia Corridor Transportation Study in 1999.



## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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### BUDGET SUMMARY

<b>Requirements:</b>			<b>Resources:</b>	
Personal Services (PDOT)	\$204,450		Regional STP	\$500,000
Materials & Services	\$350,000		PDOT match	\$54,450
<b>TOTAL</b>	<b>\$554,450</b>		<b>TOTAL</b>	<b>\$554,450</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CITY OF PORTLAND - ST. JOHNS PEDESTRIAN AND FREIGHT PROJECT (IVANHOE: RICHMOND – ST. LOUIS)**

The St. Johns Freight and Pedestrian consists of two related projects in the St. Johns Town Center. The freight project implements the recommendations of the St. Johns Truck Strategy and the pedestrian project implements the recommendations of the St. Johns/ Lombard Plan. The planning phase that will refine the proposed improvements of both plans prior to design engineering.

Phase I of the St. Johns Truck Strategy includes signal and geometry improvements to the N Philadelphia/ N Ivanhoe, Ivanhoe/ St Louis and St Louis/ Lombard intersections to improve freight mobility between the St. Johns Bridge, Rivergate Industrial area and Columbia Blvd freight route. The project will also include improvements designed reduce conflicts with pedestrian circulation within the town center core area and discourage use of non-designated freight routes. The planning work will refine the basic design concept proposed in the St. Johns Truck Strategy to address design issues associated with truck speeds, right-of-way acquisition and access to the town center for other modes.

Planning for the pedestrian improvements will focus on design refinement of the curb extensions recommendations of the St. Johns Lombard Plan to improve pedestrian crossing safety. Key refinement issues include design and warrants of a proposed signal at N Richmond St and Ivanhoe St and the location, transit capability, and potential impacts to traffic capacity and on-street parking supply of the proposed curb extensions.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

Both projects are identified in the Transportation System Plan of the City of Portland and the Regional Transportation Plan. The projects will be carried out and managed by the Project Management Division of the Portland Office of Transportation.

### **STAKEHOLDERS**

- Portland Office of Transportation
- Portland Bureau of Environmental Services
- Portland Bureau of Planning
- Tri-Met
- Oregon Department of Transportation (ODOT)
- Oregon Trucking Association
- North Portland Business Association
- St. Johns Boosters Business Association
- St. Johns Neighborhood Association
- Cathedral Park Business Association

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

Project Scoping:

- Develop project work plan and assemble work team;
- Refine design concept for freight related improvements to determine basic intersection geometry, incorporate measures to control freight speeds, enhance pedestrian crossing safety, and minimize impacts to local access and circulation for non-freight traffic;
- Revisit location priorities for pedestrian crossing improvements and design options at chosen locations to address the design guidelines included in the St. Johns/ Lombard Plan.

Plan Implementation:

- Provide refined design concepts for preliminary engineering phase with cost estimates.

Public Outreach and Involvement:

- Develop public involvement strategy consistent with conditions outlined in the MTIP.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

Both the freight and pedestrian projects are intended to support St. Johns' town center designation. The Portland Office of Transportation identified the projects in its Transportation System Plan. The projects are an the outgrowth of the St. Johns Truck Strategy, adopted by City Council in 2001 and the St. Johns/ Lombard Plan, adopted by City Council in 2004.

### **BUDGET SUMMARY**

<b>Requirements:</b>			<b>Resources:</b>	
Personal Services (PDOT)	\$75,000		Regional STP	\$75,000
Materials & Services	\$7,840		PDOT match	\$7,840
<b>TOTAL</b>	<b>\$82,840</b>		<b>TOTAL</b>	<b>\$82,840</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CITY OF WEST LINN – HIGHWAY 43 BOULEVARD: WEST A STREET TO MCKILLICAN**

Complete a streetscape plan for Highway 43 between West A Street and McKillican Street in West Linn. The streetscape plan will develop implement regional street design guidelines and address substandard pedestrian, bicycle and transit facilities and the potential addition of a median/turn lane.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project is identified in the Transportation System Plan of the City of West Linn and the Regional Transportation Plan. The project will be carried out and managed by the City of West Linn.

### **STAKEHOLDERS**

- City of West Linn
- Oregon Department of Transportation (ODOT)
- TriMet
- Bolton Middle School
- Bolton Neighborhood

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Planning background report summarizing planning activities, project need statement and project solution statement.
- Base map, profiles, typical sections and narrative describing field location data.
- Report describing anticipated structure and foundation needs.
- Description of future maintenance needs and the responsible agencies.
- Cost estimates for future project phases (final design/engineering, right-of-way, construction).
- Map of properties in the project area; Right of Way (ROW) report including title information.
- Environmental Baseline Report to address federal environmental requirements.
- Initial draft of ODOT Prospectus Part 3 narrative and checklist.
- A public outreach summary report.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

Project development planning for this project is first step leading to proposal for future work on final design, right of way acquisition and construction.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$200,000	Regional STP	\$200,000
Materials & Services	\$20,900	West Linn match	\$20,900
<b>TOTAL</b>	<b>\$220,900</b>	<b>TOTAL</b>	<b>\$220,900</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CITY OF WILSONVILLE – SOUTH METRO AREA RAPID TRANSIT**

The Transit Master Plan is currently in final draft stage and is expected to be complete in FY 05/06. With continuing growth and development in Wilsonville, South Metro Area Rapid Transit (SMART) recognizes the need to examine the nature, frequency and scope of its service. In particular, advent of commuter rail in Wilsonville, and the Villebois site, a 2,500-unit mixed-use development, will greatly increase demand for transit service. At the same time, the nature of the demand will be different than what it has been in the past. The Transit Master plan will address these changes and plan for future service over the next 20 years.

SMART provides fixed-route service within the City of Wilsonville and operates connecting service to Portland, Canby and Salem. SMART also provides transportation to medical appointments in the Portland area for Wilsonville seniors and people with disabilities. Fares are not charged to the passenger except for the Salem to Wilsonville route. All other routes and services remain free at this time. SMART's Transportation Demand Management (TDM) program (SMART Options) continues to promote transportation alternatives to driving alone and assists local employers in establishing transportation worksite programs.

SMART coordinates its service with TriMet, Canby Area Transit (CAT) and Cherriots in Salem. The SMART Options program takes part in coordinated regional travel planning processes through Metro's Regional Travel Options Subcommittee and works closely with other area transit agencies and jurisdictions in planning outreach and employer programs. SMART also participates in coordinated regional planning processes with other transit agencies and jurisdictions for the elderly and disabled.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

SMART is operated by the City of Wilsonville and is supported by a Wilsonville payroll tax and by grant funding from Federal Transit Authority (FTA) earmarked funds, Job Access & Reverse Commute (JARC), Section 5307, Elderly & Disabled, and Congestion Mitigation and Air Quality (CMAQ). With the exception of the SMART Options program, SMART does not currently receive grant funding for planning; all of the grants are for capital and operations. The SMART Options and Walk SMART programs are currently funded at an annual rate of \$71,000 in CMAQ funds through the FTA.

### **STAKEHOLDERS**

- FTA
- Oregon Department of Transportation
- TriMet
- Cities of Wilsonville, Portland, Canby and Salem
- CAT
- Cherriots
- Metro

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Assess future system demands due to Villebois development and the arrival of Washington County Commuter Rail.
- Assess future system demands due to increases in commercial and industrial development in the Wilsonville area
- Develop a system growth plan that will progressively address increasing system needs
- Develop a multi-modal strategy creating coordinated travel options to reduce dependence on the automobile for employment transportation
- Transit Master Plan that identifies specific strategies for smart growth of the transit system and efficient coordination with neighboring systems
- Implementation of SMART Travel Options in conjunction with strategies identified in the Transit Master Plan

## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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### **BUDGET SUMMARY**

#### **Requirements:**

Personal Services	\$	35,231
Material & Services	\$	43,061
<b>TOTAL</b>	<b>\$</b>	<b>78,292</b>

#### **Resources:**

CMAQ	\$	71,000
Local Payroll Tax	\$	7,292
<b>TOTAL</b>	<b>\$</b>	<b>78,292</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **CLACKAMAS COUNTY – SUNRISE PROJECT SDEIS (UNIT 1: I-205 TO ROCK CREEK JUNCTION)**

The purpose of this project is to address the significant congestion and safety problems in the Highway 212/224 corridor between I-205 and the Rock Creek Junction (Unit 1) to serve the growing demand for regional travel and access to the state and federal highway system.

A Draft Environmental Impacts Statement (DEIS) was released in July 1993 for a Sunrise Corridor project with a proposed new roadway alignment of Oregon Highway 212/224, between I-205 and US26. The Sunrise Corridor was one of 15 state projects that were included in the Access Oregon Highway (AOH) funding program. The program goals and objectives were to connect economic centers in the state, to improve travel time, to improve capacity and to improve safety conditions. The objective of the Sunrise Corridor was to connect a major north-south interstate highway (I-205) with a regional east –west highway that connects Portland with the states central interior. In 1996 the Clackamas County Board of County Commissioners approved a preferred alternative for the Sunrise Corridor. Clackamas County in cooperation with Oregon Department of Transportation (ODOT) obtained permission from Federal Highway Administration (FHWA) to complete a Supplemental Draft Environmental Impacts Statement (SDEIS) for Unit 1 of the Sunrise Corridor. The SDEIS will update previous alternatives and likely add or modify alternatives based on current traffic data, addressing Unit 1 only. A SDEIS is appropriate since the purpose and need for the project has not changed since the release of the DEIS and the opportunity for alternatives remain the same with some variations. Unit 1 is an existing transportation need that has independent utility and does not preclude any alternatives within Unit 2. Unit 2 will be addressed at a future date in a separate document.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

As provided by the State Transportation Planning Rule (TPR), the RTP call for completion of 17 specific corridor refinements and studies. Chapter 6 of the RTP identified significant needs in these areas that require further analysis before a specific project can be developed.

As mentioned, a Sunrise Corridor DEIS was prepared in 1993, however, a Supplemental EIS is needed to update the design and update the environmental information. In addition, when a alternative is selected, the RTP will need to be amended to add this alternative to the RTP and to the financially constrained system.

### **STAKEHOLDERS**

Stakeholders include, but are not limited to:

- ODOT
- FWHA
- Clackamas County
- City of Happy Valley
- City of Damascus
- Metro

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

The goals of the Supplemental EIS are the following:

- Enhance the through movement function of the highway;
- Maintain and improve freight mobility and access to the Clackamas Industrial Area – one of the busiest trucking centers in the state;
- Provide regional access from the Portland area to the US corridor that links the metropolitan area to central and eastern Oregon;
- Reduce congestion and improve safety within a corridor that currently experiences unacceptable congestion and delay;
- Provide an adequate and efficient level of multi-modal transportation improvements in the corridor;
- Provide access to the Damascus and Boring areas;
- Determine any environmental concerns and determine mitigation measures (if needed);
- Increase efficient use of land. Particular attention will be given to supporting developments within the Clackamas Regional Center, Clackamas Industrial area, Happy Valley and Damascus.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

The project has completed the alternative development phase. Five alternatives within options have been identified for analysis during the EIS phase of the project. A related project, the Damascus Concept Plan has been completed that look at a potential alignment for unit 2 from the Rock Creek Junction through Damascus to US-26.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal services	\$ 1,298,000	STP	\$ 600,000
Materials & Services	1,571,000	Clackamas County	\$ 860,000
		ODOT	\$ 909,000
		Federal earmark	\$ 500,000
<b>TOTAL</b>	<b>\$ 2,869,000</b>	<b>TOTAL</b>	<b>\$ 2,869,000</b>



## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **MULTNOMAH COUNTY- SELLWOOD BRIDGE**

The purpose of the project is to either: 1) perform a major rehabilitation of the existing Sellwood Bridge and/or 2) construct a new replacement bridge, and provide this east-west link to the public with a 50-100 year service lifespan. This work is needed because the existing bridge is deteriorating badly and is at the end of its structural life.

The proposed rehabilitation/replacement of the Sellwood Bridge must also address growing travel demands. The existing bridge is functionally obsolete, creating a barrier to all modes of traffic, cars, and trucks, to buses, pedestrians and bicyclists. The Sellwood Bridge currently carries over 35,000 vehicles per day, with a weight restriction of 10 tons. Buses and all but the lightest trucks must use alternate, inconvenient routes. Emergency vehicles are limited in their access to the bridge. A rehabilitated/replacement bridge must serve the growing demands and needs of the Sellwood Community, travel demand of vehicles between Highways 99E and 43, freight, public transit, pedestrians and bicyclists.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Safe, Accountable, Flexible, and Efficient Transportation Equity Act - A Legacy for Users (SAFETEA-LU) requires Metropolitan Planning Organizations (MPO) to meet eight planning factors including planning for people and freight and supporting economic vitality by enabling global competition, productivity and equity.

Regional Transportation Plan (RTP) Policy 13.0, Regional Motor Vehicle System, requires Metro to (a.) "provide an adequate system of arterials to supports local and regional travel", (c) "provide an adequate system of local streets that supports localized travel, thereby reducing dependency on the regional system for local travel" and (h) "implement a congestion management system to identify and evaluate low cost strategies to mitigate and limit congestion in the region".

At the conclusion of the South Willamette River Crossing Study (1999), the Joint Policy Advisory Committee on Transportation (JPACT) developed a series of recommendations that should be reviewed at the outset of the development of Sellwood Bridge alternatives.

The Sellwood Bridge currently scores a sufficiency rating of 2 out of 100. Typically a score below 50 requires either replacement or rehabilitation. Prior to its current rating, the bridge already had a weight restriction of 32 tons (down from 40 tons). The current weight restriction for the bridge is 10 tons, thereby closing the bridge to buses, emergency vehicles and freight movement.

### **STAKEHOLDERS**

- Metro
- Transportation Policy Alternatives Committee (TPAC)
- JPACT
- Metro Planning Update of Regional Transportation Plan
- Oregon Department of Transportation (ODOT)
- TriMet
- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- Sellwood-Moreland Improvement League (SMILE neighborhoods)
- Cities of Lake Oswego, Milwaukie and Portland
- Sellwood commercial and industrial users
- Portland Freight Committee

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

This program will assist the City of Portland and Multnomah County in developing alternatives necessary for the replacement of the current Sellwood Bridge and associated transportation network. Metro, in coordination with the City of Portland will develop travel demand forecasts (2030). Metro will also provide

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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the City with screen line travel analysis and provide assistance to the project's technical advisory committee on the transit, freight, pedestrian/bike and vehicular plans and coordinate efforts with concurrent transit planning on Lake Oswego Trolley and Milwaukie Light Rail Transit (LRT) extension. In FY 2005-06, the initial set of alternatives will be developed for replacement of the Sellwood Bridge. Stakeholders will review those plans, the refinement will be developed and a final recommendation(s) will be submitted for approval by the City and Multnomah County in FY 2006-07.

Multnomah County will be leading a consulting team in the preparation of an alternatives analysis (AA) report and either an Environmental Assessment (EA) or Environmental Impact Statement (EIS) for the Sellwood Bridge project. ODOT, TriMet, the cities of Milwaukie and Portland and Metro will participate in the project team.

In addition Metro will provide technical assistance in the evaluation of alternatives. Metro, coordination with the City of Portland will develop travel demand forecasts (2030) for two or three alternatives. Metro will also provide the City with screen line travel analysis for more detailed vehicle simulations.

The AA and NEPA process will begin in the spring of 2006 and is expected to last 18 months.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

South Willamette River Crossing Study (Summer 1999) –identifying motor vehicles, transit, bicycles and pedestrian improvements recognized by JPACT 2000 Regional Transportation Plan Regional Motor Vehicle system and Regional Freight System plans.

### **BUDGET SUMMARY**

<b>Item</b>	<b>Consultant</b>	<b>Non-Consultant</b>	<b>Total</b>
Project Team Participation	100,000	200,000	300,000
Technical Advisory Committee		200,000	200,000
Alternatives Analysis	500,000		500,000
NEPA (EA/EIS)	1,000,000		1,000,000
<b>Total</b>	<b>1,600,000</b>	<b>400,000</b>	<b>2,000,000</b>

#### Total Project Funding (detail by year)

\$7m SAFETEA (through FY09)

\$2m FY08-09 STP (local)

\$12.8m FY08-09 Highway Bridge Replacement Rehabilitation (HBRR) (local)

\$1.5m FY08-09 (State)

\$2.7m County

#### 2007 Funding Request

\$3m HBRR

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **WASHINGTON COUNTY – I-5/99W CONNECTOR STUDY**

As a result of the Western Bypass Study, the I-5 to Highway 99W Connector was included in the 1997 RTP as a needed facility, though the exact location was not determined. In 2000, Metro proposed an amendment to the RTP to include a southern corridor for the Connector, the corridor located outside the UGB. However, the LCDRC concluded that not all requirements for an exception to State Planning Goals had been demonstrated and that additional work was needed. In 2004, the Oregon Transportation Commission included the Connector as one of eight Projects of Statewide Significance.

This work program is designed to develop the I-5 to 99W Connector Project through the federal Record of Decision and FHWA's issuance of Design Approval in a two-phase process. The selected project development process will have a first phase that defines and adopts a corridor within which the Connector can be constructed. The second phase will complete an EIS for establishing the facility's design within that corridor. This process has been termed the "RTP Process" which reflects the intent to adopt a selected corridor through amending the RTP before issuing a Notice of Intent to perform a design-level EIS.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The OTC has recognized the I-5 to Highway 99W Connector as a "Project of Statewide Significance." Metro included the project, along with potential corridor alignments, in both the 1996 and 2000 RTPs. The project is also referenced in the most recent TSPs of Washington County, the cities of Sherwood and Tualatin.

In 1995, ODOT completed the Western Bypass Study, which evaluated five alternatives for addressing circumferential travel in the southwest Portland metropolitan area. The recommended alternative from this study was a combination of improvements to the existing transportation system in conjunction with construction of new arterial and collector road improvements, implementation of transportation system management and demand management strategies and expanded transit service in the study area.

June 1997, the Metro Council adopted recommendations identified in the Western Bypass Study, including an amendment to add the I-5 to 99W Connector corridor to the 1995 Interim Federal RTP for the Portland metropolitan area. The amendment establishes need, mode, function and general location (transportation need, highway mode, statewide and regional function in the specified corridor) consistent with state land use statutes for the proposed I-5 to 99W Connector. A future selected alignment within the corridor would be subject to further land use review and actions.

Senate Bill 626, codified into Oregon Revised Statute 383 (ORS 383), passed by the 1995 Oregon Legislature, authorizes the building, operation and maintenance of tollways by governments, private entities or a combination of the two. The law requires that ODOT obtain authorization of the Legislative Assembly before entering into any agreements for the construction or operation of any tollway facilities except two: the Newberg-Dundee Bypass, and the Tualatin-Sherwood Highway, linking Interstate 5 and Highway 99W. This restriction was subsequently amended to include the Lewis and Clark Bridge in Columbia County and an unnamed project in the Portland urban area.

August 14, 1996, OTC approved proceeding with siting studies and land use and environmental feasibility reviews of the Tualatin-Sherwood and Newberg-Dundee tollway projects. This decision came after the OTC considered a staff report and public testimony regarding the preliminary assessment of the financial feasibility of these projects as toll roads.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **STAKEHOLDERS**

Stakeholders include, but are not limited to:

- Residents and officials of Washington County, possibly Clackamas County (depending on the alignment selected), ODOT, Metro, LCDC, cities of Sherwood, Tualatin, Wilsonville, Tigard, King City, Newberg, McMinnville;
- Rural and farm land owners in the area;
- Industrial and other employers within the Tigard/Tualatin/Wilsonville/Sherwood area and areas newly included in the UGB and their existing and future employees;
- Travelers and freight hauling operators to and from the Oregon central coast area;
- Other State agencies including DLCD, DEQ, Department of Fish and Wildlife, Corrections, State Lands;
- Federal agencies including FHWA, EPA, US Army Corps of Engineers, US Fish and Wildlife, National Oceanic and Atmospheric Administration, Fisheries, US Department of Interior.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

The objective of the project is to address the problem of inadequate transportation facilities in the outer southwest quadrant of the Portland metropolitan area to serve the growing demand for regional and intrastate travel access to the area's federal and state highways (I-5 and 99W).

By June 30, 2007 project selection and local and regional approval will be completed. Products will consist of technical reports and documentation required to identify a connector corridor alignment alternative that will then be included in an RTP amendment. This Connector corridor will also be adopted into the TSPs of the cities of Sherwood, Tualatin and Wilsonville as well as Washington and Clackamas counties (as required). This effort will lead into a NEPA effort that will be undertaken to determine a specific alignment immediately following the RTP amendment process. If necessary, land use planning goal exceptions will also be considered.

The results of the study will include identification of potential issues and mitigation opportunities. Additionally, a selection of alternatives to be carried forward into NEPA will be identified. The product is intended to include agreement by resource agencies and DLCD, on purpose and need as well as appropriateness of alternatives selected for NEPA.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

During the past fiscal year, the project has approved a scope of work and created a Project Management Team, a Executive Management Team, a Project Steering Committee and a Stakeholder Working Group (citizen committee), all of which are currently active. The initial set of public open houses were held November 29 and 30. A draft purpose and need statement has been drafted and reviewed by all advisory committees. An Environmental Reconnaissance Report, providing a broad level of analysis of natural features, land use and socio-economic analyses have been drafted. Project goals and objectives are also under development at this time.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Washington County	\$ 370,000	Metro STP	\$ 2,100,000
ODOT	\$ 526,000	ODOT Highway Trust Fund	\$ 1,850,000
Metro	\$ 290,000		
Consultant Contract	\$ 2,764,000		
<b>Total</b>	<b>\$ 3,950,000</b>	<b>Total</b>	<b>\$ 3,950,000</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **WASHINGTON COUNTY – BEAVERTON-HILLSDALE/OLESON/SCHOLLS FERRY ROAD**

This project will plan land use and development in the vicinity of the intersection of Beaverton-Hillsdale Highway, Oleson and Scholls Ferry Roads.

#### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project is identified in the Regional Transportation Plan (RTP) and the Washington County Transportation System Plan (TSP).

#### **STAKEHOLDERS**

- Metro
- Washington County
- Oregon Department of Transportation
- City of Beaverton
- City of Portland
- Raleigh Hills Businesses and Neighborhood

#### **OBJECTIVES/PRODUCTS/DELIVERABLES**

- Identify an evaluation area generally addressing the current commercially zoned parcels in the project area north and south on SW Scholls Ferry Road and along SW Beaverton Hillsdale Highway.
- Examine possibilities for consolidating parcels, public right-of-way and access points that result in the creation of parcels of the appropriate size and orientation for redevelopment.
- Examine opportunities for multi-modal circulation and access to transit, including internal pedestrian circulation within and between existing adjacent development and project impact areas.
- Evaluate the comprehensive plan, zoning and relevant portions of the Washington County.
- Evaluate Community Development Code for the area to determine whether opportunities exist for changes that would facilitate implementation of the report recommendations for Neighborhood Serving Commercial Areas, including the possibility to encourage additional residential uses.
- Consider adoption of plan, zoning and development code amendments to implement opportunities identified.
- Report on these activities for acceptance by the Washington County Board of Commissioners.

#### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

A preliminary design of a reconfiguration of this intersection has been completed.

#### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 95,450	Regional STP	\$100,000
Materials & Services	\$ 15,000	Washington County match	\$10,450
<b>TOTAL</b>	<b>\$110,450</b>	<b>TOTAL</b>	<b>\$110,450</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **METRO – TONQUIN TRAIL MASTER PLAN**

This project will plan multi-use trail improvements between the cities of Wilsonville, Tualatin and Sherwood.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project is identified in the Transportation System Plan of the Cities of Wilsonville, Tualatin and Sherwood and the Regional Transportation Plan. The project will be carried out and managed by Metro.

### **STAKEHOLDERS**

- Metro
- Oregon Department of Transportation (ODOT)
- City of Wilsonville
- City of Tualatin
- City of Sherwood
- Clackamas County
- Washington County
- Costa Pacific Communities

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

The master plan would complete planning work to determine a more precise route for the trail along BPA power line corridors and the ODOT owned rail line and other public right of ways. Trail widths, surface materials, and signage, street-crossing designs would be proposed and associated costs estimated. In developing these alignment and design recommendations, Metro's guidelines for Green Trails will be employed.

A public outreach strategy will be developed and employed to engage stakeholders and the community in alignment and design decisions.

- Planning background report summarizing planning activities, project need statement and project solution statement;
- Base map, profiles, typical sections and narrative describing field location data;
- Reconnaissance level report of flow and drainage conditions; regulatory requirements to be addressed and preliminary drainage and water quality options;
- Report describing anticipated structure and foundation needs;
- Description of future maintenance needs and the responsible agencies;
- Cost estimates for future project phases (final design/engineering, right-of-way, construction);
- Map of properties in the project area;
- ROW report including title information;
- Environmental Baseline Report to address federal environmental requirements;
- Initial draft of ODOT Prospectus Part 3 narrative and checklist;
- A public outreach summary report.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

A trail feasibility study was completed in July 2004 and identified potential trail routes and alignments. Metro and the City of Wilsonville has worked with Costa Pacific homes to determine the dedication of a trail alignment through the Villaboia property and to design the trail segment through the Graham Oaks natural area. The Boeckman Road extension project has provided for the trail crossing of a wetland as a part of that project. The cities of Wilsonville, Tualatin and Sherwood have updated their trails and park plans to allow for the future Tonquin Trail.

## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services (Metro)	\$101,445	Regional STP	\$100,000
Materials & Services	\$10,000	Metro match	\$11,445
<b>Total</b>	<b>\$111,445</b>	<b>Total</b>	<b>\$111,445</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **METRO – MILWAUKIE TO LAKE OSWEGO TRAIL MASTER PLAN**

This project will plan multi-use trail improvements between the cities of Milwaukie and Lake Oswego.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

This project is identified in the Transportation System Plan of the Cities of Milwaukie and Lake Oswego and the Regional Transportation Plan. The project will be carried out and managed by Metro.

### **STAKEHOLDERS**

- Metro
- City of Milwaukie
- City of Lake Oswego
- Clackamas County
- Western & Pacific Railroad
- North Clackamas Parks and Recreation District
- Oak Grove Neighborhood

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

The master plan would complete planning work to determine a more precise route for the trail connecting the Trolley Trail in Milwaukie and Oak Grove, potentially utilizing the Western & Pacific railroad bridge to the Willamette Shoreline trail in the city of Lake Oswego. Trail widths, surface materials, and signage, street-crossing designs would be proposed and associated costs estimated. In developing these alignment and design recommendations, Metro's guidelines for Green Trails will be employed.

- A public outreach strategy to engage stakeholders and the community in alignment and design decisions;
- Report summarizing planning activities, project need statement and project solution statement;
- Base map, profiles, typical sections and narrative describing field location data;
- Reconnaissance level report of flow and drainage conditions; regulatory requirements to be addressed and preliminary drainage and water quality options;
- Report describing anticipated structure and foundation needs;
- Description of future maintenance needs and the responsible agencies;
- Cost estimates for future project phases (final design/engineering, right-of-way, construction);
- Map of properties in the project area; ROW report including title information;
- Summary of coordination with regulatory agencies (Oregon Division of State Lands, National Marine Fisheries, etc.) and identification of permit processes needed to complete project;
- Summary of coordination with railroad operator and issues to be addressed in final design and engineering;
- Environmental Baseline Report to address federal environmental requirements;
- Initial draft of ODOT Prospectus Part 3 narrative and checklist;
- A public outreach summary report.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

The cities of Milwaukie and Lake Oswego have updated their trails and park plans to allow for the future trail connection. The Regional Trails master plan and the Regional Transportation Plan have incorporated this trail segment into their plans.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Personal Services	\$ 99,000	Regional STP	\$100,000
Materials & Services	\$ 12,445	Metro match	\$11,445
<b>TOTAL</b>	<b>\$111,445</b>	<b>TOTAL</b>	<b>\$111,445</b>



## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **PORT OF PORTLAND – REGIONAL FREIGHT DATA COLLECTION PROJECT**

The safe and efficient movement of freight and the role it plays in the region's economic competitiveness is increasingly important as the region increase its participation in the global economy. This region lacks a comprehensive understanding of freight flows – impacting investment decisions and land supply issues.

Approximately 63 percent of all freight tonnage moves by truck into, out of and through the region. Within 30 years, this figure is expected to increase to more than 70 percent. Regional commodity flow data describes these inter-regional trips, but gives little information about freight movement within the region. Better translating the commodity flow data into sub-regional trips is a primary goal of this project. This will help the region get the most return on its investments by targeting projects that best facilitate the movement of goods that are so critical to the region's economy.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The project received State Transportation Planning (STP) funds through the region's MTIP process based on a fundamental scope of work. This scope of work is also the foundation for a series of intergovernmental agreements between the project sponsors.

### **STAKEHOLDERS**

- Metro
- Oregon Department of Transportation (ODOT)
- Washington State Department of Transportation (WSDOT)
- Multnomah County
- Southwest Regional Transportation Council (RTC)
- Planners and policy makers around the region
- The freight and business community.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

This data should provide the region with a better understanding of:

- Detailed data on origins and destinations of freight shipments within the region;
- Truck count data;
- Proposal for a region-wide, coordinated, on-going truck count program.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

This project builds on the region's commodity flow forecast to provide more detail on the movement of freight on the region's transportation network.

### **BUDGET SUMMARY**

<b>Requirements:</b>		<b>Resources:</b>	
Materials & Services	\$ 729,000	MTIP	\$ 500,000
		Port/WSDOT/Mult. Co.	\$ 164,000
		ODOT	\$ 65,000
<b>TOTAL</b>	<b>\$ 729,000</b>	<b>TOTAL</b>	<b>\$ 729,000</b>

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **TRIMET- FREQUENT SERVICE DEVELOPMENT**

The Regional Transportation Plan (RTP) and TriMet's Transit Investment Plan call for the development of "Frequent Service" bus routes as part of a family of public transit modes. Frequent Service is characterized by 15-minute frequencies, day and evening, seven days a week. This service is enhanced with added customer amenities and information and priority treatments that keep the service fast and reliable. This type of service complements the high capacity service provided by MAX light rail and makes connections to local services.

The intent of this development program is to increase the visibility of the service (new signage and service branding), to make it convenient and available (frequent and reliable) and more competitive with the automobile (direct service, expedited through traffic). In FY 2004-05 there were 16 Frequent Service lines. There has been a very strong response from riders to this level of service. Ridership on frequent service routes was up 16% in between January 2004 and January 2005. This service accounts for 56% of the weekly bus riders. This new service type raises the service standard for the majority of transit riders. TriMet's 5-year Transit Investment Plan proposes to develop 22 Frequent Service lines serving 65% of the bus ridership.

TriMet and the region have made this program a priority through the distribution of regional MTIP funds. The program is actually the integration of two parts to achieve the greatest impact on a route-by-route basis. A program priority is to improve safe access to transit for all population groups and for the mobility impaired in particular. This is achieved with sidewalk and curb ramp construction and pedestrian crosswalk improvements in partnership with other jurisdictions. TriMet also gives priority consideration to services for disadvantaged populations and communities – reflected in TriMet's Title VI Report.

### **STREAMLINE PROGRAM**

This is the eighth year of a comprehensive program that incorporates the grant-funded signal priority treatment project that was managed by the City of Portland. In partnership with the City, TriMet has expanded that program to include other preferential street treatments and related bus stop amenities. It is reducing transit running times and thereby operating costs, while also making the service more attractive to riders. Further Streamline implementation is being coordinated with Frequent Service and bus stop improvements. As the program has become more integrated with the bus stop and route management process, it also is being applied in jurisdictions beyond the City of Portland.

This program builds on the TEA-21 funded (OR-90-X087-00) signal priority project. The program was also coordinated with other City pedestrian and streetscape programs. The original grant is sustained with CMAQ funds allocated through the regional MTIP for FY 2004 through FY 2009.

### **STAKEHOLDERS**

This program is directed at improving the operating efficiency of TriMet operations and thus is closely coordinated with internal operating management departments. The benefits of the program accrue to the public through more reliable service, faster travel times which in turn produces greater use of the service. All aspects of the program are coordinated with the local street jurisdiction who control many of the tools required for this program to be successful (signal management, lane configuration, bus stop placement, etc.)

### **OBJECTIVES / PRODUCTS / DELIVERABLES**

Program objectives include:

- Decrease transit-running time on twelve targeted routes by 10 percent or enough to eliminate one bus from the weekday-operating schedule.
- Increase transit ridership on those same lines by 10 percent.
- Improve the transit-riding environment through enhanced rider amenities.
- Increase the visibility of transit in the community.

## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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Products / Deliverables include:

- Assessment of principal intersections used by the targeted bus routes, prioritized for installation of signal priority treatment, including Opticom preemption, potential queue jump lanes or curb extensions.
- Detailed review of each selected bus route, including inventory of facilities and compliance to bus stop standards, ADA requirements and operating requirements.
- Identification of related bus stop improvements including improved access, respacing of stops, amenity improvements, customer information and adjacent sidewalk / crosswalk needs – in coordination with those respective programs.
- Work program, schedule and budget for each line.
- Construction drawings and documents.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

- Five bus routes have been substantially “Streamlined”:
  - Line 4: Division / Fessenden is completed and being evaluated. Route schedule reductions have already been taken in the range of 10%.
  - Line 72: 82<sup>nd</sup> Avenue/Killingsworth is completed. A significant element of this project is a northbound bus only lane on 82<sup>nd</sup> Avenue from the Clackamas Town Center.
  - Line 12: Sandy / Barbur is completed.
  - Line 9: Powell/Broadway is a major route serving the urban northeast and a major State-operated arterial in the southeast. The Powell transit service was considered in a regional corridor study and is the lead candidate for the region’s first bus rapid transit route. Streamline improvements on this route help to initiate a long-term need to build transit ridership in this congested corridor. This work was coordinated with ODOT and related ODOT and City of Portland projects.
  - Line 14: Hawthorne is a heavily used urban route. Hawthorne Boulevard is receiving City of Portland streetscape improvements. Efforts are being combined to improve operation and ridership on this route. This work is expected to be complete in FY 2005-06.
- Further implementation of the program will be in concert with TriMet’s network of Frequent Service routes. There are now 16 Frequent Service routes accounting for 56% of weekly bus ridership. TriMet’s five-year plan calls for there to be 22 frequent routes carrying 65% of the bus ridership. Signal priority emitters are operational on all TriMet buses. 250 signalized intersections are equipped with Opticom devices.

Program Evaluation - Early evaluation of the program has been conducted on the Lines 12 – Barbur and Line 4 Fessenden / Division. A more complete review is in progress in collaboration with the City of Portland and the Portland State University Transportation Research Center. These early results include:

- Reduction of 2-11% of travel time for all Line 12-Barbur peak-period buses (depending on direction; largest reduction of 11% was for outbound PM peak).
- Reduction of 8-11% of travel time for Line 12-Barbur p.m. peak period buses that were behind schedule by 90 seconds or more for their entire trip (and thereby activated signal priority at all City of Portland signals on Barbur).
- Average reduction for peak period travel time of 7-12 % in a route segment that was isolated around a signal with TSP on Line 4-Division.
- Dramatic reduction in variability of travel times for all Line 12-Barbur peak-period buses, in most cases reducing variability by half or more. This reduction in variability improves schedule reliability and significantly reduces the time needed for layovers.
- Trimming away of the longest travel run times.
- Elimination of one 4-hour peak tripper bus on Line 4 in June 2002 resulting in an estimated annual cost savings of \$60,000 and potential one-time capital cost savings of \$300,000 by reducing the peak vehicle requirement. These treatments reduce schedule erosion due to congestion and thus postpone the need to add trips.
- Median run time over the whole route (both directions) on Line 4 (Division and Fessenden) that was roughly the same in Spring 2003 as in Spring 2001 (prior to signal priority treatment) despite additional congestion (not quantified).

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **BUDGET SUMMARY**

The TriMet portion of the original program was \$6,650,000 – using TriMet and grant funds. This program used \$1.5 million of the City of Portland's TEA-21 funded signal priority project for the installation of Opticom emitters on buses and system development. The City transferred an additional \$400,000 to TriMet for software system upgrades, which is complete.

FY 2003-04 and FY 2004-05 CMAQ funds in the annual amounts of \$312,665 locally matched to support a total budget of \$348,451 have continued this program. These funds are provided through the region's MTIP. The program will be integrated with "Frequent Bus" improvements in FY 2006-07 at similar levels of funding (see below).

TriMet expects to continue this program as long as benefits are cost-effectively realized. High frequency, high ridership routes identified as "Frequent Service" will receive priority consideration under this on-going program.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **TRIMET- BUS STOP DEVELOPMENT PROGRAM**

For several years TriMet has promoted the concept of the Total Transit Experience. This concept emphasizes the environment at the bus stops and the transit rider's experience getting to and from the bus stop. Out of this effort have emerged the following capital improvement programs:

#### **Bus Stop Sign and Pole Replacement with Schedule Displays**

- Deployment of new two-sided bus stop signs and poles. The multi-part signs are a unique shape and the poles are dedicated and colored to make this stop identifier more distinguishable in the streetscape.
- Printed schedule displays with bus stop identification numbers are being installed on each bus stop pole, which is a significant convenience for riders.
- These signs are being deployed on a route basis throughout the system, but with priority for Frequent Service routes and the Focus Areas identified in the Transit Investment Plan. In FY 2003-04 this focus was on North/Northeast Portland in coordination with the introduction of MAX light rail service. The program is more broadly directed in FY 2004-05 with a concentration of improvements to Tualatin Valley Highway through the Westside communities of Beaverton, Hillsboro, Cornelius and Forest Grove. The FY2005-06 and FY 2006-07 program will continue with a focus more to the south and southwest. The changeover should be complete in FY 2007-08.
- The FY 2005-06 program investment of \$238,000 will be repeated for an additional year and \$75,000 in the fourth and final year to complete all bus stops.

#### **Bus Stop Enhancements**

- This program improves bus stops by constructing wheelchair access, strategic sidewalk connections and other improvements that integrate stops with the streetscape. The cost can vary greatly, but approximately 30 locations supported through a mix of funding programs can be addressed annually.
- These improvements must be closely integrated with other streetscape improvements (sidewalks and crosswalks) and will be programmed in support of TIP focus areas and frequent corridors and where jurisdictions are making other improvements that can support these improvements.

#### **Shelter Expansion**

- TriMet continues to increase the number of bus shelters from a total of 885 four years ago to approximately 1,145 by the end of FY 2005-06.
- With the help of other grant funding additional bus stop improvements are being made in Washington County, particularly along Tualatin Valley Highway, which has been the focus of some concern regarding pedestrian safety.
- TriMet expects to continue the FY 2005-06 program level with approximately 35 new shelters in FY 2006-07 using primarily CMAQ funds provided through the regional MTIP process.

#### **Transit Tracker**

- With software development and refinement nearly complete, TriMet began implementation of real time customer information at bus stops and MAX light rail stations. These electronic units were deployed based on criteria that address the TIP focus areas, frequent corridors and needs and benefit-based criteria.
- The on-street Transit Tracker program was suspended in January 2004 and since replaced with a call-in Transit Tracker program, providing real-time arrival information based on a bus stop ID number. This has proven to be very popular and is far more cost effective to operate.

While this is a capital program and CMAQ funds are being used for capital elements and related staffing of these programs, they are presented in this Unified Planning Work Program, as each element requires up-front planning.

This program is at the core of TriMet's service development and expansion program and is an on-going part of the 5-year Transit Investment Plan. These capital improvements complement both development of Frequent Bus corridors and service development in local focus areas. They are integrated with the on-going Streamline program described above.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **STAKEHOLDERS**

This program is closely coordinated with internal TriMet departments – primarily marketing (customer information) and operations. Benefits of the program clearly accrue to the general public and transit users. TriMet research has demonstrated that on-street amenities are important considerations as riders choose to use the service. The program is closely coordinated with the street jurisdiction – often through permits. Integration with local streetscape projects is also fostered to achieve the greatest mutual program benefits.

### **OBJECTIVES / PRODUCTS / DELIVERABLES**

Objectives of this program include:

- Increase transit ridership by improving the total transit experience – focused on on-street transit and pedestrian facilities improvements.
- Improve the utility of transit by providing better customer information – identifiable signage, posted schedules and maps and real time arrival information.
- Improve access to transit with integrated sidewalk and crosswalk improvements and bus stop improvements that meet ADA requirements.
- Increase pedestrian and rider safety with appropriate lighting at bus stops and by removing pedestrians from the path of traffic.
- Support communities, town centers, regional centers and land use and transportation policies identified in the RTP and 2040 Framework Plan.
- Respond to specific user needs and community input for improved transit facilities, access and information.

Products and Targets of the program include:

- Preparation of work programs, schedule and budget for each sub-program.
- Community outreach to assess needs and coordinate implementation.
- Supporting intergovernmental agreements, property transactions and permits.
- Construction drawings and documents.
- Construction of on-street capital facilities investments.
- Coordination of capital improvements with related roadway improvements managed by local jurisdiction and ODOT.

### **ACCOMPLISHMENTS TO DATE**

These programs build on prior work. Program priorities are identified in the Transit Investment Plan (TIP). The on-street programs, including Streamline, are coordinated to achieve the greatest combined effect that will contribute to new transit ridership. Where possible they are being combined with service improvements. The program will continue to expand with a focus on Frequent Service bus routes. The installation of new signs is proceeding on a route-by-route basis, again with priority given to Frequent Service routes and the focus areas identified in the TIP.

### **BUDGET SUMMARY**

The budget for this composite program is as follows:

Bus Stop Development Program	CMAQ	TriMet	Total
Bus shelter expansion	\$ 233,298	\$ 26,702	\$ 260,000
Pavement and ADA improvements	\$ 67,298	\$ 7,702	\$ 75,000
Bus stop signs and poles	\$ 213,557	\$ 24,443	\$ 238,000
Streamline treatments	\$ 358,920	\$ 41,080	\$ 400,000
Support staff (3 FTEs)	\$ 224,325	\$ 25,675	\$ 250,000
Other improvements	\$ 136,390	\$ 15,610	\$ 152,000
<b>TOTAL</b>	<b>\$ 1,233,788</b>	<b>\$ 141,121</b>	<b>\$1,375,000</b>

\*This program is under review and the budget is subject to revision.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **REGIONAL JOB ACCESS AND REVERSE COMMUTE PROGRAM**

OR-37-X001-01 of the Job Access and Reverse Commute (JARC) funds will be applied to the Portland Area-Wide Job Access Program administered by TriMet. Funds will be used to support and promote programs in the region that connect low-income people and those receiving Temporary Assistance to Needy Families (TANF) with employment and related support services.

**JARC Regional Funding Allocation and Project Evaluation Process-** The Portland regional allocation and distribution of JARC funds under Safe, Accountable, Flexible, and Efficient Transportation Equity Act-A Legacy for Users (SAFETEA-LU) will be very similar to the process under Transportation Equity Act for the 21st Century (TEA-21). A region-wide solicitation will take place for projects that provide transportation services designed to transport welfare recipients and low-income individuals to and from jobs and activities related to employment in a cost-effective manner. This will be a competitive process and existing grant sub-recipients will be encouraged to reapply for funds.

A regional committee comprised of social service and transportation providers, known as the Job Access Advisory Committee (JAC), will assist TriMet with the research, planning, and allocation of funding among regional-wide urbanized projects. Projects seeking funding will present their proposals to TriMet and the JAC, which will objectively evaluate applicants seeking grant funds.

Tri-Met will continue to lead the annual Jobs Access Plan evaluation efforts and will be responsible for providing status reports to the Federal Transit Administration. TriMet meets with all grant sub-recipients at least once a year to review both project performance and compliance requirements as recipients of federal grant funds.

TriMet will fulfill the requirement for a Human Services Plan by combining the results of the Special Transportation Fund Advisory Committee's work on New Freedom funds and the Job Access Advisory Committee's work.

**The Current Program-** The current Portland Area-Wide Job Access Program includes programs designed to serve targeted low-income populations and employment areas (see below) in the region. Creating and improving access to work and job-training services for low-income job seekers is the focus of the programs. They include:

- U-Ride Shuttle in western Washington County
- Swan Island Evening Shuttle
- Installation of bike racks and lockers at transit centers
- Community resource maps at transit centers
- Non-commute taxi voucher program (Clackamas and Multnomah County)
- Tualatin employer vanpool shuttle
- Create-a-Commuter bike program
- Alternative Commute Center
- Portland Community College Joblink Program
- Improved bike and pedestrian access to Swan Island
- South Metro Area Region Transit (SMART) service between Wilsonville and Portland as well as between Wilsonville and Canby
- South Clackamas Transportation District Service (SCTD) service between Molalla and Canby
- Sandy Area Metro (SAM) service between Estacada and Sandy
- Travel training programs
- Trainings and presentations for case managers and their clients regarding transportation options
- Free transit schedules and maps
- Increased fixed route transit service in targeted areas
- Free *Commuter Choices* brochures, available in English and Spanish
- *How to Ride* brochures and videos available in seven languages
- Vehicle purchases in rural and suburban communities

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **STAKEHOLDERS**

The Job Access program works to increase mobility of residents in lower income neighborhoods and improve access to areas that provide a high number of entry-level employment opportunities. In the Portland metropolitan region, such areas include:

#### Population Areas

Gateway Transit Center  
N/NE Portland  
Lents & Brentwood/Darlington  
Hillsboro Central City  
Oregon City Central City  
Western Washington County  
Rockwood  
Estacada

#### Employment Areas

Columbia Corridor  
Rivergate Industrial area  
City of Tualatin (Industrial area)  
City of Wilsonville  
Swan Island Industrial area  
Washington County (Light rail corridor)  
City of Milwaukie (Industrial Way area)  
Tigard (Nimbus Business area)

Implementation of the Portland Area-Wide Job Access Program takes place through partnerships TriMet has formed in the region. Though not all partners are direct sub-recipients of JARC grant funds, they all provide services to the Job Access targeted audience. Partners include:

- Oregon Department of Human Services (DHS)
- Clackamas County Social Services Division
- Housing Authority of Portland
- Metropolitan Family Services
- Multnomah County Aging and Disabilities Services
- Steps to Success (Mt Hood and Portland Community colleges)
- Worksystem Inc. (Southeast One Stop, Northeast One Stop, East County One Stop and Capital Career Center)
- City of Portland
- Dress for Success
- Tualatin Transportation Management Association
- Westside Transportation Management Association
- Swan Island Transportation Management Association
- Ride Connection
- Oregon Department of Employment
- Community Cycling Center
- South Metro Rapid Transit District
- South Clackamas Transit District
- Sandy Area Metro
- Metro
- TriMet
- U.S. Federal Transportation Administration

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

Compliance with JARC Program Objectives

1. According to the 2000 Census, 236,000 (or 15.7 percent) of the 1.5 million people that live in the Portland metropolitan region live below 150 percent of the federal poverty level.
2. Access to transportation that meets their needs is among the top three challenges this target audience faces in moving out of poverty. The other two challenges identified include access to childcare and acquiring job skills and training.
3. Rides provided by Job Access funded programs and services total over 4,000,000 between September 2000 and September 2005.



## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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### **BUDGET SUMMARY**

Job Access programs are supported by grant funds provided from the FTA and regional match dollars. Elements of the work program for TriMet fiscal year 2007 totaling \$650,562 are shown below.

Work Program Line Item	JARC Funds
Outreach & Materials	\$55,500
Bicycle Program	\$160,165
Job Training and Retention Services	\$198,790
Non Commute Transportation	\$10,000
Service to Employment Areas	\$143,328
Service to Communities	\$82,779
Total: Job Access Reverse Commute Funds	\$650,562

Match Programs	Local funds
TriMet Operating Costs (Fixed Route Bus Service)	\$650,562

This budget reflects Federal FY 2006 Jobs Access Reverse Commute funds carried into TriMet's FY 2006-07 program.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **TRIMET- INTERSTATE MAX BEFORE AND AFTER EVALUATION**

TriMet and Metro are working with the Federal Transit Administration (FTA) to prepare a comprehensive before and after evaluation of this project both to assess success in the project itself meeting its goals for improving the quality of transportation in this urban community as well as evaluating the tools used in the region to plan and forecast the benefits and impacts of the project.

The study in progress builds on work to date, including that contained in the project Environmental Impact Statement (EIS), and requires extensive before and after data collection to ascertain the utilization of the introduced services and their intended or unintended impacts of the project on the community and the corridor.

The project is divided into seven tasks as follows:

1. Organization
2. Documentation of forecasts
3. Documentation of conditions before project implementation
4. Documentation of conditions after project opening
5. Proposed analyses
6. Findings and recommendations
7. Bibliography

Tasks 2 through 5, above, will include the following subtopics:

- Project scope
- Service levels
- Capital costs
- Operating and maintenance costs
- Ridership and fare revenue
- Transit equity
- Environment
- Public opinion

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

In August 2001 the Federal Transit Administration (FTA) instituted Section 611.7(c)(4) of the *Final Rule on Major Capital Investment Projects (New Starts)* (published on December 7, 2000, and effective as of April 7, 2001) whereby Section 5309 New Starts Full Funding Grant Agreement grantees must submit a plan for collection and analysis of information to identify project impacts and to determine the accuracy of forecasts prepared during project development. While this provision did not apply to the Interstate MAX Full Funding Grant Agreement (FFGA) OR-03-0076, which was executed in September 2000, FTA concurred that TriMet could use project savings for the study. That project, constructed between the Rose Quarter and the Expo Center in Northeast Portland, opened for service in May 2004.

FTA requires that grantees report on five project characteristics:

1. Project scope – the physical components of the project, including environmental mitigation;
2. Service levels – the operating characteristics of the guideway, feeder bus services, and other transit services in the corridor;
3. Capital costs – the total costs of construction, vehicles, engineering, management, testing and other capital expenses;
4. Operation and maintenance costs – incremental operating/maintenance costs of the project and the transit system;
5. Ridership patterns – incremental ridership, origin/destination patterns of transit riders on the project and in the corridor, and incremental fare box revenues for the transit system.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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FTA further requires that this information be assembled at three key milestones in the development and operation of the project:

1. Predictions – predictions for the five characteristics developed at the conclusion of preliminary engineering, along with any changes made to those estimates during final design;
2. Prior conditions – transit service levels, operating/maintenance costs, and ridership/fare box revenues that prevail immediately prior to any significant changes in transit service levels caused by either construction or opening of the project;
3. After conditions – actual outcomes for the five characteristics of the project two years after the opening of the project in revenue service and associated adjustments to other transit services in the corridor.

### **STAKEHOLDERS**

Internal (TriMet) - The Project Sponsor for the Interstate MAX project is Tri-County Metropolitan Transportation District of Oregon (TriMet), the agency operating public transit in the Portland metropolitan region. The Interstate MAX Before and After Study will be the responsibility of the Marketing and Customer Services Division (MCSD). The Executive Director of Marketing and Customer Services reports directly to the General Manager of TriMet. The Director of Marketing Information (DMI) has been designated as the key individual responsible for all aspects of the Before and After Study.

The DMI will:

- Oversee the activities of the various TriMet departments, public agencies and consultants participating in the Interstate MAX Before and After Study;
- With supporting staff, assemble and maintain key reports, studies and other records related to the Study;
- Direct staff and consultant resources applied to the Before and After Studies;
- Coordinate all study activities and will have responsibility for preparation and submission of both regular progress reports and all other identified interim and final reports.

Primary TriMet responsibilities related to the project include:

- Capital Projects – Development, monitoring and reporting of the Project Scope, Capital Costs, and Environment sections of the plan.
- Operations – Development, monitoring and reporting of the Services Levels sections of the plan. The Traffic and Parking sections will rely heavily on assistance from the City of Portland and Oregon Department of Transportation.
- Finance – Development, monitoring and reporting of the Operating and Maintenance Costs sections of the plan.
- Marketing and Customer Services – Development, monitoring and reporting of the Ridership and Fare Revenue, Public Opinion, and Recommendations sections of the plan.
- Diversity and Transit Equity – Development, monitoring and reporting of the Transit Equity section of the plan.

Metropolitan Planning Organization - Metro is the source for basic planning data in the region including forecasts of population, households and employment for the Portland/Vancouver metropolitan area. Metro also develops and maintains the travel forecasting models used for transportation planning in the region. Metro will:

- Provide documentation for key planning data and methods used for the Light Rail project;
- Collect/assemble demographic and economic data for the Light Rail corridor before project initiation and after project opening;
- Model ridership using updated data;
- Conduct the forecast v. actual ridership analyses;
- In coordination with TriMet, analyze the forecast v. actual cost estimates;
- Identify and analyze potential model refinements.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### Other Local Agencies

- The Oregon Department of Transportation (ODOT) will collect and report traffic volume data for the I-5 freeway;
- The City of Portland Department of Planning will provide traffic volume data for roadways in the corridor, and building occupancy and building permit data for the Portland CBD and communities along the Light Rail Corridor;
- C-Tran will provide ridership counts for their routes serving the Corridor.

FTA - FTA will review and approve the Before and After Study work program. FTA will also review project interim and final reports.

Project Management Oversight (PMO) contractors - The PMO contractors designated by FTA will assist in reviewing project data.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

This study will in large measure validate the goal of the North Corridor Interstate MAX light rail project: Implement a major transit program in the North Corridor that maintains the livability in the metropolitan region, supports bi-state land use goals, optimizes the transportation system, is environmentally sensitive, reflects community values and is fiscally responsive.

The study, however, is also a means of evaluating the project planning and management tools, with feedback to improve our collective ability to make the effective transportation investment decisions. The study will provide the region and FTA with valuable information regarding the validity of model assumptions and the sensitivity of new modeling software; the accuracy of capital, operating and maintenance estimates; the results of environmental mitigation measures; and rider characteristics. The next opportunities for the region to conduct such studies will come with the Washington County Commuter Rail (planned opening in late 2007 or early 2008) and the I-205 / Portland Mall light rail projects (planned opening in 2009). The participating jurisdictions are committed to making the results of this study meaningful for local and Federal objectives.

The project will produce the following products:

- Summary of findings, including the relationship between forecast and actual ridership and capital and operating cost;
- Summary of recommendations, including proposed improvements to forecasting methodology or other action that can improve transit investment decision-making;
- A draft report for submittal to the FTA;
- A presentation of findings with the FTA;
- Revised and final report.

All pertinent data will be collected and made available for reference including plans, reports, drawings, resolution, technical memoranda, schedules, spreadsheets and maps.

### **ACCOMPLISHMENTS TO DATE**

As noted above, this program builds on corridor work program work to date, principally that contained in the North Corridor Interstate MAX Light Rail Project Final Environmental Impact Statement (October 1999). It will also draw on origin-destination surveys and systems statistics maintained by the transit and road jurisdictions.

TriMet submitted the draft study plan to the FTA in December 2003. The FTA approved the inclusion of the study work scope into the Interstate MAX project on January 14, 2004. All tasks and subtasks have been assigned. TriMet and Metro are executing the tasks as outlined in the draft work plan. Tasks 1, 2, and 3 are complete as of December 2004. Task 4 is underway and will be complete in Spring 2006.

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **BUDGET SUMMARY**

This work program is funded through the Interstate MAX Full Funding Grant Agreement in the total amount of \$750,000. The budget for data collection under Tasks 3 and 4 is summarized as follows:

Origin / Destination Survey	
Pre-Implementation (March 2004)	\$100,000
Post-Implementation (March 2005)	\$300,000
On-Board Counts by Station	
Post-Implementation (May-June 2004)	\$ 35,000
Attitude and Awareness (Public Opinion Survey @40% of full survey)	
Pre-Implementation (November 2003)	\$ 14,000
Post-Implementation (November 2004)	\$ 15,000
Public Opinion (measures not captured in the Attitude and Awareness)	
Pre-Implementation (Spring 2004)	\$ 5,000
Customer Impact Survey	
Pre-Implementation (Spring 2004)	\$ 30,000
Post-Implementation (Spring 2005)	\$ 32,000
Brand Identity Survey	
Pre-Implementation (October 2003)	\$ 22,000
Post-Implementation (January 2006)	\$ 34,000

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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### **ODOT I-5 COLUMBIA RIVER CROSSING PROJECT (CRCP)**

The goal of the CRCP is to implement a major portion of the strategic plan developed by the I-5 Transportation and Trade Partnership on how to manage and improve transportation in the I-5 corridor between Portland and Vancouver. The corridor stretches between I-84 in Oregon and I-205 in Washington.

The CRCP will develop additional freeway, and transit, capacity where I-5 crosses the Columbia to meet the needs in the corridor. The plan will also address how to manage demand for transportation in the corridor.

### **MANDATES, AUTHORIZATIONS, CONSTRAINTS**

The Bi-State Leadership Committee recommended that the region undertake a public process to develop a strategic plan for the corridor. In response to this recommendation, Governors Gary Locke of Washington and John Kitzhaber of Oregon appointed a Task Force to guide the public planning process and to develop the strategic plan.

### **STAKEHOLDERS**

- Oregon Department of Transportation (ODOT)
- Washington Departments of Transportation (WSDOT)
- Federal Highway Administration (FHWA)
- City of Vancouver
- City of Portland
- Metro
- Southwest Washington Regional Transportation Council (RTC)
- Port of Vancouver and Portland
- TriMet
- CTRAN
- Clark County, Washington,
- Multnomah County, Oregon.

### **OBJECTIVES/PRODUCTS/DELIVERABLES**

The strategic planning effort for the I-5 corridor between Portland and Vancouver was initiated in response to recommendations of a bi-state Leadership Committee, which met over a nine-month period in 1999. The committee found that:

- This corridor is a critical economic lifeline for the region and the state, serving two ports, two transcontinental rail lines, providing critical access to industrial land in both states, and facilitating through freight movement.
- There will be economic and livability consequences if we do nothing in the corridor.
- There is no silver-bullet. A solution for the corridor will need to include highway and transit improvements, demand management strategies, and freight rail improvements. Even substantial improvements will only maintain today's level of congestion.
- Those physical solutions will be costly, and will require innovative funding solutions in order to succeed.

The plan identified several different concepts for the crossing that will require an environmental impact analysis. The scale of the project will result in an Environmental Impact Statement process that will be initiated in 2005 and take several years to complete.

### **ACCOMPLISHMENTS OF THIS PROGRAM TO DATE**

During FY 2000-01, the Governors' Task Force was established, along with a Community Forum consisting of representatives from neighborhoods, businesses and other interested groups. Both the

## **OTHER PROJECTS OF REGIONAL SIGNIFICANCE**

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Task Force and Forum met several times and developed Evaluation Criteria and Improvement Option packages for evaluation. Work also progressed on Land Use Assessment and Rail Capacity Analysis. In June 2002, the Task force issued its final Strategic Plan, the most significant recommendation of which was the recommendation that the region expand the capacity of I-5 where it crosses the Columbia with a multi-modal project that includes additional freeway lanes and provision for high capacity transit.

### **BUDGET SUMMARY:**

Resources:	
National Corridor Planning and Development Program Grant	\$6,500,000
ODOT/WSDOT Match	\$ 400,000
Metro STP	
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<b>Total Resources</b>	<b>\$6,900,000</b>

Federal Aid # NCPD S000 (197)

## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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### ODOT- SPR PROGRAM

#### MANDATES, AUTHORIZATIONS, CONSTRAINTS

Transportation improvement projects in the Portland Metropolitan Planning Organization (MPO) must be included in the Metro Regional Transportation Plan (RTP) before they can receive federal funds for project development.

Oregon Department of Transportation (ODOT) works in partnership with local and regional governments to update, refine and implement the Portland MPO Regional Transportation Plan and local transportation system plans. This work includes assuring consistency among transportation system plans, local use plans, the Metro's 2040 Growth Plan and Urban Growth Management Functional Plan, and Oregon's Transportation Plan, Highway Plan and the Transportation Planning Rule.

#### STAKEHOLDERS

##### External

- Local Governments and Agencies
- Regional Governments and Agencies
- Federal Agencies
- Washington State Department of Transportation
- State Legislators
- Special Interest Groups
- General Public
- Other State Agencies

##### Internal

- ODOT Region 1 Tech Center
- ODOT Transportation Development Division
- ODOT Rail Division
- ODOT Public Transit Division
- ODOT Safety Division
- ODOT Central Services Division
- Other State Agencies

#### OBJECTIVES/PRODUCTS/DELIVERABLES

Coordinate and Support of Metro Programs-ODOT staff participates on regional and local standing and project committees to provide information, analyze (as needed) ensure coordination and provide other support as needed. Specifically:

- **TIP Development:** ODOT staff is working with Metro on the 08-11 STIP/MTIP update to assure that the process for selecting and programming federally funded transportation projects is coordinated, balanced, fair, allows plenty of opportunity for public involvement and provides for a range of needs.
- **RTP Update:** ODOT staff will work closely with Metro on the RTP update.
- **Support RTP Implementation:** ODOT staff will work closely with Metro on a regional tolling analysis, the I-84 – US 26 connector plan, the Regional Truck Freight Origin / Destination Study, and high capacity transit studies.
- **“New Look”:** ODOT staff will participate in Metro's “New Look,” the update of the Region 2040 Growth Concept Plan.
- **Governor's Economic Revitalization Team (ERT):** ODOT staff will participate in the ERT to foster economic development consistent with the Region 2040 plan and the RTP.
- **Transportation Model, Traffic Analysis and Methodology:** ODOT staff provides assistance with traffic input and analysis.



## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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Coordinate Transportation Planning Activities- Link the land use and transportation planning programs with planning and operation of state highways as part of the regional transportation system. Coordinate with other state agencies concerning activities that affect regional transportation planning. Specific activities:

- **Local Land Use and Development Review:** ODOT staff process almost 5000 land use notices and provides comments on several hundred that potentially affect state highways. Staff response usually consists of a letter of record, however it sometimes requires extensive negotiation and traffic analysis.
- **Local Transportation System Planning (TSP):** ODOT staff participates in the development of TSPs for every jurisdiction in the region. The TSPs are critical in identifying the impact of future growth on the state highway system. ODOT staff assists in the development of these plans to assure consistency with the Oregon Transportation Plan (OTP), Oregon Highway Plan (OHP), Corridor Plans and the Transportation Planning Rule (TPR).
- **Oregon Highway Plan (OHP) Implementation:** ODOT staff coordinates and participates with regional and local jurisdictions in the process of selecting Special Transportation Areas (STA), Urban Business Areas (UBA), and expressways in the Portland metropolitan area. ODOT staff will continue to negotiate the transfer of state highways whose function is primary local or redundant. Staff works with Metro and local jurisdictions to redefine national highway system (NHS), state freight route and the functional classifications system in conjunction with the adoption of local TSPs and RTP.
- **Regional Air Quality Planning:** ODOT staff works with Metro and DEQ to ensure that the Region's transportation projects comply with federal air-quality regulations.

Conduct Transportation Planning Studies- The major activities to be undertaken are those necessary to produce and implement corridor plans and studies, transportation conditions reports, refinement plans, transportation system plans, and amendments to comprehensive plans and ordinances necessary to implement transportation plans and other long range planning documents. These tasks are aimed at meeting federal regulations, the Transportation Planning Rule, the Oregon Transportation Plan, the Oregon Highway Plan policies and other modal plans and Oregon's local plans and regulations. Tasks include engineering, population, economic, environmental, traffic and land use studies, travel demand modeling and analysis, and public involvement activities such as newsletters, opinion polls, public meetings and other mechanisms that involve the public in transportation decisions. Specific activities include:

### Corridor Strategies

- I-205 Reconnaissance Study
- OR 43 Corridor Study
- I-5 South Reconnaissance Study
- I-5/I-405 Loop Study

### Tolling and Managed Lane Feasibility Studies:

- Regional Tolling Feasibility Study

### Refinement Plans/Environmental Documentation:

- Sunrise Corridor
- I5-99W Connector
- I-5 / Wilsonville Road
- US 26: Access for Springwater area (Gresham)
- US 26: Glencoe Rd. Interchange
- I-205: Airport Way
- I-5: Columbia Crossing

## OTHER PROJECTS OF REGIONAL SIGNIFICANCE

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### **Budget Summary**

**Requirements:**

Personal Services (FY 07)                      \$    1,773,680

**Resources:**

SPR Program (FY07)                              \$    1,773,680

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<b>TOTAL</b>	<b>\$    1,773,680</b>	<b>TOTAL</b>	<b>\$    1,773,680</b>
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Total Region 1 SPR Program                      \$2,217,000 (FY07)

80% MPO SPR Program                              \$1,773,680

20% Rural SPR Program                              \$ 443,320

Metro

GRAND TOTAL	2,134,407	800,000	509,548	29,160	225,000	386,825	225,000	2,239,661	275,000	75,000	150,000	250,000	825,000	1,073,507	2,369,000	1,639,288	13,206,396
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\*Federal funds only, no match included

1. PL is comprised of \$1,493,059 new federal PL; \$170,887 ODOT match and \$422,145 carry over PL and \$48,316 ODOT match

**2. Household Survey will be funded by ODOT (\$125,000; TriMet (\$75,000); and RTC(\$75,000)**

### 3. ODOT Marketing Agreement

**4. See narrative for anticipated funding sources**

13,206,396

**FY 2007 UNIFIED PLANNING WORK PROGRAM**  
**OTHER PROJECTS OF REGIONAL SIGNIFICANCE**  
**FUNDING SUMMARY**

<u>Federal Aid Number</u>	<u>Project</u>	<u>Jurisdiction</u>	<u>STP</u>	<u>CMAQ</u>	<u>37-x00101 JARC</u>	<u>Section 1118</u>	<u>Sunrise Project (1)</u>	<u>Section 5309</u>	<u>SPR</u>	<u>Funds/ Match</u>	<u>TOTAL</u>
X-STP5900(144)	<i>Red Electric</i>	<i>Portland</i>	135,000							15,000	150,000
	<i>Division Street</i>	<i>Portland</i>	215,352							24,648	240,000
	<i>Interstate TravelSmart</i>	<i>Portland</i>	500,365							52,935	553,300
	<i>MLK Jr. Blvd.</i>	<i>Portland</i>	500,000							54,450	554,450
	<i>St. Johns Ped/Frieght</i>	<i>Portland</i>	75,000							7,840	82,840
	<i>Highway 43 Blvd.</i>	<i>West Linn</i>	200,000							20,900	220,900
	<i>SMART</i>	<i>Wilsonville</i>		71,000						7,292	78,292
	<i>Sunrise SDEIS</i>	<i>Clackamas County</i>	600,000				1,409,000			860,000	2,869,000
	<i>Sellwood Bridge</i>	<i>Multnomah County</i>	2,000,000								2,000,000
	<i>I-5/99W Corridor</i>	<i>Washington Co</i>	2,100,000							1,850,000	3,950,000
X-HPPC067(043)	<i>Beaverton Hillsdale</i>	<i>Washington Co</i>	100,000							10,450	110,450
	<i>Tonquin Trail Master Plan</i>	<i>Metro</i>	100,000							11,445	111,445
	<i>Master Trail Milw./LO</i>	<i>Metro</i>	100,000							11,445	111,445
	<i>Regional Freight Data</i>	<i>Port of Portland</i>	500,000						65,000	164,000	729,000
	<i>Streamline/</i>										-
	<i>Bus Stop Development</i>	<i>TriMet</i>		1,233,788						141,121	1,374,909
	<i>Job Access/JARC</i>	<i>TriMet</i>			650,562					650,562	1,301,124
	<i>Interstate Max Eval</i>	<i>TriMet</i>						34,000			34,000
	<i>I-5 Columbia Riv Crosng</i>	<i>ODOT</i>				6,500,000				400,000	6,900,000
	<i>Planning Assistance</i>	<i>ODOT</i>							1,773,680		1,773,680
GRAND TOTAL			7,125,717	1,304,788	650,562	6,500,000	1,409,000	34,000	1,838,680	4,282,088	23,144,835
Division - STIP-13529											
Red Electric - STIP Key #11443											
I-5/99W - STIP Key #09788											
							1. ODOT- 909,000 & Federal earmark 500,000				23,144,835





**SOUTHWEST WASHINGTON  
REGIONAL TRANSPORTATION COUNCIL  
(RTC)**

**UNIFIED PLANNING WORK PROGRAM  
FOR  
FISCAL YEAR 2007  
(July 1, 2006 to June 30, 2007)**

**Draft: March 20, 2006**

**Southwest Washington Regional Transportation Council  
1300 Franklin Street  
Vancouver, WA 98660  
Telephone: (360) 397-6067  
Fax: (360) 397-6132**

**RTC's Website: <http://www.rtc.wa.gov>**





**SOUTHWEST WASHINGTON  
REGIONAL TRANSPORTATION COUNCIL  
(RTC)**

**UNIFIED PLANNING WORK PROGRAM  
FOR  
FISCAL YEAR 2007**

**(July 1, 2006 to June 30, 2007)**

**DRAFT: March 20, 2006**

*This Unified Planning Work Program has been financed in part through grants from the Federal Highway Administration, Federal Transit Administration, and the Washington State Department of Transportation. The views expressed in this Program do not necessarily represent the views of these agencies.*

**Southwest Washington Regional Transportation Council  
1300 Franklin Street  
Vancouver, WA 98660  
Telephone: (360) 397-6067  
Fax: (360) 397-6132**

Preparation of this document was funded by grants from the Washington State Department of Transportation, U.S. Department of Transportation (Federal Highways Administration and Federal Transit Administration) and local funds from RTC member jurisdictions.

### **Title VI Compliance**

The Southwest Washington Regional Transportation Council (RTC) assures that no person shall, on the grounds of race, color, national origin, or sex as provided by Title VI of the Civil Rights Act of 1964 and the Civil Rights Restoration Act of 1987 (P.L. 100.259), be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity.

### **Americans with Disabilities Act (ADA) Information:**

Materials can be provided in alternative formats by contacting the Southwest Washington Regional Transportation Council (RTC) at (360) 397-6067 or [info@rtc.wa.gov](mailto:info@rtc.wa.gov).

## **FY 2007 UPWP for Clark County: Index**

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## **FISCAL YEAR 2007 UNIFIED PLANNING WORK PROGRAM: INTRODUCTION**

### **Purpose of UPWP**

The Unified Planning Work Program (UPWP) is prepared annually by the Southwest Washington Regional Transportation Council (RTC). RTC is the Metropolitan Planning Organization (MPO) for the Clark County, Washington portion of the larger Portland/Vancouver urbanized area. An MPO is the legally mandated forum for cooperative transportation decision-making in a metropolitan planning area. With passage of the Intermodal Surface Transportation Efficiency Act (ISTEA) of 1991, the region became a federally designated Transportation Management Area (TMA) because it is a larger urban area with over 200,000 population. TMA status brings with it additional transportation planning requirements that the MPO must carry out. RTC is also the Regional Transportation Planning Organization (RTPO) for the three-county area of Clark, Skamania and Klickitat as designated by the state. RTC's UPWP is developed in coordination with Washington State Department of Transportation, C-TRAN and local jurisdictions. As part of the continuing transportation planning process, all regional transportation planning activities proposed by the MPO/RTPO, Washington State Department of Transportation and local agencies are documented in the UPWP. The financial year covered in the FY 2007 UPWP runs from July 1, 2006 through June 30, 2007.

The UPWP focuses on transportation work tasks that are priorities for federal and/or state transportation agencies, and those tasks considered a priority by local elected officials. The planning activities relate to multiple modes of transportation and include planning issues significant to the Regional Transportation Plans (RTPs) for the two rural counties and the Metropolitan Transportation Plan (MTP) for the Clark County region. The federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), passed in 2005, provides direction for regional transportation planning activities. SAFETEA-LU is the successor to the Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21) passed in 1998.

RTC was established in 1992 to carry out the regional transportation planning program. Previously, the designated MPO was the Intergovernmental Resource Center (IRC) that disbanded in 1992. In FY 2007, RTC will continue to work closely with local jurisdictions on transportation plans, concurrency programs and congestion monitoring and with the Bi-State Coordination Committee to discuss recommendations on bi-state issues.

### **UPWP Objectives**

The UPWP describes the transportation planning activities and summarizes local, state and federal funding sources required to meet the key transportation policy issues of the upcoming year. The UPWP is reflective of the national focus to "encourage and promote the safe and efficient management, operation and development of surface transportation systems that will serve the mobility needs of people, freight and foster economic growth and development within and through urbanized areas". The UPWP is reflective of federal, state and local transportation planning emphasis areas. The Federal Highway Administration, the Federal Transit Administration, and Washington State Department of Transportation identify transportation planning emphasis areas (PEAs) to promote priority themes for consideration, as appropriate, in metropolitan and statewide transportation planning processes. The emphasis areas are intended to provide federal/state guidance for the development of local work programs. The FHWA has not identified PEAs for this forthcoming year though FY 2006 PEAs are included in the list below for information. The FTA published updated PEAs in the November 30, 2005 Federal Register. WSDOT's PEAs remain the same as last year. Below is a list of the PEAs from FHWA, FTA and WSDOT:

#### **Federal Highway Administration (FHWA) Planning Emphasis Areas (from FY 2006 UPWP):**

- Consideration of Safety and Security in the Transportation Planning Process. Following passage of SAFETEA-LU in 2005, Safety and Security are to be considered as two separate planning factors.
- Linkage of the Planning and NEPA Processes.

- Consideration of Management and Operations within Planning Processes.
- State DOT Consultation with Non-Metropolitan Local Officials.
- Enhancement of the Technical Capacity of Planning Processes.
- Coordination of Human Service Transportation.

**Federal Transit Administration (FTA) Planning Emphasis Areas (Nov. 2005):**

- Incorporating Safety and Security in Transportation Planning.
- Participation of Transit Operators in Metropolitan and Statewide Planning.
- Coordination of Non-Emergency Human Service Transportation.
- Planning for Transit Systems Management/Operations to Increase Ridership.
- Support Transit Capital Investment Decisions Through Effective Systems Planning.

**Washington State Department of Transportation (WSDOT) Planning Emphasis Areas:**

- Washington Transportation Plan Update.
- Continued Implementation of Transportation and Growth Management Planning.
- MPO Travel Demand Forecasting.
- Intelligent Transportation System Architecture.

The Work Program describes regional transportation planning issues and projects to be addressed during the next fiscal year. Throughout the year, the UPWP serves as the guide for planners, citizens, and elected officials to track transportation planning activities. It also provides local and state agencies in the Portland/Vancouver and RTPPO region with a useful basis for coordination.

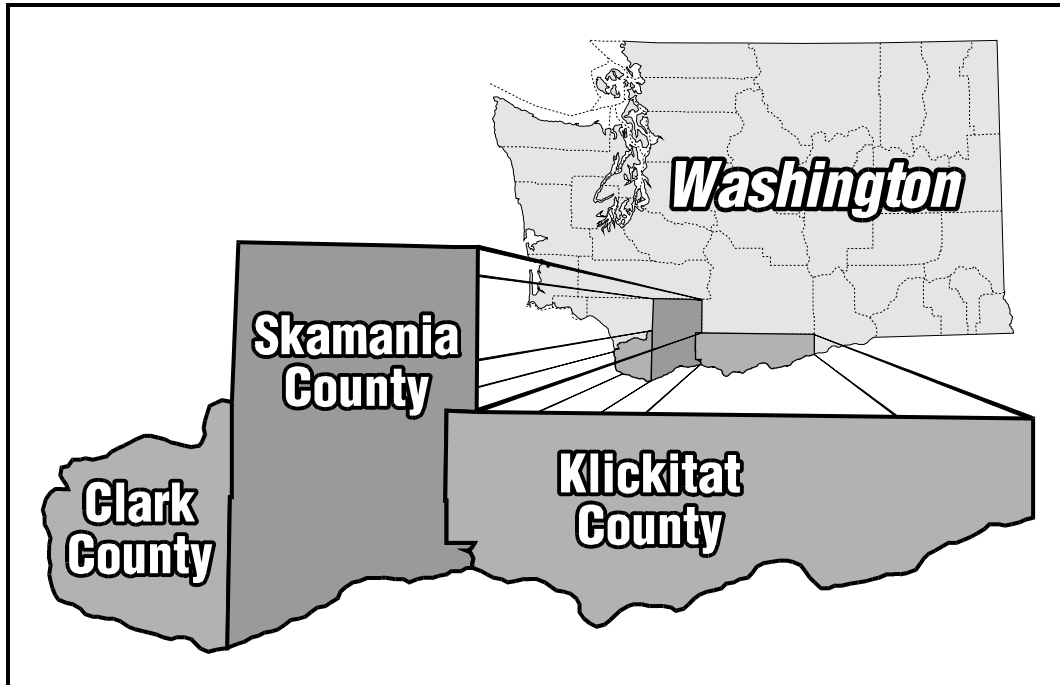
The FY 2007 UPWP provides for the continuation of baseline program activities such as the Metropolitan and Regional Transportation Plans, the Metropolitan Transportation Improvement Program, data collection and analysis, travel model forecasting with transition to a different software platform, air quality conformity analysis, program and project coordination. The Portland-Vancouver I-5 Partnership arrived at a set of recommendations in June 2002. The Draft Environmental Impact Statement process for the Columbia River Crossing project moves forward from the I-5 Partnership's work. RTC continues to provide support to WSDOT as projects funded by the state "Nickel" and "Partnership" packages move through the planning, design, and environmental phases. RTC also continues to provide support to Clark County and local jurisdictions as part of the update process for local Comprehensive Growth Management Plans. Other key transportation planning projects to be addressed in 2006/2007 include: 1) a region-wide policy plan for consideration of high capacity transit as part of the transportation mix for certain corridors within Clark County, 2) continuation of environmental review of projects proposed for the I-205 Corridor, 3) work on the SR-35 Columbia River Bridge Environmental Impact Statement in Klickitat County, and 4) implementation of the Washington State Transportation Plan update due in 2006. RTC will continue the program management, coordination, outreach and education for the Intelligent Transportation System (ITS) project deployment as part of the VAST program. RTC will continue to work in partnership with local and state elected officials to bring needed transportation investments to this region.

**Key Transportation Issues Facing The Region:**

- Providing transportation system improvements to support economic development and growth in Clark County. Between 1990 and 2005, Clark County's population grew by 64.5% from 238,053 to 391,500.
- Investing in transportation infrastructure to support the economic and land use goals of our region.

- 
- Supporting the state through final design and implementation of projects funded by the 2003 Washington State Legislature's "Nickel Package" and 2005 Legislature's Partnership Package. Through these state packages Clark County will receive about \$450 million in transportation projects.
  - Providing support to C-TRAN in planning for transit to adequately serve the growing Clark County community. In FY 07 transit planning will include revision to C-TRAN's 20-Year Transit Development Plan and A park and ride demand study for Clark County.
  - Addressing policy guidance for potential future High Capacity Transit corridors in Clark County.
  - Coordinating with the Human Services Council to meet transportation needs for people needing transportation to medical appointments and access to jobs for those with low incomes.
  - Maintaining Level of Service and concurrency standards consistent with the revenues available for transportation "mobility/capacity" projects.
  - Moving projects through the required planning and environmental review phases to ensure that they are "ready to construct" if transportation funds become available.
  - Continuing work on an EIS for the Columbia River Crossing Project and an Environmental Assessment for a segment of the I-205 Corridor.
  - Making the most efficient use of the existing transportation system through implementation of Transportation Demand Management (TDM) and System Management (TSM) measures and strategies.
  - Continuing deployment of Intelligent Transportation System (ITS) projects, measures and strategies through implementation of the cooperatively developed Vancouver Area Smart Trek (VAST) program.
  - Addressing bi-state transportation needs in partnership with Metro (Portland), WSDOT, ODOT, C-TRAN and Tri-Met through the Bi-State Coordination Committee.
  - Addressing environmental issues relating to transportation, including seeking ways to reduce the transportation impacts on air quality and water quality and addressing environmental justice issues. SAFETEA-LU requires an increased level of coordination with resources agencies at an earlier stage of the planning process.
  - Monitoring and seeking solutions to the growing transportation congestion in the region.
  - Implementing projects to allow people to walk and bike to their destinations throughout the region.
  - Involving the public in identifying transportation needs, issues and solutions in the region. In FY 2007 this will include coordination with the Washington State Department of Transportation on public outreach efforts related to the Washington's Transportation Plan update.

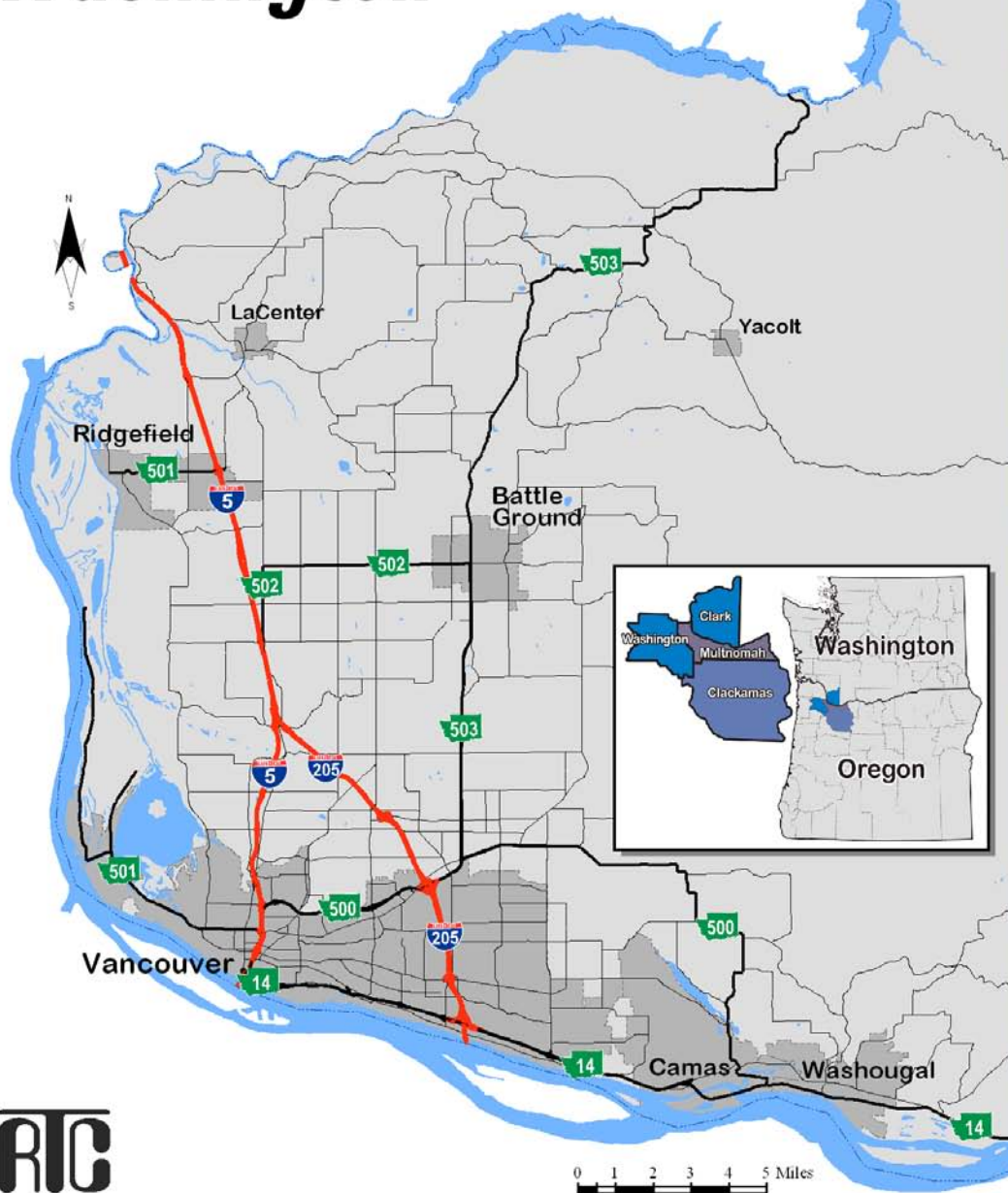
**SOUTHWEST WASHINGTON REGIONAL TRANSPORTATION COUNCIL (RTC)  
EXTENT OF RTC REGIONAL TRANSPORTATION PLANNING ORGANIZATION REGION**

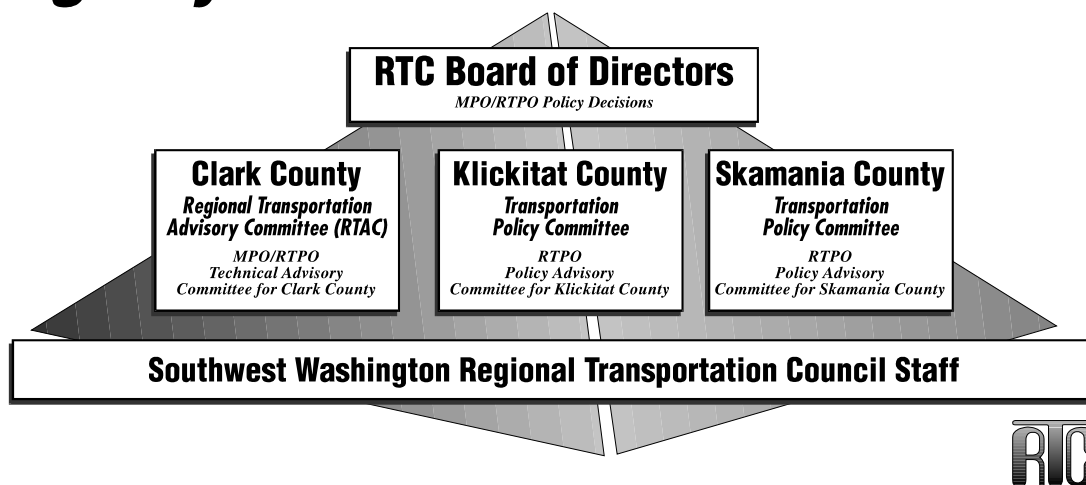




**SOUTHWEST WASHINGTON REGIONAL TRANSPORTATION COUNCIL (RTC)****EXTENT OF RTC METROPOLITAN PLANNING ORGANIZATION REGION  
SHOWING INCORPORATED AREAS WITHIN CLARK COUNTY**

# ***Clark County, Washington***

**Southwest Washington Regional Transportation Council**

**SOUTHWEST WASHINGTON REGIONAL TRANSPORTATION COUNCIL (RTC)****RTC: AGENCY STRUCTURE*****Agency Structure***

<b>RTC: TABLE OF ORGANIZATION</b>	
<b>Position</b>	<b>Duties</b>
Transportation Director	Overall MPO/RTPO Planning Activities, Coordination, and Management
Project Manager	Vancouver Area Smart Trek (VAST), Intelligent Transportation System (ITS), Congestion Management Monitoring, High Capacity Transportation (HCT)
Sr. Transportation Planner	MTP, UPWP, Corridor Studies
Sr. Transportation Planner	Metropolitan Transportation Improvement Program (MTIP), Project Programming, RTPO, Skamania and Klickitat Counties, Traffic Counts
Sr. Transportation Planner	Regional Travel Forecast Model, Data
Sr. Transportation Planner	Geographic Information System (GIS), Mapping, Data, Graphics, Webmaster
Transportation Analyst	Regional Travel Forecast Model, Air Quality
Staff Assistant	RTC Board of Directors' Meetings, Bi-State Committee Meetings, Appointment Scheduling
Office Assistant	General Administration, Reception, Regional Transportation Advisory Committee (RTAC) Meetings
Accountant	Accounts Payable, Grant Billings

## **Participants, Coordination and Funding Sources**

Consistent with the 1990 State Growth Management Act legislation, the Regional Transportation Council (RTC) Board of Directors has been established to deal with transportation policy issues in the three-county RTPO region. Transportation Policy Committees for Skamania and Klickitat Counties are in place and also a Regional Transportation Advisory Committee (RTAC) for Clark County. (Refer to *Agency Structure* graphic, Page v). Membership of RTC, the RTC Board, the Regional Transportation Advisory Committee (RTAC), Skamania County Transportation Policy Committee and Klickitat Transportation Policy Committee is listed on pages vii through ix.

### **A. Clark County**

The primary transportation planning participants in Clark County include the following: the Southwest Washington Regional Transportation Council (RTC), C-TRAN, Washington State Department of Transportation (WSDOT), Clark County, the cities of Vancouver, Camas, Washougal, Ridgefield, Battle Ground and La Center and the town of Yacolt, the ports of Vancouver, Camas-Washougal, and Ridgefield, the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA). In addition, the state Department of Ecology (DOE) is involved in the transportation program as it relates to the State Implementation Plan for carbon monoxide and ozone. The Human Services Council for the region coordinates with RTC on human services transportation issues. As the designated MPO for the Clark County Urban Area, RTC annually develops the transportation planning work program and endorses the work program for the entire metropolitan area that includes the Metro Portland region. RTC is also responsible for the development of the Metropolitan Transportation Plan, the Metropolitan Transportation Improvement Program, the Congestion Management program and other regional transportation studies.

C-TRAN regularly adopts a *Transit Development Plan* (TDP) that provides a comprehensive guide to C-TRAN's future development. The TDP provides information regarding capital and operating improvements over the next six years. The TDP, required by RCW 35.58.2795, outlines those projects of regional significance for inclusion in the Transportation Improvement Program within the region. In 2003 C-TRAN worked on a 20-Year Planning Process. Early in 2005, C-TRAN convened a Public Transportation Improvement Conference (PTIC) to reconsider the Public Transportation Benefit Area service and taxing boundary. The PTIC designated a new boundary which took effect June 1, 2005. C-TRAN's new boundary has been reduced from county-wide service to an area that includes the City of Vancouver and its urban growth boundary, and the city limits only of Battle Ground, Camas, La Center, Ridgefield, Washougal, and the Town of Yacolt. In September 2005, voters approved an additional 0.2 percent sales tax for C-TRAN thus avoiding significant service reductions, preserving existing service, and restoring service to outlying cities.

WSDOT is responsible for preparing *Washington's Transportation Plan*; the long-range transportation plan for the state of Washington. RTC coordinates with WSDOT to ensure that transportation needs identified in regional and local planning studies are incorporated into statewide plans. RTC and WSDOT also cooperate in involving the public in development of transportation policies, plans and programs. WSDOT, the Clark County Public Works Department and City of Vancouver Public Works Department conduct project planning for the highway and street systems in their respective jurisdictions. Coordination of transportation planning activities includes local and state officials in both Oregon and Washington states. Bi-State Coordination is described on page ix.

Mechanisms for local, regional and state coordination are described in a series of Memoranda of Agreement and Memoranda of Understanding (MOU). These memoranda are intended to assist and complement the transportation planning process by addressing:

1. The organizational and procedural arrangement for coordinating activities such as procedures for joint reviews of projected activities and policies, information exchange, etc.
2. Cooperative arrangements for sharing planning resources (funds, personnel, facilities, and services).

3. Agreed upon base data, statistics, and projections (social, economic, demographic) as the basis on which planning in the area will proceed.

Memoranda of Understanding (MOUs) between RTC and Southwest Washington Air Pollution Control Authority (SWAPCA) now renamed the Southwest Clean Air Agency (SWCAA), and RTC and C-TRAN, the local public transportation provider, were adopted by the RTC Board on January 4, 1995 (Resolutions 01-95-02 and 01-95-03, respectively). A Memorandum of Understanding between RTC and Washington State Department of Transportation was adopted by the RTC Board at the August 1, 1995 Board meeting (RTC and WSDOT MOU; RTC Board Resolution 08-95-15). An MOU between RTC and Metro was first adopted by the RTC Board on April 7, 1998 (RTC Board Resolution 04-98-08). The Metro/RTC MOU is reviewed triennially with adoption of the UPWP. It was last revised with adoption of the FY 2004 UPWP in May 2004 (RTC Board Resolution 05-03-11, May 6, 2003).

---

### **Southwest Washington Regional Transportation Council: Membership 2006**

Clark County  
 Skamania County  
 Klickitat County  
 City of Vancouver  
 City of Washougal  
 City of Camas  
 City of Battle Ground  
 City of Ridgefield  
 City of La Center  
 Town of Yacolt  
 City of Stevenson  
 City of North Bonneville  
 City of White Salmon  
 City of Bingen  
 City of Goldendale  
 C-TRAN  
 Washington State Department of Transportation  
 Port of Vancouver  
 Port of Camas/Washougal  
 Port of Ridgefield  
 Port of Skamania County  
 Port of Klickitat  
 Portland Metro  
 Oregon Department of Transportation

*Washington State Legislators from the following Districts:*

15<sup>th</sup> District  
 17<sup>th</sup> District  
 18<sup>th</sup> District  
 49<sup>th</sup> District

**RTC Board of Directors**

City of Vancouver	Mayor Royce Pollard (Vancouver)
City of Vancouver	Pat McDonnell (City Manager)
Cities East	Council Member Helen Gerde (Camas)
Cities North	Council Member Bill Ganley (Battle Ground) [Chair]
Clark County	Commissioner Marc Boldt
Clark County	Commissioner Steve Stuart
Clark County	Commissioner Betty Sue Morris [Vice-Chair]
C-TRAN	Lynne Griffith (Executive Director/CEO)
ODOT	Cathy Nelson (Region One Manager, interim)
Ports	Commissioner Arch Miller (Port of Vancouver)
WSDOT	Donald Wagner (Southwest Regional Administrator)
Metro	Metro Councilor Rex Burkholder
Skamania County	Commissioner Paul Pearce
Klickitat County	Mayor Brian Prigel (City of Bingen)
<i>Washington State Legislative Members:</i>	
15 <sup>th</sup> District Senator	Jim Honeyford
15 <sup>th</sup> District Representative	Bruce Chandler
15 <sup>th</sup> District Representative	Dan Newhouse
17 <sup>th</sup> District Senator	Don Benton
17 <sup>th</sup> District Representative	Jim Dunn
17 <sup>th</sup> District Representative	Deb Wallace
18 <sup>th</sup> District Senator	Joe Zarelli
18 <sup>th</sup> District Representative	Richard Curtis
18 <sup>th</sup> District Representative	Ed Orcutt
49 <sup>th</sup> District Senator	Craig Pridemore
49 <sup>th</sup> District Representative	Bill Fromhold
49 <sup>th</sup> District Representative	Jim Moeller

**Regional Transportation Advisory Committee Members**

WSDOT Southwest Region	Brian McMullen
Clark County Public Works	Bill Wright
Clark County Planning	Mike Mabrey
City of Vancouver, Public Works	Matt Ransom
City of Vancouver, Community Development	Bryan Snodgrass
City of Washougal	Scott Sawyer
City of Camas	Jim Carothers
City of Battle Ground	Sam Adams
City of Ridgefield	Justin Clary
C-TRAN	Ed Pickering
Port of Vancouver	Rebecca Eisiminger
ODOT	Thomas Picco
Metro	Mark Turpel
Regional Transportation Council	Dean Lookingbill

**B. Skamania County**

The Skamania County Transportation Policy Committee was established in 1990 to oversee and coordinate transportation planning activities in the RTPPO Skamania region.

**Skamania County Transportation Policy Committee**

Skamania County	Commissioner Paul Pearce
City of Stevenson	Mary Ann Duncan-Cole, City Clerk
City of North Bonneville	Thomas Payton, Mayor
WSDOT, Southwest Region	Donald Wagner, SW Regional Administrator
Port of Skamania County	Port Manager

**C. Klickitat County**

The Klickitat County Transportation Policy Committee was established in 1990 to oversee and coordinate transportation planning activities in the RTPPO Klickitat region.

**Klickitat County Transportation Policy Committee**

Klickitat County	Commissioner Ray Thayer
City of White Salmon	Mayor Roger Holen
City of Bingen	Mayor Brian Prigel
City of Goldendale	Larry Bellamy, City Administrator
WSDOT, Southwest Region	Donald Wagner, SW Regional Administrator
Port of Klickitat	Dianne Sherwood, Port Manager

**D. Bi-State Coordination**

Both RTC, the MPO for the Clark County, Washington portion of the Portland-Vancouver metropolitan region and Metro, MPO for the Oregon portion of the Portland-Vancouver region, recognize that bi-state travel is a significant part of the Portland-Vancouver regional transportation system. To coordinate planning for bi-state transportation, RTC representatives participate on Metro's Transportation Policy Advisory Committee (TPAC) and Joint Policy Advisory Committee on Transportation (JPACT) committees. Metro is represented on RTC's Regional Transportation Advisory Committee (RTAC) and RTC Board of Directors. Currently, several locations on the I-5 and I-205 north corridors are at or near capacity during peak hours resulting in frequent traffic delays. The need to resolve increasing traffic congestion levels and to identify long-term solutions continues to be a priority issue. Also of bi-state significance is continued coordination on air quality issues.

The Bi-State Transportation Committee was established in 1999 to ensure that bi-state transportation issues are addressed. This Committee was reconstituted in 2004 to expand its scope to include both transportation and land use according to the Bi-State Coordination Charter. The Committee is now known as the Bi-State Coordination Committee. The Committee's discussions and recommendations continue to be advisory to the RTC, the Joint Policy Advisory Committee on Transportation (JPACT), and Metro on issues of bi-state transportation significance. On issues of bi-state land use and economic significance, the Committee advises the appropriate local and regional governments.

## **1 REGIONAL TRANSPORTATION PLANNING PROGRAM**

### **1A. METROPOLITAN TRANSPORTATION PLAN**

The Metropolitan Transportation Plan (MTP) serves as the Regional Transportation Plan (RTP) for the Clark County metropolitan region to promote and guide development of an integrated, multimodal and intermodal transportation system that facilitates the efficient movement of people and goods, using environmentally sound principles and fiscal constraint. The Plan for Clark County covers a county-wide-area, the area encompassed by the Metropolitan Area Boundary, and, at a minimum, covers a 20-year planning horizon. The most recent update to the *Metropolitan Transportation Plan (MTP) for Clark County* was adopted in December 2005 that extended the Plan's horizon year to 2030. The MTP should be consistent with the Washington Transportation Plan (WTP) and state Highway System Plan (HSP) to provide a vision for an efficient future transportation system and to provide direction for sound transportation investments. The next major MTP update will follow update to the Clark County Comprehensive Growth Management Plan anticipated for adoption in late 2006. The MTP update will reestablish consistency with the local land use plans and will address priority regional transportation system needs.

#### **Work Element Objectives**

1. Develop regular MTP updates or amendments to reflect changing comprehensive plan land uses, demographic trends, economic conditions, regulations and study results and to maintain consistency between state, local and regional plans. Regular update and amendment of the Metropolitan Transportation Plan (MTP) is a requirement of the state Growth Management Act (GMA) and Federal Transportation Act, currently SAFETEA-LU. The state requires that the Plan be reviewed for currency every two years and current federal law allows transition to required update at least every four years. Whenever possible, major update to the MTP for Clark County will be scheduled to coincide with update to the County and local jurisdictions' comprehensive growth management plans. Plan updates will also acknowledge federal transportation policy interests and reflect the latest version of Washington's Transportation Plan (WTP) and Highway System Plan (HSP). At each MTP amendment or update, the results of recent transportation planning studies are incorporated and identified and new or revised regional transportation system needs are documented. MTP development relies on analysis of results from the 20-year regional travel forecast model as well as results from a six-year highway capacity needs analysis. The Plan also reflects the transportation priorities of the region.
2. Comply with Washington's state law, the Revised Code of Washington (RCW), and guidance provided in Washington Administrative Code (WAC) and have the MTP include the following components:
  - a. A statement of the goals and objectives of the Plan. (See WAC 468.86.160)
  - b. A statement of land use assumptions upon which the Plan is based.
  - c. A statement of the regional transportation strategy employed within the region.
  - d. A statement of the principles and guidelines used for evaluating and development of local comprehensive plans.
  - e. A statement defining the least cost planning methodology employed within the region.
  - f. Designation of the regional transportation system.
  - g. A discussion of the needs, deficiencies, data requirements, and coordinated regional transportation and land use assumptions used in developing the Plan.

- h. A description of the performance monitoring system used to evaluate the plan, including Level of Service (LOS) parameters consistent with federal management systems, where applicable, on all state highways at a minimum.
  - i. An assessment of regional development patterns and investments to ensure preservation and efficient operation of the regional transportation system.
  - j. A financial section describing resources for Plan development and implementation.
  - k. A discussion of the future transportation network and approach.
  - l. A discussion of high capacity transit and public transportation relationships, where appropriate.
3. Address the eight federal planning factors required of the metropolitan planning process. The planning process for a metropolitan area shall provide for consideration of projects and strategies that will:
  - a. Support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity, and efficiency.
  - b. Increase the safety of the transportation system for motorized and non-motorized users.
  - c. Increase the security of the transportation system for motorized and non-motorized users.
  - d. Increase the accessibility and mobility options available to people and for freight.
  - e. Protect and enhance the environment, promote energy conservation, and improve quality of life.
  - f. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight.
  - g. Promote efficient system management and operation.
  - h. Emphasize the preservation of the existing transportation system. These will be addressed in the MTP.
4. Involve the public in MTP development.
5. Reflect updated results from the Congestion Management System process. The latest update to the Clark County region's *Congestion Management Report* was published in June 2005 and an update is anticipated in 2006.
6. Address bi-state travel needs and review major bi-state policy positions and issues. Issues include High Capacity Transit (HCT) in the I-5/I-205/SR-500 loop, Traffic Relief Options (TRO), Commute Trip Reduction (CTR), Transportation Demand Management (TDM), Transportation System Management (TSM), including Intelligent Transportation System (ITS) implementation, and congestion management policies.
7. Address regional corridors, associated intermodal connections and statewide intercity mobility services.
8. Identify measures to help maintain federal clean air standards and analyze the MTP for conformity with the Clean Air Act Amendments of 1990.
9. Reflect freight transportation issues and describe the State's Freight and Goods System.



10. Address the bicycling and pedestrian modes in the MTP.
11. Describe concurrency management and its influence on development of the regional transportation system as well as a tool to allow for the most effective use of the existing transportation systems.
12. Describe transportation system management and operations, Intelligent Transportation System (ITS) applications, as well as Transportation Demand Management (TDM) strategies.
13. Evaluate the environmental impacts and mitigation opportunities related to the developing regional transportation system as required by SAFETEA-LU, the Clean Air Act and State law. This evaluation includes Clean Air Act conformity analysis, as needed.
14. Coordinate with environmental resource agencies.
15. Carry out an environmental review process of the proposed MTP prior to its adoption, as necessary.
16. Address the impacts of the Endangered Species Act as it relates to transportation system development.
17. Report on transportation system performance.
18. Develop an MTP that can be implement through more detailed corridor planning processes and eventual programming of funds for project construction and implementation.
19. Address planning for the future transit system. This will include the latest results from C-TRAN's 20-year planning efforts and park and ride analysis.

#### **Relationship To Other Work Elements**

The MTP takes into account the reciprocal effects between land use, growth patterns and transportation system development. It also identifies the mix of transportation strategies needed to address future transportation system problems. The MTP for Clark County is interrelated with all other RTC work elements. In particular, the MTP provides planning support for the Metropolitan Transportation Improvement Program and relates to the congestion management system.

#### **FY 2007 Products**

1. An update to the MTP will be developed in FY 2006/07 and adopted in FY 2007. Land uses from the updated Comprehensive Growth Management Plan for Clark County, anticipated for adoption in late 2006, will be used as the basis for the MTP update. The MTP update will reflect the new County demographic projections, updated land use allocations and urban area boundaries, the transportation planning process in the region and will address the requirements of SAFETEA-LU including addressing the eight planning factors as required by federal law. In summary the following list of items are anticipated to be addressed in the MTP update process:
  - Review of MTP Vision and Goals to ensure consistency with the Comprehensive Plan update.
  - Incorporation of the County's updated land uses and demographic forecasts and allocation to Transportation Analysis Zones (TAZs) for input to the regional travel forecast model to use in transportation system analysis.
  - Updated MTP base year.
  - Updated MTP horizon year to ensure MTP covers at least a 20-year planning horizon to comply with federal requirements.

- Revision of federal functional classification of the highway/arterial system to be as consistent as possible with the Clark County Arterial Atlas and local street classifications.
  - Review of the designated regional transportation system.
  - Identification of transportation deficiencies in the 20-plus year horizon and listing of projects to improve the transportation system. The listing of projects will reflect the State's *Highway System Plan* and local Capital Facilities Plans.
  - Re-assessment of financial plan assumptions and update to the financial plan chapter.
  - Update of maintenance, preservation, safety improvement and operating cost data and information.
  - Update to the list of priority transportation projects and strategies.
  - Review, update, and analysis of system performance measures and level of service assumptions.
  - Update of Intelligent Transportation System (ITS) and Transportation Demand Management (TDM) strategies.
  - Results and recommendations from recent and ongoing transportation planning studies that affect the regional transportation system.
  - Update of the transit and other non-auto modal mix in the Plan as well as acknowledgement of an updated Clark County Trails Plan anticipated in spring 2006 and providing for more active communities.
  - Update to the list of transportation improvements included in regional air quality conformity analysis.
  - Public outreach and involvement.
  - Certification of updated transportation elements of local comprehensive growth management plans to ensure consistency between the state, local, and federal transportation plans.
2. The MTP update will reflect Washington's Transportation Plan (WTP), the latest state Highway System Plan (HSP) and will address federal transportation policy interests, including safety and security of the transportation system, reverse commute, welfare to work, environmental justice, integration of environmental review into the planning process and consideration of management and operations in the planning process. Transportation projects identified in the MTP development process are coordinated with WSDOT to include in the WTP update.
3. The MTP update will include further work to make the most efficient use of the existing transportation system through implementation of Transportation Demand Management (TDM) strategies. TDM planning takes a broader definition of TDM and identifies policies, programs and actions to include use of commute alternatives, reducing the need to travel as well as spreading the timing of travel to less congested periods, and route-shifting of vehicles to less congested facilities or systems.
4. Documentation of conformity with the requirements of the Clean Air Act Amendments (CAAA) will be provided with MTP update, as necessary. Transportation improvement projects proposed in the MTP and assumed in air quality conformity analysis will be clearly listed in the MTP appendix.
5. A fully maintained traffic Congestion Management System serves as a tool for performance evaluation and support for transportation policy decisions, as well as identification of transportation strategies to relieve and/or manage congestion. The latest results from Congestion Management Monitoring (CMM) as part of the Congestion Management Process will be reflected in the MTP update. Results include highway and transit modes.

6. The status of High Capacity Transit Corridor planning will be reported in the MTP update.
7. The MTP update will reflect work with local jurisdictions and agencies to ensure that bicycling and pedestrian modes are addressed in the MTP.
8. The MTP will incorporate plans for the interstate corridors. Transportation needs in the I-5 corridor are being addressed through the I-5 Columbia River Crossing Project (CRCP) and through the work of the Bi-State Coordination Committee. Work on environmental analysis relating to projects proposed for the I-205 corridor will continue in FY 2006/07.

**FY 2007 Expenses:**

	\$
RTC	255,514
Total	<u>255,514</u>

**FY 2007 Revenues:**

	\$
• Federal FHWA	110,352
• Federal FTA	30,289
• Federal STP	47,000
• State RTPO	11,194
• State RTPO (WTP)	38,000
• MPO Funds	<u>18,679</u>
	<u>255,514</u>

Note:

Federal \$ are matched by  
state and local MPO \$.  
Minimum required match: \$32,130

## **1B. METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM**

The Metropolitan Transportation Improvement Program (MTIP) is a multi-year program of transportation projects having a federal funding component. In order for transportation projects to receive federal funds they must be included in the MTIP. Projects programmed in the MTIP should implement the Metropolitan Transportation Plan (MTP). The MTIP is developed by the MPO in a cooperative and coordinated process involving local jurisdictions, C-TRAN and the Washington State Department of Transportation (WSDOT). Projects listed in the MTIP should have financial commitment and meet the requirements of the Clean Air Act. With passage of SAFETEA-LU in 2005 the MTIP update will need to reflect any changes in funding programs resulting from the federal transportation act reauthorization.

### **Work Element Objectives**

1. Develop and adopt the Metropolitan Transportation Improvement Program (MTIP) consistent with the requirements of the federal Transportation Act.
2. Review of the MTIP development process and project selection criteria used to evaluate, select and prioritize projects proposed for federal highway and transit funding. Project selection criteria reflect the multiple policy objectives for the regional transportation system (e.g. safety, maintenance and operation of existing system, multimodal options, mobility, economic development and air quality improvement).
3. Coordinate the grant application process for federal, state and regionally-competitive fund programs such as federal Surface Transportation Program (STP), state Transportation Improvement Board (TIB) programs, corridor congestion relief and school safety.
4. Program Congestion Mitigation/Air Quality (CM/AQ) funds with consideration given to emissions reduction benefits provided by projects.
5. Coordinate with local jurisdictions as they develop their Transportation Improvement and Transit Development Programs. Participate in Clark County's Transportation Improvement Program Involvement Team (TIPIT) Committee, the City of Vancouver's TIP process and C-TRAN's Transit Development Plan (TDP) and 20-Year Plan process. The Clark County Committee is citizen-based and seeks public input on developing and funding of transportation projects.
6. Coordinate with transit and human service agencies to address human service transportation.
7. Develop a realistic financial plan for the MTIP that addresses costs for operation and maintenance of the transportation system. The MTIP is to be financially constrained by year.
8. Analysis of MTIP air quality impacts and documentation of MTIP Clean Air Act conformity.
9. Amendments to the MTIP, where necessary.
10. Monitoring of MTIP implementation and obligation of project funding.
11. Ensure MTIP data is input into the State Transportation Improvement Program (STIP) program software and submitted to WSDOT for inclusion in the State Program and database.

### **Relationship To Other Work Elements**

The MTIP provides the link between the MTP and project implementation. The process to prioritize MTIP projects uses data from the transportation database and regional travel forecasting model output. It relates to the Public Involvement element described in section 3 of the UPWP. The MTIP program requires significant coordination with local jurisdictions and implementing agencies in the Clark County region.

**FY 2007 Products**

1. The 2007-2009 Metropolitan Transportation Improvement Program will be adopted. The type of environmental review and analysis (Environmental Impact Statement or Environmental Assessment or Categorical Exclusion) anticipated for projects incorporated into the MTIP will be noted. The MTIP will be fiscally constrained by year to reflect the programming of federal funds and project selection criteria. The MTIP will also include an annual list of implemented projects since the last MTIP adoption as well as a listing of bicycle and pedestrian projects.
2. MTIP amendments, as necessary.
3. Prioritization of regional transportation projects for the statewide competitive programs e.g. programs administered by the Transportation Improvement Board (TIB). The prioritized projects will be presented to RTAC for recommendation and to the RTC Board for adoption and/or endorsement.
4. MTIP Clean Air Act conformity analysis and documentation, as required.
5. Reports on tracking of MTIP implementation and on obligation of funding of MTIP projects.
6. Provide input to update the State Transportation Improvement Program (STIP).
7. Public involvement in MTIP development.

**FY 2007 Expenses:**

	\$
RTC	59,892
Total	<u>59,892</u>

**FY 2007 Revenues:**

	\$
• Federal FHWA	38,760
• Federal FTA	10,639
• State RTPO	3,932
• MPO Funds	6,561
	<u>59,892</u>

Note:

Federal \$ are matched by  
state and local MPO \$.  
Minimum required match: \$8,709

## **1C. CONGESTION MANAGEMENT SYSTEM MONITORING**

A Congestion Management System (CMS) was adopted by the RTC Board in May of 1995. SAFETEA-LU requires that the Clark County region, as a Transportation Management Area (TMA), continue to address Congestion Management by adopting and implementing a Congestion Management Process for the region. The federal Intermodal Surface Transportation Efficiency Act (ISTEA), passed in 1991, first required the development of a Congestion Management System (CMS) to be used as a tool for monitoring traffic congestion and for identifying improvement strategies to alleviate the congestion. The purpose of a CMS was to develop a tool to provide information on the performance of the transportation system as well as identify strategies to alleviate congestion and enhance mobility. Traffic congestion negatively impacts the region's natural environment, economy, and quality of life. Facilities proposed for federal funding for additional general-purpose lanes were to first be assessed through the CMS process. While regulations were modified in SAFETEA-LU, the Federal Transportation Act continues to recognize the value of congestion management by directing TMAs to continue providing for effective management and operation of the transportation system through a congestion management process. The CMS process focuses on transportation performance within corridors through monitoring of vehicular travel, auto occupancy, transit, and TDM and implementation of solutions to address congestion. Information produced as part of the CMS process provides valuable information to decision-makers in identifying the most cost-effective strategies to provide congestion relief.

### **Work Element Objectives**

1. Implement a Congestion Management Process to provide effective management of existing and future transportation facilities and to evaluate potential strategies for managing congestion. The CMS monitoring process should provide the region with a better understanding of how the region's transportation system operates. The CMS is intended to be a continuing, systematic process that provides information on transportation system performance.
2. Update and enhance the transportation database including the traffic count database and other database elements, such as transit ridership and capacity, travel time and speed, auto occupancy information and vehicle classification data, for CMS corridors through the CMS monitoring program. The transportation database can be referenced and queried to meet user-defined criteria.
3. Incorporate CMS data into the regional traffic count database that, in turn, allows for refined calibration of the regional travel forecast model and provides input to the corridor congestion index update.
4. Analyze traffic count data, turn movements, vehicle classification counts and travel delay data to get an up-to-date representation of system performance, including evaluation of congestion on the Columbia River Bridges between Clark County and Oregon. Assess expansion of data collection efforts to support other regional transportation analysis needs for items such as model calibration, monitoring fast growth locations, and new parallel facilities.
5. Coordinate with local jurisdictions and local agencies to ensure consistency of data collection, data factoring and ease of data storage/retrieval. Coordination is a key element to ensure the traffic count and turn movement data supports local and regional transportation planning studies and Concurrency Management programs.
6. Collection, validation, factoring and incorporation of traffic count data into the existing count program.
7. Measure and analyze performance of the transportation corridors in the CMS network. This system performance information is used to help identify system needs and solutions. The data is also used to support transportation concurrency analysis.
8. Publish results of the Congestion Management Monitoring program in a System Performance Report that is updated periodically. Each year the Report's content and structure is reviewed to enhance its use, access

and level of analysis. Updates may include more explanatory text, modified or additional graphics and charts, additional analysis, or more detailed examination of the data.

9. Coordinate with Metro on development of the congestion management process.

### **Relationship To Other Work**

Congestion monitoring is a key component of the regional transportation planning process. The congestion management process for the Clark County region supports the long-term transportation goals and objectives defined in the Metropolitan Transportation Plan. It assists in identifying the most effective transportation projects to address congestion. The congestion management process also supports local jurisdictions in implementation of their concurrency management systems and transportation impact fee program. The Congestion Management System Monitoring element is closely related to the data management and travel forecasting model elements. The congestion management process also supports work by the state to update the WTP and congestion relief strategies.

### **FY 2007 Products**

1. Adoption of a Congestion Management Process including implementation plan and schedule.
2. Updated traffic counts, turning movements, vehicle classification counts, travel delay and other key data for numerous locations throughout Clark County. Data updates will come from new counts and the compilation of traffic count information developed by the state and local transportation agencies. New and historic data will be made available on RTC's web site (<http://www.wa.gov/rtc>). Traffic count data is separated into 24 hour and peak one-hour (a.m. and p.m. peak) categories. Two-hour peak period traffic counts are also collected, analyzed and stored to help future regional travel forecast model enhancement and update.
3. New traffic count data will be used to update the corridor congestion ratio for each of the CMS corridors. The congestion ratio assesses the overall performance of a full corridor (which may include multiple intersections and parallel roads) instead of just a single intersection. The corridor congestion ratio is used to classify each corridor according to its relative level of congestion, to identify the need for further evaluation, and to determine the effectiveness of alternative strategies.
4. Review and collect data other than traffic counts for CMS corridors, including auto occupancy, roadway lane density, vehicle classification, transit ridership, transit capacity, travel time and speed. Data should support the CMS, concurrency and/or other regional transportation planning programs.
5. Comparison between most recent data with data from prior years back to 1999 to support identification of system needs and solutions and monitoring of impacts of implemented improvements. "Areas of Concern" are listed in the Congestion Management Report and RTC works with local jurisdictions to identify transportation solutions for the corridor segments of concern. The linkage between Congestion Management Monitoring and traffic operations will also be addressed.
6. The first Congestion Monitoring Report was adopted by the RTC Board in April, 2000. In FY 2007, the Report will be reviewed and updated, as necessary, and will again include a comparison with system performance reported in previous reports. In addition to a comprehensive summary of transportation data, the Report includes analysis and presentation of data to provide a better understanding of regional transportation system capacity and operations and potential for its improvement. It also includes analysis of the potential for transportation demand management to offset infrastructure needs and to improve transportation efficiency. The Report provides an update of performance information for the identified regionally-significant multimodal transportation corridors critical to the mobility needs of the region. Twenty-one transportation corridors were identified and monitored through the CMS at the

outset. Additional corridors have been identified and added to the monitoring system over time. Thirty corridors are now monitored.

7. Assess transportation system impact of Transportation Demand Management strategies.
8. Develop capacity or operational solutions to address transportation deficiencies identified as part of the congestion management monitoring process and incorporate these solutions into the regional plan (MTP).
9. Provide CMS data and system performance indicators to inform the WTP update process.
10. Provide information to Federal Highway Administration to help in FHWA's assessment of the congestion management process.
11. Communicate with Metro on RTC's congestion management process and keep informed on development of Metro's Congestion Management Process.

**FY 2007 Expenses:**

	\$
RTC	80,607
Consultant	35,000
Total	<u>115,607</u>

**FY 2007 Revenues:**

	\$
CM/AQ	100,000
Local	15,607
	<u>115,607</u>

*Assumes use of 2006/07 CM/AQ funds, \$35,000 of which is used for data collection by contractor.*



## **1D. VANCOUVER AREA SMART TREK (VAST)**

Traditionally, our region has met demand for mobility by building more highways and bridges and/or by adding more lanes to roads. Today, the urban area's highway system can no longer support a strategy that continues lane-capacity expansion into the indefinite future. While there may be no single solution, Intelligent Transportation Systems (ITS), offers a promising technological strategy to improve the efficiency of the total transportation system. ITS uses advanced electronics, communications, information processing, computers and control technologies to help manage congestion, improve the safety, security and efficiency of our transportation system.

RTC will continue coordination and management of the Vancouver Area Smart Trek (VAST) program that will result in implementation of ITS technologies in our region. The planning and management of the program by RTC was initiated in FY2002. The goal of VAST is to use ITS technologies for integration of all transportation information systems, management systems and control systems for the urbanized area of Clark County. RTC will be responsible for program management, program coordination and outreach/education. Participating agencies will be jointly responsible for ITS program implementation through the VAST Steering Committee. The deployment of ITS projects includes the use of federal CMAQ funds for communications infrastructure, transit management (computer-aided dispatch, automatic vehicle locators and automatic passenger counters), freeway management (variable message signs, video cameras, data stations), arterial management (central signal system software, advanced controllers, signal timing/coordination), and traveler information.

RTC has worked with regional partners to define the VAST regional architecture for the Clark County region, including a 20-year plan of ITS projects and an operational concept by VAST program areas.

### **Work Element Objectives**

1. Continuation of the VAST program.
2. Continue implementation of projects currently programmed for CMAQ funding in the MTIP which include: 1) a freeway operations/incident management program, 2) an arterial transportation operations improvement pilot project, 3) identification and implementation of Phase II of the advanced traveler information system, and 4) management of the VAST program led by RTC. The freeway operations and incident management will enhance freeway operations by greater integration of the WSDOT Traffic Management Center (TMC) with the ODOT TMC and common freeway management. It will also deploy an operations plan for the I-5/Hwy 99 corridor and identify additional incident management needs in the corridor. The transportation operations improvement pilot project will develop and deploy a signal integration project in a corridor under the control of three jurisdictions. The traveler information system builds upon the Phase I improvements deployed in FY06. A stakeholder workshop will be held to identify Phase II improvements and work to provide more content and integrate the use and sharing of traveler information for use by the public.
3. Provide for ongoing planning, coordination and management of the VAST program by RTC. This will include ensuring the region is meeting federal requirements for ITS deployment for integration and interoperability. It will also provide for completion of the VAST project checklist to determine project compliance for current projects and new projects.
4. Manage and provide support for the VAST Steering Committee for oversight in the development and deployment of projects contained in the 20-year VAST Implementation Plan. Ensure that VAST integration initiatives and consistency with the ITS architecture are addressed. The RTC Board established a Steering Committee that has executed a memorandum of understanding that defines how our region will work together to develop, fund, and deploy ITS projects contained in the 20-year plan. The Committee is comprised of Vancouver, Camas, Clark County, the Washington State Department of Transportation Southwest Region, the Southwest Washington Regional Transportation Council, C-

TRAN and the Oregon Department of Transportation. The Committee's oversight role includes project review and endorsement prior to funding, and monitoring and tracking of projects during implementation. The Steering Committee also acts as liaison with other key ITS stakeholders and assists in regional ITS policy formulation.

5. Continue activities and develop agreements under the Communications Memorandum of Understanding for the coordination of construction, management and maintenance of communications infrastructure for VAST member agencies.
6. Complete data conversion and deployment of a shared communications assets management database and mapping system for use by the VAST partner agencies.
7. Execute communications asset maintenance and sharing agreements between partner agencies.
8. Manage the VAST Communications Infrastructure Committee to establish procedures, protocols, and standards for the VAST communications network.
9. Manage and facilitate the development of strategies to secure funding for ITS projects contained in the VAST 20-year implementation plan. Assist Steering Committee members on funding applications for individual ITS project funding. Continue process of Steering Committee partnership for joint project funding applications.
10. Develop and complete a VAST 20-year plan project status report and coordinate with the VAST partner agencies to update the VAST Plan.
11. Continue to work with ITS stakeholders, including emergency service providers such as Clark Regional Emergency Services Agency (CRESA), police departments and fire departments, as part of the VAST process to assess how VAST/ITS can facilitate and benefit public safety needs.
12. Initiate and manage a Phase II traveler information workshop and identify Phase II improvements and develop a scope of work for implementation and deployment.
13. Work to "institutionalize" the regional ITS program by incorporating ITS into the planning process and the Metropolitan Transportation Plan. Areas of mutual need, institutional issues, institutional opportunities, recommendations and strategies to reduce or eliminate barriers and optimize the success of strategic deployment opportunities and the Implementation Plan are to be identified and followed through.
14. Participate in the Oregon Transport Project and other bi-state committees and groups for bi-state coordination of ITS activities.
15. Technical assistance in ITS implementation.

### **Relationship To Other Work Elements**

The Vancouver Area Smart Trek (VAST) work element relates to the MTP as one element to improve the efficiency of the existing transportation system and to the MTIP where ITS projects are programmed for funding and implementation.

### **FY 2007 Products**

1. Coordination of ITS activities within Clark County and with Oregon.
2. Institutionalize VAST Operational Concept that identifies relationships and protocols in the exchange, sharing, and control of information between agencies that will serve as the foundation for the preparation of operation and maintenance agreements.

3. Management of the VAST program including coordination of the preparation of the memoranda of understanding, interlocal agreements, and operational and maintenance agreements that are needed to support the implementation of the VAST program and the deployment of ITS projects.
4. Initiate agreements and activities under the Communications Memorandum of Understanding for communication infrastructure executed in FY 2004.
5. Facilitation of the activities of the Steering Committee.
6. Management of consultant technical support activities as needed.
7. Carry out the recommendation of the Communication Operations Plan for VAST that provides the specific detail needed to fully implement ITS which includes a communications network among VAST agencies. The Plan includes definition of the fiber optic needs and communication hubs required for ITS and mapping the communications network for ITS.
8. Regional ITS goals and policies for the Clark County region and for bi-state ITS issues.
9. Development and management of an ITS data warehouse and maintenance of the VAST web site.

**FY 2007 Expenses:**

	\$
RTC: VAST Program	86,705
Coordination/Management	
<b>Total</b>	<b><u>86,705</u></b>

**FY 2007 Revenues:**

	\$
CM/AQ	75,000
MPO Local Match (13.5%)	11,705
	<b><u>86,705</u></b>

*Federal funds for project implementation by WSDOT and local agencies are programmed in the MTIP.*

## **1E. I-5 COLUMBIA RIVER CROSSING PROJECT (CRCP)**

The Transportation Equity Act for the 21<sup>st</sup> Century (TEA-21) recognized the importance of trade corridors to the national economy and designated I-5 within the Portland/Vancouver region as a Priority Corridor under the National Trade Corridors and Borders Program. The Portland-Vancouver I-5 Transportation and Trade Partnership strategic planning effort for the I-5 corridor between I-84 in Portland and I-205 in Vancouver was initiated in response to recommendations of a bi-state Leadership Committee, which met over a nine-month period in 1999. The Committee found that the I-5 corridor is a critical economic lifeline for the region and the state, serving the Ports of Portland and Vancouver, two transcontinental rail lines, providing critical access to industrial land in both states, and facilitating through movement of freight.

Following that effort, in 2001, a Task Force appointed by Governors Gary Locke of Washington and John Kitzhaber of Oregon met to guide development of the Partnership Study. On June 18, 2002, the Bi-State Governors' Task Force adopted its recommendations, which were incorporated into the Strategic element of the Metropolitan Transportation Plan for Clark County. Work on implementing the I-5 recommendations now continues with the I-5 Columbia River Crossing Project (CRCP) and the initiation of the Draft Environmental Impact Statement process.

Phase I of the Columbia River Crossing Project will develop a wide range of alternatives, conduct an analysis that will narrow the range of alternatives, and select a set of alternatives to be carried into the Draft Environmental Impact Statement (DEIS). Phase II of the project will complete the DEIS, which is expected to continue through 2007, and will culminate with the selection of a locally preferred alternative in early 2008. The Final Environmental Impact Statement is to be completed by the end of 2008.

In addition to regular briefings, the RTC Board will have direct input into the project via their representative on the Project Sponsors Council (PSC). By the end of 2006, the project will have completed the adoption of the problem definition, evaluation criteria, adoption of a range of alternatives, and adoption of the list of alternatives to be carried into the EIS. A separate but related issue to the Columbia River Crossing Project is the Delta Park widening project. In 2006, the Bi-State Coordination Committee, in coordination with ODOT, will be selecting the preferred alternative. From there the project moves to final design and construction.

RTC as the federally designated Metropolitan Transportation Planning Organization (MPO) for Clark County has a mandated role regarding the DEIS process. Ultimately, the RTC Board will be required to make a decision regarding the locally preferred highway and transit alternatives and to incorporate them into the region's adopted MTP. The DEIS process itself is a large, complex process that requires significant staff resources from a number of partnering agencies and consultant team.

### **Work Element Objectives**

1. RTC's key staff involvement areas are expected to include the following: 1) local agency liaison, 2) day to day project development activities, provide input and analysis in the development of alternatives, 3) provide transportation data and analysis, and 4) conduct the travel demand model elements of the Clark County side of the project.
2. RTC will participate in the Project Development Team, a host of technical working groups including, Travel Demand Forecasting, Environmental, Transit, and the Regional Partners Group.
3. RTC will have key activities in the CRC transportation planning work element. This includes the development of study parameters, data collection, initial and secondary screening of alternatives, transportation analysis of baseline and build alternatives, and support for other tasks, including the environmental and design tasks. RTC will act as the lead Clark County agency to review and assist in

developing and conducting the transportation analyses of existing conditions and for the future year alternatives and will collaborate with Metro on the travel forecasting process.

4. RTC will assist the project team on the review and development of required New Starts submittals for the Federal Transit Administration. RTC will assist in the development of the initial range of transit alternatives and will also collaborate with C-TRAN and local jurisdictions to define the Build alternatives and the No Build and Federal Transit Administration required Baseline Alternative.
5. RTC will work in partnership with ODOT, WSDOT, Metro, the cities of Vancouver and Portland, counties of Clark, Washington and Multnomah, Oregon, TriMet, C-TRAN, the Port of Vancouver and Port of Portland to initiate, complete the DEIS, and select a locally preferred alternative.
6. RTC's specific role in FY 2006/07 is to work cooperatively with regional partners on all elements of the Draft Environmental Impact Statement (DEIS) and to specifically assist with the development of travel demand networks, traffic analysis associated with tolling options, and development of multimodal Columbia River Crossing alternatives.
7. Participate in public involvement activities relating to the CRCP.

#### **Relationship To Other Work**

Implementation of a strategic plan for transportation improvements in the I-5 corridor is critical to the long-term development of the region's transportation system. The I-5 Partnership recommendations were incorporated into the Strategic Plan section of the MTP update for Clark County (December 2002). The Governors' Task Force recommendations included supplementing or replacing the I-5 Interstate Bridge and related highway improvements, Transportation Demand Management (TDM) measures, a land use accord, Environmental Justice initiatives, park and ride spaces, a high capacity transit loop in Clark County that would connect to Portland region's system and recommended railroad and railroad bridge improvement.

*This RTC work element relates to the "I-5 Columbia River Crossing Project (CRCP)" work element described in the "Other Projects of Regional Significance" section of Metro's FY 2005-06 Unified Work Program (UWP). The ODOT work element outlines funding for the Project in the amount of \$6.5 million in federal National Corridor Planning and Development Program funds with \$400,000 in local matching funds.*

#### **FY 2007 Funding: RTC**

<b>FY 2007 Expenses:</b>		<b>FY 2007 Revenues:</b>	
RTC	\$135,249	WSDOT	\$135,249
Total	<u>\$135,249</u>		<u>\$135,249</u>

*The work element is led by ODOT/WSDOT.  
Further details of the work and funding can be found in the ODOT section of Metro's UPWP*

## **1F. HIGH CAPACITY TRANSIT CORRIDORS STUDY**

Regional transportation policy direction surrounding the issue of high capacity transit, including corridors and alternative high capacity transit modes, has been an uncertain part of the regional transportation system for the last 10 years. In late November of 2004, the 2005 federal transportation Appropriations Bill included a \$1.488 million earmark to RTC for the analysis of the I-5/I-205/SR-500 transit loop. RTC's 2006 Work Plan proposed to utilize this funding source to assist the RTC Board in facilitating a broad discussion with affected Clark County agencies on modal alternatives for future high capacity corridors within Clark County and how that system would connect to transit across the Columbia River. The anticipated products of this analysis would lead to a set of high capacity transit policies that would balance the land use policies, transit priorities, and regional transportation system priorities to help policy makers determine whether a high capacity transit component is needed in Clark County and to guide development of RTC's long-range regional transportation system plan. The technical analysis and policymaking process would require the support and participation of RTC member jurisdictions with land use, transportation, and transit authority who would be impacted by the HCT policies.

### **Work Element Objectives**

1. Provide information, solicit input, and develop consensus on the HCT Study's scope of work.
2. Identify a set of high capacity transit policies that would balance the land use goals, transit priorities, and regional transportation system needs to guide the development of the region's high capacity transit element.
3. Provide information on the feasibility of a range of high capacity transit options within Clark County.
4. Identify the most promising high capacity transit corridors and modes in order to increase the level of transit service in Clark County.
5. Address connection to any high capacity transit solutions that may result from the Columbia River Crossing project.
6. Re-designate high capacity corridors in the Metropolitan Transportation Plan.
7. Provide preliminary financial information for HCT.

### **Relationship To Other Work Elements**

Transit is an important component of the regional transportation system. Transit as a component of the regional transportation system provides mobility and accessibility to help support the region's growth and economic development goals. The High Capacity Transit Study is included in the Strategic Plan section of the Metropolitan Transportation Plan for Clark County (December 2005). The recommendations of this study, including high capacity transit policies and goals for the Clark County region, will be incorporated into the MTP.

### **FY 2006 Products**

1. Federal Transit Administration (FTA) Grant Agreement Process.
2. Scope of Work for the HCT Study.
3. Consultant Agreement.

**FY 2006 Expenses:**

	\$
RTC	1,860,000
<b>Total</b>	<b><u>1,860,000</u></b>

**FY 2006 Revenues:**

	\$
Section 5309	1,488,000
Local Match (20%)	<u>372,000</u>
	<b><u>1,860,000</u></b>

*Federal and local funds are programmed in the 2006-2008 MTIP for Clark County and STIP.  
The balance of funds will be carried forward from the FY 2006 into the FY 2007 UPWP.*

**IG. SKAMANIA COUNTY RTPO**

Work by the RTPO on a transportation planning work program for Skamania County began in FY 1990. The Skamania County Transportation Policy Committee meets monthly to discuss local transportation issues and concerns. The SR-14 Corridor Management Plan was completed in FY 1998. The Skamania County Regional Transportation Plan was initially adopted in April 1995 with updates in April 1998 and May 2003. An April 2006 update is anticipated. In 2003, Skamania County completed a transit feasibility study. The recommendations of the transit study will continue to be implemented. Development and traffic trends are monitored and the regional transportation planning database for Skamania County kept up to date. RTC staff will continue to provide transportation planning technical assistance for Skamania County.

**Work Element Objectives**

1. Conduct a regional transportation planning process.
2. Ensure the Skamania County Transportation Plan is regularly reviewed and provide opportunity for regular update if needed.
3. Gather growth and development data to reveal trends to report in the Regional Transportation Plan update.
4. Further develop the transportation database for Skamania County, for use in the Regional Transportation Plan update.
5. Coordinate with WSDOT staff and review plans of local jurisdictions for consistency with RTP and WTP.
6. Continuation of transportation system performance monitoring program.
7. Assistance to Skamania County in implementing a new federal transportation reauthorization act. This will include continued assistance in development of federal and state-wide grant applications and, if there are regionally significant projects, development of the Regional TIP.
8. Work with Skamania County to ensure that TEA-21 High Priority Funding is used effectively and, where possible, is used to leverage additional funds for transportation projects in the region. The TEA-21 High Priority Funding is being used for safety improvements along SR-14 in the Cape Horn area.
9. Continue assessment of public transportation needs, including specialized human services transportation, in Skamania County. Recommendations of the 2003 Skamania County Transit Feasibility Study began implementation in 2004 when commuter service between Skamania County and Clark County (Fisher Landing Transit Center) was initiated. Work with Skamania County in its coordination with Gorge TransLink, an alliance of transportation providers offering public transportation services throughout the Mid-Columbia River Gorge area as well as to destinations, such as Portland and Vancouver. These transportation services are available to everyone regardless of age or income. Coordination with the state's Agency Council on Coordinated Transportation (ACCT) will also continue related to meeting special transportation needs.
10. Coordinate with Skamania County to implement the next steps of the SR-35 Columbia River Crossing Study. This would include obtaining funding to move forward with preliminary design and a Final Environmental Impact Statement (FEIS).
11. Assistance to Skamania County in conducting regional transportation planning studies.



**Relationship To Other Work Elements**

The RTPO work program activities for Skamania County will be tailored to the County's specific needs and issues and, where applicable, coordinated across the RTPO region with Clark County to the west and with Klickitat County to the east.

**FY 2007 Products**

1. Continued development of a coordinated, technically sound regional transportation planning process in Skamania County.
2. Continued development of a technical transportation planning assistance program.
3. Development of the 2007-2009 Regional Transportation Improvement Program.
4. Report to WSDOT Planning Office on consistency between RTP, WTP and local plans.

**FY 2007 Expenses:**

	\$
RTC	17,431
Total	<u>17,431</u>

**FY 2007 Revenues:**

	\$
RTPO	17,431
	<u>17,431</u>

## **1H. KLINKITAT COUNTY RTPO**

Work by the RTPO on a transportation planning work program for Klickitat County began in FY 1990. The Klickitat County Transportation Policy Committee meets monthly to discuss local transportation issues and concerns. The SR-14 Corridor Management Plan was completed in FY98. The Klickitat County Regional Transportation Plan was initially adopted in April 1995 with updates in April 1998 and May 2003. An April 2006 RTP update is anticipated. Development and traffic trends are monitored and the regional transportation planning database for Klickitat County is kept up to date. RTC staff will continue to provide transportation planning technical assistance for Klickitat County.

### **Work Element Objectives**

1. Continue regional transportation planning process.
2. Ensure the Klickitat County Transportation Plan is regularly reviewed and provide opportunity for regular update if needed.
3. Gather growth and development data to reveal trends to report in the Regional Transportation Plan update.
4. Keep the transportation database for Klickitat County updated and current so that data and information can be used as input to the Regional Transportation Plan.
5. Coordinate with WSDOT staff and ensure that components of the WTP are integrated into the regional transportation planning process and incorporated into the RTP update.
6. Review plans of local jurisdictions for consistency with RTP and WTP.
7. Work with Klickitat County to ensure that TEA-21 High Priority Funding is used effectively and, where possible, is used to leverage additional funds for transportation projects in the region.
8. Continuation of transportation system performance monitoring program.
9. Assistance to Klickitat County in implementing the new six-year federal transportation reauthorization bill. This will include continued assistance in development of federal and state-wide grant applications and, if there are regionally significant projects, development of the Regional TIP.
10. Continue assessment of public transportation needs, including specialized human services transportation, in Klickitat County. Currently, Klickitat County is fulfilling transit service needs through grant funding. Work with Klickitat County in its coordination with Gorge TransLink, an alliance of transportation providers offering public transportation services throughout the Mid-Columbia River Gorge area as well as to destinations, such as Portland and Vancouver. These transportation services are available to everyone regardless of age or income. Coordination with the state's Agency Council on Coordinated Transportation (ACCT) will also continue related to meeting special transportation needs.
11. Coordinate with Klickitat County to implement the next steps of the SR-35 Columbia River Crossing Study. This would include obtaining funding to move forward with preliminary design and a Final Environmental Impact Statement (FEIS).
12. Assistance to Klickitat County in conducting regional transportation planning studies.

**Relationship To Other Work Elements**

The RTPO work program activities for Klickitat County are tailored to the specific needs and issues of the Klickitat County region and, where applicable, coordinated across the RTPO.

**FY 2007 Products**

1. Continued development of a coordinated, technically sound regional transportation planning process in Klickitat County.
2. Continued development of a technical transportation planning assistance program.
3. Development of the 2007-2009 Regional Transportation Improvement Program.
4. Report to WSDOT Planning Office on consistency between RTP, WTP and local plans.

**FY 2007 Expenses:**

	\$
RTC	19,646
Total	<u>19,646</u>

**FY 2007 Revenues:**

	\$
RTPO	19,646
	<u>19,646</u>

## **11. STATE ROUTE 35 COLUMBIA RIVER CROSSING: FEIS**

The SR-35 Columbia River Crossing Final Environmental Impact Statement (FEIS) work element results from a local grass roots effort by a wide range of individuals who are interested in the near-term and longer-term future of the White Salmon/Bingen, Washington and Hood River, Oregon region. A Draft Environmental Impact Statement (DEIS) was completed in January 2004 that assessed the environmental impacts of three action alternatives as well as a “no action” alternative. The SR-35 Columbia River Crossing FEIS will evaluate potential impacts of the preferred alternative as well as the other alternatives that were evaluated in the DEIS.

The existing Columbia River Bridge is referred to locally as the Hood River Bridge and was built in 1924. The bridge spans the Columbia River connecting the cities of Bingen and White Salmon in Washington to Hood River in Oregon. This bridge is the second oldest Columbia River crossing and one of only three crossings in the Columbia River Gorge National Scenic Area. It provides a vital economic link between Washington and Oregon communities and commerce. The existing structure is 4,418 feet long with two 9.5-foot wide travel lanes and no pedestrian or bicycle facilities. It has open grid steel decking, which is known to adversely affect vehicle tracking.

The Final Environmental Impact Statement and preliminary design is expected to begin in late 2007 and last approximately one year. The SR-35 Columbia River Crossing FEIS will be funded with \$640,000 in federal funding and \$160,000 in local matching funds. The FEIS will be managed by RTC in partnership with WSDOT and ODOT and will be carried out in close coordination with the Klickitat and Skamania County Transportation Policy Committees. The study supports the regional goals contained in the Klickitat County Regional Transportation Plan.

### **Work Element Objectives**

1. Conduct an environmental evaluation of alternatives to meet NEPA requirements and produce a Final Environmental Impact Statement (FEIS).
2. Conduct a public and agency participation program including communication and outreach to tribes that builds a decision-making structure and local consensus for a long-term solution.

### **Relationship To Other Work Elements**

The SR-35 Columbia River Crossing FEIS is most closely related to work under the Klickitat County RTPO work element and is also of significance to the Skamania County RTPO work element.

### **FY 2007 Products**

1. Begin the Final Environmental Impact Statement (FEIS) and preliminary design.
2. Completion of technical memoranda.
3. Completion of Biological Assessment.
4. Completion of Final Type, Size, and location study.
5. Right-of-Way Plans.
6. Project Newsletters.

<b><u>FY 2007 Expenses:</u></b>		<b><u>FY 2007 Revenues:</u></b>	
	\$		\$
RTC	25,000	Federal High Priority	320,000
Consultant	375,000	ODOT & WSDOT	75,000
		Match	
		Other local Match	5,000
Total	<u>400,000</u>		<u>400,000</u>

*\$640,000 in federal High Priority funds was included in the federal Transportation Reauthorization Act, SAFETEA-LU (2005).*

*The table above assumes 50% would be used in FY 2007 and 50% in FY 2008.*

*Local matching funds are required but sources have not been finalized.*

## **2A. REGIONAL TRANSPORTATION DATA, TRAVEL FORECASTING, AIR QUALITY AND TECHNICAL SERVICES**

This element includes the development, maintenance and management of the regional transportation database to support the regional transportation planning program. The database is used to assess transportation system performance, evaluate level of service standards, calibrate the regional travel forecasting model, and includes functional classification of roadways, routing of trucks, technical support for studies by local jurisdictions and air quality analysis. Work will continue on maintaining and developing a Geographic Information System (GIS) transportation database. Technical assistance will be provided to MPO/RTPO member agencies and other local jurisdictions as needed. RTC will continue to assist local jurisdictions in updating and implementing Growth Management Act (GMA) plans. The regional travel model serves as the forecasting tool to estimate and analyze future transportation needs and its output is used to support development of the Metropolitan Transportation Plan and Metropolitan Transportation Improvement Program. EMME/2 software is currently used to carry out travel demand and traffic assignment steps but in FY 2006/07 a transition will be made to use of the PTV Vision suite of modeling software for transportation planning and operations analyses that includes VISUM and VISSIM. RTC continues to coordinate with Metro on use of Metro's regional model and to ensure that data used as inputs to the model, such as census data and land uses, are kept current.

This work element also includes air quality planning. Mobile emissions are a significant source of the region's air quality problems. As a result, transportation planning and project programming cannot occur without consideration for air quality impacts. In an effort to improve and/or maintain air quality, the federal government enacted the Clean Air Act Amendments in 1990. Currently, under the new federal 8-hour Ozone standard, the Vancouver/Portland Air Quality Maintenance Area (AQMA) has been redesignated from "maintenance" to "unclassifiable/attainment" for Ozone and no longer needs to demonstrate conformity for Ozone. The Vancouver AQMA is currently designated as a CO maintenance area. Regional emissions analyses of the Plan (MTP) and Program (MTIP) were no longer required after June 15, 2005 when the new one-hour Ozone standard took effect. However, conformity analysis for carbon monoxide is still currently required. RTC assists the region's air quality planning program in providing demographic forecasts, develops a Vehicle Miles Traveled (VMT) grid, and monitors changes in VMT. RTC also analyzes air quality implications through the EPA Mobile Emissions model and analyses project-level air quality impacts for local jurisdictions and agencies.

### **Work Element Objectives**

1. Maintain an up-to-date transportation database and map file for transportation planning and regional modeling that includes transit ridership and transit-related data, developed by C-TRAN. The database is used as support for development of regional plans, travel forecasting model and transportation maps.
2. Collect, analyze and report on regional transportation data from data sources such as the U.S. Census, Census Transportation Planning Package data, National Household Travel Survey (NHTS) data (<http://nhts.ornl.gov/2001/index.shtml>), travel behavior survey data, and County GIS information.
3. Continue to maintain and update a comprehensive traffic count program coordinated with local jurisdictions and agencies.
4. Compile accident data for use in development of plans and project priorities.
5. Analyze demographic forecasts for the region for use in regional travel forecast model development. RTC reviews the Clark County-produced region-wide growth totals for population, households and employment allocated to Clark County's transportation analysis zones (TAZs). The TAZ allocation is used by RTC in the travel forecast modeling process.
6. Analyze growth trends and relate these to future year population and employment forecasts.

7. Coordinate with Metro on procedures for forecasting the region's population and employment data for future years as well as on Metroscope development, a process that integrates land use development and transportation system change in an integrated model. RTC staff will also research the use models such as *UrbanSim* to enable integrated transportation and land use modeling.
8. Continue to incorporate transportation planning data elements into the ArcInfo system and work with Clark County's Assessment and GIS Department to support transportation data being incorporated in the County ArcGIS system.
9. Maintain GIS layers for the designated regional transportation system, federal functional classification system of highways and freight routes.
10. Assist local jurisdictions in analyzing data and information from the regional transportation data base and in updating and implementing GMA plans, including Concurrency Management programs.
11. Coordinate with the County's computer division to update computer equipment and software, as needed.
12. Continue to develop the regional travel forecast model and use it as a tool to help analyze the transportation system in the region and to use its output to identify deficiencies in the regional transportation system.
13. Develop and maintain the regional travel model to include: periodic update to provide updated base year, six year and twenty year horizons together with necessary re-calibration, network changes, speed-flow relationships, link capacity review, turn penalty review, land use changes, and interchange/intersection refinements.
14. Document the regional travel forecast model development and procedures.
15. Update RTC travel demand model codes with WinMTX, which is developed by RTC staff. WinMTX is a matrix manipulation tool set written in Visual Basic. It will be upgraded and optimized continuously to run travel demand models more efficiently.
16. Work with local agencies to help them use the regional travel forecasting model and to expand model applications for use in regional plans, local plans, transportation demand management planning and transit planning. When local agencies and jurisdictions request assistance relating to use of the regional travel forecasting model for sub-area studies, the procedures outlined in the adopted Sub-Area Modeling guide (February, 1997) are followed.
17. Organize and hold meetings of the local Transportation Model Users' Group (TMUG) providing a forum for local model developers and users to meet and discuss model development and enhancement.
18. Participate in the Oregon Modeling Steering Committee (OMSC) meetings, organized as part of the Oregon Travel Model Improvement Program (OTMIP) to learn about model development in Oregon and the Portland region. In FY 2007, a major travel activity survey will be conducted in coordination with Metro and Oregon MPO's. The survey will include use of GPS units to collect data and beginnings of a longitudinal panel survey. The travel activity and behavior survey will be used to support development of the regional travel forecast model.
19. Increase the ability of the existing travel forecasting procedures to respond to information needs placed on the forecasting process. The model needs to be able to respond to emerging issues, including concurrency, peak hour spreading, latent demand, design capacity, performance measures, air quality, growth management, and life-style, as well as the more traditional transportation issues.
20. Continue research into regional travel forecasting model enhancement.

21. The transition from use of EMME/2 to the PTV Vision suite of software as part of the regional travel model process will move forward in FY 2007. The PTV Vision software includes VISUM for strategic transportation planning and VISSIM for traffic analysis and management. The transition will require staff training and development of a new framework for modeling analyses. The new software will provide better integration of transportation planning and transportation operational analysis through use of traffic simulation tools. Use of the new, integrated transportation planning and operational analysis software will necessitate the development of standard practices and travel modeling parameters to achieve consistency in transportation analysis.
22. Coordinate the utility, development and refinement of the Clark County regional travel forecasting model with Metro and other local agencies. RTC's model is consistent with Metro's.
23. Continue to expand RTC's travel modeling scope through development of operational modeling applications and true dynamic assignment techniques that are increasingly important in evaluating new planning alternatives, such as HOV operations and impacts, ITS impact evaluation, congestion pricing analysis, and concurrency analysis.
24. Further develop procedures to carry out post-processing of results from traffic assignments.
25. Continue to develop data on vehicle miles traveled (VMT) and vehicle occupancy measures for use in air quality and Transportation Demand Management (TDM) planning.
26. Assist WSDOT and local agencies by supplying regional travel model data for use in local planning studies, environmental analyses, development reviews, Capital Facilities Planning and Transportation Impact Fee program updates. In FY 2007, the implementation of projects funded through the state Nickel and Partnership funding packages will move forward. RTC will provide WSDOT with transportation model data to support project implementation.
27. Assist local jurisdictions in conducting their Concurrency Management Programs by modifying the travel model to apply it to defined transportation concurrency corridors in order to determine available traffic capacity, development capacity and identify six-year transportation improvement needs.
28. Provide technical support for analysis of High Capacity Transportation (HCT) needs in the Clark County High Capacity Transit Corridors Study.
29. Provide technical support for implementation of the Commute Trip Reduction program.

#### **Air Quality Planning**

30. Monitor federal guidance on the Clean Air Act and state Clean Air Act legislation and implementation of the requirements. In FY 2007 this will include addressing issues any issues concerning the Limited Maintenance Plan for Carbon Monoxide (CO) being developed for the Vancouver Air Quality Maintenance Area. In addition, the Portland-Vancouver area is reclassified from maintenance to attainment status for ozone based on the Environmental Protection Agency's (EPA's) eight-hour ozone standard. However, monitored data still indicates potential ozone problems.
31. Because of the new eight-hour standard for ozone, an ozone emissions budget is no longer required for the MTP. In addition, the Limited Maintenance Plan for CO would eliminate the need for a CO mobile emissions budget in the MTP. RTC will coordinate with Southwest Clean Air Agency (SWCAA) and the other air agencies to ensure that the MTP reflects these changes and that Transportation Control Measures (TCMs), if needed to retain the current air quality status or prevent backsliding, will be identified in the MTP.
32. Work with the air quality consultation agencies to comply with the new provisions under consideration under the proposed new standard for Particulate Matter of 2.5 mcg (PM 2.5). The Environmental



Protection Agency (EPA) is evaluating monitored data to determine if the Vancouver Air Quality Maintenance Area (AQMA) is in violation of the new standard. If transportation is a significant contributor, new transportation conformity requirements may be required. RTC will coordinate with air agencies to determine the regulatory and technical impact of conformity.

33. Program any identified TCMs in the Metropolitan Transportation Improvement Program (MTIP), as necessary.
34. Cooperate and coordinate with State Department of Ecology in their research and work on air quality in Washington State.
35. Coordinate with Southwest Clean Air Agency (SWCAA) in carrying out the provisions established in the Memorandum of Understanding (MOU) between RTC and Southwest Clean Air Agency (SWCAA), adopted by the RTC Board in January, 1995 [RTC Board Resolutions 01-95-02]. RTC's responsibilities include conformity determination for regional plans and programs and for adoption of TCMs for inclusion in the MTP and MTIP. In addition, the MOU seeks to ensure that inter-agency coordination requirements in the State Conformity Rule are followed.
36. Coordinate and cooperate with air quality consultation agencies (Washington State Department of Ecology, EPA, FHWA, FTA, WSDOT, and SWCAA) on air quality technical analysis protocol and mobile emissions estimation procedures. This consultation process supports the review, update, and testing of the new Mobile 6 emissions model to ensure accuracy and validity of mobile model inputs for the Clark County region and ensure consistency with state and federal guidance.
37. Coordinate with Metro to ensure consistency of mobile emissions estimation procedures and air quality emissions methodology using the travel-forecasting model.
38. Tracking of mobile emission strategies required in Maintenance Plans. Strategies equate to emissions benefits. If a strategy cannot be implemented then alternatives have to be sought and substituted.
39. Participate with SWCAA and other air agencies in discussions regarding RTC's role and responsibilities in the upcoming update of the carbon monoxide maintenance plan for the air quality maintenance area. As part of this process, provide assistance to SWCAA as needed to produce mobile emissions inventory estimates in support of the Carbon Monoxide Limited Maintenance Plan underway by SWCAA. In addition, determine and carry out any responsibilities that may be required under the region's status as an Ozone attainment area.
40. Analyze transportation data as required by federal and state Clean Air Acts.
41. Prepare and provide data for DOE in relation to the vehicle exhaust and maintenance (I/M) program implemented in the designated portion of the Clark County region.
42. Use TCM Tools, where applicable, to assess the comparative effectiveness of potential TCMs in terms of travel and emissions reductions. In addition, TCM Tools can be used to quantify the Carbon Monoxide air quality benefits of projects proposed for MTIP programming and to measure the impacts of air quality improvement strategies that cannot be assessed through the regional travel model.
43. Carry out project level conformity analysis for local jurisdictions to provide for regional consistency.
44. Work with local agencies in the summer to implement Clean Air Action Days, as necessary.

#### **Transportation Technical Services**

45. The provision of technical transportation planning and analysis services to member agencies is continued in recognition that a common and consistent regional basis for analysis of traffic issues is a key element in maintaining, planning for and building an efficient transportation system with adequate

capacity. Technical service activities are intended to support micro traffic simulation models, the input of population, employment and household forecasts, and the translation of the land use and growth forecasts into the travel demand model. In FY 2007, RTC staff will provide support to local agencies transitioning to use of PTV Vision software. In addition, RTC also anticipates providing the requested technical services related to the cities' and County's GMA transportation capital facilities plans.

### **Relationship To Other Work Elements**

This element is the key to interrelating all data activities. Output from the database is used by local jurisdictions and supports development of the MTP, MTIP, congestion management report and Transit Development Plan. Traffic counts are collected as part of the Congestion Management Monitoring program and are coordinated by RTC. This is an ongoing data activity that is valuable in understanding existing travel patterns and future travel growth. The program is also a source of county-wide historic traffic data, and is used to calibrate the regional travel forecast model. Development and maintenance of the regional travel forecasting model is vital as it is the most significant tool for long-range transportation planning.

### **FY 2007 Products**

1. Update of the regional transportation database with data from the U.S. Census, including the US Census Long Form Census Transportation Planning Package (CTPP) data and the American Community Survey (ACS) as well as the National Household Travel Survey (NHTS).
2. Analysis of Clark County transportation information. The main elements include: transportation measures in the GMA update, use of highway by travel length, peak spread, transit related data and information, and work trip analysis. Trip analysis and travel time calculations will be used to address environmental justice issues.
3. Updated regional travel forecast model base year and updated future horizon year. The MTP's long-range planning horizon is currently at 2030 but with the 2006 update to the Comprehensive Growth Management Plan likely to forecast higher growth, the MTP horizon year demographic allocations will need to be revised. A six-year model may also be updated for nearer-term planning purposes such as concurrency program and Capital Facilities Plan (CFP) development.
4. Compilation and analysis of data relating to minority and low income populations to support transportation plans for the region and for specific corridors and for specific Title VI requirements.
5. Integration of transportation planning and GIS Arc/Info data.
6. Coordinate with Clark County on maintenance and update of the highway network and local street system in a GIS coverage. A comprehensive review and update of the federal functional classification system will be completed to be as consistent as possible with local comprehensive plans. This update will include an updated report on total road mileage in the region.
7. Work with regional bi-state partners on freight transportation planning including analysis of a Truck Origin and Destination Study ("Truck O-D Study") to improve truck forecasting ability. Integrate freight traffic data into the regional transportation database as it is collected and analyzed. Metro leads the commodity flow modeling in the region.
8. Update of the traffic count database.
9. Technical assistance to local jurisdictions.
10. Transportation data analysis provided to assist C-TRAN in planning for future transit service provision.

11. Purchase of updated computer equipment using RTPPO revenues.
12. Continue implementation of interlocal agreements relating to use of RTC's regional travel forecast model and implementation of sub-area modeling.
13. Host Transportation Model Users' Group (TMUG) meetings.
14. Update of travel demand codes in the WinMTX as Metro updates the regional travel forecast model structure.
15. Refine travel forecast methodology using the VISUM and VISSIM software.
16. Documentation of regional travel forecasting model procedures.
17. Re-calibration and validation of model as necessary.
18. Review and update of model transportation system networks, including highway and transit.
19. Analysis of TDM and ITS impacts, and congestion pricing impacts.
20. Re-evaluate the peak one hour analysis and continued to consider adoption of multiple peak hour period in the regional travel model process.
21. Use regional travel forecasting model data for MTP and MTIP development, as well as for Clark County Comprehensive Plan analysis, state WTP/HSP updates and support for corridor planning studies and environmental analysis such as the I-205 Corridor Environmental Assessment and I-5 Columbia River Crossing Project.

#### **Air Quality Planning**

22. Participation in development of the transportation elements of Carbon Monoxide and Ozone Maintenance Plan updates coordinated with Southwest Clean Air Agency.
23. Air quality conformity analysis and documentation for updates and/or amendments to the MTP and MTIP as required by the Clean Air Act Amendments of 1990.
24. Coordination with local agencies, Southwest Clean Air Agency (SWCAA), the Washington State Department of Ecology (DOE), Metro and Oregon Department of Environmental Quality (DEQ) relating to air quality activities.
25. Project level air quality conformity analysis as requested by local jurisdictions and agencies.

#### **Transportation Technical Services**

26. RTC will continue to serve local jurisdictions' needs for travel modeling and analysis.
27. Output from the regional travel forecast model is used in the analysis process for local transportation concurrency analyses and concurrency program development. A regular travel model update procedure for base year and six-year travel forecast is established that can be used in concurrency programs. As part of the process, the travel model is used and applied in the defined transportation concurrency corridors to determine available traffic capacity, development capacity and to identify six-year transportation improvements.
28. Travel Demand Forecast Model Workshops will be organized and held. Invitees will include staff of local agencies and jurisdictions. These will help to improve understanding of travel demand modeling issues and new advances to promote efficiencies in use of the model in our region.
29. Use of model results for local development review purposes and air quality hotspot analysis.

30. Technical support for the comprehensive growth management planning process in the Clark County region. Local comprehensive plans were updated in 2004 and an FY 2007 update, toward the end of 2006, is anticipated for the Comprehensive Growth Management Plan for Clark County.

**FY 2007 Expenses:**

	\$
RTC	365,844
Computer Equipment (use of RTPPO revenues)	6,000
Total	<u>371,844</u>

**FY 2007 Revenues:**

	\$
• Federal FHWA	182,401
• Federal FTA	50,065
• Federal STP	60,000
• State RTPPO	18,503
• State RTPPO (WTP)	30,000
• MPO Funds	30,875
Total	<u>371,844</u>

Note:

Federal \$ are matched by  
state and local MPO \$.

Minimum required match: \$50,348

## **REGIONAL TRANSPORTATION PROGRAM COORDINATION AND MANAGEMENT**

### **3A. REGIONAL TRANSPORTATION PROGRAM COORDINATION AND MANAGEMENT**

This element provides for overall coordination and management required of the regional transportation planning program. Ongoing coordination includes holding regular RTC Board and Regional Transportation Advisory Committee (RTAC) meetings. It also provides for bi-state coordination including partnering with Metro to organize and participate in the Bi-State Coordination Committee that addresses both transportation and land use issues of bi-state significance. In addition, this Coordination and Management work element provides for public outreach and involvement activities as well as the fulfillment of federal and state requirements.

#### **Work Element Objectives**

##### **Program Coordination and Management**

1. Coordinate, manage and administer the regional transportation planning program.
2. Organize meetings and develop meeting packets, agenda, minutes, and reports/presentations for the RTC Board, Regional Transportation Advisory Committee (RTAC), Bi-state Coordination Committee, Skamania County Transportation Policy Committee and Klickitat County Transportation Policy Committee.
3. Promote RTC Board interests through the participation on statewide transportation committees and advisory boards. Specific opportunities for this include participation on the Statewide MPO/RTPO Coordinating Committee.
4. Provide leadership and coordination as well as represent RTC Board positions on policy and technical committees within the Portland-Vancouver region that deal with bi-state, air quality, growth management, high capacity transit, and transportation demand management issues and programs. Specifically, the key committees include the following: C-TRAN Board, Metro's Joint Policy Advisory Committee on Transportation (JPACT), Metro's Transportation Policy Advisory Committee (TPAC) and the Bi-State Coordination Committee.
5. Coordinate and promote regional and bi-state transportation issues with the Washington State legislative delegation and with the Washington State congressional delegation. The Washington State legislative delegation from this region are now ex-officio, non-voting members of the RTC Board of Directors.
6. Represent RTC's interest when working with organizations such as the following: Greater Vancouver Chamber of Commerce, Columbia River Economic Development Council, and the Washington State Transit Association.
7. Coordinate with WSDOT on update and implementation of Washington's Transportation Plan (WTP). It is anticipated that the current update will be completed prior to FY 2007. However, RTC will work with WSDOT on implementation of the Plan.
8. Coordinate with the Human Services Council on issues related to meeting special transportation needs for people needing transportation to medical appointments and access to jobs for those with low incomes. This will include implementation of Job Access and Reverse Commute in coordination with both C-TRAN and the Human Services Council.
9. Coordinate with WSDOT and the state Department of Health on the Active Community Environments (ACE) program. RTC will work with local partners to organize and participate in meetings of the Active Living Task Force known in this region as the Active Community Environments Team. RTC will also work with local partners to complete community assessments regarding Active Community

Environments, review policies and suggest projects to improve non-motorized transportation modes in the Clark County region. The State Growth Management Act now requires that two additional components relating to active communities be addressed in local growth management plans. The two components are: (1) a pedestrian and bicycle component, and (2) land use policies that promote greater physical activity. RTC will coordinate with local agencies to implement this new requirement.

10. Coordinate regional transportation plans with local transportation plans and projects.
11. Coordinate with the Growth Management Act (GMA) planning process. The Clark County Comprehensive Growth Management Plan update was adopted in 2004 and is now in the process of another update anticipated for late 2006 following environmental analysis and review. RTC is required under state law to review and certify the transportation elements of local comprehensive plans to ensure they conform to the requirements of the Growth Management Act and are consistent with the MTP.
12. Communicate and outreach to tribes in the region regarding transportation issues.
13. Facilitate early environmental decisions in the planning process through work with resource agencies and local partners. This may involve working with the Signatory Agency Committee (SAC) in Washington and the Collaborative Environmental and Transportation Agreement for Streamlining (CETAS) in Oregon as well as with the State Historic Preservation Office.
14. Work with environmental resource agencies to ensure a coordinated approach to environmental issues relating to transportation.
15. Represent the MPO at EIS scoping meetings relating to transportation projects and plans.
16. Monitor new legislative activities as they relate to regional transportation planning requirements.
17. Participate in transportation seminars and training.
18. Prepare RTC's annual budget and indirect cost proposal.
19. Ensure that the MPO/RTPO computer system is upgraded when necessary to include new hardware and software to efficiently carry out the regional transportation planning program. Provide computer training opportunities for MPO/RTPO staff.
20. Continue the Bi-State Memorandum of Understanding between Metro and RTC.
21. Coordinate with Metro's regional growth forecasting activities and in regional travel forecasting model development and enhancement.
22. Develop bi-state transportation strategies and participate in bi-state transportation studies. In FY 2007 this will include the I-5 Columbia River Crossing Project and Delta Park Widening Project.
23. Liaison with Metro and Oregon Department of Environmental Quality regarding air quality planning issues.

#### **Bi-State Coordination Committee**

24. In 2004 a new charter was adopted for the Bi-State Coordination Committee. Since that time, the Bi-State Coordination Committee has been charged with addressing transportation issues of bi-state significance as well as transportation related land use issues of bi-state significance that impact economic development, environmental, and environmental justice issues. The Committee's discussions and recommendations are advisory to RTC, the Joint Policy Advisory Committee on Transportation (JPACT), and Metro on issues of bi-state transportation significance. On issues of bi-state land use and economic significance, the Committee's advisory recommendations are to the appropriate local and regional governments.

25. Hold meetings of the Bi-State Coordination Committee to serve as the communication forum to address transportation and land use issues of bi-state significance. The two interstates now serve business, commercial, freight and other personal travel needs including over 56,000 daily commuters who travel from Clark County to Portland to work. In 2006, the Bi-State Coordination Committee is expected to take up issues related to the Columbia River Crossing Project, other bi-state transportation issues such as the I-205 corridor, freight rail, and federal bi-state priorities. RTC and Metro would continue to serve as staff to the Committee.

#### **Public Involvement**

26. Increase public awareness of and provide information on regional and transportation issues. SAFETEA-LU requires that public outreach include visualization techniques including web site content, maps and graphics.
27. Involve and inform all sectors of the public, including the traditionally under-served and under-represented, in development of regional transportation plans, programs and projects. Incorporate public involvement at every stage of the planning process and actively recruit public input and consider public comment during the development of the MTP and MTIP.
28. Update the adopted Public Involvement Program (updated by RTC Board Resolution 10-01-17; October 2, 2001) to become the Public Participation Plan (PPP) required by SAFETEA-LU. The PPP will be reviewed regularly and will be amended when necessary. When changes are made to the PPP, RTC will follow the procedures outlined in federal Metropolitan Planning guidelines.
29. Hold public outreach events, including meetings relating to the MTP and MTIP, in coordination with outreach events and activities hosted by local jurisdictions and WSDOT Southwest Region, WSDOT Headquarters and C-TRAN. In FY 2007, there will be specific public outreach efforts related to the Washington's Transportation Plan (WTP) update.
30. Conduct public involvement process for any special projects and studies conducted by RTC.
31. Continue to update the RTC web site (<http://www.rtc.wa.gov>) which allows the public to gain information about planning studies being developed by RTC, allows access to RTC's traffic count database and provides links to other transportation agencies and local jurisdictions.
32. Participate in the public involvement programs for transportation projects of the local jurisdictions of Clark County such as the County's Transportation Improvement Program Involvement Team and the City of Vancouver's TIP Committee.
33. Communicate with local media.
34. Maintain a mailing list of interested citizens, agencies, and businesses.
35. Ensure that the general public is kept well informed of developments in transportation plans for the region. Outreach may be at venues such as the annual Clark County Fair held in August or at Westfield Shoppingtown (Van Mall) weekend events.
36. Respond to requests from various groups, agencies and organizations to provide information and give presentations on regional transportation topics. These requests provide an important opportunity to gain public input and discussion on a variety of transportation issues.
37. Support InterACT's efforts to raise awareness and solicit feedback from the public on transportation issues. InterACT is a subsidiary of Identity Clark County, a private, non-profit organization focused on community and economic development.

**Federal Compliance**

38. Comply with federal laws that require development of a Regional Transportation Plan, Transportation Improvement Program, and development of a Unified Planning Work Program. The current federal Transportation Act is SAFETEA-LU enacted in 2005.
39. Develop and adopt an annual UPWP that describes transportation planning activities to be carried out in the Washington portion of the Portland-Vancouver metropolitan area. The UPWP identifies the key policy decisions for the year and provides the framework for RTC planning, programming, and coordinating activities. A UPWP Annual Report is also produced.
40. Certify the transportation planning process as required by federal law.
41. Gather and analyze data to support C-TRAN and local jurisdictions' implementation of the Americans with Disabilities Act (ADA) enacted by the federal government in 1990. The Act requires that mobility needs of persons with disabilities be comprehensively addressed. C-TRAN published the C-TRAN ADA Paratransit Service Plan in January 1997 and in 1997 achieved full compliance with ADA requirements.
42. Report annually on Title VI activities. The Title VI Plan was adopted by the RTC Board of Directors in November 2002 (Resolution 11-02-21). FTA Circular 4702.1 outlines reporting requirements and procedures for transit agencies and MPOs to comply with Title VI of the Civil Rights Act of 1964. RTC and C-TRAN will work cooperatively to provide the necessary Title VI documentation, certification and updates to the information. C-TRAN Title VI documentation follows release of the most recent decennial Census data.
43. Compliance with Title VI and related regulations such as the President's 1994 Executive Order 12898 on Environmental Justice. RTC will work to ensure that Title VI and environmental justice issues are addressed throughout the transportation planning and project development phases of the regional transportation planning program. Beginning with the transportation planning process, consideration is given to identify and address where programs, policies and activities may have disproportionately high and adverse human health or environmental effects on minority and low-income populations.
44. Continue to review Clean Air Act Amendments conformity regulations as they relate to regional transportation planning activities and the State Implementation Plan (SIP). Participate in SIP development process led by the Washington State Department of Ecology (DOE). Coordinate with Southwest Clean Air Agency (SWCAA) on development of the CO maintenance plan update and seek to implement transportation strategies to promote mobile source emissions reductions that will help to maintain clean air standards.
45. Address environmental issues at the earliest opportunity in the transportation planning process. Participate in scoping meetings for National Environmental Policy Act (NEPA) process. RTC will include "discussion" of potential environmental mitigation, developed in consultation with Federal, State and Tribal wildlife, land management, and regulatory agencies, in Plan documents.
46. As part of the metropolitan transportation planning process, RTC will consult, as appropriate, with state and local agencies responsible for land use management, natural resources, environmental Protection, conservation, and historic preservation. Consultation may address local and State conservation plans or maps, and inventories of natural or historic resources, if available.



**Relationship To Other Work Elements**

Regional transportation coordination activities are vital to the success of the regional transportation planning program and interrelate with all UPWP work elements. Program management is interrelated with all the administrative aspects of the regional transportation planning program and to all the program activities. The UPWP represents a coordinated program that responds to regional transportation planning needs.

**FY 2007 Products**

**Program Coordination and Management**

1. Meeting minutes and meeting presentation materials for transportation meetings organized by RTC.
2. Year 2007 Budget and Indirect Cost Proposal.
3. Participation in Metro's regional transportation planning process.

**Bi-State Transportation Committee**

4. Bi-State Coordination Committee meeting materials produced in partnership with Metro.

**Public Involvement**

5. Documentation of public involvement and public outreach activities carried out by RTC during FY 2007.
6. Participate in public outreach activities related to regional transportation planning program and projects as well as outreach activities related to the Washington's Transportation Plan (WTP) update.
7. Ensure that the significant issues and outcomes relating to the regional transportation planning process are effectively communicated to the media, including local newspapers, radio and television stations through press releases and press conferences as well as through regular update to RTC's website.
8. Continue to work with InterACT, which as a part of Identity Clark County leads a community-wide effort to create real solutions to Clark County's transportation issues.

**Federal Compliance**

9. Complete any required MPO certification documentation and include the certification statement in the MTIP.
10. An adopted FY 2008 UPWP, annual report on the FY2006 UPWP and, if needed, amendments to the FY 2007 UPWP.
11. Conduct data analysis and produce maps to support implementation of Title VI and environmental justice and documentation of the Title VI and Executive Order 12898 (Environmental Justice) program, as necessary. RTC completes a Title VI report annually.

<b><u>FY 2007 Expenses:</u></b>		<b><u>FY 2007 Revenues:</u></b>	
	\$		\$
RTC	259,970	• Federal FHWA	124,489
		• Federal FTA	34,169
		• Federal STP	43,000
		• State RTPPO	12,628
		• State RTPPO (WTP)	21,612
		• MPO Funds	21,072
		• Federal – National Center for Disease Control (DOH)	3,000
Total	<u>259,970</u>		<u>259,970</u>
Note:		Federal \$ are matched by state and local MPO \$.	
		Minimum required match:	\$34,682

#### **4. TRANSPORTATION PLANNING ACTIVITIES OF STATE AND LOCAL AGENCIES**

Federal legislation requires that all regionally significant transportation planning studies to be undertaken in the region are included in the MPO's UPWP regardless of the funding source or agencies conducting the activities. Section 4 provides a description of identified planning studies and their relationship to the MPO's planning process. The MPO/RTPO, WSDOT, C-TRAN and local jurisdictions coordinate to develop the transportation planning work program.

##### **4A. WASHINGTON STATE DEPARTMENT OF TRANSPORTATION, SOUTHWEST REGION**

Washington State Department of Transportation, Southwest Region, publishes the *Washington State Department of Transportation, Southwest Region, FY 2006 Unified Planning Work Program* that provides details of each planning element outlined below.

##### **Key issues and planning activities for the WSDOT Southwest Region within the RTC's region are:**

1. Support the I-5 Columbia River Crossing (also known as the Portland-Vancouver I-5 Transportation and Trade Partnership). Specific activities include:
  - a. Support the Draft Environmental Impact Statement Phase.
  - b. Support the Bi-State Environmental Justice Working Group and ODOT's Delta Park to Lombard Environmental Assessment.
  - c. Provide staff support for the Bi-State Coordination Committee and their Land Use, Rail and TDM Forums.
  - d. Work with local and regional partners to develop and implement plans and activities related to TDM/TSM.
2. Coordinate with the RTPO's, MPO's, local jurisdictions, transit agencies, and tribes on updating the WTP, including an updated HSP. Specific activities include:
  - a. Coordinate with MPO's, RTPO's, local jurisdictions, transit agencies and tribes in developing and refining solutions for highway deficiencies.
  - b. Refine solutions and cost estimates for mobility improvements to update the HSP database.
  - c. Conduct performance measurements and benefit-cost analyses of proposed improvements for project prioritization.
  - d. Analyze and prioritize mobility and safety deficiencies on the state highway system.
  - e. Update the travel delay program database.
  - f. Transition traffic modeling analysis from EMME2 to Visum and Vissim software platforms.
3. Participate with bi-state partners on policies, issues, and coordination related to the bi-state regional transportation system.
4. Continue planning and coordination with the MPO's, transit agencies, local jurisdictions and tribes located in the region on multimodal and intermodal planning, air quality analysis, transportation system performance, congestion management, intelligent transportation systems (ITS), livable communities, and major investment studies.
5. Coordinate with local jurisdictions and tribes on implementing Washington Transportation Plan (WTP), Highway System Plan (HSP), Route Development Plans (RDPs), and other work plan elements.
6. Work with the Program Management section in supporting development of the Capital Improvement and Preservation Program (CIPP).
7. Provide public information and support opportunities for public involvement and communication in elements of regional and statewide activities.

8. Coordinate and provide input with counties and local jurisdictions on planning efforts to update comprehensive land use plans, transportation plans and capital facilities plans to comply with Growth Management Act requirements.
9. Work closely with RTC and Clark County on integration of local comprehensive plans in updating the Metropolitan Transportation Plan.
10. Participate in regional data collection, analysis and planning activities related to freight mobility issues.
11. Implement elements of the local Commute Trip Reduction program.
12. Coordinate with RTC, C-TRAN, Clark County and cities on development of transportation demand management strategies for inclusion in the Metropolitan Transportation Plan (MTP).
13. Work with RTC, ODOT and local governments on the SR-35 Columbia River Crossing Study.
14. Support the development of a long-term route development plan for SR-14 through Camas-Washougal.
15. Support special studies on congestion relief issues or other topics, as needed.

**WSDOT PLANNING GROUP WORK ELEMENTS:**

**Planning and Administration**

**Public Information/Communications/Community Involvement**

**MPO/RTPO Regional and Local Planning**

MPO/RTPO Coordination and Planning

Bi-State Coordination

Tribal Coordination

Regional or Local Studies

**Corridor Planning**

Route Development Planning

Corridor and Special Studies

Corridor Management Planning

**State Highway System Plan**

Deficiency Analysis

Benefit/Cost Analysis

**Data and Research**

Data Collection/Analysis

Travel Demand Forecasting

**Transportation Planning and Coordination**

Public Transportation and Rail Planning/Coordination

Multimodal/Intermodal Planning/Coordination

Transportation Demand Management (TDM)

High Occupancy Vehicle (HOV)/High Capacity Transportation (HCT) Coordination

Non-Motorized (Bike & Pedestrian Planning/Coordination

Freight Mobility Planning/Coordination

**Growth Management and Development Review**

Coordinate Access Management/SEPA/NEPA reviews and mitigation

Local Comprehensive Plans/County Planning Policies and Other Policy Review

**Transportation Demand Management**

Congestion Relief

Commute Trip Reduction

**4B. C-TRAN**

C-TRAN has identified the following planning elements for FY 2007 (July 2006 through June 2007):

### **Regional Participation**

C-TRAN will coordinate its transit planning with other transportation planning activities in the region through the Southwest Washington Regional Transportation Council (RTC). C-TRAN will continue to work with the MPO's, DOT's, plus city, county and regional agencies, and other transit providers on multi-modal planning, air quality analysis, land use and transportation system planning. C-TRAN will also be participating in various regional and bi-state (Washington and Oregon) transportation-related committees and task forces.

**Regional Transportation Planning Studies:** C-TRAN will be involved in the following planning and engineering studies:

1. Columbia River Crossing Project: C-TRAN continues to work with regional partners in recommending multimodal and capacity improvements to the I-5 Trade Corridor, including:
  - \* Highway improvements to enhance express bus service to Portland
  - \* High capacity transit options that include supportive local bus service
  - \* Columbia River Crossing and I-5/Delta Park projects to reduce bottlenecks.
  - \* Transportation demand management and system management to reduce congestion and improve transit performance.
2. High Capacity Transit Alternatives Analysis: C-TRAN will provide technical assistance and feedback to the Regional Transportation Council on a high capacity transit alternatives analysis.
3. Metropolitan Transportation Plan and Transportation Improvement Program: C-TRAN will participate in, and contribute to the development of revised and updated regional plans and programs.

### **Transit System Planning**

Following the successful sales tax vote to preserve C-TRAN services, and with the development of its capital projects, C-TRAN will have the opportunity to re-evaluate its service design. A comprehensive service design analysis will be completed with implementation begun during this UPWP period. Route structure planning will need to connect the new transit center facility located at C-TRAN's Administration, Operations and Maintenance facility and the new transit center/park and ride located at I-5 and 99th Street in Vancouver. Both facilities will be under construction in 2006-07. The service design analysis will re-evaluate the role of 7th Street Transit Center and Vancouver Mall Transit Center in the C-TRAN system.

C-TRAN's 20-Year Transit Development Plan will be revised to include the new service design concepts, and to address the long term (2030) vision for C-TRAN.

A park and ride demand study for Clark County will be prepared, revising a previous study completed in the 1990's. Based on future planned growth in Clark County and its cities, and the resulting increase in travel demand, a park and ride study is needed for capital project planning purposes.

C-TRAN has won a state grant to plan, locate and develop super stop facilities on its fixed route system. The C-TRAN Bus Stop Guidelines will be revised to include super stop design and siting guidelines, prior to developing up to 20 super stops.

Service Standards will be implemented to evaluate transit system performance, with a process to mitigate under-performing routes and services. Newly implemented Automated Passenger Counter technology will provide valuable information to the route evaluation and improvement process.

The *2006-2011 Transit Development Plan* will be published, following public review and input, identifying capital and operational changes planned over the six-year period.

The FTA Ridership Team spent several days during 2005 at C-TRAN learning about the transit system and discovering opportunities for improving ridership. Their final report included many useful recommendations for increasing C-TRAN ridership. While many of the recommendations are anticipated to occur by July 1, 2006, their full benefit will be realized in 2006-07 and beyond. Other recommendations are scheduled to be met in the 2006-07 timeframe including:

- Consider expanding service to Evergreen Park and Ride
- Design new park and ride facilities with capacity for expansion on adjoining sites
- Review C-TRAN fare structure and possible modifications
- Make improvements to the C-TRAN web site
- Complete installation of APC's on the fixed route fleet
- Review and assess the ADA Paratransit Program eligibility process
- Install additional passenger benches using Federal transit enhancement funds
- Partner with ESD programs to make transit riding part of life skill curriculum
- With Clark College, develop a Senior Travel Training program, and conduct a mobility fair
- Develop a packet of transit information for new residents.

### **Public Information and Feedback**

C-TRAN will inform and educate riders, businesses and the public through various means. C-TRAN will continue to work with the disabled and environmental justice communities to assure a broad level of public participation in the planning and delivery of regional and local transit services. Specific marketing of C-TRAN services will occur for the Hispanic, Russian and Vietnamese populations, and to area employers. Users of innovative transit services will be queried as to the effectiveness of the new service, with service revisions possible during 2006-07.

An annual Community Report Card and other means to communicate with Clark County residents and businesses will be instrumental in tailoring transit service to customer needs. On an annual basis, C-TRAN conducts market research, prepares a community report of the results, and uses the information to guide service and planning decisions. Each of the major planning activities i.e. service planning, 20-year plan, etc. will include a public information and feedback process.

### **Transportation Demand Management**

**Job Access / Reverse Commute:** Through a federal JARC grant the Camas Connector (general purpose dial-a-ride) provides essential connections for low-income workers needing access to training and employment. As east Clark County grows with new employment sites, Connector service may be revised to provide greater access to jobs. The service is accessible to all citizens in the Camas Connector service area.

C-TRAN will be evaluating deviated fixed route ridership and connectivity, deployed in early 2006 in the cities of Battle Ground, La Center, Ridgefield and the Town of Yacolt. These innovative transit services are being deployed in communities that lost C-TRAN service as a result of reduced revenue with the passage of Initiative 695.

### **Intelligent Transportation System (ITS)**

VAST (Vancouver Area Smart Trek) is a cooperative Intelligent Transportation System (ITS) program that includes transportation agencies in Clark County. The VAST program partnership is coordinated with similar

efforts underway in the Portland area to ensure ITS strategies throughout the region are integrated and complementary.

Automatic Passenger Counting system data will begin to be used as an analytical planning tool to evaluate route performance and target marketing activities that generate additional ridership. VAST improvements will allow C-TRAN to more effectively operate and schedule both fixed route and demand response service, as well as more efficiently gather data required by FTA.

Implementation of Phase II is expected in 2006-07 and includes the Automatic Fleet Maintenance system, next bus signage at transit centers, and ADA-compliant On-Board Announcements. Phase II improvements will allow for enhanced maintenance, provide dynamic schedule information to customers, and ensure ADA requirements are met.

Scoping for Phase III will occur in 2006-07 and will include traveler information kiosks at transit centers, traffic signal prioritization, and additional traveler information signage. This major ITS investment is made possible by significant federal grants and earmarks that C-TRAN has received.

#### **4C. CLARK COUNTY AND OTHER LOCAL JURISDICTIONS**

**CLARK COUNTY** has identified the following transportation planning studies:

- Development of Transportation Improvement Program (TIP).
- Concurrency Management System: includes maintenance of the Concurrency Management System. The work program includes monitoring of existing capacity, capacity reserved for recently approved development and LOS in response to new development proposals.
- Transportation analysis needed to respond to appeals to the recently-adopted Comprehensive Plan.
- Continuing work on the transportation system database that will integrate information contained in the state-required Mobility database, formerly known as the County Road Information System (CRIS), with other transportation-related information systems to improve long-range transportation improvement cost estimates.
- Working through the Vancouver Area Smart Trek (VAST) process to implement promising ITS strategies.
- A Bicycle Advisory Committee assisted Clark County in putting together the 1995-2001 Bikeways Program. Clark County will continue to carry out multi-modal transportation planning activities during FY 2006.
- To protect the classified arterials and to serve local trips on the local street system, Clark County will examine local (non-arterial) circulation planning in several unincorporated urban areas.
- Update of the county's Traffic Impact Fee.

**CITY OF VANCOUVER** has identified the following planning studies and other activities:

##### ***Citywide Planning / Studies***

- 2007-2012 Transportation Improvement Program.
- Year 2006 Transportation Impact Fee Program – annual inflation update to fees.

- City of Vancouver Transportation System Plan (TSP), ongoing development code updates and plan implementation
- 2006 Concurrency Program – Annual Report.
- High Capacity Transit Loop – Alternatives Analysis (support to RTC initiative).
- Transportation Codes (development and concurrency) updates (ongoing, see above).
- ADA Program – Policy Updates and Implementation.
- Citywide Annual Traffic Safety Monitoring Report and Evaluation – update.
- City Transportation Services Business Plan.
- Commute Trip Reduction Program – provide direct services to affected employers in support of the Commute Trip Reduction (CTR) program. Contract directly with WSDOT in the provision of those services.

***Sub-Area Studies***

- I-205 Interchanges Environmental Review – Mill Plain to NE 28<sup>th</sup>.
- Columbia River Crossing, City of Vancouver Coordination & Project Involvement
- 192<sup>nd</sup> Avenue South Corridor Subarea Plan
- Annexation Transition Planning & Implementation
- East 39<sup>th</sup> Street Rail Yard Overpass Design (with WSDOT)
- Evergreen Highway and Columbia River Trail Plan
- Vancouver Waterfront Access Improvement—Roads & Rail
- Comprehensive Downtown Traffic Impact Study, Vancouver City Center Vision EIS and Planned Action Ordinance.
- Fourth Plain Corridor Subarea Land Use Plan.
- NE 18<sup>th</sup> Street Design.
- NE 137<sup>th</sup> Avenue (NE 28<sup>th</sup> Street to NE 59<sup>th</sup> Street) Corridor design.
- SE 1<sup>st</sup> Street (SE 164<sup>th</sup> Avenue to SE 192<sup>nd</sup> Avenue) Corridor design.
- NW 26<sup>th</sup> Avenue Extension/BNSF Rail Revision to Port of Vancouver, pre-design study, EIS.

***Capital Improvement Program – Projects and Planning Support***

- Year 2006 NTS REET Program – project planning and implementation.
- Year 2006 CDBG Transportation Program – project planning and implementation.
- Vancouver Area Smart Trek (VAST) coordination.
- Fourth Plain Traffic Safety Corridor – project planning and implementation, community outreach implementation.



- Traffic Safety Corridor Program Expansion—additional, new traffic safety corridor within City of Vancouver

***Transportation Demand Management***

- Administration of countywide Commute Trip Reduction Program and provision of direct services to affected CTR employers.

**CITY OF CAMAS** has identified the following planning studies:

- Growth Management Plan implementation will include redraft of the Concurrency Management Ordinance.
- Transportation Impact Study Guidelines, Update.

**CITY OF WASHOUGAL** has identified the following planning studies:

- Transportation Improvement Program (TIP) – Annual Update
- Transportation Impact Fee Program - Annual update to fees
- Park Comprehensive Plan Adoption and Impact Fee Update
- Sewer Master Plan Adoption – System Development Fee Update
- Sewer Capital Facility Plan – Annual Update
- Water Capital Facility Plan – Annual Update

**CITY OF BATTLE GROUND** has identified the following planning studies:

- Implement an updated Transportation System Plan developed as part of the comprehensive growth management planning process in FY2005. Elements of the Plan include the traffic impact fees program, access management, identification of truck routes and Capital Facilities Plan.
- Work with WSDOT on planning for access points onto SR-502 and SR-503 within Battle Ground.
- Establish traffic calming program.
- Implement the pathways element that is part of Battle Ground's Parks Plan Update.
- I-5 North Interchange. Battle Ground will participate in planning for a new interchange at I-5/219<sup>th</sup> Street and widening of SR-502. The new interchange was funded by the 2003 state "nickel package" and preliminary engineering and right of way acquisition for SR-502 widening is also funded from the same source. Both projects are programmed in the MTIP.

**CITY OF RIDGEFIELD:**

- Initiate design and permitting associated with replacement of the Interstate 5 and State Route 501 (Pioneer Street) interchange with a single point urban interchange.
- Complete traffic modeling and design analysis supporting construction of roundabouts at the following intersections with State Route 501:
  - 35<sup>th</sup> Avenue
  - 45<sup>th</sup> Avenue

- 51<sup>st</sup> Avenue
  - S. 56<sup>th</sup> Way
  - 65<sup>th</sup> Avenue.
- Coordinate with CTRAN service re-introduction to Ridgefield and definition of appropriate service routes.

**PORT OF VANCOUVER:**

- The Port of Vancouver is working on the Economic Development and Conservation Plan (EDCP) that includes consideration of improvement to transportation access to and from the Port. The environmental review/NEPA process is underway.

## **TRANSPORTATION ACRONYMS**

<b>ABBREVIATION</b>	<b>DESCRIPTION</b>
AA	Alternatives Analysis
AADT	Annual Average Daily Traffic
AASHTO	American Association of State Highway and Transportation Officials
AAWDT	Annual Average Weekday Traffic
ACCT	Agency Council on Coordinated Transportation
ACE	Active Community Environments
ACS	American Community Survey
ADA	Americans with Disabilities Act
ADT	Average Daily Traffic
AIP	Urban Arterial Trust Account Improvement Program
APC	Automatic Passenger Counter
APTA	American Public Transportation Association
APTS	Advanced Public Transportation System
AQMA	Air Quality Maintenance Area
ATIS	Advanced Traveler Information System
ATMS	Advanced Transportation Management System
AVL	Automated Vehicle Location
AVO	Average Vehicle Occupancy
AWDT	Average Weekday Traffic
BEA	Bureau of Economic Analysis
BMS	Bridge Management System
BNSF	Burlington Northern Santa Fe
BRAC	Bridge Replacement Advisory Committee
BRCT	Blue Ribbon Commission on Transportation
BRRP	Bridge Replacement and Rehabilitation Program
CAA	Clean Air Act
CAAA	Clean Air Act Amendments
CAC	Citizens' Advisory Committee
CAPP	County Arterial Preservation Program
CBD	Central Business District
CBI	Coordinated Border Infrastructure Program
CCI	Corridor Congestion Index
CCP	City and County Congested Corridor Program
CCRI	Corridor Congestion Ratio Index
CCRP	Corridor Congestion Relief Program
CDBG	Community Development Block Grant
CDMP	Corridor Development and Management Plan
CE	Categorical Exclusion
CERB	Community Economic Revitalization Board
CETAS	Collaborative Environmental and Transportation Agreement for Streamlining (Oregon)
CFP	Capital Facilities Plan
CFP	Community Framework Plan
CFP	Community Framework Plan
CHAP	City Hardship Assistance Program
CIT	Community Involvement Team

## **TRANSPORTATION ACRONYMS**

<b>ABBREVIATION</b>	<b>DESCRIPTION</b>
CM/AQ	Congestion Mitigation/Air Quality
CMP	Congestion Management Process
CMS	Congestion Management System
CO	Carbon Monoxide
CRCP	I-5 Columbia River Crossing Project
CREDC	Columbia River Economic Development Council
CRESA	Clark Regional Emergency Services Agency
CTPP	Census Transportation Planning Package
CTR	Commute Trip Reduction
C-TRAN	Clark County Public Transportation Benefit Area Authority
CVISN	Commercial Vehicle Information Systems and Networks
DCTED	Washington State Department of Community, Trade and Economic Development
DEIS	Draft Environmental Impact Statement
DEQ	Oregon State Department of Environmental Quality
DLCD	Oregon Department of Land Conservation and Development
DNS	Determination of Non-Significance
DOE	Washington State Department of Ecology
DOL	Washington State Department of Licensing
DS	Determination of Significance
EA	Environmental Assessment
EAC	Enhancement Advisory Committee
ECO	Employee Commute Options
EIS	Environmental Impact Statement
EJ	Environmental Justice
EMME/2	EMME/2 is an interactive graphic transportation planning computer software package distributed by INRO Consultants, Montreal, Canada.
EPA	Environmental Protection Agency
ETC	Employer Transportation Coordinator
ETRP	Employer Trip Reduction Program
FEMA	Federal Emergency Management Agency
FEIS	Final Environmental Impact Statement
FFY	Federal Fiscal Year
FHWA	Federal Highways Administration
FONSI	Finding of No Significant Impact
FTA	Federal Transit Administration
FY	Fiscal Year
GIS	Geographic Information System
GMA	Growth Management Act
GTF	Governors' Task Force
HCM	Highway Capacity Manual
HCT	High Capacity Transportation
HOV	High Occupancy Vehicle
HPMS	Highway Performance Monitoring System
I/M	Inspection/Maintenance
IMS	Intermodal Management System
InterCEP	Interstate Collaborative Environmental Process (relates to Columbia River Crossing Project)

## **TRANSPORTATION ACRONYMS**

<b>ABBREVIATION</b>	<b>DESCRIPTION</b>
IPG	Intermodal Planning Group
IRC	Intergovernmental Resource Center
ISTEA	Intermodal Surface Transportation Efficiency Act (1991)
ITS	Intelligent Transportation System
IV/HS	Intelligent Vehicle/Highway System
JPACT	Joint Policy Advisory Committee on Transportation
LAC	Local Advisory Committee
LAS	Labor Area Summary
LCDC	Oregon Land Conservation and Development Commission
LCP	Least Cost Planning
LMC	Lane Miles of Congestion
LMP	Limited Maintenance Plan (relating to air quality)
LOS	Level of Service
LPG	Long Range Planning Group
LRT	Light Rail Transit
MAB	Metropolitan Area Boundary
MIA	Major Investment Analysis
MOU	Memorandum of Understanding
MP	Maintenance Plan (air quality)
MPO	Metropolitan Planning Organization
MTIP	Metropolitan Transportation Improvement Program
MTP	Metropolitan Transportation Plan
MUTCD	Manual on Uniform Traffic Control Devices
NAAQS	National Ambient Air Quality Standards
NCPD	National Corridor Planning and Development Program
NEPA	National Environmental Policy Act
NHS	National Highway System
NHTS	National Household Travel Survey
NOX	Nitrogen Oxides
O/D	Origin/Destination
ODOT	Oregon Department of Transportation
OFM	Washington Office of Financial Management
OTP	Oregon Transportation Plan
PAG	Project Advisory Group
PCE	Passenger Car Equivalents
PDT	Project Development Team (relates to Columbia River Crossing Project)
PE/DEIS	Preliminary Engineering/Draft Environmental Impact Statement
PHF	Peak Hour Factor
PM10	Fine Particulates
PMG	Project Management Group
PMS	Pavement Management System
PMT	Project Management Team
POD	Pedestrian Oriented Development
PPP	Public Participation Plan
Pre-AA	Preliminary Alternatives Analysis
PSC	Project Sponsors Council (relates to Columbia River Crossing Project)
PSMP	Pedestrian, Safety & Mobility Program

## **TRANSPORTATION ACRONYMS**

<b>ABBREVIATION</b>	<b>DESCRIPTION</b>
PTBA	Public Transportation Benefit Area
PTMS	Public Transportation Management System
PTSP	Public Transportation Systems Program
PVMATS	Portland-Vancouver Metropolitan Area Transportation Study
RACMs	Reasonable Available Control Measures
RACT	Reasonable Available Control Technology
RID	Road Improvement District
ROD	Record of Decision
ROW	Right of Way
RPC	Regional Planning Council
RPG	Regional Partners Group (relates to the Columbia River Crossing Project)
RTAC	Regional Transportation Advisory Committee
RTC	Southwest Washington Regional Transportation Council
RTFM	Regional Travel Forecasting Model
RTP	Regional Transportation Plan
RTPO	Regional Transportation Planning Organization
RUGGO	Regional Urban Growth Goals and Objectives
SAC	Signatory Agency Committee Agreement (Washington)
SAFETEA-LU	Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (2005)
SCP	Small City Program
SEIS	Supplemental Environmental Impact Statement
SEPA	State Environmental Policy Act
SIC	Standard Industrial Classification
SIP	State Implementation Plan
SMS	Safety Management System
SOV	Single Occupant Vehicle
SPG	Strategic Planning Group
SPUI	Single Point Urban Interchange
SR-	State Route
SSAC	Special Services Advisory Committee
STIP	State Transportation Improvement Program
STP	Surface Transportation Program
SWCAA	Southwest Clean Air Agency
TAZ	Transportation Analysis Zone
TCM's	Transportation Control Measures
TCSP	Transportation and Community and System Preservation Pilot Program
TDM	Transportation Demand Management
TDP	Transit Development Program
TDP	Travel Delay Program (WSDOT)
TEA-21	Transportation Equity Act for the 21 <sup>st</sup> Century
TIB	Transportation Improvement Board
TIMACS	Transportation Information, Management, and Control System
TIP	Transportation Improvement Program
TIPIT	Transportation Improvement Program Involvement Team
TMA	Transportation Management Area
TMC	Traffic Management Center

**TRANSPORTATION ACRONYMS**

<b>ABBREVIATION</b>	<b>DESCRIPTION</b>
TMIP	Transportation Model Improvement Program
TMS	Transportation Management Systems
TMZ	Transportation Management Zone
TMUG	Transportation Model Users' Group
TOD	Transit Oriented Development
TPAC	Transportation Policy Advisory Committee
TPEAC	Transportation Permit Efficiency and Accountability Committee
TPMS	Transportation Performance Measurement System (WSDOT)
TPP	Transportation Partnership Program
TPR	Transportation Planning Rule (Oregon)
Transims	Transportation Simulations
Tri-Met	Tri-county Metropolitan Transportation District
TRO	Traffic Relief Options
TSM	Transportation System Management
TSP	Transportation System Plan
UAB	Urban Area Boundary
UGA	Urban Growth Area
UGB	Urban Growth Boundary
UPWP	Unified Planning Work Program
USDOT	United States Department of Transportation
V/C	Volume to Capacity
VAST	Vancouver Area Smart Trek
VHD	Vehicle Hours of Delay
VISSIM	Traffic/Transit Simulation Software (a product of PTV AG of Karlsruhe, Germany)
VMT	Vehicle Miles Traveled
VOC	Volatile Organic Compounds
WAC	Washington Administrative Code
WSDOT	Washington State Department of Transportation
WTP	Washington Transportation Plan

## FY 2007 SUMMARY OF EXPENDITURES AND REVENUES: RTC

SOUTHWEST WASHINGTON REGIONAL TRANSPORTATION COUNCIL FY 2007 UNIFIED PLANNING WORK PROGRAM - SUMMARY OF REVENUES/EXPENDITURES BY FUNDING SOURCE													
Work Element	1. FY 2007 Federal FHWA PL	2. FY 2007 Federal FTA	State RTPO	State RTPO for WTP	Federal STP	Federal CM/AQ	Federal Sec. 5309	Federal High Priority	3. Dept. of Health	State (WSDOT /ODOT)	MPO Funds	Local Funds	RTC TOTAL
<b>I REGIONAL TRANSPORTATION PLANNING PROGRAM</b>													
A Metropolitan Transportation Plan	110,352	30,289	11,194	38,000	47,000						18,679		255,516
B Metropolitan Transportation Improvement Program	38,760	10,639	3,932								6,561		59,892
C Congestion Management System Monitoring 4.						100,000					15,607		115,607
D Vancouver Area Smart Trek						75,000					11,705		86,705
E I-5 Columbia River Crossing 5.										135,249			135,249
F High Capacity Transit Corridors Study							1,488,000					372,000	1,860,000
G Skamania County RTPO			17,431										17,431
H Klickitat County RTPO			19,646										19,646
I SR-35 Columbia River Crossing FEIS 6.								320,000		75,000		5,000	400,000
Sub-Total	149,113	40,928	52,203	38,000	47,000	175,000	1,488,000	320,000	0	210,249	52,553	377,000	2,950,046
<b>II DATA MANAGEMENT, TRAVEL FORECASTING, AIR QUALITY AND TECHNICAL SERVICES</b>													
A Reg. Transp. Data, Forecast, AQ & Tech. Services	182,401	50,065	18,503	30,000	60,000						30,875		371,844
Sub-Total	182,401	50,065	18,503	30,000	60,000	0	0	0	0	0	30,875	0	371,844
<b>III TRANSPORTATION PROGRAM COORDINATION AND MANAGEMENT</b>													
A Reg. Transp. Program Coord. & Management	124,489	34,169	12,628	21,612	43,000				3,000		21,072		259,970
<b>TOTALS</b>	<b>456,002</b>	<b>125,162</b>	<b>83,335</b>	<b>89,612</b>	<b>150,000</b>	<b>175,000</b>	<b>1,488,000</b>	<b>320,000</b>	<b>3,000</b>	<b>210,249</b>	<b>104,500</b>	<b>377,000</b>	<b>3,581,860</b>

3/20/06

## NOTES:

1. Includes FY07 FHWA PL funds. Local match for FHWA PL funds is provided from State RTPO and MPO funds.
2. Local Match for federal FTA funds is provided from State RTPO and MPO funds.
3. FY07 funding unknown at this time. Funding originates with the National Center for Disease Control, is granted to the state Department of Health and comes to RTC from WSDOT.
4. Assumes use of \$100,000 per year programmed in MTIP to support the CMM program.
5. \$210,380 in WSDOT funds beginning in FY 2006 with balance carried into FY 2007
6. \$640,000 in federal High Priority funds was included in the federal Transportation Reauthorization Bill (SAFETEA-LU, 2005).  
This assumes 50% would be used in FY 2007 and 50% in 2008. Local matching funds are required but sources have not been finalized.

*Note: Numbers may not add due to rounding*





## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 06-3668 FOR THE PURPOSE OF ADOPTING THE FY 2007 UNIFIED PLANNING WORK PROGRAM

---

Date: March 23, 2006

Presented by: Andrew C. Cotugno

## BACKGROUND

The FY 2007 Unified Planning Work Program (UPWP) describes transportation planning activities to be carried out in the Portland-Vancouver metropolitan region during the fiscal year beginning July 1, 2006. Included in the document are federally funded studies to be conducted by Metro, Southwest Washington Regional Transportation Council (RTC), the Oregon Department of Transportation (ODOT), TriMet, City of Wilsonville SMART, the Port of Portland, and local jurisdictions.

## ANALYSIS/INFORMATION

1. **Know Opposition-** No known opposition
2. **Legal Antecedents-** Federal transportation agencies (Federal Transit Administration [FTA] and Federal Highway Administration [FHWA]) require an adopted UPWP as a prerequisite for receiving federal funds according to Title 23 of the Code of Federal Regulations, Part 450 subpart c.
3. **Anticipated Effects -**Approval will mean that grants can be submitted and contracts executed so work can commence on July 1, 2006, in accordance established Metro priorities.
4. **Budget Impacts-** The UPWP matches the projects and studies reflected in the proposed Metro budget submitted by the Metro Chief Operating Officer to the Metro Council. The UPWP is subject to revision in the final Metro budget. This resolution also directs staff to update the UPWP budget figures, as necessary, to reflect the final Metro budget.

## RECOMMENDED ACTION

Approve Resolution No. 06-3668 which adopts the Unified Planning Work Program (UPWP) continuing the transportation planning work program for FY 2007; and authorize submittal of grant applications to the appropriate funding agencies.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ACCEPTING THE	) Resolution No. 06-3677
REGIONAL HOUSING CHOICE	)
IMPLEMENTATION STRATEGY RECOMMENDED	)
BY THE HOUSING CHOICE TASK FORCE	) Introduced by Councilors Rex Burkholder
APPOINTED BY THE METRO COUNCIL	) and Robert Liberty

WHEREAS, the provision of housing choice for all families and individuals across the region is a matter of regional concern because of its impact on regional economic competitiveness, access to jobs, transportation investments, environmental quality, and issues of fairness to people and among communities; and

WHEREAS, ensuring greater housing choice helps fulfill other elements of Metro's Regional Framework Plan and Urban Growth Management Functional Plan ("UGMFP"), including focusing development in 2040 Regional and Town Centers and along Corridors, conserving farm and forestland, achieving a greater balance of jobs and housing other elements, being efficient in the use of tax dollars in transportation, roads and sewers; and

WHEREAS, the Metro Council has identified, through its strategic planning, an aspiration for the region that "The region's residents choose from a diversity of housing options" and has declared this as a strategic objective; and

WHEREAS, Policy 1.3 of the Regional Framework Plan and Title 7 of the UGMFP set forth the policies of the Council related to housing and affordable housing; and

WHEREAS, the Council adopted Ordinance 98-769 (For the Purpose of Amending the Regional Framework Plan Section 1.3 Regarding Housing and Affordable Housing, Adding a Chapter to the Metro Code Creating an Affordable Housing Technical Advisory Committee and Confirming the appointment of Members) on September 10, 1998, amending Policy 1.3 to authorize the creation of the Affordable Housing Technical Advisory Committee ("HTAC"); and

WHEREAS, HTAC met from September, 1998, to May, 2000, and developed the Regional Affordable Housing Strategies ("RAHS"), which the Metro Council accepted as the basis for further amendments to Policy 1.3 and Title 7 of the UGMFP; and

WHEREAS, in response to the recommendations of the HTAC, the Council, by Ordinance No. 0-882C (For the Purpose of Amending the Regional Framework Plan Ordinance No. 97-715B Regarding Housing and Affordable Housing Including Policy Section 1.3 and Amendments to the UGMFP Titles 7 and 8), adopted on January 18, 2001, established affordable housing production goals, and adopted policies and strategies intended to meet these goals, including strategies to reduce barriers to

sufficient and affordable housing for all income levels in the region, to create housing opportunities commensurate with the wage rates of jobs available across the region, to initiate a process for addressing current and future needs for affordable housing, and to reduce concentrations of poverty; and

WHEREAS, the Council further amended Title 7 on June 26, 2003, by Ordinance No. 03-1005A (For the Purpose of Amending Title 7 of the UGMFP to Clarify and Revise City and County Responsibilities), to, among other things, create an ad hoc affordable housing task force to recommend changes to the Council, if warranted, to the existing goals, policies, programs, tools, strategies and funding for affordable housing by December, 2005; and

WHEREAS, Title 7 requires local governments to submit annual progress reports for three years (2001, 2002, 2003) to Metro; and

WHEREAS, progress on local governments' adoption of strategies and achievement of goals has been slower than desired because funds for housing subsidies and staffing are not keeping pace with the need for more housing choices; and

WHEREAS, the Council consulted with its Metropolitan Policy Advisory Committee ("MPAC") on the slow progress, and MPAC emphasized the importance of affordable housing in regional livability; and

WHEREAS, the Council adopted Resolution 05-3536 (For the Purpose of Establishing the regional Housing Choice Task Force and Its Duties and Responsibilities, and Confirming the appointment of its Members) on February 10, 2005, which created the Housing Choice Task Force ("HCTF"), and authorized HCTF to meet from March, 2005, to March, 2006, to develop solutions for increasing housing choices, especially in the 2040 Regional and Town Centers and Corridors, and for overcoming the barriers that contributed to local governments' slow progress in the implementation of Title 7; and

WHEREAS, HCTF utilized three teams (Funding, Land Use and Regulatory and Pilot Project), meeting regularly from May to December, 2005, to develop solutions for increasing housing choice in the Regional Housing Choice Implementation Strategy ("RHCIS"); and

WHEREAS, the Funding Solution Team developed new short-term and long-term regional funding sources solutions based on factual information, including the previous work of HTAC and the Regional Blue Ribbon Committee on Housing Resource Development; and

WHEREAS, the Land Use & Regulatory Solution Team developed land use strategies and regulatory solutions for immediate implementation based on factual information, and identified additional land use strategies and regulatory solutions to be addressed as part off Metro's "New Look"; and

WHEREAS, the Pilot Project Solution Team developed convening and technical assistance solutions based on factual information; and

WHEREAS, HCTF has reviewed, revised and approved all the draft strategy reports prepared by the solution teams, and used them to develop the key recommendations for Metro and other local governments and entities for increasing and preserving the inventory of affordable work force and other housing, including optional levels of investment for Metro; and

WHEREAS, HCTF presented its report to MPAC on January 11, 2006, January 25, 2006, February 8, 2006, February 22, 2006, March 8, 2006 and received MPAC comments; and

WHEREAS, HCTF presented its report to MTAC on August 13, 2005, February 1, 2006, February 15, 2006 and March 1, 2006, to the Wilsonville City Council on February 28, 2006, and to the Oregon Housing Council on February 24, 2006, for comments; and

WHEREAS, HCTF revised the RHCIS at its March 15, 2006, meeting to address concerns raised by MPAC and MTAC, and reached a decision to forward its recommendations in the form of the March, 2006, RHCIS to the Metro Council; now, therefore,

BE IT RESOLVED:

1. That the Metro Council accepts the final recommendations of the Housing Choice Task Force (“HCTF”) contained in the Regional Housing Choice Implementation Strategy (“RHCIS”), March, 2006, attached and incorporated into this resolution as Exhibit A.
2. That the Council hereby directs the Chief Operating Officer to prepare an ordinance for consideration by the Council of appropriate amendments to the Regional Framework Plan and the Urban Growth Management Functional Plan to implement the recommendations in the RHCIS, and to establish a process for reporting by local governments on their progress in meeting affordable housing and a diversity of housing options goals and objectives.
3. That the Council hereby directs the Chief Operating Office to prepare a resolution for the creation of a permanent Housing Choice Policy Advisory Committee with representatives of MPAC, MTAC, for project homes and apartment builders, non-profit homes and apartment builders, federal, state and local public housing providers and developers, housing financiers, realtors, and affordable housing advocates, to meet quarterly and advised the Council on how to: a) realize regional goals for new housing choice; b) integrate housing choice with Metro’s actions in land use and transportation planning; and c) implement policies in the Regional Framework Plan and Title 7, including funding solutions and technical assistance.
4. That the Council hereby directs the Chief Operating Officer to prepare a resolution for the creation of an ad hoc housing financing study committee with representatives of elected officials, housing developers, major employers, realtors,

affordable housing advocates, and federal and state housing officials to assist Metro and other entities involved in providing affordable housing in the region to develop a politically feasible mechanism for implementing the funding solutions as recommended by the Housing Choice Task Force.

5. That the Council hereby directs the Chief Operating Officer to work cooperatively with local governments in the region to provide technical assistance to preserve and develop affordable housing, including inventory of publicly owned land that could be potential sites for establishing housing choice.

ADOPTED by the Metro Council this \_\_\_ day of \_\_\_\_\_, 2006.

---

David Bragdon, Council President

Approved as to form:

---

Daniel B. Cooper, Metro Attorney



# Regional Housing Choice Implementation Strategy

RECOMMENDATION OF THE HOUSING CHOICE TASK FORCE

ACCEPTED BY THE METRO COUNCIL

March 2006



**METRO**

PEOPLE PLACES  
OPEN SPACES

## **About Metro**

People places • open spaces

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 25 cities and 3 counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

## **Your Metro representatives**

Metro Council President – David Bragdon

Metro Councilors:

Rod Park, District 1

Brian Newman, District 2

Carl Hosticka, deputy council president, District 3

Susan McLain, District 4

Rex Burkholder, District 5

Robert Liberty, District 6

Auditor – Alexis Dow, CPA

Metro's web site: [www.metro-region.org](http://www.metro-region.org)



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## **ACKNOWLEDGEMENTS**

### **HOUSING CHOICE TASK FORCE (HCTF)**

#### **Members**

Councilor Rex Burkholder, Co-Chair, Metro Council District 5

Councilor Robert Liberty, Co-Chair, Metro Council District 6

Kate Allen, Enterprise Foundation

Bill Ashworth, Oregon Realty

Margaret Bax, City of Portland

Robin Boyce, Housing Development Center

Sam Chase, Community Development Network

Mike Coffey, Shorebank Pacific

Tom Cusack, US Dept. of Housing & Urban Development

Betty Dominguez, Oregon Housing & Community Services

Mayor Rob Drake, City of Beaverton

Charlotte Gallagher, Pacific Continental Bank

Joe Grillo, City of Beaverton

Councilor Jack Hoffman, City of Lake Oswego

Ellen Johnson, Legal Aid Services of Oregon

Thomas Kemper, Kemper Co., LLC

Martha McLennan, NW Housing Alternatives Inc

Ed McNamara, Turtle Island Development LLC

John Miller, Host Development, Inc.

Steven D. Rudman, Housing Authority of Portland

Mike Swanson, City of Milwaukie

Dee Walsh, Reach Community Development, Inc.

Ramsay Weit, Washington County Citizen

## **ACKNOWLEDGEMENTS CONTINUED**

### **HCTF Alternate Members**

Hal Bergsma, City of Beaverton  
Michelle Haynes, Reach Community Development, Inc.

### **HCTF Pilot Project Jurisdiction – City of Wilsonville**

Mayor Charlotte Lehan  
Councilor Tim Knapp  
Arlene Loble, City Manager  
Sandi Young, Planning Director  
Chris Neamtzu, Long Range Planning Manager  
Dan Stark, GIS Specialist

### **Metro Planning Department**

#### *Housing Project Staff:*

O. Gerald Uba, Project Manager  
Malu Wilkinson, Senior Regional Planner  
Marisa Cravens, Assistant Regional Planner

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Christina Deffebach, Long Range Planning Manager

### **Chief Operating Officer Office**

Reed Wagner, Policy Advisor  
Lake McTighe, Policy Associate Intern

# Chapter One

## Introduction

### Preface

This document represents the second phase of a process that started in 1998 when the Affordable Housing Technical Advisory Committee (HTAC) was created. By 2000, HTAC had defined affordable housing needs across the region and had developed a Regional Affordable Housing Strategy (RAHS). In 2000 the Metro Council adopted Title 7 of the Urban Growth Management Functional Plan to implement the HTAC recommendations. The Council also required that Metro convene a housing advisory committee after three years to assess the progress of implementing Title 7 and advise on next steps. An assessment of local governments' annual reports revealed five categories of barriers to their adoption of Title 7 strategies and tools:

- "We're already in compliance through implementation of State housing requirements"
- "One size doesn't fit all due to unique local conditions"
- "It costs too much – no funding/not enough staff"
- "Little vacant land exist or land is too expensive"
- "Political barriers due to local charter provisions that limit local actions"

In 2005 the Housing Choice Task Force (HCTF) was formed, bringing together the resources of non-profit and for-profit developers, real estate professionals, and local, regional, and state officials and staff.<sup>1</sup> The charge of the Housing Choice Task Force was to:

- A.) Assess barriers that hinder "work-force" housing supply in the 2040 Growth Concept mixed use areas, corridors and other locations, and assess opportunities that would facilitate an increase;
- B.) Assess the experience and conclusions from local pilot project/s that identify the solutions to meet local Affordable Housing Production Goals;
- C.) Develop solutions for increasing housing and affordable housing supply, including actions that should be undertaken by public and private entities to implement the solutions; and
- D.) Help build broader support for regional housing supply solutions by working closely with individuals and organizations that are in the position to assist.

The work of HCTF during the last 12 months (March 2005 to March 2006) culminated in the following key recommendations for Metro and two categories of solutions for increasing the supply of affordable housing, and especially housing for working families who must choose to either pay for housing or pay for other basic necessities such as transportation, food and child care.

### Key Recommendations for Metro

1. Integrate housing supply concerns, and specifically affordable housing, into all policy making and funding allocations, in order to achieve regional housing choice equity through promotion of affordable housing as a regional function on par with transportation and green spaces. A permanent Housing Choice Advisory Committee should be established to assist in this effort.
2. Direct effort towards development of resources, and especially a new, permanent regional resource for affordable housing, and join and lead advocacy for increased funding at the Federal, State, regional levels.

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<sup>1</sup> Resolution No. 05-3536

3. Promote strategies identified by the HCTF to remove regulatory barriers and reduce the cost of developing housing and affordable work force housing specifically, especially in the 2040 Centers and Corridors.
4. Prioritize the budget for housing to provide technical assistance to local governments such as land/site inventory, model codes, etc.

**Two categories of recommended solutions in Chapter Five of this report.**

- Solutions for reducing the cost of housing and increasing housing supply in the 2040 Centers and Corridors
- Solutions for increasing the development and production of affordable housing on a region wide basis.

**Trends and Persistent Housing Choice Problem**

A review of the status of housing needs across the region indicates the need for an increased supply of housing choices. Additionally, the HCTF findings indicate that many families have fewer housing choices than they did in 2000. In other words, the housing problem articulated in 2000 still exists and is beginning to affect regional livability.

- The median income has not kept pace with rising housing costs, and the accelerated rise in home purchase costs over the past few years have priced many residents out of neighborhoods where they would otherwise choose to live.
- The region's unemployment rate has been above the national average since the last recession.
- A majority of workers in the 2040 Centers earn below 50% of the region's Median Family Income (\$67,900).
- Federal support for housing has been decreasing and the region's need for the retention and creation of a diverse and adequate housing supply has grown.
- Although rents have not increased much since 2000, high-income renters occupy a good proportion of affordable housing units, thus creating an "affordability mismatch."
- Families with children are migrating from central areas to outer areas of the region where there are limited public services, and thus putting more stress on existing public services systems such as schools and transportation and spending on transportation.
- People between the ages of 25 and 29 and the portion of the baby boomers between 50 and 54 are the fastest growing age groups that are creating a mix of housing need in the region.

**Barriers**

The HCTF reviewed and prioritized over forty barriers to reaching an adequate affordable housing supply, including<sup>2</sup>:

- Physical barriers
- Financial barriers
- Market barriers
- Regulatory barriers
- Political barriers

This document contains the HCTF recommendations and implementation strategies for overcoming these barriers such as:

- Implementing new funding sources
- Lowering the construction cost of housing

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<sup>2</sup> The top 20 barriers are shown in Table 3 of Chapter 4

- Supporting development in the centers
- Addressing the housing needs of low and medium-income populations

The recommendations and strategies are outlined in Chapter 4 and 5.

### **What Does It Mean for a Household to Have “Housing Choices”?**

Housing choice refers to the range of housing types that are available in a community to households with broad range of needs such as:

- Families with young children
- People with disability
- Seniors
- Workers in various profession

Housing choice also includes a range of housing types at various levels of affordability, meaning that households of various income levels have a choice in the type of housing they live in. The availability, or lack of, affordable housing choices can impact the livability of the region. Housing choice affects people’s access to jobs, schools, transportation alternatives, and the communities they would choose to live in. Job, school and housing mismatches can negatively affect the environment by increasing car trips.

### **What Does It Mean for Housing to be “Affordable”?**

In general, housing is considered affordable when a household pays no more than 30% of its income towards housing.<sup>3</sup> While this measure is useful, it has limitations, not the least of which is that most poor families cannot afford to spend as much as 30% of their income on housing. Another limitation is that some people may simply prefer to spend higher shares of their incomes on housing for investment purposes. If a household can expect to earn enough to still have sufficient resources to meet their other needs while paying more than 30% of their income for housing, their housing cost burdens do not constitute a housing problem. A person’s income level is often the defining factor in the housing choices available. Table 1 shows the median family income for different households.

**Table 1: Median Income Percentages – FY 2004**

Household Size	30%	50%	60%	80%	100%	120%	150%
1	\$14,250	\$23,750	\$28,500	\$38,000	\$47,550	\$57,050	\$71,300
2	\$16,300	\$27,150	\$32,600	\$43,450	\$54,300	\$65,200	\$81,500
3	\$18,350	\$30,550	\$36,650	\$48,900	\$61,000	\$73,350	\$91,650
4	\$20,350	\$33,950	\$40,750	\$54,300	\$67,900	\$81,500	\$101,850
5	\$22,000	\$36,650	\$44,000	\$58,650	\$73,350	\$88,000	\$110,000
6	\$23,650	\$39,400	\$47,250	\$63,000	\$78,750	\$94,500	\$118,150
7	\$25,250	\$42,100	\$50,500	\$67,350	\$84,200	\$101,050	\$126,300
8	\$26,900	\$44,800	\$53,800	\$71,700	\$89,650	\$107,550	\$134,450

Source: Regional Blue Ribbon Committee on Housing Resource Development  
(Based on the HUD Portland Area Median Income as of February 9, 2004: \$67,900 for a family of four.  
Figures are rounded to the nearest \$50.00)

<sup>3</sup> United States Department of Housing and Urban Development. For renters, housing costs include rent and utilities. For homeowners, it includes principle, interest, taxes, property insurance, and mortgage insurance, if applicable

Defining affordability for different income levels is also important. For example, a household that is making less than 30% of the median family income, or under \$20,000 for a family of four, may require 100% subsidized housing, while a family of four that is making 60% of the median family income (just over \$40,000), may be able afford an apartment without assistance, though it may not be in the community where they work.

Nearly all households earning less than \$20,000 a year are expected to rent rather than purchase homes. The situations of families that earn less than 50% of the median family income are at a critical point, needing solutions to housing more desperately than families making more than 50% MFI. Table 2 gives an idea of what households at different levels can typically afford to pay when renting

**Table 2: 2004 Housing Affordability - Maximum Monthly Rent Including Utilities by Median Family Income with a Housing Burden of 30%**

# of Bedrooms	Household Size	30%	50%	60%	80%	100%	120%	150%
Group Home	0.75	\$267	\$445	\$534	\$713	\$892	\$1,070	\$1,337
0	1	\$356	\$594	\$713	\$950	\$1,189	\$1,426	\$1,783
1	1.5	\$382	\$636	\$764	\$1,018	\$1,273	\$1,528	\$1,910
2	3	\$459	\$764	\$916	\$1,223	\$1,528	\$1,834	\$2,291
3	4.5	\$529	\$883	\$1,059	\$1,412	\$1,766	\$2,119	\$2,648
4	6	\$591	\$985	\$1,181	\$1,575	\$1,969	\$2,363	\$2,954
5	7.5	\$652	\$1,086	\$1,304	\$1,738	\$2,173	\$2,608	\$3,259

Source: Regional Blue Ribbon Committee on Housing Resource Development  
(Based on the HUD Portland Area Median Income as of February 9, 2004: \$67,900 for a family of four.  
Figures are rounded to the nearest \$1.00)

The 2000 *Regional Affordable Housing Strategy* developed by the Housing Technical Advisory Committee (HTAC) included a 20-year estimation of the regional need for affordable housing to 2017. Using a supply-oriented assessment, the HTAC found that the region would need 90,479 units affordable to households with income below 50% of the median household income.<sup>4</sup> Table 3 gives the benchmark affordable housing needs for 2017 by jurisdiction.

<sup>4</sup> Regional Affordable Housing Strategy, 2000, pp.-16-18.



**Table 3. Benchmark Affordable Housing Need to 2017**

(Total Affordable Housing Need - Not Targets or Goals)

Jurisdiction	2017 Households <sup>1</sup>	Number of Households in each Income Group in 2017 based on Regional Percentages in 1995 <sup>2</sup>				Estimated Housing Units in 1998 Affordable to Defined Income Groups <sup>3</sup>				Total Need for Affordable Housing Units by Jurisdiction by Income Group to Year 2017**			
		<30%	30 - 50%	51 - 80%	81 - 120%	<30%	30 - 50%	51 - 80%	81 - 120%	<30%	30 - 50%	51 - 80%	81-120%
<b>Beaverton</b>	38,704	4,451	4,296	7,780	7,160	175	2,005	8,557	8,105	(4,276)	(2,291)	777	944
<b>Cornelius</b>	3,601	414	400	724	666	16	300	1,244	1,234	(398)	(100)	520	568
<b>Durham</b>	533	61	59	107	99	6	23	85	326	(55)	(36)	(22)	228
<b>Fairview</b>	4,145	477	460	833	767	51	151	1,135	481	(425)	(309)	302	(286)
<b>Forest Grove</b>	8,227	946	913	1,654	1,522	398	817	2,104	2,076	(548)	(96)	451	554
<b>Gladstone</b>	4,582	527	509	921	848	91	413	1,883	1,462	(436)	(96)	962	614
<b>Gresham</b>	45,297	5,209	5,028	9,105	8,380	654	4,004	16,925	5,853	(4,555)	(1,024)	7,821	(2,527)
<b>Happy Valley</b>	2,583	297	287	519	478	3	8	56	510	(294)	(279)	(463)	32
<b>Hillsboro</b>	27,911	3,210	3,098	5,610	5,164	180	981	6,865	8,022	(3,030)	(2,117)	1,255	2,859
<b>Johnson City</b>	754	87	84	152	139	141	243	25	133	55	159	(126)	(7)
<b>King City</b>	417	48	46	84	77	2	42	660	608	(46)	(4)	576	531
<b>Lake Oswego</b>	16,452	1,892	1,826	3,307	3,044	42	284	2,823	3,683	(1,850)	(1,542)	(484)	639
<b>Maywood Park</b>	122	14	14	25	23	5	25	217	54	(9)	11	192	31
<b>Milwaukie</b>	11,709	1,347	1,300	2,354	2,166	304	1,323	3,471	3,062	(1,043)	23	1,118	896
<b>Oregon City</b>	12,896	1,483	1,431	2,592	2,386	253	1,076	4,137	3,166	(1,230)	(355)	1,545	780
<b>Portland</b>	280,528	32,261	31,139	56,386	51,898	12,396	33,055	89,310	50,141	(19,864)	1,916	32,923	(1,756)
<b>Rivergrove</b>	123	14	14	25	23	0	1	23	43	(14)	(13)	(2)	20
<b>Sherwood</b>	6,395	735	710	1,285	1,183	66	148	891	1,248	(670)	(561)	(394)	65
<b>Tigard</b>	19,179	2,206	2,129	3,855	3,548	37	1,092	3,604	5,038	(2,169)	(1,037)	(251)	1,490
<b>Troutdale</b>	7,096	816	788	1,426	1,313	65	229	2,257	1,564	(751)	(559)	831	251
<b>Tualatin</b>	10,552	1,213	1,171	2,121	1,952	6	475	1,948	3,511	(1,208)	(696)	(173)	1,559
<b>West Linn</b>	8,897	1,023	988	1,788	1,646	36	274	1,069	1,638	(987)	(713)	(719)	(8)
<b>Wilsonville</b>	8,842	1,017	981	1,777	1,636	17	184	1,714	1,138	(1,000)	(797)	(63)	(497)
<b>Wood Village</b>	1,548	178	172	311	286	14	160	551	282	(164)	(11)	240	(5)
<b>Clackamas County Uninc.</b>	77,498	8,912	8,602	15,577	14,337	1,603	4,858	19,355	23,713	(7,309)	(3,744)	3,778	9,375
<b>Multnomah County Uninc.</b>	7,621	876	846	1,532	1,410	62	312	1,632	1,820	(814)	(534)	100	410
<b>Washington County Uninc.</b>	116,696	13,420	12,953	23,456	21,589	266	3,526	15,960	24,242	(13,154)	(9,427)	(7,496)	2,653
<b>Totals</b>	722,909	83,135	80,243	145,305	133,738	16,889	56,009	188,503	153,153	(66,245)*	(24,234)*	43,198	19,414

\*\* Parentheses indicate a need for housing units.

<sup>1</sup>Based on Metro's Urban Growth Management Functional Plan.

<sup>2</sup>American Housing Survey, 1995. <30%MHI = 11.5%; 30-50%MHI = 11.1%; 51-80% = 20.1%; 81-120%MHI = 18.5%; 120%MHI+ = 38.8%.

<sup>3</sup>U.S. Census, 1990; Marathon Management, 1998; Metro, 1999. Assisted rental housing is included but not separately displayed on this table.

\*H-TAC determined that the households with the greatest need for affordable housing were those in the 0-30% and 30-50%MHI (66,245 + 24,234 = 90,479)

There are other issues to consider in defining affordability such as family composition and stage in the life cycle. An elderly couple will have significantly different needs than a student or a single parent with a child. Large families will be able to spend proportionately less on their housing than smaller families with the same level of income, as the large family will have greater food, clothing, and health care costs. Table 3 below gives an indication of the range of “stories” behind the median family income numbers.

**Table 4: Income Groups by Type of Occupation**

Percent of Median Household Income (MHI)	Size of Household & Occupations
Less than 30% MHI	<ul style="list-style-type: none"> <li>• <b>1 person:</b> fast food worker, service station attendant</li> <li>• <b>4 people:</b> preschool teacher with 3 children (Many people in this income group are unemployed due to age or disability, for example, a single person receiving solely Social Security Income would have an income at approximately 14% MHI)</li> </ul>
30-50% MHI	<ul style="list-style-type: none"> <li>• <b>1 person:</b> home health aide, hairdresser, receptionist</li> <li>• <b>4 people:</b> dental assistant with 3 children; fast food worker and a service station attendant with 2 children</li> </ul>
51-80% MHI	<ul style="list-style-type: none"> <li>• <b>1 person:</b> emergency medical technician, computer operator</li> <li>• <b>4 people:</b> full time registered nurse or social worker with 3 children; teacher's aide and bank teller with 2 children</li> </ul>
81-120% MHI	<ul style="list-style-type: none"> <li>• <b>1 person:</b> computer programmer, corrections officer, carpenter</li> <li>• <b>4 people:</b> electrical engineer or health services manager with 3 children; dental assistant and a maintenance worker with 2 children</li> </ul>

Source: Metro Regional Affordable Housing Strategy, 2000

### Local and Regional Difference

The challenges and opportunities associated with affordable housing and housing choices vary across the region. Some communities have adequate affordable housing options except for households at the lowest income levels, some communities have a surplus of vacant rental units, but limited ownership opportunities, while most areas have limited options for families in very low income groups, seniors, or persons with disabilities. Local differences are important, and they require different solutions and approaches. This report acknowledges the importance of the local experience, as well as the need to address affordable housing as a regional issue.

The Portland metropolitan region functions as one housing market. People may live in one area, work in another, and shop somewhere else. The efforts of one city to provide housing for lower income residents are less effective if neighboring communities do not make similar efforts. Confining affordable housing to limited areas forces residents to commute long distances to their work, decreasing their quality of life and adding to congestion. The concentration of poverty in areas where land is least costly can disproportionately burden the jurisdiction where it occurs. Thinking regionally includes implementing solutions to lower the cost of producing housing and increase the supply of housing in the 2040 Centers and corridors.

## Chapter Two

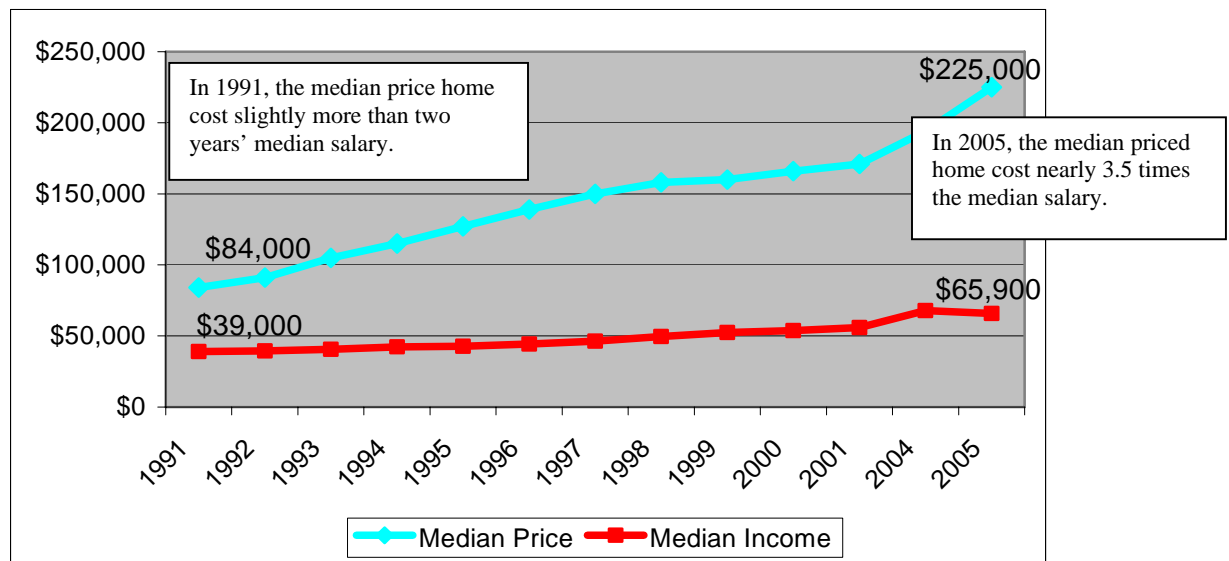
### How Have Housing Choices Changed Since 2000?

This chapter looks at the impact of regional housing affordability trends on housing choice (section A), and the relationship between housing choice and regional livability (section B).

#### A. Regional Housing Affordability Trends

Despite the continued demonstration of housing demand, and the efforts of local jurisdictions such as to spur development, there has been an insufficient increase in housing availability to reduce the supply gap since 2000. Several regional indicators show that working families have fewer housing choices now than they did in 2000. These indicators include median family income and median house price gaps, lower cost rental units occupied by families with higher incomes, and a lack of housing affordable to households with incomes 50% and below the median family income. Figure 1 indicates that median income levels have not kept up with median home prices. While median income has risen since 2000, it has not kept up with the rate of increased housing prices. In 2000, about 51% of the regional population earned below 80% (\$42,960) of the 2000 median family income of \$53,700. Residents earning 80% MFI earned a little more than enough to purchase the median priced home (\$166,000).<sup>5</sup> In 2005, a resident earning 80% MFI (\$54,320) would not be able to purchase the median priced home (\$225,000) under the same calculations. As noted in the previous chapter, the supply of housing for the elderly and people with disabilities is another facet of the regional housing problem.

**Figure 1: Median Income Vs. Median Home Price in the Metro Region, 1991-2005**



Source: Realtors Multiple Listing Service, 2004 and RMLS Market Action, August 2005.

<sup>5</sup> Using the federal guideline that a financially healthy household should have to spend no more than 30 percent of its income on shelter.

In 2000 the Affordable Housing Technical Advisory Committee (HTAC) warned that housing was becoming increasingly expensive; the past five years have only reinforced that trend. Although there has been some speculation about the pace of appreciation starting to slow, housing prices have increased in the last ten years. Some regional neighborhoods have seen dramatic increases. Table 5 shows the appreciation value of homes since 1995 in several neighborhoods in the region.

**Table 5: Portland Metropolitan Area Neighborhood Median Sales Prices, 1995-2005**

	<b>1995</b>	<b>August 2005, Year to Date</b>	<b>Appreciation</b>
North Portland	\$80,000	\$192,000	140%
Northeast Portland	\$107,000	\$228,500	114%
Tigard/Tualatin/Wilsonville	\$130,000	\$275,000	112%
Southeast Portland	\$99,500	\$194,000	95%
Downtown Vancouver	\$91,800 <sup>6</sup>	\$177,800	94%
West Portland	\$170,500	\$328,000	92%
Northwest Washington County	\$175,000	\$325,000	86%
Milwaukie/Clackamas	\$134,500	\$248,000	84%
Oregon City/Canby	\$136,500	\$248,600	82%
Lake Oswego/West Linn	\$208,100	\$364,900	75%
Hillsboro/Forest Grove	\$125,000	\$215,000	72%
Gresham/Troutdale	\$128,500	\$206,700	61%
Beaverton/Aloha	\$132,000	\$210,000	59%

*Source: Real Estate Multiple Listing Service. Ranked by Appreciation*

Construction material costs are another important trend contributing to housing affordability. The construction market has remained steady for the past ten years, but is now playing catch-up with overall project costs increasing 6%–10% for single-family and multi-family residential units, according to the Association for General Contractors. Increasing construction costs in the past years, shown in Table 6, can be attributed to a growing demand from overseas markets and higher energy prices, making the delivery and production of goods more expensive.<sup>7</sup> Local development companies have noted that construction costs for housing projects have come in over budget, causing them to cut costs on the buildings in other ways, often reducing the aesthetic appeal. Some construction companies are finding it harder to guarantee price estimates for projects and are forced to either absorb the price fluctuations or pass them along to the consumer. The increases are attributed mostly to:

- Brisk growth and modernization of the Chinese landscape has fueled the world's largest construction boom and also disrupted markets around the globe. China uses more than two-fifths of the world's annual output of cement, one-third of its iron ore, one-quarter of its lead and steel, and more than one-fifth of its copper, aluminum and zinc. Prices, however, may cool off in the future as China's production capacity grows to meet the country's demand.
- Hurricanes also played an important role in the construction market. Infrastructure damage after Hurricanes Katrina and Rita is estimated to exceed \$20 billion. The process of repairing homes and businesses damaged by weather forces has put heavy demands on construction materials such as lumber, steel, plywood, electrical components, glass, roofing materials, asphalt, carpeting, drywall and PVC piping. The

<sup>6</sup> Measured 1996.

<sup>7</sup> Association for General Contractors, 2006

hurricane season also impacted the nation's oil infrastructure, disrupting production for many oil refineries located in the Gulf Coast region and causing shortages for petroleum-based products.

Rising prices for materials such as steel, concrete, plastics and gypsum products drive many projects over-budget or compel the scope of projects to be scaled back.

**Table 6: Percentage Changes in Construction Costs between 2001 and 2005**

<b>Construction Materials Costs</b>	<b>Estimated Cumulative Percent Change 2001-2005</b>
<b>Construction Types</b>	
Single-unit residential	17.06
Multi-unit residential	20.36
<b>Specific Construction Inputs</b>	
1. #2 diesel fuel	125.23
2. Aluminum mill shapes	8.69
3. Asphalt	41.30
4. Asphalt felts and coatings	27.74
5. Brick and structural clay tile	17.19
6. Concrete Products	22.08
a. Concrete block and brick	21.40
b. Concrete pipe	17.23
c. Ready-mix concrete	24.07
d. Precast concrete products	17.20
e. Prestressed concrete products	20.29
7. Copper and brass mill shapes	56.61
8. Fabricated structural metal	23.46
9. Fabricated iron and steel pipe, tube, and fittings	38.10
10. Gypsum products	45.29
11. Insulation materials	11.83
12. Lumber and plywood	8.21
13. Paving mixtures and blocks	21.35
14. Plastic construction products	15.99
15. Prefabricated metal buildings	14.32
16. Steel mill products	48.59
a. Hot-rolled bars, plates, and structural shapes	71.59
b. Steel pipe and tube	80.70
<b>Percentage Change in Costs for Basic Inputs</b>	
1. Cement	20.38
2. Construction sand/gravel/crushed stone	20.87
3. Copper base scrap	154.08
4. Copper ores	150.21
5. Crude petroleum	141.11
6. Industrial natural gas	28.79
7. Iron ore	25.29
8. Iron and steel scrap	234.22

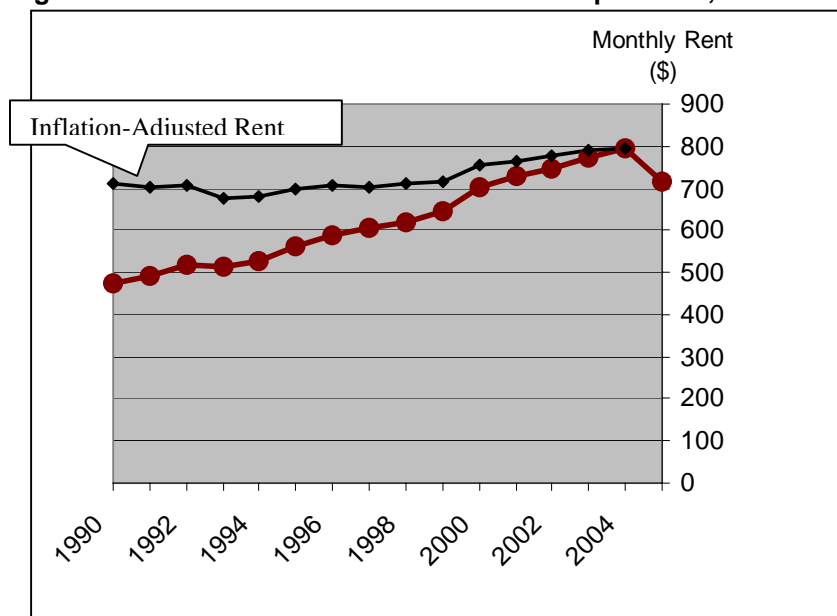
While the housing market and housing cost appreciation is often credited for buoying the national economy, citizens' ability to purchase a home has decreased overall nationwide since 2000. Many homeowners would not qualify for a mortgage to purchase their current home under today's conditions.

The western United States has historically had the least affordable housing of all regions in the U.S. At the turn of the century, the census considered 39% of Western families financially able to buy a modestly-priced house; affordability for families and individuals was greatest in the Midwest (55%), followed by the Northeast (50%), and then the South (48%)<sup>8</sup>.

However, low interest rates, new loan programs, and new opportunities to purchase homes without a down payment have allowed many people to purchase homes who could not otherwise afford them. This has created a demand for moderately-priced housing, which in turn has driven up housing costs. In the past few years, low interest rates have enabled many residents to purchase homes, which in turn has stabilized rents by decreasing rental demand. Rising interest rates are anticipated to block this avenue to homeownership, and in turn, create more competition for the region's affordable rentals.

The rental market has not seen the same swings that home sales have. Figure 2 shows that rents have risen steadily, even with adjustments for inflation, but dropped in 2005. Many neighborhoods in the region have a surplus of rental units, though not necessarily units that are affordable to every income level. Other communities have lost rental housing to condominium conversions.

**Figure 2: Fair Market Rents for a 2-Bedroom Apartment, 1990-2005**

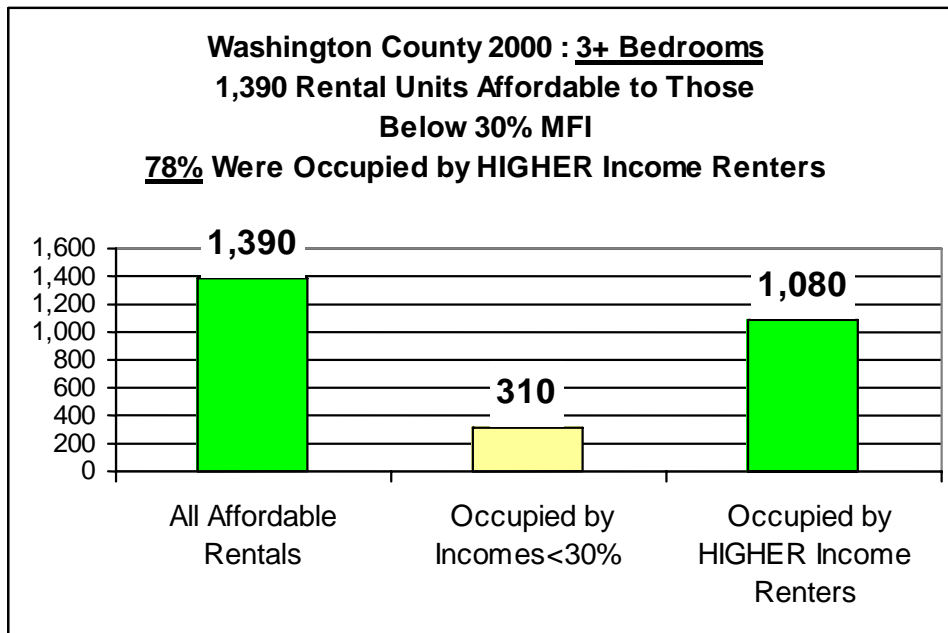


Source: Federal Authority for Housing and Urban Development (HUD)

<sup>8</sup> US Dept. of Commerce Newsletter, 12/12/99. <http://www.census.gov/Press-Release/www/1999/cb99-175.html>

The apparent “surplus” of affordable rental units can be illusionary for low-income renters, when higher income families, who choose to spend less than 30% of their income for rent, occupy units with rents affordable to lower income renters. This is called the “affordability mismatch”- when rental units have affordable rents but they are not available for use by low-income renters because higher income families occupy them. An example of this mismatch is shown for 3-bedroom rentals in Washington County and renters with incomes below 30% of median family income (Figure 3). In Washington County higher income renters occupied 78% of the “affordable units” in 2000.

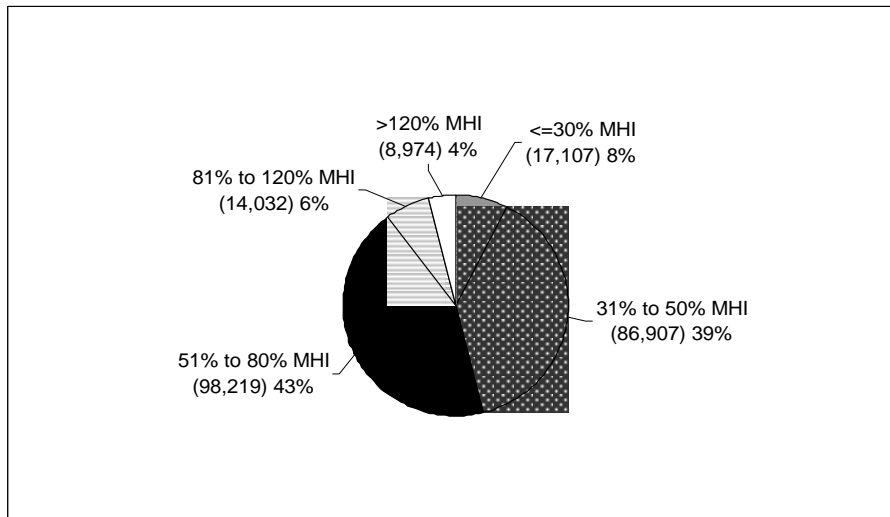
**Figure 3. Sample: Affordability Mismatch in Washington County**



Source: HUD Oregon calculations from Washington County Housing Affordability Mismatch

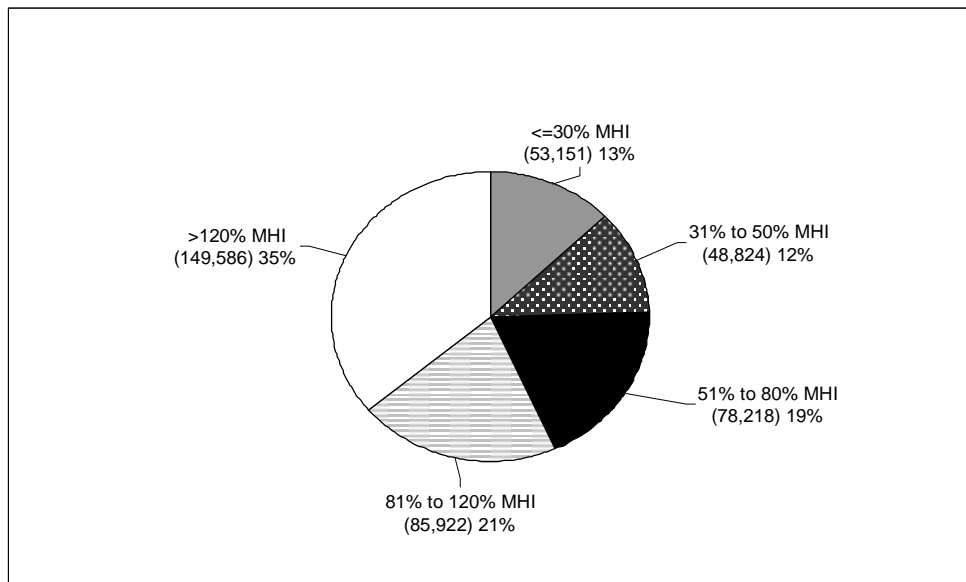
Very low-income renters face a shortage of rental opportunities (Figure 4a and 4b). In 2000, 8% of the region's rental units were affordable to households earning less than 30% (\$16,110 for a family of four) of medial household income. This group, meanwhile, constituted 13% of all regional households.<sup>9</sup> Nearly all households in this group would be expected to be renters.

**Figure 4a: Rental Units Affordable to Households in Specific Income Groups for Portland metropolitan area – 2000**



Source: Metro Data Resource Center, based on Census 2000 Summary File 3 Tables H54 and H59, April 1, 2000

**Figure 4b: Percentage of Households in Four Income Bins for Portland Metropolitan Area – 2000**



Source: Metro Data Resource Center, based on Census 2000 Summary File 3 Table P52

<sup>9</sup> United States Census 2000.

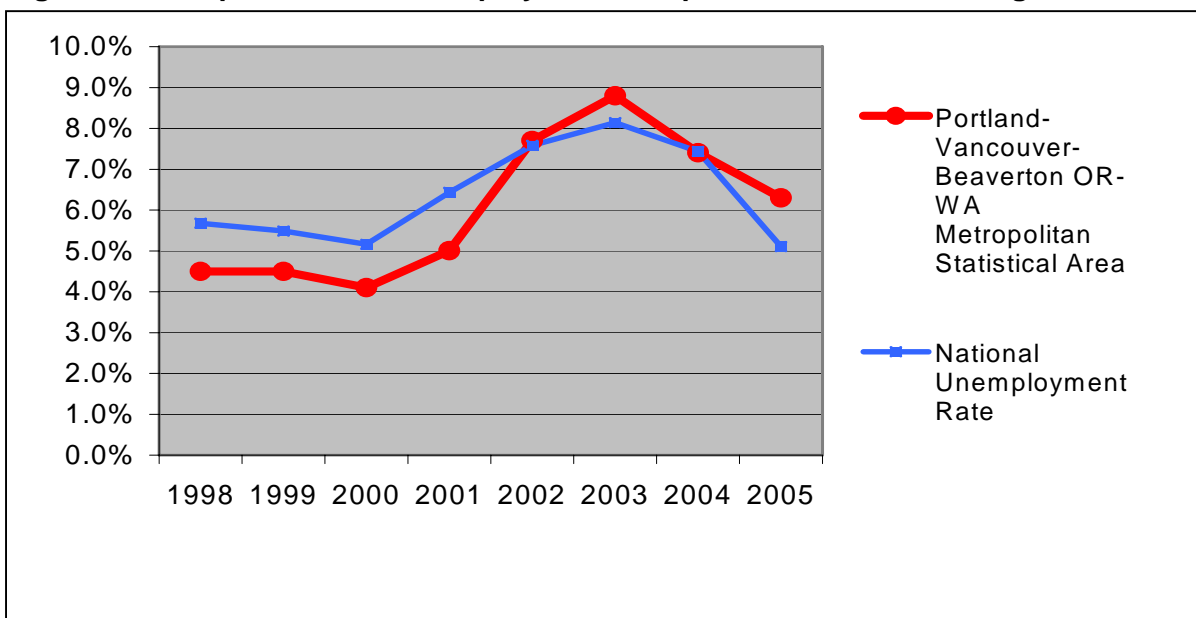


## B. The relationship between Housing Choice and Regional Livability

The livability of our region is directly affected by the availability of housing choices for residents. The regional housing supply impacts access to jobs, transportation investments, environmental quality, regional economic competitiveness, and issues of fairness to people and among communities. A lack of housing choices undermines household stability, impacting student performance in schools, families, community stability and local culture. Housing choices are also essential to a healthy, diverse economy, employee productivity, the cost of doing business and a strong tax base. Companies choose location based on their workers' commutes and access to housing. The provision of a choice of housing types for all families and individuals across the region is therefore a matter of regional concern.

**Employment.** One result of a rise in home prices combined with shifts in the economy is that many jobs that used to support a family on a single paycheck may no longer cover the costs of keeping a home. As shown in Figure 5, the region's enjoyed lower unemployment level than the national level during the 1990s technology boom, and that has changed since 2002. The high unemployment level exacerbates the housing affordability issue. In 2002, while home prices in the Portland Metropolitan area were increasing, the region also entered a period of high unemployment.

**Figure 5: Metropolitan Area Unemployment Compared to National Average, 1998-2005**



Source: Bureau of Labor Statistics, 2005

Table 7 shows the estimated average wages of workers in the region's centers. In many centers, the majority of the workers are earning at or below 50% of the region's current Median Family Income, \$67,900. These jobs include teachers, police, firefighters, manual laborers, entry-level white-collar workers and office staff, service industry workers such as cooks, waiters, hotel staff, and retail clerks, and providers of essential services such as health care and child care. Many jurisdictions currently offer a small affordable housing supply or affordable apartments at market rates, but rising costs, teardowns, and condo conversions threaten this supply, indicating the need to retain and preserve these units.

**Table 7: Employment and Wages in Regional Centers, 2004**

Sector	Estimated Annual Wages - Portland MSA 2004	Central City		Beaverton		Clackamas		Gateway		Gresham		Hillsboro		Oregon City		Washington Square	
		Est. Wages	Share	Est. Wages	Share	Est. Wages	Share	Est. Wages	Share	Est. Wages	Share	Est. Wages	Share	Est. Wages	Share	Est. Wages	Share
Construction	\$ 43,725	\$ 57,307	3%	\$ 35,592	2%	\$ 38,936	0%	\$ 40,712	2%	\$ 48,247	5%	\$ 40,278	2%	\$ 45,680	9%	\$ 40,206	2%
Education & Health Services	\$ 37,506	\$ 36,781	7%	\$ 22,899	9%	\$ 57,512	33%	\$ 43,857	43%	\$ 27,981	17%	\$ 40,705	48%	\$ 29,910	6%	\$ 36,384	5%
Financial Activities	\$ 50,185	\$ 64,051	16%	\$ 41,374	11%	\$ 52,717	7%	\$ 40,423	6%	\$ 36,895	8%	\$ 35,862	4%	\$ 31,937	2%	\$ 61,656	11%
Information	\$ 64,165	\$ 65,715	8%	\$ 62,076	5%	\$ 38,683	0%	\$ 51,565	1%	\$ 45,405	2%	N/A	N/A	N/A	N/A	\$ 65,331	7%
Leisure & Hospitality	\$ 16,262	\$ 23,423	14%	\$ 14,911	22%	\$ 14,266	14%	\$ 15,184	16%	\$ 12,029	22%	\$ 13,243	7%	\$ 13,183	15%	\$ 17,522	10%
Manufacturing	\$ 54,413	\$ 38,929	3%	\$ 23,755	3%	\$ 34,922	0%	\$ 31,236	2%	\$ 26,352	2%	\$ 23,324	1%	\$ 46,201	19%	\$ 64,908	5%
Other Services	\$ 27,114	\$ 30,053	5%	\$ 25,100	3%	\$ 23,425	3%	\$ 28,490	3%	\$ 22,189	8%	\$ 22,357	3%	\$ 17,445	4%	\$ 24,751	3%
Professional & Business Services	\$ 44,368	\$ 57,224	28%	\$ 31,142	15%	\$ 34,791	11%	\$ 26,721	10%	\$ 18,215	9%	\$ 25,006	21%	\$ 36,846	13%	\$ 42,168	19%
Trade, Transportation & Utilities	\$ 38,561	\$ 37,549	16%	\$ 34,117	31%	\$ 18,854	31%	\$ 27,559	19%	\$ 28,104	27%	\$ 30,333	12%	\$ 23,349	31%	\$ 35,177	38%

Source: Metro Data Resource Center, Oregon Employment Department ES-202 data base, 2004.

### **Sector Descriptions:**

#### **Construction**

**Education and health services:** Education services, health care and social assistance.

**Financial activities:** Finance and insurance, real estate and rental and leasing.

#### **Information**

**Leisure and hospitality:** Arts, entertainment, and recreation, accommodation and food services.

#### **Manufacturing**

**Natural resources and mining:** Agriculture, forestry, fishing and hunting, mining.

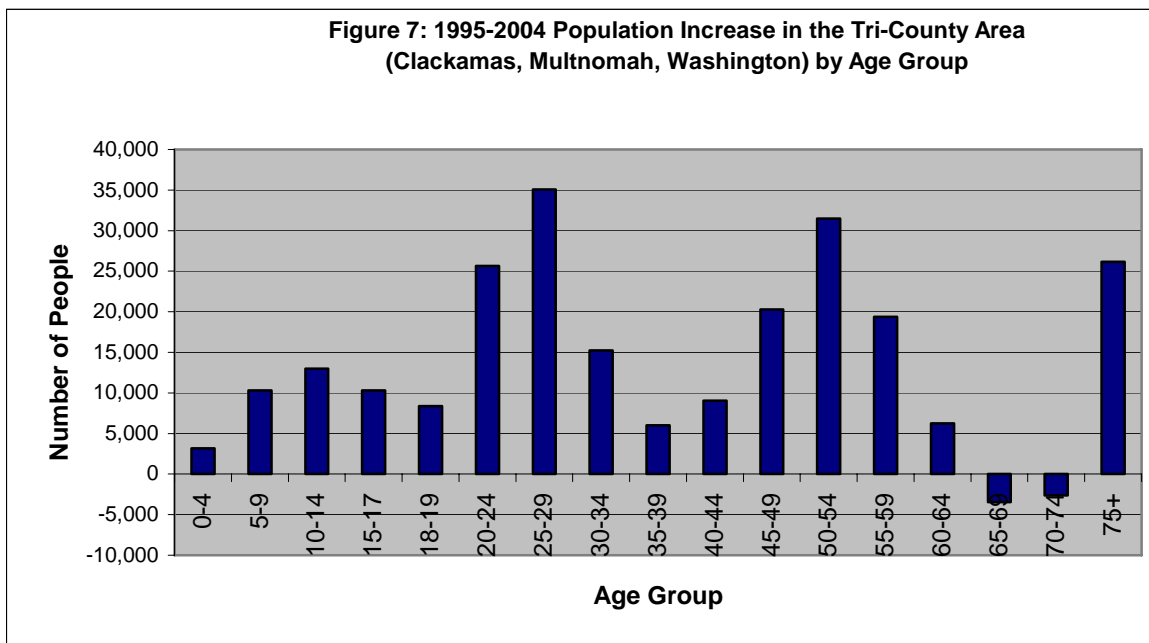
**Professional and business services:** Professional, scientific, and technical services, management of companies and enterprises, administrative and support and waste management and remediation services.

**Trade, transportation, and utilities:** Wholesale trade, retail trade, transportation and warehousing, utilities.

**Note:** Unavailable data in table is due to confidentiality restrictions on the publication of ES-202 data, which require a minimum of three or more reporting units at the level of summary used, and that no reporting unit represent eighty percent or more of that summary level employment. ES-202 employment data represent only wage and salary employment subject to unemployment insurance. Populations excluded from these data would include: self-employed, railroad workers, student workers, elected officials, religious organizations, family farms and some agricultural employees.

**2. Age (Connection of Age and Housing):** The region needs a variety of housing choices to serve the economic and lifestyle needs of its diversifying population. The Portland region has a younger population than many metropolitan areas and continues to attract residents in their 20s. In the last ten years, the fastest-growing age groups were 20 to 29 year olds, the portion of the “baby boom” generation between 50-54, and people over age 75 (Figure 6). As they age, younger residents will need housing solutions that include lower-cost starter homes, cooperatives, or community land trusts that allow them to move out of shared housing or parents’ homes, even if they do not receive high earnings. Residents in their 50s may seek “downsized” homes as children move out, or other homes that accommodate lifestyle changes. Older population groups may affect the regional housing market by increasing demand for homes for residents with fixed incomes. A significant share of Oregon Housing Agency Bond Financed projects with expiring HUD funded Section 8 subsidized contracts also have elderly tenants.

**Figure 6: Breakdown of the 1995-2004 Population Increase in the Tri-County Area (Clackamas, Multnomah, Washington) by Gender and Age Group**



Source: U.S. Census, PSU Population Research Center, 2004..

**3. Public Services (Connection of Schools, Transportation and Housing):** The shifts in the regional housing market have had a historic impact on local schools. Families with children have migrated outwards from the central areas, resulting in additional stress to public services such as the transportation system, and in a giant increase in school enrollment in suburban school districts (Figures 7 and 8). Some Portland schools have closed down due to a shrinking student population, and the district is considering more closures. Other districts have seen substantial increases in enrollment, such as Sherwood, which has grown by almost 25% between 2000 and 2005.

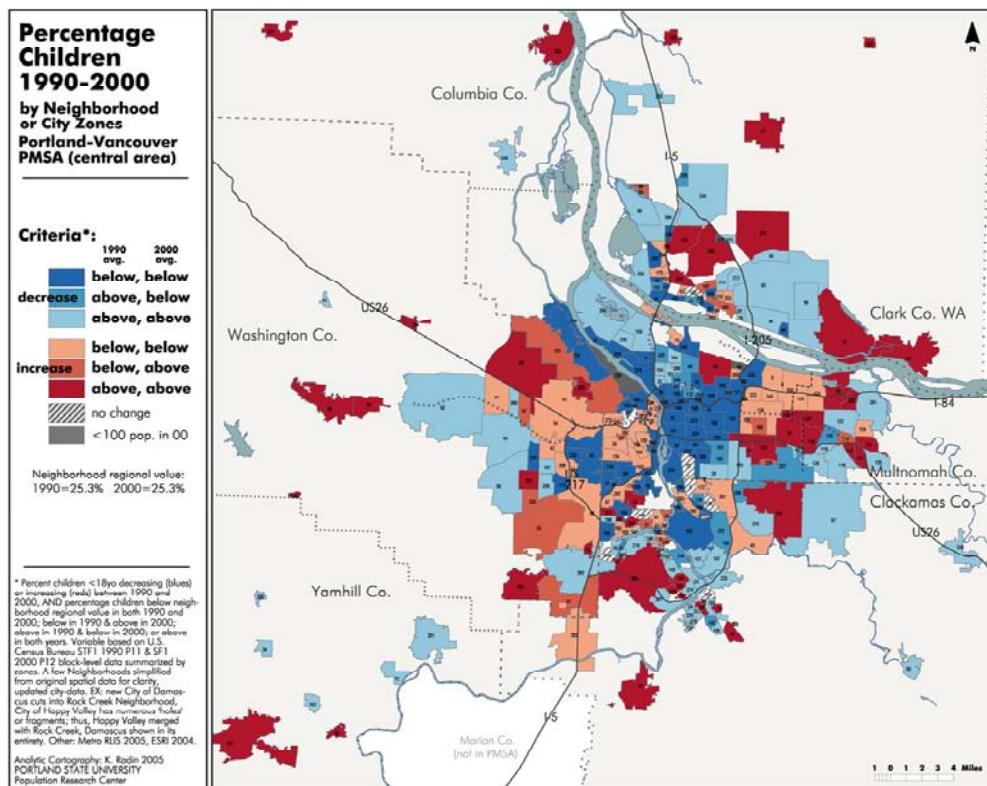
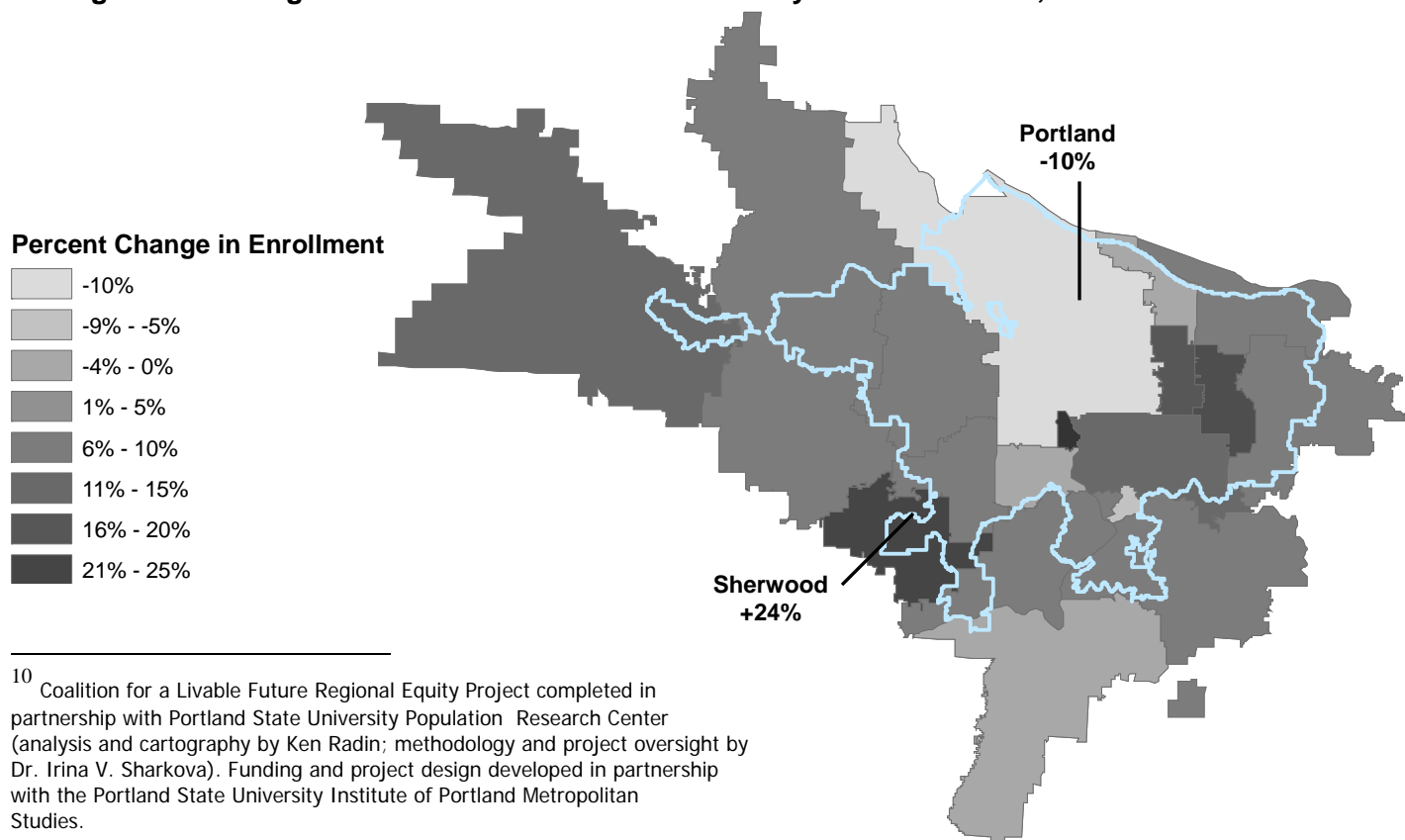


Figure 7.<sup>10</sup>

Figure 8: Shifting School Enrollment in the Tri-County School Districts, 2000-2005



This population shift leads to urbanization and development along the outer edges of the UGB, rather than in centers and corridors. It adds to the transportation costs and congestion in the region. Poverty has shown similar movement in the region; as poverty has decreased in central Portland, it has increased outwards to the east and west. (Figures 9 and 10.) In 2000, the Federal poverty level for a family of four was \$16,700.

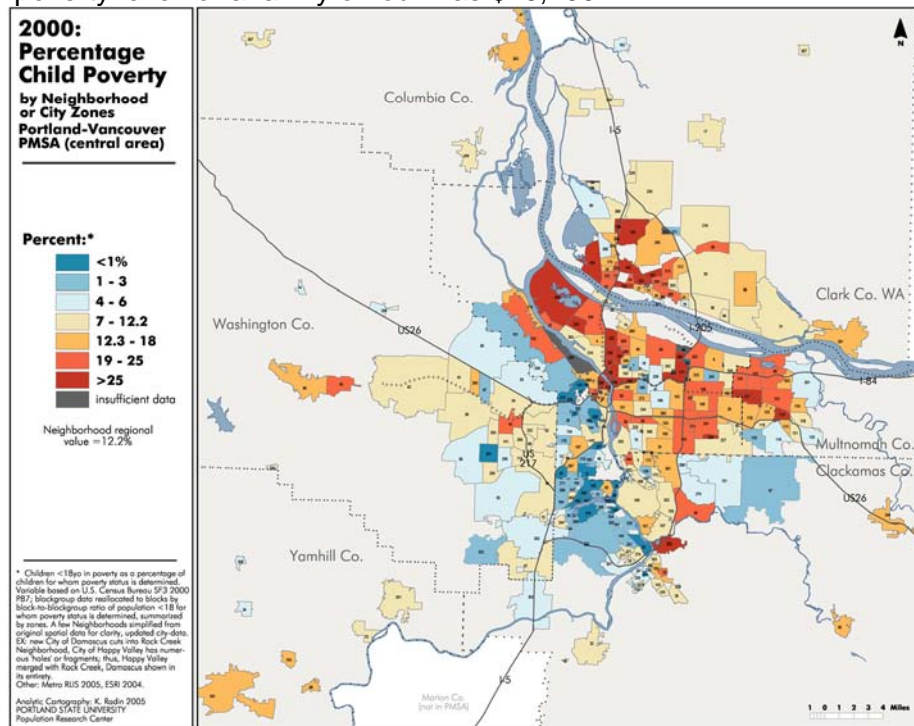


Figure 9.

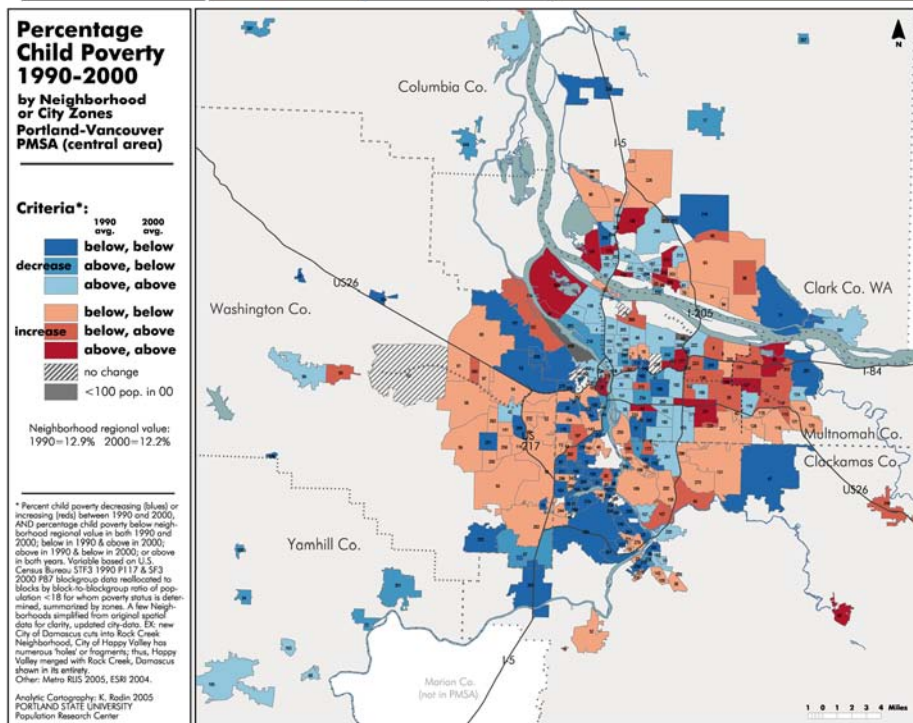


Figure 10<sup>11</sup>.

<sup>11</sup> Coalition for a Livable Future Regional Equity Project completed in partnership with Portland State University Population Research Center



**4. Transportation Costs.** As families with children move to the outer edge, some of them are forced to spend more on transportation. The cost of motor vehicle transportation will rise significantly in the next couple of decades as global demand for oil exceeds supply, reducing the cost advantage of less convenient locations and increasing the demand for housing in areas with good transportation options and mixed use.

**5. 2040 Centers and Corridors.** A component of the 2040 regional growth plan is the creation of transit-oriented housing in centers and corridors. Of the 1,469 total housing units completed or under construction using financing from Metro's Transit-Oriented Development (TOD) program, 664 are affordable to households earning up to 80% MFI (\$54,300) at the market rate<sup>12</sup>, and 252 subsidized units are restricted to households earning below 60% MFI (\$40,740). An additional 776 market-rate units at 80% MFI and 364 income-controlled units at 60% MFI are approved.<sup>13</sup> The TOD program, like all development partners, has wrestled with rising construction costs following Hurricane Katrina and the rebuilding of New Orleans. Strategies for decreasing costs include decreasing parking requirements and creating smaller, well-designed units. Greater subsidies would be needed to create new construction for lower-income families in centers and corridors. In many projects, the addition of subsidies has added fees and wait times that have resulted in higher development costs.

**Figure 11. Milwaukie Lofts, a Metro TOD & Centers Project containing 97 moderate-income units**



## Conclusion

The lack of an adequate supply of housing choices is a persistent problem, affecting neighborhoods across the region. Current housing development patterns run counter to the 2040 Regional Growth Plan of centers, station communities and corridors. Goals of “livability” and “complete communities” include residents’ ability to live close to their work and have their children in stable schools.

Over the course of a lifetime, each person’s housing needs change several times, depending on their age, wealth, family size, health condition and lifestyle (see Figure 12). Regional growth policies should encourage a variety of types of housing in every jurisdiction to accommodate these needs.

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(analysis and cartography by Ken Radin; methodology and project oversight by Dr. Irina V. Sharkova). Funding and project design developed in partnership with the Portland State University Institute of Portland Metropolitan Studies.

<sup>12</sup> TOD estimates that occupants average 65% MFI.

<sup>13</sup> Metro/Transit Oriented Development, “Program Results,” September 5, 2005

**Figure 12. A variety of housing choices accommodates residents at all stages of their lives.**



## **Chapter Three**

### **How Did We Try to Address Housing Choices in 2000?**

#### **A. Synopsis of the 2000 Regional Affordable Housing Strategy (RAHS)**

The recommendations of the Housing Technical Assistance Committee (HTAC) in the 2000 RAHS can be summarized as follows:

1. The estimation of 20-year benchmark need for affordable housing;
2. Voluntary Affordable Housing Production Goals that the twenty-four local jurisdictions at the time should adopt to serve as a guide to measure progress;
3. Comprehensive plan and implementing ordinances amendments by local governments to ensure a) diversity of housing; b) maintaining the existing supply and increasing new dispersed affordable housing; and c) increasing affordable housing opportunities for household of all income levels.
4. Land use and non-land use strategies to be included in the Metro Regional Framework Plan and Urban Growth Management Functional Plan (Title 7 – Affordable Housing) for local jurisdiction to consider adopting;
5. Local governments to submit annual progress reports for three years; and
6. Assess the region's progress toward achieving the Affordable Housing Production Goals.

The RAHS also contained the following important information:

- Who needs affordable housing;
- Homeownership and rental affordability gap;
- History of housing policy at Metro;
- How to maximize existing housing resources;
- New funding sources such as the Real Estate Transfer Fee and Employer Assisted Housing;
- Maximize existing funding sources, such as developing a regional training program and maximizing federal funds through increased coordination;
- Roles and responsibilities for governments and other organizations;
- Special issues for residents of manufactured home parks;
- Estimated cost of meeting the Affordable housing production Goals.

#### **Local Government Experiences Regarding the Adoption of RAHS Goals**

Three local governments (Beaverton, Portland and Multnomah County) adopted the five-year Affordable Housing Production Goals. Ten jurisdictions declined to adopt the goals. The affordable housing production goal apportioned to Johnson City and Maywood Park was zero. The remaining nine jurisdictions have not either adopted or declined the goal. Jurisdictions identified many barriers to the creation of housing choices.

#### **Local Government Experiences Regarding Comprehensive Plan Amendment and Consideration of Land Use Policies**

Fourteen jurisdictions have comprehensive plans that contain or have been amended to contain policies for encouraging a diversity of housing, maintaining the existing supply, increasing new dispersed affordable housing, and increasing affordable housing opportunities for households of all income levels. The City of Portland and Multnomah County adopted all the *land use and non-land use* strategies, while the City of Beaverton adopted nine of the 12 *land use and non-land use* strategies. Some jurisdictions had adopted various strategies prior to the establishment of the requirement in January 2001.



The rest of the jurisdictions complied with this requirement by considering but declining to adopt a strategy.

In conclusion, the 2000 RAHS created some new housing solutions and also detected some local barriers to a diverse housing supply. This feedback provided an essential springboard for the further pursuit of regional housing choices.

## **B. Examples of Successes Since 2000**

There have been a number of housing success stories since 2000. They include new buildings, new policies that encourage the better use of existing resources, and new designated funds. These successes provide excellent models for future work in our region.

### **New Developments**

**1. Oleson Woods** is a 32-unit townhouse rental project in Unincorporated Washington County that opened in 2005. Most of the townhouses are 3 or 4 bedroom units, designed for families.

Development: Community Partners for Affordable Housing, with the Housing Development Center as a consultant. The Enterprise Foundation contributed financing through their Green Communities Initiative.

Households served: Several units have very low rents and are reserved for families with less than 30% of median income.



**Figure 13. Oleson woods, an example of low-density, habitat-sensitive housing.**

Special features:

- Situated near transit access and the Washington Square employment center. Access to nature.
  - Preservation of a wetland on the property provides wildlife habitat, and minimal disturbances to the tree canopy.
  - Durable, environmentally sound and energy efficient features including compact fluorescent lighting, cement fiberboard siding, Energy Star appliances, natural gas turbonics heating and hot water, low-VOC paint and fly-ash concrete.
  - A 1,500 square foot community center, computer lab with high-speed Internet access, meeting room, coin-operated laundry, and storage. Site amenities include a play structure, half court basketball area, and a walking trail loop with benches.
- 2. New Columbia** is particularly notable for creating affordable homeownership opportunities and a mixed income neighborhood. A variety of housing types, such as townhouses, garden-style apartments and single-family dwellings, combined with services and training for lower-income tenants, provides income diversity in the area.

History: The former Columbia Villa public housing community, located in the Portsmouth neighborhood of North Portland, was built in 1942 for World War II defense workers. In 1993, the U.S. Department of Housing and Urban Development (HUD) created HOPE VI

grants to revitalize the country's aging public housing. At the time, Columbia Villa consisted of 462 units; mostly unattractive, impersonal, barracks-style isolated buildings that created a poverty concentration in North Portland.

Development: In late 2001, after a twelve-month process to prepare an application, the Housing Authority of Portland (HAP) received a \$35 million HOPE VI grant in 2001 that served as the anchor for the \$153 million investment in New Columbia. HAP serves as developer along with Legend Homes, Tom Walsh & Co., HOST, and Portland Habitat for Humanity. Columbia Villa's 1,300 residents received relocation assistance and priority spots in the new development.

Households served: Housing includes 852 units of public housing, affordable rental housing, elderly housing, and 232 homes for sale. An additional 92 very low-income units will be built off-site to help lessen concentrations and make sure that there is no net loss of public housing in the city.

Special features: In addition to new parks, public facilities include a replacement public elementary school, community centers, recreational facilities, day care, and adult learning centers.



**Figure 14: Townhouses at New Columbia**

**3. Station Place** opened Station Place in January 2005 in northwest Portland's Pearl District. It is located in one of the priciest neighborhoods in the state, but has affordable rents for seniors below 80% MFI.

Development: REACH CDC developed the project. The project was financed through tax credits from the Portland Development Commission, Oregon Housing and Community Services, and others.

Households served: Station Place is a mixed-income building, with some units serving seniors with up to 80% of median income. Seventy-six (76) of the 176 units have rent subsidies attached that allow very low-income seniors to live there.

Special features:

- Transit oriented development with excellent transit service.
- Situated close to amenities and services.
- City views, a roof garden with plots for individual gardeners, a large community room for gatherings, tenant services, an on-site library stocked by Powell's Books.

- Green design, with the first roof-top rain-water harvesting system of its type in Oregon, an Eco Roof on another wing, and a number of other innovations. It has won several national and local design awards. Units have air conditioning, free high speed internet access (DSL), an exercise Room/equipment, library and a Computer Learning Room.



**Figure 15. Non-profit and For-Profit developments in the Pearl: Station Place and Sitka Apartments**

**4. Sitka Apartments** are located on a full city block in Portland's Pearl District and opened in November 2005. On less than an acre of land, the project contains 210 units, 7,150 square feet of retail space, and underground parking.

Development: The Sitka Apartments is a for-profit development. The developer is Praxis Partners LLC, a joint venture of Turtle Island Development LLC and Williams and Dame Development, Inc. The Portland Development Commission and Oregon Housing and Community Services' Conduit Bond program and federal Low Income Housing Tax Credits supported financing. The bonds were purchased by US Bank and Homestead Capital purchased the tax credits.

Households served: About 34% of the 210 units are available to households earning less than 50% of the median family income, and another 62% are available to households earning less than 60% of the median family income.

Special features: Construction costs were \$92 per square foot. This includes upgrades to make the building more energy and water efficient and to use more durable materials and equipment. These upgrades will reduce future operating costs, which will in turn allow rents to stay low.

**5. The Bridge** in Beaverton provides an independent living environment for the developmentally disabled, and was designed with extensive input from the community, parents, and potential residents.

Development: The City of Beaverton purchased the land and orchestrated a CDBG grant, HOME grant, and fee waiver for the project. Total direct assistance from the city totaled \$493,000. Washington County also contributed a HOME grant. The Bank of America Foundation and Families for Independent Living/Providence Hospital also gave grants. In addition to the operating subsidy, HUD contributed a capital grant for construction, and the

Harvest Community Church provided volunteer labor. Tualatin Valley Housing Partners, a non-profit manages the property.

Households served: Residents pay no more than 30% of their income, with HUD providing the balance through an operating subsidy program.

### ***New Policies:***

**1. Affordable Housing Production Goals:** The Voluntary Affordable Housing Production Goals in the Metro Functional Plan, Title 7, were adopted by the Cities of Beaverton (656 units) and Portland (1,791 units) as a guide to measure their progress towards meeting the needs of the households with incomes below 50% of the region MFI.

**2. Project Based Existing Vouchers:** The 2000 HTAC report recommended that Housing Authorities be given more authority to use project based vouchers, in the form of longer term contracts. Over 90% of Oregon's housing assistance is in the form of rental vouchers. Persons with vouchers were free to move and use their vouchers wherever allowed, but the region found that residents in higher income brackets were occupying many affordable units. HUD has since revised its project-based voucher rules to allow an initial contract term of up to 10 years. This means that Public Housing Authorities can count on 10 years of voucher financing to help offset the cost of development, a better use of an important resource. A successful competition under the Low Income Housing Tax Credit program can also now substitute for the prior requirement for a separate competition by the housing authority. This makes it easier for Public Housing Authorities, at their discretion, to use project-based vouchers to increase the supply of housing that remains both affordable AND available to low income renters.

Since 2000, the Housing Authority of Portland has contracted with a number of different owner/developers to make 810 vouchers project-based. 25% of those vouchers were used to build or contract for hard-to-find 3 or more bedroom units, and others are being used to help meet the City of Portland's plan to reduce chronic homeless population. Assuming a conservative \$100,000 cost per unit, these 810 units represent \$81 million in Development costs. This alone is within striking distance of the \$90-\$120 million estimated development cost found in the original HTAC Report, from just *one* housing authority in the Metro area.

### ***New Resources and Partnerships:***

**1. City of Portland Housing Opportunity Bond:** In March 2005 the Portland City Council authorized the sale of a \$10 million Housing Opportunity Bond, a limited tax revenue bond to finance housing for low-income seniors, people with disabilities, and low-income working people. The bonds, both tax exempt and taxable, were sold in June 2005. All of the proceeds from the bonds have been granted to five non-profit housing providers to acquire, rehabilitate, and develop housing for the City's poorest and most difficult to house people including very low income families. Proceeds from the bond can only be used for capital projects; they are not eligible for operations, services, or rent assistance. Although not required, in most cases significant amounts of public and private resources were leveraged through the granting process. The bond proceeds will support development of an additional 390 units of housing citywide including 170 units of permanent supportive housing where residents will have access to job training and other services they need to stabilize their lives. One project to be funded through the Housing Opportunity Bond is the

Rose Quarter Workforce Housing and Employment Center. This rehabilitated old motel will provide 176 units of stable housing and supportive services to people re-entering the workforce. The other four projects are the Civic building just South of Burnside Avenue downtown, the Clark Center Annex, Leander Court, and the Howard House.

**2. The Community Housing Fund (Washington County):** The Community Housing Fund, a 501c3 organization, was created in May 2003, the result of a county-wide strategic planning process focused, in part, on the creation of additional financial resources for housing production. The mission of the Fund is to identify and secure new sources of capital for housing development. The fundraising plan includes contributions from corporate, faith, foundation, and local government communities, as well as individual givers. The Fund is a philanthropic undertaking and to date has no dedicated government funding source. Washington County provided a \$370,000 challenge grant, and, thus far, the Fund has raised over \$400,000, including a three-year grant from Meyer Memorial Trust and support from the Oregon Community Foundation.

As of January 2006, the Fund has awarded \$100,000 in grants and loans to community non-profits for predevelopment expenses connected to new housing projects. Grants of \$25,000 each were made to Tualatin Valley Housing Partners for a multi-family rental development on light-rail in Beaverton and to Community Partners for Affordable Housing to help refinance the operation of a large multifamily community in Tigard. Two loans of \$25,000 each have been made in Hillsboro, one to Luke-Dorf, Inc. to support a special needs housing project for individuals with mental illness and the other to Boys and Girls Aid Society toward a transitional housing project for homeless youth.

**3. Bi-State Regional Housing Partnership Project:** The Bi-State Regional Housing Partnership is a collaborative effort of the Portland-Vancouver region's affordable housing and community development agency directors and managers, the Portland HUD Office, Portland-Vancouver area federal entitlement jurisdictions (Cities of Portland, Beaverton, Hillsboro, Gresham and Vancouver (WA), and Counties of Clackamas, Multnomah, Washington and Clark (WA), and State of Oregon; Public Housing Authorities (Clackamas, Multnomah, Washington and Clark (Vancouver), and Metro. They share the goal to improve conditions for low-income families and neighborhoods and agreed to develop a regional component/placeholder as part of their respective Consolidated or Public Housing Plans. The group succeeded in securing federal funds (Economic Development Initiative Grant) that supported projects such as the: a) Regional lead paint mitigation; b) Bi-State Regional Housing Partnership Database that offers a compilation of hundreds of 2000 Census data tables pertaining to the demographics, economics, and housing conditions in towns, cities, and counties of the Portland-Vancouver metropolitan area; c) Housing affordability awareness campaign and resource development; and d) Regional Section 8 homeownership pilot project.

A continuing collaboration of Bi-State group is *Housing Connections* [[www.housingconnections.org](http://www.housingconnections.org)] a custom searchable database of affordable housing vacancies throughout the 4-county area. This groundbreaking tool has now been licensed and adopted by others, including the State of Wisconsin. The database continues to demonstrate its value in expanding housing choices to fit individual needs, including its very successful use assisting in the relocation of New Columbia tenants while the project was in its demolition and reconstruction phases.

**4. Housing Alliance:** The Housing Alliance was created in 2003 to bring together advocates, local governments, housing authorities, community development corporations,

environmentalists, service providers, business interests and others to support a common statewide legislative and policy agenda dedicated to increasing the resources available to meet the growing housing needs of the state.

The Housing Alliance aims to build relationships and educate state legislators, in the hope of developing more passionate supporters and champions in the House and Senate in a non-partisan fashion.

The Housing Alliance succeeded to get four priority bills through the legislature in 2005, two of which passed:

- ❑ Senate Bill 996, the Oregon Affordable Housing Tax Credit, expands the cap on credit sales to \$11 million and extends the sunset to 2020 on a program that directly reduces rents to low income renters by offering a tax credit to banks.
- ❑ Senate Bill 31 includes the earned income tax credit expansion and puts money in the pockets of low income Oregonians.

### **C. Barriers to Adoption of Strategies and Tools Identified by Local Governments**

Outside of these regional housing success stories, a wide array of obstacles to developing affordable housing still exists. Many local governments did not implement the Regional Affordable Housing Strategy. In the Title 7 compliance process, local governments informed Metro of the wide array of barriers they faced in implementing affordable housing. These include:

- **“We’re already in compliance”** - Many jurisdictions did not recognize a need to do more for affordable housing than they are already doing, and took the position that compliance with State Planning Goal 10 – Housing, the Metropolitan Housing Rule, and the requirements in Metro’s Functional Plan (density requirements, accessory dwelling units, parking minimums) are sufficient efforts to create a positive environment for affordable housing;
- **“One size doesn’t fit all”** - Many local governments felt that the requirements did not take into account unique local situations or city characteristics, such as their housing stock which is already oriented to serve lower income or elderly families;
- **“It costs too much – no funding/not enough staff”** - many jurisdictions stated that they lacked the resources to comply, and regional funding was not in place to assist with affordable housing production;
- **“Little vacant and expensive land”** – a few jurisdictions stated that they have relatively little vacant land, while one jurisdiction stated that developable residential land remaining within its city limits, and available land is among the most expensive residential property in Oregon;
- **“Political barriers”** - Many local governments explained that local charter provisions currently prevent the implementation of certain provisions of the requirements, such as replacement housing in urban renewal areas and inclusionary housing in urban renewal areas.



## Chapter Four

### HCTF Recommended Solutions: How Are We Addressing Housing Choices in 2005?

#### A. Barriers to Housing Supply Identified by HCTF

The HCTF was convened to assess the current trends in housing affordability. The HCTF reviewed and prioritized the barriers to addressing the trends of lack of housing choice and inadequate supply of affordable housing. The top twenty barriers are shown in Table 8.

The consideration of several strategies for overcoming these barriers resulted in the identification of nine courses of actions for overcoming the barriers and the creation of three "Solution Teams".

**Table 8: Barriers to Housing Supply Ranked by Impact on Choice/Affordability**

1	Land availability in the right place at the right price (real and perceived) <b>(Physical)</b>	11	Redevelopment possibility and requirements <b>(Political)</b>
2	Land costs <b>(Financial)</b>	12	Neighborhood resistance / public perception <b>(Political)</b>
3	Fiscal base of local governments (under-funded local governments) <b>(Financial)</b>	13	Lack of similar uses [e.g., developer's and financier's fear] <b>(Market)</b>
4	Difficulty of assembling land <b>(Market)</b>	14	Permit fees <b>(Financial)</b>
5	System development charges (SDCs) <b>(Financial)</b>	15	Zoning requirements <b>(Regulatory)</b>
6	Raising necessary capital (public or private) <b>(Financial)</b>	16	Lack of leadership <b>(Political)</b>
7	Household income [e.g., inadequate purchasing power] <b>(Financial)</b>	17	Perception of the "American dream" of consumer preference <b>(Market)</b>
8	Acknowledgement of housing problem <b>(Political)</b>	18	Property tax <b>(Financial)</b>
9	Lack of subsidies <b>(Financial)</b>	19	Parking requirements <b>(Regulatory)</b>
10	Restrictive development & design standards <b>(Regulatory)</b>	20	Building codes <b>(Regulatory)</b>

## **B. Solution Teams' Process and Courses of Action**

The HCTF members divided into three "Solution Teams" to analyze and discuss the implementation of the following courses of action.

1. **Regional Funding Program(s):** Identify regional funding options for housing and affordable housing that may be less politically difficult to implement. The task includes a review of funding sources identified by previous efforts.
2. **Land Use Policies for Increasing the Supply of Housing and Affordable Housing Across the Region:** Determine how state, regional and local governments land use policies can better support the co-location of jobs and housing, leverage UGB expansion policies to increase the supply of affordable housing, and address equity and fairness in the production and location of affordable housing across the region.
3. **Metro Convening Solutions/Pilot Projects:** Enlist volunteer housing experts, community leaders and local government staff and officials in a pilot project to develop a portfolio of feasible projects that would achieve their Title 7 goals in conjunction with other community development objectives, such as focusing development in 2040 centers, main streets and transit stops.
4. **Regional Technical Assistance:** Although a Solution Team was not created for Technical Assistance, this subject was addressed through the work of the Pilot Project team.
5. The Task Force also developed **Preservation Solutions** and **Employer Assisted Housing Solutions**.

### **Limitations to the Study**

Due to limited time and resources, other courses of action were identified but not addressed by the Solution Teams, including: a) Regional land banking; b) A web-based resource guide; c) A regional housing conference and awards; and d) Past successes.

Following are the Task Force recommended solutions for increasing the supply and preservation of affordable work force and other housing in the region.



# Recommendations

## FUNDING SOLUTIONS

### **Prior (Pre HCTF) Funding Source Recommendations and Limitations to Implementation**

The need for affordable housing in the Metro region continues to grow. Households making below 50% of the area median family income are especially vulnerable. In 2000, the Affordable Housing Technical Advisory Committee (HTAC) estimated that an additional 90,000 units of housing affordable to families with incomes below 50% MFI would be needed by 2017. Any housing fund should give special consideration to these households. Based on the data available in 2000, the total federal and state resources that could reasonably be expected to be available to produce these units was approximately **\$27,077,586 annually**, while the cost of meeting the Five-Year Affordable Housing Production Goal was estimated to be approximately **\$124,210,944 annually**. The additional subsidy needed to begin to meet the housing needs of residents of the region was estimated to be **\$97,133,358 annually**. The need for additional funding to meet regional affordable housing needs has been well documented in the Regional Affordable Housing Strategy<sup>14</sup> produced by HTAC and the Summary Report of the Regional Blue Ribbon Committee on Housing Resource Development (BRC Report)<sup>15</sup>.

The BRC and HTAC considered several possible sources for funding devoted to affordable housing, ultimately recommending a Real Estate Transfer Fee (RETF) as the most appropriate source of long term stable funding. This option is currently not available under state law.

However, the H-TAC and BRC reports concluded that the revenue potential and the connection to affordable housing provide strong enough reasons to pursue this funding source. In addition to the RETF, the HTAC report recommended Employer Assisted Housing and maximizing current sources of funding.

### **New Regional Funding Source Recommendations**

The Housing Choice Task Force (HCTF) agreed with the BRC and HTAC recommendations. Recognizing that a Real Estate Transfer Fee (RETF) is not immediately available, the HCTF decided on a twofold recommendation that is responsive to local needs and that will capitalize on existing resources. In making these recommendations, the HCTF choose those funding options that were stable, reliable, permanent sources of funding and that had a relationship to housing.

1. **Long Term Solution:** There is a region wide need of at least \$50 million annually to meet the affordable housing needs of the very low income - those earning below 50% of the area median family income. Possible revenue sources for a long term solution include:
  - A Real Estate Transfer Fee (RETF)
  - Document Recording Fee (DRF)
  - Urbanization/Windfall Tax
  - General Obligation Bond
  - Condo and Mobile Home Conversion Fees or Taxes
2. **Short Term Solution:** An initial \$10 million revenue bond, made available to local communities for capital projects through grants is needed to jumpstart affordable housing production.

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<sup>14</sup> June 22, 2000

<sup>15</sup> January 10, 2005

Examples of how the long term and short term solutions could work are provided below.

### **1. Long Term Regional Funding Solution – Stable Source of Funding From a Real Estate Transfer Fee (RETF) or a Document Recording Fee (DRF)**

A Real Estate Transfer Fee (RETF) or a Document Recording Fee (DRF) would provide a substantial and permanent source of funding for affordable housing. This funding mechanism is currently used by 37 states, including California and Washington. A RETF and DRF collect fees based on the transfer of real property. New RETFs and document recording fees are currently not allowed under state law. To implement a RETF Metro would need an amendment to, or an exemption from, or a revocation of, Oregon Revised Statute 306.815, the statute that currently prohibits governments from collecting the fee. In the case of a document recording fee the code language that defines the fee amount would need to be changed. The RETF would provide a more substantial source of funding than the DRF, but may be more politically difficult to achieve. The Blue Ribbon Committee estimated that a RETF on residential property could provide a permanent fund of \$50 million annually for affordable housing, even with an exemption of the first \$100,000 value of each property.

- A Real Estate Transfer Fee (RETF) is paid by the seller or the buyer, or split between the two, and is calculated as a percentage of a purchase price, a flat deed registration tax, or a combination of both. General exemptions from the fee can include homes selling below a set affordable housing price, transfers between or to government entities, transfers between spouses or parents and children, transfers of businesses owned 100% by a guarantor, and transactions below \$100,000. For example, with a .5% transfer fee, with an exemption for the first \$100,000, a seller would pay \$500 on the sale of a \$200,000 home. A RETF is a self-funding mechanism; that is, unlike the repayment of a revenue bond described above, a RETF will accumulate funds for specified uses over a period of time.
- A Document Recording Fee (DRF) is a set fee charged for the recording of documents for the transfer of real property. Currently the fee is limited for use by the county clerk to cover expenses. Each county has a different DRF structure. Fees are per page. For example, in Washington County there is a higher fee for the first page of a recorded document, while Multnomah County imposes a \$5 per page fee, plus more for "non-standard" documents. To implement a DRF that would collect funds in addition to what is currently imposed and collected, two statutes would have to be amended. These statutes set the DRFs to be collected, and direct where the funds collected from these recording fees must go.

### ***Solutions and actions***

#### ***Recommendations For Metro***

- a. Metro should play a strong leadership role in partnership with local jurisdictions, the development community, realtors and the Housing Alliance<sup>16</sup> to strategically pursue the RETF and/or a DRF as a source of funding for affordable housing by:
  - Creating broad local jurisdictional support to lift the preemption of the fees.
  - Creating a strong and workable proposal for the allocation and oversight of the funds.

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<sup>16</sup> An explanation of the work of the Housing Alliance is in Chapter 2 – “Examples of New Resources and Partnerships”

- b. Metro should include the RETF and/or DRF in its legislative agenda and actively pursue legislation to allow local governments access to this funding source.
- c. Metro should amend the Regional Framework Plan to establish a funding program that will address any associated issues of a regional affordable housing fund.
- d. Metro should consider prioritizing households with income levels below 50% median family income.

#### *Recommendations For Local Governments*

- a. Local governments should work within their jurisdictions to raise awareness of the need for a stable, long term funding source for housing development.
- b. Local governments should include the RETF and/or DRF in their legislative agendas and actively pursue legislation to allow local governments access to this funding source.
- c. Local governments should join the Statewide Housing Alliance and support its efforts. Some local governments are already members.
- d. Local governments should consider prioritizing households with income levels below 50% median family income.

## **2. Short Term Regional Funding Solution – Revenue Bond Financed by a Regional Funding Mechanism**

A \$10 million revenue bond would provide an initial, short term funding solution that would enable immediate needs to be addressed, including the funding of pilot projects and the preservation/replacement of existing low income housing that is at risk, such as manufactured homes and expiring use projects. The revenue bond is issued against a guaranteed revenue stream. Using its general taxing authority, Metro could provide a dedicated funding source for the repayment of the bond. A revenue stream of approximately \$850,000 a year for 20 years would be needed to provide a dedicated funding source for repayment of the bond. A revenue bond such as this can only fund capital expenses, such as new construction, building rehabilitation, land acquisition and land banking, and must be spent within three years.

### ***Solutions and actions***

#### *Recommendations For Metro*

- a. Metro should establish an initial fund with a \$10 million revenue bond<sup>17</sup>, to be spent on capital projects that will develop or preserve low-income housing and leverage public and private resources.
- b. Funding should prioritize households with income levels below 50% median family income.
- c. Metro should establish a tax study committee comprised of key regional and local stakeholders to:
  - Identify a funding mechanism to provide a dedicated revenue source of approximately \$850,000 a year for 20 years for a \$10 million revenue bond. (Metro has various taxing authority that could be used as the revenue source);
  - Resolve issues of regional equity and distribution.
- d. Metro should amend the Regional Framework Plan to establish a funding program that will address any associated issues of a regional housing fund.
- e. Metro should work in partnership with local governments and the development community to establish an implementation strategy that meets local needs and leverages the most out of this resource.

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<sup>17</sup> The Portland \$10 million Housing Opportunity Bond should be emulated.

- f. Metro should consider prioritizing households with income levels below 50% median family income.

#### *Recommendations For Local Governments*

- a. Local governments should raise public awareness of local housing needs.
- b. Local governments should support the construction excise tax as a means to increase the local supply of housing choices.
- c. Local governments should consider prioritizing households with income levels below 50% median family income.

#### **Potential Uses of the Revenue Bond and RETF:**

The HCTF identified examples of capital projects that could be implemented with a regional affordable housing fund supported by a revenue bond and Real Estate Transfer Fee (RETF) (see Appendix B for details). Additionally, the Housing Alliance will be estimating the impact of a housing trust fund in the future. The estimate could be used to identify an optimal spending strategy that is responsive to local needs, capitalizes on existing resources, and takes into account the region's most pressing needs.

## **LAND USE AND REGULATORY SOLUTIONS**

The following solutions are intended to: a) address the housing needs of low and median income families; b) lower construction cost of housing; and c) target centers for more housing development. The solutions are divided into two categories, those proposed for immediate implementation and those to be addressed through Metro's New Look at the 2040 Growth Concept.

### **A. Solutions Proposed for Immediate Implementation**

#### **1. Housing supply survey**

An accurate assessment of the region's progress toward achieving affordable housing goals is an important piece of the regional affordable housing strategy. Such an assessment has been difficult to conduct so far. Title 7 of Metro's Urban Growth Management Functional Plan requires cities and counties to report progress towards the voluntary affordable housing production goals. However, the requirement is focused on "inputs," or policy decisions, rather than on "outputs" – actual numbers of affordable units that are built or preserved for a specified contract period so they remain affordable AND available to lower income tenants. The reporting requirement has been difficult for cities and counties to comply with and correspondingly frustrating for Metro staff. A sample format of this reporting system is shown in Table 9. The benefits of the survey and a new reporting system are:

- A. It focuses on results and not process;
- B. Output of the survey includes units built and preserved that are important for achieving the goals of the Regional Framework Plan;
- C. Reveals to the development community areas where they can take advantage to produce affordable work force housing;
- D. Reveals potential mismatch of the location of affordable housing and services such as transportation infrastructure.

Including a community's housing score as a criterion in the allocation of regional funds can help spur awareness and acknowledgment that housing needs are a key aspect of maintaining and nurturing great communities in the urban area. Metro allocates funds for transportation, community enhancement grants, restoration grants, and potentially may develop a plan to raise money for concept planning in new urban areas. For example, Metro serves as the MPO for the region, allocating federal transportation dollars to specific projects on a competitive basis using a qualitative approach. However, some items provide a project with extra points, such as a green streets component. An output-based affordable housing score could serve a similar purpose. Outputs could be measured based on 1) the actual number of units built, weighted by units affordable to the lower income families, and 2) the amount of local funds committed, through fee waivers, property tax exemptions, or otherwise, to the development of affordable housing. Metropolitan Transportation Improvement Projects funds are allocated on a competitive basis every two years.

### ***Solutions and actions***

#### ***Recommendations For Metro:***

- a. Metro should develop and implement a biannual local government survey of housing supply increases by specific types of housing (e.g., meets voluntary housing production goals, accessory dwelling units, housing in centers, etc.).
- b. Metro should amend Title 7 annual reporting compliance to replace reports on consideration of strategies to this results-oriented report on housing supply.

- c. Metro should develop a method to incorporate the results of the housing supply survey into a community housing score that can be used as a factor in the allocation of regional funds, and decide whether output should be measured in units affordable to the lower income levels or local funds committed.

*Recommendations For Local Governments:*

- a. Local governments should assist in the implementation of the housing supply survey.
- b. Local governments should supplement the data produced by the survey with information regarding new transit-oriented housing developments or accessory dwellings, but these will not be required.

**Table 9. Sample Format of the New Metro Affordable Housing Supply Reporting Survey**

DRAFT Sample of New Metro Affordable Housing Supply Reporting Data Collection Format										
A	B	C	D	E	F	G	H	I	J	K
AGENCY SOURCE	PROJECT TYPE	PROJECT NAME	CYCLE	Year	TERM	PROJECTED EXPIRATION YEAR	PROJECT ADDRESS	PROJ CITY	PROJ ZIP	COUNTY
		Use of Excel AutoFILTERs will allow easy zeroing in on projects that meet user defined criteria.				Data for each property will all be filled in by funding agencies BEFORE being sent by Metro to local governments.				
		L	M	N	O	P	Q	R	S	T
		#<30	#<40	#<50	ALL Units Below 50%	<60	All Units Below 60%	GEOCODE S	Census Tract	TAZ
								Geocodes will allow local government mapping of the location of these projects.		

**Key:**

A	Funders
B	eg. Public Housing, Tax Credit
C	Name
D	OHCS funding cycle
E	Year project was funded
F	Period of restricted use
G	Year restriction is lifted
H	Address
I	City

J	Zip
K	County
L	# residents below 30% MFI
M	below 40% MFI
N	below 50% MFI
O	Total below 50% MFI
P	below 60% MFI
Q	Total below 60% MFI
R	Map data
S	Census tract
T	Transportation Analysis Zone

## **2. Regional policies**

ORS 197.299(1) requires Metro to review the supply of residential land within the UGB at least every five years in order to ensure that the UGB provides a 20-year supply of buildable land for residential development at each planning cycle. The Metro Data Resource Center calculates the supply by comparing the regional population and housing unit forecast with the zoned land capacity from 27 cities and the urbanized portions of three counties. In the event that a deficit exists, ORS 197.296 and the Metro Code allow Metro to increase the size of the UGB or adopt policies to increase capacity of lands within the current boundary, or both. State Goal 14 and Metro Code chapter 3.01.020 provide rules on the establishment and changes to the urban growth boundaries and the requirements of state law that must be addressed prior to expansion of the UGB. Metro has the authority to place certain conditions on land that is brought inside the UGB, as well as prescribing requirements for the comprehensive planning that occurs after the land is brought inside.

Based on the parameters of existing state laws that limit conditions Metro can place on land to be brought within the UGB, HCTF proposes a solution that would provide guidance to Metro to negotiate voluntary agreements with landowners to provide affordable housing. A precedent for this recommendation was set in negotiations over development in the Bethany area, added to the UGB in 2002. This solution provides more specific guidance than is currently in Metro's code; however, it does not result in a predictable outcome. Furthermore, concerns have been raised about how such an agreement would be enforced over time, since there is a substantial time lag between a decision to expand the UGB and actual development. Therefore, the HCTF also recommends considering the application of inclusionary zoning in UGB expansion areas in order to ensure results. State law currently restricts this zoning. There is legal precedent for applying inclusionary zoning in expansion areas, since Metro has set a precedent of treating these places differently through recent legislation that applies a higher level of fish and wildlife habitat protection to newly added areas than within the existing UGB.

### ***Solutions and actions***

#### ***Recommendations For Metro:***

- a. Metro should include language in its codes to use UGB expansion decisions to negotiate voluntary landowner commitments to provide workforce housing. The Metro Council should define this language.
- b. Metro should work with its regional partners to pursue the possibility of removing the restriction on inclusionary zoning from state law to encourage the development of housing choices inside the Portland metropolitan area and in UGB expansion areas. (For example, if the housing needs analysis identifies that certain income groups are paying more than 30% of their income for housing, inclusionary zoning could be considered to require a certain percent of new units for this group).
- c. Metro should give preference to proposed expansion areas (that have satisfied state expansion priorities) where local governments have a credible, implementable plan that utilizes tools such as site control and landowner agreements to assure the development and production of affordable housing.

#### ***Recommendations For Local Governments:***

- a. Local governments and their stakeholders can trigger UGB expansion if voluntary landowner commitments to provide affordable workforce housing has been negotiated.

- b. Local governments should work with Metro and their constituents to pursue the possibility of removing prohibition on inclusionary zoning from state law.
- c. Local governments should also allow developers to pay a fee in lieu of building affordable housing in expansion areas, if the fee revenues could be used to pay for affordable projects in better locations (e.g. close to transit or centers).
- d. Local governments should create implementable plans for expansion areas that assure the development and production of affordable housing.
- e. Local governments should use the extension of services to expansion areas to increase the development and production of affordable housing.

### **3. Expedited review process**

Navigating the permit process to develop housing can be difficult, time-consuming, and often confusing. Smaller, non-profit developers often build housing that is affordable at lower incomes. Frequently such housing is built on sites with constraints that require additional design or environmental review. The extra time required to go through the process and potential required amendments to a proposal may increase land holding costs, increase the cost of architectural designs, and increase the financing costs, and in addition increase the level of uncertainty, which impacts the ability of developers to provide affordable housing.

#### ***Solutions and actions***

##### *Recommendations For Metro:*

- a. Metro should work with cities and counties to assess existing regulatory review process to determine how qualifying projects can be flagged for an expedited process. Encourage designation of a specific person as the “go-to contact” for these projects. Emphasis should be placed on assisting affordable housing developers in preparing complete applications, since the State 120 day rule mandates prompt review once an application is determined to be complete.
- b. Metro should develop in-house expertise or work with other experts (e.g., Portland Housing Development Center) to expand programs to provide technical assistance to cities that are too small to designate a person to shepherd qualifying projects through the process.

##### *Recommendations For Local Governments:*

- a. Cities and counties should provide expedited review for a) homeownership housing for households at 100% MHI and below, and b) rental housing for households at 60% MHI and below. Apply regional criteria to identify what projects would qualify for an expedited review process. Identify key components of an expedited review process tailored to local concerns.

## **B. Solutions to be Addressed Further as Part of Metro’s New Look**

### **1. Update Metro’s regional parking ratio requirements, and consider implementing parking management in centers**

A set ratio of parking spots per unit is required of all new development. The ratio varies depending on location and use, but typically the minimum is not less than 1:1. Metro sets maximum parking ratios, not minimums, and many cities and counties have instituted Metro’s maximum as their minimum ratio. A substantial amount of land is required to fulfill parking needs, especially for surface parking. However, structured parking adds a



significant expense to any development, which increases the cost of housing. Structured parking, while expensive, allows more land to be used for housing, commercial, and office development. It also allows achievement of the level of density necessary to create thriving urban centers. Free on-street parking encourages the use of cars for more trips.

### ***Solutions and actions***

#### *Recommendations For Metro:*

- a. Metro should update its regional parking ratio requirements to consider lower minimums, maximums, and locations where they apply.
- b. Metro should require cities and counties to adopt and implement parking management requirements in centers as part of Functional Plan compliance.

#### *Recommendations For Local Governments:*

- a. Local governments should update local parking ratio requirements
- b. Local governments should implement parking management requirements in centers

## **2. Plan for complete communities that include housing choices**

Residents of affordable housing are better served if they have good access to jobs, shopping, and transportation. Without nearby amenities such as schools, parks, playgrounds, and appropriate shopping, residents are required to spend additional scarce dollars on transportation. Substantial housing development, some of it affordable, is occurring in centers and transit-friendly locations, however much of the amenities being provided are not aimed at low- and moderate-income residents. For example, in the Pearl District (otherwise called the River District), there are about 3,000 units of housing (out of a little over 6,000) affordable to households at less than 80% MFI, as of 2005. Most of the rental units are not large enough to be suitable for families (only 162 have 2 bedrooms), in an area with an exceptional elementary school. However, there are few amenities in the Pearl that serve children (e.g., no daycare, no playground), and there are no mid-range grocery stores in the area. Housing in transit-friendly locations also becomes more affordable due to the decrease in transportation costs required to travel between home, work, shopping, and recreational opportunities.

### ***Solutions and actions***

#### *Recommendations For Metro:*

- a. Metro should plan for complete communities that include housing for people of varying income levels and household type. Development in centers, along corridors, and in other transit-friendly locations should include amenities for families with children and residents of all incomes. These amenities include mid-range grocery stores (e.g., Fred Meyer, Safeway, WinCo Foods), playgrounds and parks, schools, and daycare centers.

#### *Recommendations For Metro and Local Governments:*

- b. Inventory publicly owned land located in transit-friendly locations that could be used for affordable housing, particularly to identify opportunity areas in centers. Review Coalition for a Livable Future equity atlas to identify the spatial distribution of resources and help identify potential locations for affordable housing.

### **3. Encourage development in centers and corridors and other transit-friendly locations**

Metro's 2040 Growth Concept, adopted in 1995, defines the form of regional growth and development for the Portland metropolitan region. The concept consists of a series of design types that describe the level of density and type of development expected in specific areas. Most growth was designated to occur in centers, however a substantial amount was also expected in corridors. Corridors are meant to be located along high-quality transit lines, to feature a good pedestrian environment, and to allow for higher density development. However, Metro designated over 400 miles of corridors, which have a mix of transit levels of service and land use designations. Metro will be reconsidering the role of corridors, how they support development in centers, and how they can help accommodate more housing and employment to meet regional growth projections. This work will be a part of Metro's New Look at 2040, to occur over the next year. Initial studies of the potential in corridors have found that a substantial amount of housing could be provided in these areas. Corridors could serve as good locations for affordable housing as well, especially since by definition they are meant to provide good access to transit and a pedestrian-friendly environment in locations that are likely to be less expensive to develop in than centers.

Building height is a key component of most zoning ordinances, and is especially important in residential neighborhoods. However, many areas intended for more intense urban development are hampered by zoning codes that either do not allow heights the market would support or only allow achievement of maximum heights through a public approval process. Centers and corridors are particular locations where an examination of allowable building heights could lead to more successful, thriving urban-style development. Building height limitations can have an impact on affordable housing. One example is apartment construction in an area with a height limit of one and a half stories. In this case, a two-story apartment, townhouse, or duplex may be constructed with the first floor partially underground. This reduces the accessibility of the units for many potential residents. A second example is in the Gateway area where the height restrictions prevented the construction of 32 units that would have been affordable to area residents. HOST Development was going to partner with a commercial developer to construct four floors of condominiums above retail. However, the height limitations would have to be exceeded in order for the project to work financially, and neighborhood opposition did not allow for that.

#### ***Solutions and actions***

##### ***Recommendations For Metro:***

- a. Metro should evaluate opportunities to encourage development of affordable housing in corridors, including zoning changes, leveraging public investments to improve streetscapes, and educating property owners on benefits of changing land use. These strategies could play an important role in the revitalization of corridors.

##### ***Recommendations For Metro and Local Governments:***

- a. Conduct further research to determine where building height limitations are a problem, and consider where it is most appropriate to increase building heights (e.g., regional centers, town centers, corridors), and the most effective means to accomplish increasing building heights.
- b. Identify design solutions and case studies to integrate increased building heights in residential areas, especially in the transition areas between single-family and multi-family neighborhoods. For example, the Hollywood Library is designed to "step-down" to the street so building mass is not overwhelming at the pedestrian level.

#### **4. Evaluate opportunities to decrease construction costs by replacing design requirements with Form-based Codes**

Design requirements for housing can aid in neighborhood compatibility, and may influence the quality of materials and the durability of structures. In addition, conventional zoning codes (that are based primarily on use and density) cause problems by separating uses. Hence, prescribing materials to be used can substantially increase the cost of housing, thereby reducing affordability, and separating uses can make mixed-use and walkable neighborhoods essentially illegal.

Form-based codes, which focus on urban form over a building's use or materials, can achieve many of the same goals while allowing developers flexibility in materials and some elements of design. Form-based codes address the physical form of building and development, community or neighborhood character and vision, and prevents actions that encourage inefficient use of land. "Urban Form" includes the relationship of buildings to each other, to streets, and to open spaces. An example of how design requirements increase housing cost is two recent projects completed by HOST Development; a house in the New Columbia neighborhood costs \$10-15,000 more than the same house constructed nearby without the same design standards.

#### ***Solutions and actions***

##### *Recommendations For Metro and Local Governments*

- a. Evaluate opportunities to implement form-based codes in place of design standards to reduce construction costs, especially in centers and corridors.

## **METRO CONVENING SOLUTIONS**

### **Introduction**

HCTF identified an important role for Metro to convene local governments interested in addressing their challenges and barriers, overcoming the obstacles, and taking the next steps toward spurring affordable work force, elderly and persons with disabilities housing development. As a pilot project to test their approach, some HCTF members volunteered to work with communities as a consulting team to assemble a portfolio of possible housing developments that would serve families with a range of incomes. The Pilot Project Solutions Team reviewed the responses of local governments that had difficulty implementing Functional Plan Title 7 (regarding affordable housing), and applied the following criteria to evaluate the ones to meet with in order to determine the pilot project host community.

1. Willingness and readiness of the community.
2. Economics of the community.
3. Availability of sites.
4. Availability of services and transportation.
5. Impact on other communities of doing a successful project.

The team met with Clackamas County and the city of Wilsonville. Discussions with City and County officials covered a great deal of ground, and in the end, the following issues emerged as the most important housing needs in these communities:

- i. Conversion of manufactured home parks puts residents at risk and results in a decrease in the supply of affordable housing and the displacement of many lower-income households. Other types of land holdings that may be the next focus of speculation for market rate housing investors and developers are golf courses, fraternal organizations, churches, foreclosed properties, parking lots, and schools.
- ii. Funding is the greatest obstacle to creating more affordable housing
- iii. While the development of new urban areas may not occur for many years, it is important to determine how to work with communities, such as the Wilsonville and the new City of Damascus, to take steps to ensure affordable housing opportunities in the Damascus and Frog Pond areas.
- iv. Villebois Village development (a planned community of 2,400 dwelling units) represents an opportunity to leverage public infrastructure investment as part of a pre-development plan to increase the supply of work force and elderly housing in the community.
- v. Efforts to extend sewer services to areas targeted for urban renewal may lead to increased pressure from speculation that may affect affordability.
- vi. Supply of moderate-income housing may be sufficient, however, the availability of funds could create opportunities to increase the supply of housing that serves the lower income households.
- vii. Employer assisted housing opportunities should be explored, especially with major employers that own land that is residentially zoned.
- viii. Preservation of low-income housing (apartments, single family homes) to maintain existing low and moderate income units in the jurisdictions.
- ix. Job-housing balance – shortage of housing for medium and low income families in job rich areas will increase household transportation costs, increase congestion on the region's freeway system, and reduce the jurisdictional tax base.
- x. How to successfully promote the development of accessory dwelling units

## Wilsonville Pilot Project Implementation

### Site tour and observations:

A tremendous amount of planning and vision has gone into the design of Wilsonville, including the desire since its inception for high density, mixed-use development. Wilsonville has a flexible zoning and design review process contingent on approval of the Master Plan. Under the guidance of the Wilsonville Planning Department, the HCTF initially identified more than 20 vacant public and privately owned sites. Those that emerged as priorities are the SMART site owned by the City; the future Commuter Rail station site, owned by the City and Washington County, and the Post Office site, owned by the federal government.



**Figure 16.** Wilsonville

### Needs assessment:

Although the Wilsonville Affordable Housing White Paper (draft –June 29, 2005) estimated the number of employees (18,118) working in the City in 2003 and the proportion that live in the City (only 9%), and possible employee housing affordability, the data was inadequate for estimating the City's housing need. The Housing/Land Need Model<sup>18</sup> developed by the Oregon Housing and Community Services Department was used to estimate the City's housing need based on existing residents. This estimate does not take into account the 90% of employees in Wilsonville that commute to the city. Highlights of the need estimate are:

- Overall, there are more rental units than ownership units;
- A Rental Deficit for households in <30% MFI that are paying less than \$429, and for households in 60%-73% MFI paying \$910 - \$1,149;
- A Rental Surplus for households in 30%-60% MFI paying \$430 - \$909, and for households in >74% MFI paying above \$1,150;
- An Ownership Deficit for households in <30% MFI paying less than \$56,700<sup>19</sup>, for households in 30%-60% MFI paying \$57,700 to \$113,300, for households in 60%-73% MFI paying \$113,300 to \$141,700, and for households above 74% MFI paying \$141,700 to \$212,500.
- An Ownership Surplus for households in above 74% MFI paying above \$212,500.

### Opportunities:

Wilsonville's location and livability make it a residence of choice for commuters to Portland and Salem, particularly families that have commuters to both cities. The West Linn/Wilsonville school district is a primary factor of the area's attractiveness. Planning for housing in Wilsonville presents some unique characteristics, such as:

- Housing is allowed in all of their zones.

<sup>18</sup> The model estimates current need based on current population of the City, and does not take into account expected demand by commuting employees.

<sup>19</sup> It is assumed that this reflects the need/demand for mobile home ownership in the City.

- Flexibility is built into their code, allowing them to negotiate requirements on developments.
- Planned Development Ordinances create a negotiation process, rather than a check box permit process.
- Wilsonville's use of planned development zoning gives it several advantages, including good design, provision of amenities and reduced development costs

Challenges:

- Commuters will pay a premium to live there, making housing Wilsonville's own workforce particularly challenging.
- Low-income senior assisted housing will become pressing if the Thunderbird Mobile Home Park is closed. The Thunderbird residents may be too elderly to be interested in organizing their displacement money to buy their property.
- Old Town and Town Center areas are the best locations for new senior residences, as they allow pedestrian access to residential services.
- Other privately owned market-rate rental properties that are currently providing affordable housing will be candidates for sale/conversion as land demand rises.
- Because each community in the City is master planned, Wilsonville planning does not see that it has a role in the process until the Master Plan is presented to them unless the land is publicly owned.
- Planned Development Zoning could also be an obstacle to providing affordable housing because of its potential to exclude certain types of housing and exclusive arrangements with large (vs. small) residential building contractors.

**Lessons learned:**

There are several stories emerging from the pilot project.

1. The city's housing need based on its current population demand was estimated with the State Housing/Land Need Model. A comparison of the estimates to the Affordable Housing production Goals in the Metro Functional Plan Title 7 show that the housing need for households in <50% MFI is about 10 times higher than published in the RAHS.
2. Through the HCTF, the City has inventoried sites where development could be spurred to meet its need. This allows the City to talk with other public landowners about using the land for housing development (for example, the Post Office site).
3. Possession of the inventoried sites also puts the City in a better position to determine where to focus its subsidies (such as property tax exemption) and how to negotiate for the types of housing need in the City;
4. The City has identified areas for retention efforts, such as affordable rent-restricted and market-rate apartments;
5. Before the pilot project, the City was placed in position of playing catch-up after threats to the housing supply, such as mobile home closures. The City had not identified potential sites to develop and how they could meet those needs. Using the inventory sites information, the City can improve the interface between non-profit and for-profit housing developers and itself, and incent the building community to build more housing;
6. Low-income residents (in the \$20 to \$40,000 annual income) that commute to Portland and Salem might choose to live near the commuter rail or town center.
7. Having concluded that housing choices are a local need, Wilsonville and many local governments require technical assistance to act on that need, starting with understanding and implementing affordable housing tools. These include financing tools, targeted subsidies, amendments to zoning or plans, and others. Conversely,

many developers need more information about the housing market, available land, and finances available for the construction of affordable housing.

## ***Solutions and actions***

### *Recommendations for Wilsonville:*

1. Trust Fund: Establish a bridge loan to buy rent-restricted apartments funded with federal and state subsidy. The City may not buy the property directly, but can mobilize a non-profit to do so. Bridge financing or other tools are also critical for non-restricted low rent housing such as privately-owned apartments or mobile home parks. A designated fund can be used for the purchase of rent-restricted apartments or for units with expiring subsidies.
2. Employees that commute: Estimate the percentage of these residents for whom Wilsonville should strive to provide housing.
3. Retention of rental units: Develop strategies to preserve existing units that are currently renting to the very low-income households in <30% MFI income bracket, such as a condo conversion ordinance that requires that the city be notified in advance of condo conversions, as existing tenants are.
4. Retention of ownership units: Develop strategies to preserve existing ownership units that are currently affordable to households in <30%, 30% to 60% and 60 to 73% MFI income brackets;
5. Subsidization of current rental units: A surplus of rental units (1,113 units in the \$430-\$664 and \$665-\$909 ranges) suggests the need to subsidize these developments to make them affordable to very lower income households currently in the \$0 - \$429 rental affordability bracket<sup>20</sup>. A local government can create a mechanism for a property tax exemption or fee waiver, which would in turn allow lower rents.
6. Future ownership units: The demonstrated need for ownership units at almost every income level indicates a need to build more housing units, such as townhouses, detached dwellings, short towers and senior housing.
7. Future annexation: Negotiate the provision of affordable work force housing as a condition for annexation and approval of development plan.

### *Recommendations for Metro:*

- a. Metro should continue the convening of local governments and experts through the Pilot Project Policy (including same in the Metro FY 2007-08 Budget)
- b. Additional recommendations for Metro are in the technical assistance section below.

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<sup>20</sup> Or investigate opportunities to convert some of these units to ownership units that would offer affordable to residents who are in the \$20,000 to \$50,000 income bracket?

## **TECHNICAL ASSISTANCE SOLUTIONS**

### **Introduction**

The HCTF's Pilot Project team members, both within the team and in conversations with several of the jurisdictions, and with others on the HCTF, found that Metro Council and staff can support the affordable housing goals by making tools available to assist and/or incent jurisdictions to move to the "implementation" phase of the Functional Plan Title 7 goals.

The team outlined the following scope of services for which Metro could budget to either contract with a qualified consultant, or provide staff resources, where those exist. Services could be provided free of cost to jurisdictions, or Metro could require in-kind or financial match from the participating community.

### ***Solutions and actions***

#### *Recommendations for Metro:*

- a. Housing Needs Assessment/Basic Market Study: The Pilot Project Solutions Team discussed the Housing/Land Need Model developed and used by Oregon Housing and Community Services. While the current housing needs assessment standard is a useful and helpful improvement over old methods, Metro should suggest adjustments to the model so that the Metro Title 7 Affordable Housing Goals across the *range* of housing affordability are reflected and to insure that both affordable and available housing are included in the analysis. This adjustment would assist jurisdictions in planning for equitable inclusion of housing based on the jobs and incomes reflected in the area, not just the historic patterns of housing choice. Once this adjustment to the model is made, a consultant could work with a jurisdiction, under a Metro contract, to populate the model, review the data and prepare a basic Housing Needs report. As each jurisdiction develops this kind of a report, they will be equipped to have conversations with community stakeholders (elected officials, neighbors, land owners, etc) about why affordable housing should be a priority and about who might be served by a proposed project. Findings could also serve as evaluation criteria for assessing and approving master plans.
- b. Available Land Inventory: Utilizing Metro data, staff should assemble a "portfolio" of developable sites in the 2040 Centers, Corridors and other locations that are suitable for affordable, mixed use/mixed income and "smart" development. The model product would be a table like the one developed for Wilsonville, showing estimated density [range of units] and housing type [detached, rowhouse/townhome, or multi-family, mixed use, etc.] but not suggesting the target population or income level for each site. This would show some key ownerships—public lands, faith based ownerships, key employers, etc.—who may be encouraged or incented to support affordable housing development. With this kind of inventory, jurisdictions would be better able to monitor pending development opportunities and be prepared to intervene to urge or support the accomplishment of Title 7 goals.
- c. Model Affordable Housing Approval and Development Conditions: Metro or contract legal counsel, "borrowing" from jurisdictions with successful regulatory framework, should provide a guidebook of model approval and development conditions that could be adopted by jurisdictions to achieve Metro Functional Plan Title 7 goals. The guidebook would illustrate model approval and development conditions for jurisdictions to require or incent inclusion of affordable housing in the 2040 Centers, Corridors and other locations – as prescribed by the jurisdiction's assessment, across a range of circumstances:



- New development with planning approvals required
- New land taken into the UGB
- New development in the 2040 Centers and Corridors
- Public properties being sold
- Public facilities being built (e.g. Multnomah County library adding housing above library)
- Sale or transfer of existing properties housing converting to higher income use (no net loss)
- Advocacy by City to other public land owners (e.g. ODOT, GAO, school districts) to require inclusion of affordable housing in their disposition strategy, contribute land to a non-profit for affordable housing use, or provide a below-market sale to developer who incorporates affordable units.

The HCTF Pilot Project Solution Team was able to carry out some of the preliminary stages of the development process that was used to develop “preliminary model conditions for local governments to incent development of affordable housing.” The knowledge base and tools that local governments should develop and use to motivate, negotiate and partner with potential developers to produce the housing types their communities need are shown in Figure 17.

Adaptation of the “model” conditions for adoption by a jurisdiction could be an additional technical assistance service provided under this scope, including model requests for proposals, disposition and development agreements, and/or advice on land values.

Metro’s experience encouraging growth in 2040 Centers and Corridors has also shown, however, that the housing element should be the easiest part of the local market to shape. This is due to its flexibility:<sup>21</sup> There are many ways to respond to the need for housing and many different forms that projects can take. While data about current market conditions can tell part of the story, markets are not static and respond to other triggers and incubators. Projects such as those within the Get Centered! program have shown that higher densities and mixed use developments are more successful when other elements of the urban infrastructure are in place, such as grocery stores and a lively retail market. The current character and aesthetic of a center dictates the types of projects that local populations want to see, and the key factors such as:

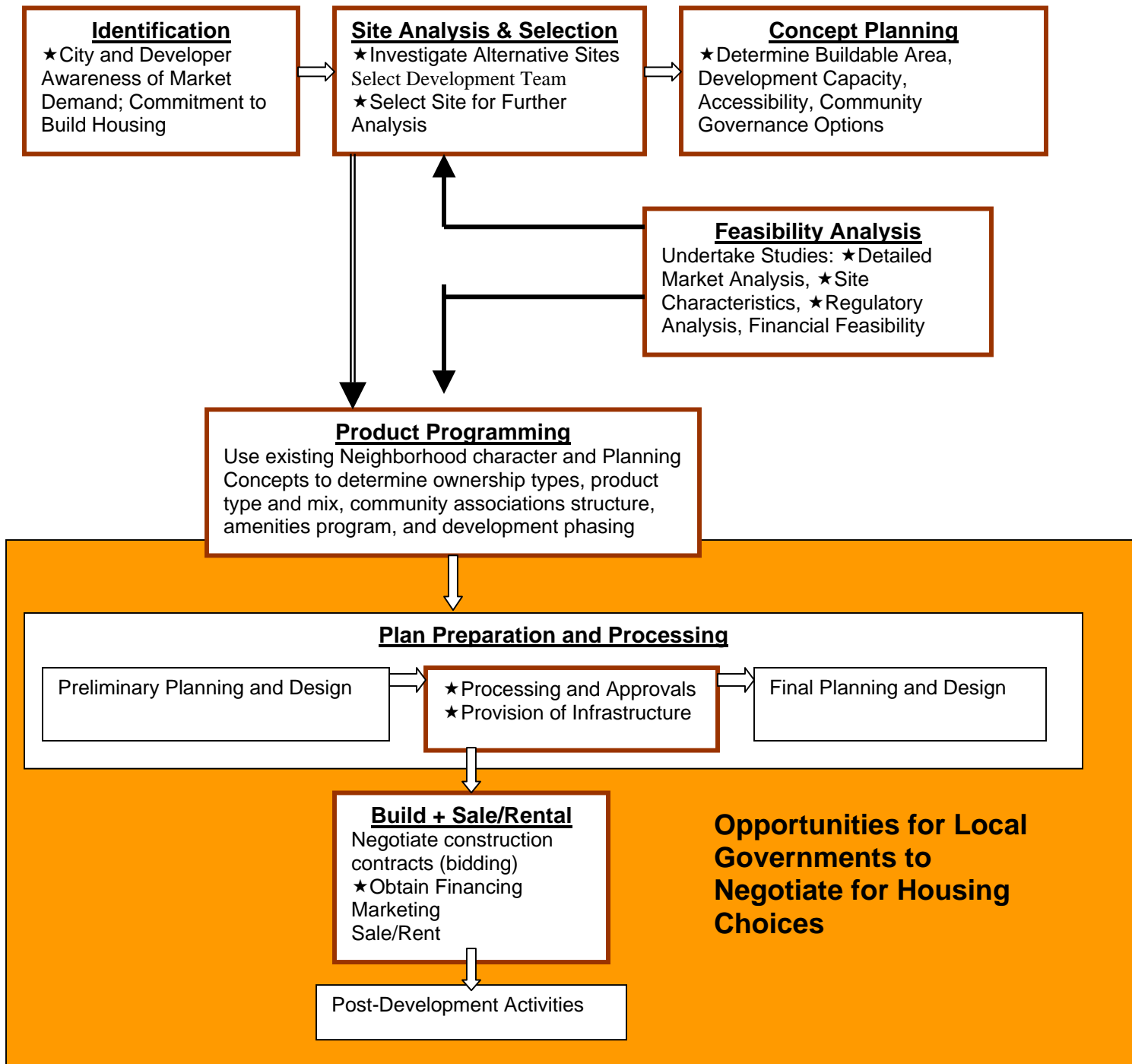
- I. Creating housing choices in centers may require subsidies for the first project or first few projects. The first project establishes a comparable example for the projects that follow. The next developer has to do less work to “pioneer a market” and can use existing rental and price information to communicate with banks and lenders.
- II. Government agencies must be clear about the types of housing desired at the beginning of a project. Negotiating unexpected elements when a project is in its closing stages can ruin projects and partnerships.
- III. Rowhouses are an important first housing type for centers. Although they offer feasible construction costs, they do not bring in enough density to create a center. However, they help establish a neighborhood and they provide an incentive to build future, denser projects. The second and third developments should be different product types. If a jurisdiction wants to secure growth in its center by establishing market rate housing prior to affordable housing, it should secure sites ahead of time for future affordable housing to avoid rising land costs.

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<sup>21</sup> “democratic.”

**Figure 17: Preliminary Model Conditions to Achieve Title 7 Goals**

★ Indicates step where Local Governments can provide housing choice incentives



Source: Metro, Urban Land Institute Residential Development Handbook, 2<sup>nd</sup> edition

- d. Illustrated Affordable Housing Toolbox: Contract with an affordable housing consultant to prepare outline summaries of financial tools that increase affordability for homeownership and rental housing, including a “non-technical” presentation of the importance of these tools in increasing affordability and leveraging other affordable housing resources. This can be organized under a rubric like:

Four Ways to Achieve Affordable Housing:

- Reduce Development Cost
- Reduce Debt Costs
- Provide Equity
- Reduce Operating Costs

Within each of these categories the report can list standard tools used by the industry, and highlight those tools that are available to local governments. For example, under Reduce Development Costs, the report would include “reduced parking ratio” or “density bonuses” as tools that a jurisdiction controls, or under Provide Equity, the report would include both the “State Housing Trust Fund” that a jurisdiction can not control as well as “SDC waiver” that they could.

This product should help to quantify the “value” of each type of subsidy. It should also help jurisdictions understand how much assistance is needed from the local government (as opposed to other sources).

- e. Communication and Awareness: Develop a communication plan utilizing visuals. Utilizing existing projects in the region, Metro could provide funding to give project tours, or produce media materials (video, interactive CD, printed case studies) to help local governments and other entities involved in housing development to visualize what affordable housing looks like and how it operates in the community, and how it can be built in the 2040 Centers, Corridors and other locations in the region.

## **PRESERVATION SOLUTIONS**

There are many strategies to ensure housing choices locally that do not involve public subsidies. Some may require continuation of existing federal and state subsidies; others may not. In areas that already have a diverse housing supply, local government strategies can aim instead at the preservation of units that allow people to live independently and without subsidy.

### **1. Federally Subsidized Affordable Housing With Expiring Contracts**

One purpose of the planned housing supply reporting survey is to identify and insure that local governments have timely information about the expiration dates of existing federally subsidized apartments that are located in their community. Successful efforts to preserve that housing, along with the substantial federal funding that is required to maintain affordable rents, will receive credit towards accomplishment of each community's affordable housing goals.

### **2. Condo Conversion Ordinances**

The conversion of existing apartment units to condominiums illustrates the different housing needs of jurisdictions. Affordably priced condominium conversions, such as the Tropea Condos in the Alberta Arts district, Peninsula Park Commons in Northeast Portland, or Four Seasons in Goose Hollow, can help create homeownership in neighborhoods where there is a rental surplus for low-to-middle income residents but a lack of ownership opportunities. This type of market is found in Portland, Wilsonville, and elsewhere in the region. New condominium developments, such as Causey Village near Clackamas Town Center and Division Street Manor in Gresham, are credited with bringing stability to developing neighborhoods. Condominiums have the potential to provide an increase in the supply of housing choices; however, the average condominium price is also rising.<sup>22</sup> The conversion of several apartment buildings attracted media attention in the past year, including the University Park Apartments in Southwest Portland, which sold at an average of \$280,000, Uptown Heights in Portland, and the Terraces at Lake Oswego. These conversions result in a loss of affordable rentals. Prior residents must relocate, often away from work and services, and add to the competition for remaining units at their income level.

#### **Tenants are currently protected under the following laws:**

ORS 100.305 (1). Tenants are entitled to 120-day notice of conversion by the "declarant" (person who proposes the conversion)." The notice must set forth the tenants' rights and other details for the proposed conversion.

ORS 100.315. The declarant cannot begin improvements to the unit during the 120-day notice period without the tenant's approval.

ORS 100.210 (1). If the units are to be offered to residency and are not be substantially altered, the declarant must offer the unit for sale to the tenant. The offer is good for sixty days.

ORS 100.305. These provisions are not applicable to, and do not protect, conversion of units rented as transient lodgings (hotel, motel, etc.)

<sup>22</sup>Average condominium costs in Portland rose from \$191,000 to \$216,000 in the past year. The Oregonian. "Cheap Chic Condos," 10/23/05

### 3. Mobile Home Ordinances

Mobile Home Parks are one of the last remaining affordable ownership opportunities for seniors and low-income earners. The Oregon Housing and Community Services (OHCS) office monitors manufactured home parks and offers several additional programs to supplement their affordability, including utility assistance, loan and grant programs for low-income tenants, and subsidized housing. Although there is a law requiring OHCS to be given 365 days notice prior to the closure of a Mobile Home Park, many owners do not comply. Since 1997, 47 parks have closed statewide—a total of 1,312 spaces. Within the UGB, OHCS currently estimates that there are 231 parks and 15,867 spaces as shown in Table 10.

**Table 10: Estimated Number of Mobile Home Parks and Spaces per Jurisdiction**

\*These estimates are based on postal addresses listed with OHCS; therefore, many parks in unincorporated areas are listed within jurisdictions.

<b>Jurisdiction</b>	<b>Parks</b>	<b>Spaces</b>	<b>Seniors</b>
Milwaukee	27	1,081	538
Uninc. Clackamas	16	1,357	214
Oregon City	8	1,007	121
Gladstone	3	326	142
Johnson City	1	283	0
Wilsonville	4	413	270
West Linn	1	55	55
<b>Clackamas</b>	<b>60</b>	<b>4,522</b>	<b>N/A</b>
Portland*	76	3,373	N/A
Gresham	14	1,032	90
Fairview	10	476	N/A
Troutdale	10	775	N/A
Wood Village	2	24	N/A
<b>Multnomah</b>	<b>112</b>	<b>5,680</b>	<b>N/A</b>
Tigard	9	888	592**
Cornelius	8	976	100**
Tualatin	5	250	N/A
Beaverton	4	332	N/A
Hillsboro	11	541	N/A
Sherwood	5	252	N/A
Forest Grove	4	622	179**
Aloha	2	278	N/A
Uninc. Washington	11	1,526	N/A
<b>Washington</b>	<b>59</b>	<b>5,665</b>	<b>N/A</b>
<b>Grand Total</b>	<b>231</b>	<b>15,867</b>	

Source: Oregon Housing and Community Services.

\*98 Portland Spaces are listed in Clackamas County.

\*\*Minimum number of spaces reserved for seniors; many units are unspecified.

The threatened closure of the Thunderbird Mobile home Park in Wilsonville mobilized tenants and local officials to address an increasingly important housing resource for underserved populations. Thunderbird contains 270 units for residents age 55 and older, in addition to greenspaces and a community center. On August 4<sup>th</sup>, 2005, the Oregon Senate and Oregon House unanimously passed House Bill 2389 to provide relief to tenants in manufactured home parks. The bill does the following:

- a. Gives mobile home park residents a state income tax credit to pay their moving costs, up to \$10,000, when the closure of a park forces them to relocate. It is a tax credit, rather than a deduction, and it is good even if the taxpayer owes nothing. In that case, the taxpayer would receive a tax refund. This replaces a prior credit of \$3,500 which ended in 1997.
- b. Pre-empts cities and counties from restricting the age of mobile homes that are allowed to move into parks, when the resident has been forced to move due to the closure of another park. This change would not prevent park owners, however, from keeping older mobile homes out of their parks, as they commonly do.
- c. Eliminates the capital gains tax for mobile home park owners when they sell to park residents or a non-profit.
- d. Directs Oregon Housing and Community Services to create a database for displaced mobile home park residents. The database would help residents find vacancies that exist in other parks.

According to Oregon statute 90.630 Paragraph 5, park owners must provide written notice to the tenants 365 days in advance of a sale, or 180 days in advance if they will be giving financial assistance towards their relocation. The new laws sunset at the end of 2007.

The Wilsonville City council adopted a further ordinance to extend the protections of state law and provide for additional mitigation of the impacts of mobile home park closure. Owners intending to close—not sell—the land beneath a mobile home park must prepare a closure impact report and apply for a permit. They must also prepare a Relocation Plan and pay all reasonable relocation costs for tenants relocating to a comparable mobile home park space within the 100 mile area. Those mobile homes that cannot be relocated to a comparable space must be identified and an offer made to purchase the mobile home at its in-place market value.<sup>23</sup>

As of January 2006, the ordinance is being appealed by park owners to the State Land Use Board of Appeals. Similar ordinances are proposed for West Linn, which has one mobile home park that is also slated for closure.

#### **4. Dealing with Demolitions**

In areas where land is scarce and land values are high, the existing housing stock is subject to teardowns and replacement with higher-value homes. Due to speculation, some of the newer, larger houses remain vacant investment properties.<sup>24</sup>

The City Of Lake Oswego Affordable Housing Task Force Report recommended a “No Net Loss” strategy, including the consideration of a teardown fee, conditioning of conversion based on the availability of adequate replacement units for tenants, and funding a low-cost loan program to assist owners of low and moderately priced homes in rehabilitation. Demolition delays or moratoriums have been discussed but not implemented. The city of Canby, outside

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<sup>23</sup> Wilsonville Ordinance 600, passed 10/17/05.

<sup>24</sup> “Tims, Dana. “Holding Their Ground,” The Oregonian, 6/6/05

the Metro boundary, has long had a condition of conversion system in which owners must prove that other rental units in the community are available for relocation of residents prior to a conversion.

*Recommendations:*

The basic concept works the same for condominium conversions, mobile home park closures, and demolition delays. Sufficient notice and time built into the real estate transfer can give tenants, local governments, nonprofits the opportunity to purchase the property.

*Recommendations for Metro and Local Governments:*

a. Legislatively Require Condominium Conversion Notification

Although existing laws require a 90-day notice to residents for when their apartments are converted to condominiums, no notification is given to the county or jurisdiction. Since the county or jurisdiction only hears about the closing via word-of mouth they have little window of opportunity for preservation or remedial action. Therefore, the municipality should request notification 90 days prior to notifying tenant. This added time would give municipalities a chance to look at nonprofit purchase alternatives or otherwise find funding. Municipalities can provide loans and technical assistance to help homeowners buy and manage their manufactured housing parks as cooperatives.<sup>25</sup> Typical conversions require code revamping, such as the construction of firewalls in an older unit. Flexibility could be built into financing conversions by establishing a Local Improvement District (LID) in a new condominium complex that can spread street/structure improvements out over a period of time.<sup>26</sup>

b. Model Condominium Conversion Ordinances

Metro or contract legal counsel should develop model condominium conversion ordinances that could be adopted by local governments to address the grave difficulties experienced by tenants who are evicted due to conversion.

c. Condominium Conversion Fee

Metro and local governments should form a "Condominium Conversion Fee study committee to identify the need for and collection and use of condominium conversion fee.

d. Legislatively Allow Manufactured Home Park Ownership as a Condominium

One way to ensure the preservation of housing stock is to have Manufactured Home Park residents form their own LLC and buy the park for themselves. While the residents can form a co-op, it would be more financially advantageous to them to purchase the land as a condominium, which would provide property tax breaks. The LLC Co-op owns a share in a corporation, not an undivided share of the land. Oregon does not currently

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<sup>25</sup> The New Hampshire Community Loan Fund's Manufactured Housing Park Program is one example.

<sup>26</sup> Further research may need to be done on this topic, because LIDs are never used. too onerous? No rational funding or timeframe too short? Re-visit how managed/governed.

allow Manufactured home parks ownership as a condo.<sup>27</sup> There is some precedent for shared ownership of land: Oregon's campgrounds offer timeshares or fractional ownership.

As stated in the condo conversion section, typical conversions require code revamping, such as the construction of firewalls in an older unit. Flexibility could be built into financing conversions by establishing a Local Improvement District (LID) in a park complex. For example, if a park wanted to buy itself out, it may be difficult for them to come up with the funding to do the street/structure improvements to convert. But an LID can spread improvements out over a period of time.

*Recommendations for Local Governments:*

a. Federally Subsidized Affordable Housing With Expiring Contracts

Local governments should use the housing supply reporting survey to identify the expiration dates of existing federally subsidized apartments located in their community, and work with non-profits developers, county housing authorities and HUD to raise funds to buy and preserve the properties.

b. Mobile Homes ordinances

Local governments should develop and adopt ordinances to mitigate the impact of mobile home park closure to tenant and the jurisdiction.

c. Demolition/teardown

Local governments should develop and adopt ordinances to mitigate the impact of teardown, including consideration of "No Net Loss" strategy, a teardown fee, conditioning of conversion based on the availability of adequate replacement units for tenants, funding a low-cost loan program to assist owners of low and moderately priced homes in rehabilitation.

*Recommendations for the Non-profit Developers*

a. Federally Subsidized Affordable Housing With Expiring Contracts

Non-profit developers work with the county housing authorities and HUD to raise funds to buy and preserve expiring federally subsidized apartments.

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<sup>27</sup> Other states do allow Mobile Home Parks to be converted into condominium ownership, such as California.



## **EMPLOYER ASSISTED HOUSING (Alternate Solution)**

The following information and recommendations are based on the presentations and comments made by participants at the special brown-bag forum held at Metro in November 2005.

Employer-Assisted Housing (EAH) refers to a range of initiatives that help businesses, government agencies, nonprofit organizations or other employers help their employees become homeowners or obtain rental housing. As employers seek to compete in a dynamic market, many find that housing is an issue for attracting and keeping employees because of the growing gap between wages and housing prices in attractive areas.

According to Fannie Mae, few employee benefits have more retention power. 53% of companies that offer EAH believe that it helps retain existing employees, and 72% conclude that the program benefits outweigh the costs or are cost neutral. Each turnover of an employee can result in employer costs between \$10,000 and \$20,000 in separation, replacement, and training costs. Helping employees to purchase homes and create community stability creates company loyalty and reduces the costs of turnover. Fannie Mae offers EAH benefits to their own employees. Over a 10-year period, they have seen a 2% reduction in turnover. Other employer benefits are better employee morale, improved recruitment, reduced turnover, community revitalization, and expanded partnerships with lenders and community organizations.

As a beginning EAH benefit, an employer can partner with a bank or non-profit to offer employees a course in financial literacy and homebuyer education. Courses could be held at the company during work hours. The most common type of EAH benefit is an interest-free loan for purchasing a home. Other benefits include matched savings, forgivable loans, and actual development of employee housing. The most important aspect of EAH is that it is a flexible concept and must be customized to fit the company's needs. For instance, EAH may only be offered to a portion of the staff, or to a certain number of employees a year, or may be targeted to a geographic area.

In Oregon, the Fannie Mae Oregon Community Business Center has developed EAH programs with a variety of public, private, and non-profit companies, including Legacy Health Systems, Wacker Siltronic, the Housing Authority of Portland, Multnomah County, and the Cities of Portland, Ashland and Corvallis. They find that the greatest representation in EAH programs is by municipalities, universities, and health care, with growing representation by high tech, communications, utilities, finance, and real estate industries.

### **How to Initiate EAH Programs**

EAH is a housing approach that is independent of federal aid. Public agencies can talk to local area employers about their bottom line and staffing needs, and encourage companies to form natural partnerships with non-profits who offer finance courses and with financial institutions who administer loans. They may have difficulty persuading employers to offer EAH if they do not already offer it to their own employees as a model.

Initiating a homeownership benefit is similar to initiating carpooling or transit programs.

- The conversation with employers begins by discussing *business, not housing*.
- EAH should be offered as a solution to employee base-related issues, such as productivity, absenteeism, and turnover rates.

Although companies benefit in a number of ways when their workforce has better housing, CEOs generally will not consider offering a housing benefit until someone brings the idea to them. The program requires a champion with decision-making authority within the company. The hurdles to implementation are the need for an understanding of the connection between workforce housing and job performance, reluctance of HR offices to enact new programs, and the program costs.

Employers are likely to be more receptive if they:

- Already offer a Corporate Relocation program
- Are on “Best Companies to Work For” lists
- Are located in a deteriorating neighborhood
- Have a lower-wage/high-turnover workforce
- Are in an economic center with low unemployment
- Want employees to live near their work
- Are looking for a morale booster
- Are active in the community

Even when downsizing, companies can offer EAH as a substitute when raises are impossible.

#### **Other Steps Local Public Agencies Can Take**

- Add EAH to the Housing Connections website
- Present on EAH to Business Alliances/Chambers of Commerce
- Offer Centralized Education on EAH
- Create a loan pool to reduce EAH setup costs for potential employers
- Advertise EAH at Human Resources Conferences

#### **Public support for EAH**

State Representative Jerry Krummel, R-Wilsonville, introduced House Bill 3378 in support of EAH in April 2005. No action has occurred. U.S. Senators Hillary Clinton, D-New York, Gordon Smith, R-Oregon and Mel Martinez, R-Florida introduced a bill to Congress offering tax credits for companies offering EAH and grants to nonprofit housing organizations or local governments that provide technical assistance, program administration, and outreach support to employers undertaking EAH initiatives.

## **Chapter Five**

### **Recommended Changes in the Metro Plan and Code**

This chapter provides summary tables of the Housing Choice Task Force (HCTF) recommendations, recommended changes to the Metro plans and code, and recommended budget options for implementing the recommendations of the HCTF.

#### **A. Summary of Recommended Solutions**

Following are key recommendations for Metro and summary of the two categories of solutions in the previous chapter.

1. Metro should integrate housing supply concerns, and specifically affordable housing, into all policy making and funding allocations, in order to achieve regional housing choice equity through promotion of affordable housing as a regional function on par with transportation and green spaces. A permanent Housing Choice Advisory Committee should be established to assist in this effort.
2. Metro should direct effort towards development of resources, and especially a new, permanent regional resource for affordable housing, and join and lead advocacy for increased funding at the Federal, State, regional levels.
3. Metro should promote strategies identified by the HCTF to remove regulatory barriers and reduce the cost of developing affordable housing and affordable work force housing specifically, especially in the 2040 Centers and Corridors.
4. Metro should prioritize its budget for housing to provide technical assistance to local governments such as land/site inventory, model codes, etc.

The following two tables (Table 11A and Table 11B) provide a summary of the recommended solutions described in Chapter 4. The recommended solutions are divided into two tables. Table 1 contains solutions for reducing the cost of housing and increasing housing supply in the 2040 Centers and Corridors. Table 2 contains solutions for dealing with housing affordability. The summary tables provide a brief explanation of each solution, what can be achieved through implementation of the solution, and the roles and responsibilities of Metro and local governments in achieving the solution.

Following the two tables is Section B (Metro Plans and Recommended Changes) of this chapter containing an explanation of the planning instruments used by Metro to implement regional housing policies. The planning instruments are the Regional Framework Plan and the Urban Growth Management Functional Plan. The changes proposed in these two planning instruments by HCTF are included in Section B.

## Summary of Recommended Solutions

**Table 11A: Solutions for Reducing Cost of Housing and Increasing Supply in the 2040 Centers and Corridors**

Solutions		Explanation	Roles and Responsibilities
<b>Regional Funding Solutions</b>			
<b>A</b>	<b>A one-time \$10 Million Revenue Bond Financed by a Regional Funding Mechanism</b>	<p>In the short term, a \$10 million revenue bond could provide an initial funding solution that would enable immediate affordable housing needs to be addressed. Using its general taxing authority, Metro could provide a dedicated funding source for the repayment of the bond. For example, a region wide construction excise tax (CET) of .1% on building permits over \$100,000 could provide a revenue stream of approximately \$850,000 a year for 20 years would be needed to provide a dedicated funding source for repayment of the bond. A revenue bond such as this can only fund capital expenses, such as new construction, building rehabilitation, land acquisition and land banking, and must be spent within three years.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Leveraging other resources to build work force housing in 2040 Centers and Corridors</li> <li>• Supporting the rehabilitation of existing multi-family complexes, primarily in 2040 Centers and Corridors</li> <li>• Negotiating incentive conditions to build and/or preserve affordable work force housing in 2040 Centers and Corridors</li> <li>• Minimizing the disparity in property tax base capacity of jurisdictions</li> <li>• Reduce the stress on public service such as the transportation system impacted by jobs-housing imbalance</li> <li>• Reduce the stress on schools (increasing class size and free lunch) due to out migration of low income households to the suburbs, including Vancouver</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should help raise public awareness of their housing needs.</li> <li>• <b>Local governments</b> should support the creation of a \$10 million revenue bond financed using Metro's general taxing authority to increase the supply of housing choices.</li> <li>• <b>Local governments</b> should consider prioritizing households with income levels below 50% median family income.</li> <li>• <b>Metro</b> should establish the initial fund with a \$10 million revenue bond. [The Portland \$10 million Housing Opportunity Bond should be emulated]</li> <li>• <b>Metro</b> should form a tax study committee to identify the need for and collection, allocation, and administration of a tax to finance the \$10 million revenue bond for housing.</li> <li>• <b>Metro</b> should amend the Regional Framework Plan to establish a funding program that will address any associated issues of a regional housing fund.</li> <li>• <b>Metro</b> should consider prioritizing households with income levels below 50% median family income.</li> </ul>

Solutions		Explanation	Roles and Responsibilities
		<ul style="list-style-type: none"> <li>Avoid shifting the burden of low income housing from one jurisdiction to another</li> </ul>	
<b>B</b>	<b>A \$50m/year Fee-based Revenue</b>	<p>In the long term, a Real Estate Transfer Fee (RETF) or a Document Recording Fee (DRF) could provide a substantial and permanent source of funding for affordable housing. A RETF on residential property could provide a permanent fund of \$50 million annually for affordable housing. The RETF and DRF would require legislative action to implement.</p> <p><u><b>What will be achieved:</b></u></p> <ul style="list-style-type: none"> <li>Same as A</li> </ul>	<ul style="list-style-type: none"> <li><b>Local governments</b> should join the Housing Alliance, if they have not already done so.</li> <li><b>Metro</b> should create support for a RETF or DRF.</li> <li><b>Metro</b> should create a plan for administering an RETF or DRF.</li> <li><b>Housing Alliance</b> should seek the cooperation of governments in the region.</li> </ul>
<b>C</b>	<b>Other funding sources</b>	<ul style="list-style-type: none"> <li>Urbanization windfall tax</li> <li>General obligation bond</li> <li>Condominium Conversion fee</li> </ul> <p><u><b>What will be achieved:</b></u></p> <ul style="list-style-type: none"> <li>Same as A</li> </ul>	
<b>Land Use &amp; Regulatory Solutions for Immediate Implementation</b>			
<b>A</b>	<b>Expedited Review &amp; Technical Assistance Expert</b>	<p>The extra time required to go through the process and potential required amendments to a proposal may increase land holding costs, increase the cost of architectural designs, and increase the financing costs, and in addition increase the level of uncertainty, which impacts the ability of developers to provide affordable housing. Assessing existing regulatory review process will help determine how qualifying projects can be flagged for an expedited process.</p> <p><u><b>What will be achieved:</b></u></p> <ul style="list-style-type: none"> <li>Reduced cost of building housing and passing the savings to potential owners and tenants</li> </ul>	<ul style="list-style-type: none"> <li><b>Cities and counties</b> should provide expedited review for a) homeownership housing for households at 100% MHI and below, and b) rental housing for households at 60% MHI and below.</li> <li><b>Metro</b> should designate a specific person who should be designated as the “go-to contact” for these projects.</li> <li><b>Metro</b> should work with cities and counties to assess existing regulatory review process to determine how qualifying projects can be flagged for an expedited process.</li> <li><b>Metro</b> should place emphasis on assisting affordable housing developers in preparing complete applications, since the State 120 day rule mandates prompt review once an application is determined to be complete.</li> <li><b>Metro</b> should develop in-house expertise or work with</li> </ul>

Solutions		Explanation	Roles and Responsibilities
			other experts (e.g., Portland Housing Development Center) to expand programs to provide technical assistance to cities that are too small to designate a person to shepherd qualifying projects through the process.
<b>Land Use and Regulatory Solutions to be Addressed as part of Metro's New Look</b>			
<b>A</b>	<b>Parking Requirements and Management</b>	<p>Parking requirements and management solutions include updating regional parking ratio requirements to consider lower minimums, maximums, and locations where they apply; implementing parking management requirements in centers to raise the money needed for community improvements such as structured parking, urban plazas, and improvements to create more pedestrian friendly streets.; implementing parking management requirements in centers as part of Functional Plan compliance.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>Reduced cost of building housing and passing the savings to potential owners and tenants</li> </ul>	<ul style="list-style-type: none"> <li><b>Local governments</b> should update local parking ratio requirements</li> <li><b>Local governments</b> should implement parking management requirements in centers</li> <li><b>Metro</b> should update its regional parking ratio requirements to consider lower minimums, maximums, and locations where they apply.</li> <li><b>Metro</b> should also implement parking management requirements in centers to raise the money needed for community improvements such as structured parking, urban plazas, and improvements to create more pedestrian friendly streets.</li> <li><b>Metro</b> should consider regional requirements to implement parking management in centers as part of Functional Plan compliance.</li> </ul>
<b>B</b>	<b>Complete Communities</b>	<p>Planning for complete communities includes housing choices for people of varying income levels and household type; development in centers, along corridors, and in other transit-friendly locations should include amenities for families with children and residents of all incomes, including mid-range grocery stores (e.g., Fred Meyer, Safeway, WinCo Foods), playgrounds and parks, schools, and daycare centers.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>Reduce the stress on public service such as the transportation system impacted by jobs-housing imbalance</li> <li>Reduce the stress on schools (increasing class size and free lunch) due to out migration of low income households to the suburbs, including Vancouver</li> </ul>	<ul style="list-style-type: none"> <li><b>Local governments and Metro</b> should create an inventory of publicly owned land located in transit-friendly locations that could be used for affordable housing, particularly to identify opportunity areas in centers.</li> <li><b>Metro</b> should review Coalition for a Livable Future equity atlas to identify the spatial distribution of resources and help identify potential locations for affordable housing.</li> <li><b>Metro</b> should plan for complete communities that include housing for people of varying income levels and household type.</li> </ul>
<b>C</b>	<b>Encouraging Development in</b>	Corridors and centers can serve as good locations for affordable housing. Opportunities to encourage development of affordable	<ul style="list-style-type: none"> <li><b>Local governments and Metro</b> should conduct further research to determine where building height</li> </ul>

Solutions		Explanation	Roles and Responsibilities
	<b>Centers and Corridors</b>	<p>housing in corridors include zoning changes, leveraging public investments to improve streetscapes, and educating property owners on benefits of changing land use, and conducting further research to determine where building height limitations are a problem. Design solutions and case studies can be identified to integrate increased building heights in residential areas, increasing the possibility of additional units.</p> <p><b><u>What will be achieved:</u></b> Same as A and B</p>	<p>limitations are a problem, and consider where it is most appropriate to increase building heights (e.g., regional centers, town centers, corridors), and the most effective means to accomplish increasing building heights.</p> <ul style="list-style-type: none"> <li>• <b>Local governments and Metro</b> should identify design solutions and case studies to integrate increased building heights in residential areas, especially in the transition areas between single-family and multi-family neighborhoods.</li> <li>• <b>Metro</b> should re-evaluate zoning in corridors and assess potential of encouraging more housing.</li> </ul>
<b>D</b>	<b>Decrease construction costs by replacing design requirements with Form-based Codes</b>	<p>Form-based codes, which focus on urban form over a building's use or materials (as is the case with conventional zoning codes), can achieve many of the same goals as conventional zoning, while allowing developers flexibility in materials and some elements of design. Form-based codes address the physical form of building and development, community or neighborhood character and vision, and prevents actions that encourage inefficient use of land. "Urban Form" includes the relationship of buildings to each other, to streets, and to open spaces.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Reduced cost of building housing and passing the savings to potential owners and tenants</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should evaluate opportunities to implement form-based codes in place of design standards to reduce cost of building housing, especially in centers and corridors.</li> <li>• <b>Metro</b> should evaluate opportunities to implement form-based codes in place of design standards to reduce cost of building housing, especially in centers and corridors.</li> </ul>
<b>Technical Assistance Solutions</b>			
<b>A</b>	<b>Available Land Inventory</b>	<p>An Available Land Inventory would provide local governments and the affordable housing development community with a "portfolio" of developable sites in the 2040 Centers, Corridors and other locations that are suitable for affordable, mixed use/mixed income and "smart" development. The portfolio should show some key ownerships—public lands, faith based ownerships, key employers, etc.—who may be encouraged or incented to support affordable housing development.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Help local governments that want help to identify opportunities that will help them create partnerships to</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Metro</b> staff should utilize Metro data to assemble an Available Land Inventory.</li> <li>• <b>Local governments</b> should use this inventory to monitor pending development opportunities and be prepared to intervene to urge or support the accomplishment of Title 7 goals.</li> </ul>

Solutions		Explanation	Roles and Responsibilities
		increase affordable work force housing <u>built</u> and/or <u>preserved</u> in their communities	
<b>B</b>	<b>Model Affordable Housing Approval and Development Conditions</b>	<p>A guidebook of model approval and development conditions could be adopted by jurisdictions to achieve Metro Functional Plan Title 7 goals. The guidebook would illustrate model approval and development conditions for jurisdictions. A staff expert would use the guidebook to assist local governments to incent or require inclusion of affordable housing in the 2040 Centers, Corridors and other locations – as prescribed by the jurisdiction’s assessment, across a range of circumstances:</p> <ul style="list-style-type: none"> <li>• New development with planning approvals required</li> <li>• New land taken into the UGB</li> <li>• New development in the 2040 Centers and Corridors</li> <li>• Public properties being sold</li> <li>• Public facilities being built (e.g. Multnomah County library adding housing above library)</li> <li>• Sale or transfer of existing properties housing converting to higher income use (no net loss)</li> <li>• Advocacy by City to other public land owners (e.g. ODOT, GAO, school districts) to require inclusion of affordable housing in their disposition strategy, contribute land to a non-profit for affordable housing use, or provide a below-market sale to developer who incorporates affordable units.</li> </ul> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Help local governments that want help to identify opportunities that will help them create partnerships to increase affordable work force housing <u>built</u> and/or <u>preserved</u> in their communities</li> <li>• Minimize the disparity in property tax base capacity of jurisdictions</li> <li>• Avoid shifting the burden of low income housing from one jurisdiction to another</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should use the annexation process to negotiate the provision of affordable work force housing</li> <li>• <b>Local governments</b> should interpret the model approval and development conditions and incorporate them into their frameworks.</li> <li>• <b>Metro or contract legal counsel</b>, “borrowing” from jurisdictions with successful regulatory framework, should provide a guidebook of model approval and development conditions that could be adopted by jurisdictions to achieve Metro Functional Plan Title 7 goals.</li> <li>• <b>Metro development negotiation expert</b>, would use the guidebook to assist local governments to incent the inclusion or affordable work force or special needs housing in 2040 Centers, Corridors and other locations.</li> </ul>
<b>C</b>	<b>Illustrated Affordable Housing</b>	An Illustrated Affordable Housing Toolbox would provide outline summaries of financial tools that increase affordability	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should use this Toolbox to understand how much assistance is needed from the</li> </ul>



Solutions		Explanation	Roles and Responsibilities
	<b>Toolbox</b>	<p>for homeownership and rental housing, including a “non-technical” presentation of the importance of these tools in increasing affordability and leveraging other affordable housing resources. The report can list standard tools used by the industry, and highlight those tools that are available to local governments. This product should help to quantify the “value” of each type of subsidy. It should also help jurisdictions understand how much assistance is needed from the local government (as opposed to other sources).</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Help local governments that want help to identify opportunities that will help them create partnerships that will increase affordable work force housing <u>built</u> and/or <u>preserved</u> in their communities</li> <li>• Minimize the disparity in property tax base capacity of jurisdictions</li> <li>• Avoid shifting the burden of low income housing from one jurisdiction to another</li> </ul>	<p>local government (as opposed to other sources) for affordable housing development.</p> <ul style="list-style-type: none"> <li>• <b>Metro</b> should contract with an affordable housing consultant to an Illustrated Affordable Housing Toolbox.</li> </ul>

**Table 11B: Solutions for Dealing with Affordability**

	Solutions	Explanation	Roles and Responsibilities
<b>Regional Funding Solutions</b>			
<b>A</b>	<b>A one-time \$10 Million Revenue Bond Financed by a Regional Funding Mechanism</b>	<p>See explanation in the “Regional Funding Solutions” in the previous section</p> <p><u><b>What will be achieved:</b></u></p> <ul style="list-style-type: none"> <li>• Acquiring properties that have expiring federal subsidy in 2040 Centers, Corridors and other locations</li> <li>• Supporting the rehabilitation of existing multi-family complexes, primarily in 2040 Centers and Corridors</li> <li>• Negotiating incentive conditions to build and/or preserve affordable work force housing</li> <li>• See also the “Regional Funding Solutions” in the previous section</li> </ul>	See roles and responsibilities in the “Regional Funding Solutions” in the previous section
<b>B</b>	<b>A \$50m/year Fee-based Revenue</b>	<p>See explanation in the “Regional Funding Solutions” in the previous section</p> <p><u><b>What will be achieved:</b></u> See A above</p>	See roles and responsibilities in the “Regional Funding Solutions” in the previous section
<b>C</b>	<b>Other funding sources</b>	<p>See explanation in the “Regional Funding Solutions” in the previous section</p> <p><u><b>What will be achieved:</b></u> See A above</p>	See roles and responsibilities in the “Regional Funding Solutions” in the previous section
<b>Land Use &amp; Regulatory Solutions for Immediate Implementation</b>			
<b>A</b>	<b>Housing Survey</b>	<p>A Housing Survey would provide actual numbers of affordable units that are built or preserved. The survey could reveal to the development community areas where they can take advantage to produce affordable work force housing, as well as revealing the potential mismatch of the location of affordable housing and services such as transportation infrastructure.</p> <p>The results would be used to recognize/support local effort.</p>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should implement the survey and supplement it with additional data.</li> <li>• <b>Metro</b> should develop and implement a biannual local government survey.</li> <li>• <b>Metro</b> should score survey results to administer regional funds.</li> <li>• <b>Metro</b> should amend Title 7 compliance reporting to be</li> </ul>

	Solutions	Explanation	Roles and Responsibilities
		<p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Improve our monitoring system, and knowledge of housing built and/or preserved in 2040 Centers and other locations</li> <li>• Improve our knowledge of the relationship between housing and other issues (transportation system, school funding, etc)</li> <li>• Take out Title 7 reporting requirements on land use tools</li> <li>• Provide incentive conditions</li> </ul>	<p>more results-oriented.</p> <ul style="list-style-type: none"> <li>• <b>Metro</b> should incorporate survey results into a “community housing score” that can be used to as a factor in regional funding allocation.</li> </ul>
<b>B</b>	<b>Regional Policies: UGB Expansion</b>	<p>A change in regional land use policies could expand the opportunities for affordable housing development, including: <b>UGB Expansion:</b> UGB expansion decisions can be used to negotiate voluntary landowner commitments to provide workforce housing.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Negotiating incentive conditions to build and/or preserve affordable work force housing</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should work with their stakeholders to trigger UGB expansion if voluntary inclusionary housing has been negotiated.</li> <li>• <b>Local governments</b> should create implementable plans for expansion areas that assure the development and production of affordable housing.</li> <li>• <b>Local governments</b> should use the extension of services to expansion areas to increase the development and production of affordable housing.</li> <li>• <b>Metro</b> should include language in its codes to use UGB expansion decisions to negotiate voluntary landowner commitments to provide affordable housing.</li> <li>• <b>Metro</b> should give preference to proposed expansion areas (that have satisfied state expansion priorities) where local governments have a credible, implementable plan that utilizes tools such as site control and landowner agreements to assure the development and production of affordable housing.</li> </ul>
<b>C</b>	<b>Regional Policies: Inclusionary Housing</b>	<p><b>Inclusionary Zoning:</b> State law currently restricts this zoning. One possibility is considering the application of inclusionary zoning in UGB expansion. There is legal precedent for applying inclusionary zoning in expansion areas, since Metro has set a precedent of treating these places differently through recent legislation that applies a higher level of fish and wildlife habitat protection to newly added areas than within the existing UGB.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Negotiating incentive conditions to build and/or preserve</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should support the removal of prohibitions on inclusionary zoning</li> <li>• <b>Metro</b> should work with its regional partners to pursue the possibility of removing prohibition on inclusionary zoning from state law</li> </ul>

	Solutions	Explanation	Roles and Responsibilities
		affordable work force housing	
<b>Metro Convening Solution</b>			
A	<b>Convener</b>	<p>HCTF identified an important role for Metro to convene local governments interested in addressing their challenges and barriers, overcoming the obstacles, and taking the next steps toward spurring affordable work force, elderly and persons with disabilities housing development. A convener plays the important role of bringing various interested parties together, such as local governments and the development community, to address challenges and barriers, overcoming the obstacles, and taking the next steps toward spurring affordable work force, elderly and persons with disabilities housing development.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Help local governments that want help to identify opportunities that will help them create partnerships to increase affordable work force housing <u>built</u> and/or <u>preserved</u> in their communities</li> <li>• Minimize the disparity in property tax base capacity of jurisdictions</li> <li>• Avoid shifting the burden of low income housing from one jurisdiction to another</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should participate in a workgroup similar to the Wilsonville Pilot Project Team to help them meet their Affordable Housing Production Goals.</li> <li>• <b>Metro</b> should act as a convener for future projects.</li> </ul>
<b>Metro Technical Assistance Solutions</b>			
A	<b>Housing Needs Assessment/Basic Market Study</b>	<p>A Housing Needs Assessment/Basic Market Study would equip local governments with the data they need to have conversations with community stakeholders (elected officials, neighbors, land owners, etc) about why affordable housing should be a priority and about who might be served by a proposed project.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Improve our knowledge of the demand and supply of housing for various income groups in local communities</li> <li>• Help local governments that want to increase affordable work force housing <u>built</u> and/or <u>preserved</u> in their communities</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should work with a consultant, under a Metro contract, to populate the model, review the data and prepare a basic Housing Needs report.</li> <li>• <b>Metro</b> should take the opportunity to suggest adjustments to the State Housing model so that the Metro Title 7 Affordable Housing Goals across the <i>range</i> of housing affordability are reflected.</li> </ul>

	Solutions	Explanation	Roles and Responsibilities
		<ul style="list-style-type: none"> <li>Improve our knowledge of the relationship between housing and other issues (transportation system, school funding, etc)</li> </ul>	
B	<b>Model Affordable Housing Approval and Development Conditions</b>	<p>A guidebook of model approval and development conditions could be adopted by jurisdictions to achieve Metro Functional Plan Title 7 goals. The guidebook would illustrate model approval and development conditions for jurisdictions. A staff expert would use the guidebook to assist local governments to incent or require inclusion of affordable housing in the 2040 Centers, Corridors and other locations – as prescribed by the jurisdiction's assessment, across a range of circumstances:</p> <ul style="list-style-type: none"> <li>New development with planning approvals required</li> <li>New land taken into the UGB</li> <li>New development in the 2040 Centers and Corridors</li> <li>Public properties being sold</li> <li>Public facilities being built (e.g. Multnomah County library adding housing above library)</li> <li>Sale or transfer of existing properties housing converting to higher income use (no net loss)</li> <li>Advocacy by City to other public land owners (e.g. ODOT, GAO, school districts) to require inclusion of affordable housing in their disposition strategy, contribute land to a non-profit for affordable housing use, or provide a below-market sale to developer who incorporates affordable units.</li> </ul> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>Help local governments that want help to identify opportunities that will help them create partnerships to increase affordable work force housing <u>built</u> and <u>preserved</u> in their communities</li> <li>Minimize the disparity in property tax base capacity of jurisdictions</li> <li>Avoid shifting the burden of low income housing from one jurisdiction to another</li> </ul>	<ul style="list-style-type: none"> <li><b>Local governments</b> should use the annexation process to negotiate the provision of affordable work force housing</li> <li><b>Local governments</b> should interpret the model approval and development conditions and incorporate them into their frameworks.</li> <li><b>Metro or contract legal counsel</b>, “borrowing” from jurisdictions with successful regulatory framework, should provide a guidebook of model approval and development conditions that could be adopted by jurisdictions to achieve Metro Functional Plan Title 7 goals.</li> <li><b>Metro development negotiation expert</b>, would use the guidebook to assist local governments to incent the inclusion of affordable work force or special needs housing in 2040 Centers, Corridors and other locations.</li> </ul>

	Solutions	Explanation	Roles and Responsibilities
C	<b>Communication and Awareness</b>	<p>A communication plan that utilizes visuals could help local governments and other entities involved in housing development to visualize what affordable housing looks like, how it operates in the community, and how it can be built in the 2040 Centers, Corridors and other locations in the region.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Help local governments that want help to identify opportunities that will help them create partnerships to increase affordable work force housing <u>built</u> and/or <u>preserved</u> in their communities</li> <li>• Minimize the disparity in property tax base capacity of jurisdictions</li> <li>• Avoid shifting the burden of low income housing from one jurisdiction to another</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Metro</b> should develop a communication plan utilizing visuals. Utilizing existing projects in the region, Metro could provide funding to give project tours, or produce media materials (video, interactive CD, printed case studies).</li> </ul>
<b>Preservation of Affordable Housing</b>			
A	<b>Federally Subsidized Affordable Housing With Expiring Contracts</b>	<p>One purpose of the planned housing supply reporting survey is to identify and insure that local governments have timely information about the expiration dates of existing federally subsidized apartments that are located in their community. Successful efforts to preserve that housing, along with the substantial federal funding that is required to maintain affordable rents, will receive credit towards accomplishment of each community's affordable housing goals.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Monitor federally subsidized properties that have expiration dates and make it possible for partnerships to be created to buy and preserve the properties</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should use the housing supply reporting survey to identify the expiration dates of existing federally subsidized apartments located in their community, and work with non-profits developers, county housing authorities and HUD to raise funds to buy and preserve the properties.</li> <li>• <b>Non-profit developers</b> work with the county housing authorities and HUD to raise funds to buy and preserve expiring federally subsidized apartments.</li> </ul>
B	<b>Condominium Conversion</b>	<p>Affordably priced condominium conversions can help create homeownership in neighborhoods where there is a rental surplus for low-to-middle income residents but a lack of ownership opportunities. New condominium developments are credited with bringing stability to developing neighborhoods. Condominiums have the potential to provide an increase in the supply of housing choices; however, the average condominium price is also rising, and some conversions can result in a loss of</p>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should work regional partners to pursue the possibility of legislatively requiring condominium conversion notification to give them a chance to look at nonprofit purchase alternatives or otherwise find funding.</li> <li>• <b>Local governments</b> can provide loans and technical assistance to help homeowners buy and manage</li> </ul>

	Solutions	Explanation	Roles and Responsibilities
		<p>affordable rentals. Prior residents must relocate, often away from work and services, and add to the competition for remaining units at their income level.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Avoid shifting the burden of low income housing from one jurisdiction to another</li> <li>• Minimize the disparity in property tax base capacity of jurisdictions</li> </ul>	<p>their manufactured housing parks as cooperatives.</p> <ul style="list-style-type: none"> <li>• <b>Local governments</b> should use model condominium conversion ordinances developed by Metro.</li> <li>• <b>Local governments</b> should assist in the development and implementation of Condominium Conversion Fee.</li> <li>• <b>Metro</b> should work with its regional partners to pursue the possibility of legislatively requiring condominium conversion notification to give local governments a chance to look at nonprofit purchase alternatives or otherwise find funding.</li> <li>• <b>Metro</b> or contract legal counsel should develop model condominium conversion ordinances that could be adopted by local governments to address the grave difficulties experienced by tenants who are evicted due to conversion.</li> <li>• <b>Metro</b> and local governments should form a "Condominium Conversion Fee study committee to identify the need for and collection and use of condominium conversion fee.</li> </ul>
<b>C</b>	<b>Manufactured Home Park</b>	<p>Mobile Home Parks are one of the last remaining affordable ownership opportunities for seniors and low-income earners. Although there is a law requiring Oregon Housing and Community Services (OHCS) to be given 365 days notice prior to the closure of a Mobile Home Park, many owners do not comply. Since 1997, 47 parks have closed statewide—a total of 1,312 spaces. Within the UGB, OHCS currently estimates that there are 231 parks and 15,867 spaces.</p> <p><b><u>What will be achieved:</u></b></p> <ul style="list-style-type: none"> <li>• Same as B</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should work regional partners to pursue the possibility of legislatively allowing manufactured home park residents to form their own LLC Co-op and buy the park.</li> <li>• <b>Local governments</b> should develop and adopt ordinances to mitigate the impact of mobile home park closure to tenant and the jurisdiction.</li> <li>• <b>Metro</b> should work with its regional partners to pursue the possibility of legislatively allowing manufactured home park residents to form their own LLC Co-op and buy the park. The LLC Co-op would own a share in a corporation, not an undivided share of the land.</li> </ul>
<b>D</b>	<b>Demolition/ Teardown</b>	<p>In areas where land is scarce and land values are high, the existing housing stock is subject to teardowns and replacement with higher-value homes. Due to speculation, some of the newer, larger houses remain vacant investment properties.</p> <p><b><u>What will be achieved:</u></b></p>	<ul style="list-style-type: none"> <li>• <b>Local governments</b> should develop and adopt ordinances to mitigate the impact of teardown, including consideration of "No Net Loss" strategy, a teardown fee, conditioning of conversion based on the availability of adequate replacement units for tenants, funding a low-cost loan program to assist</li> </ul>

	Solutions	Explanation	Roles and Responsibilities
		<ul style="list-style-type: none"> <li>Same as B</li> </ul>	owners of low and moderately priced homes in rehabilitation.
<b>Wilsonville Pilot Project Implementation</b>			
<b>A</b>	<b>Pilot Project</b>	<p>The key instrument for testing the convener role for Metro explained above was a pilot project that was managed by some HCTF members volunteering to work with communities as a consulting team to identify opportunities in local jurisdictions, and assemble a portfolio of possible housing developments that would serve families with a range of incomes. Under the guidance of the Wilsonville Planning Department, the HCTF initially identified more than 20 vacant public and privately owned sites for the Pilot Project. Those that emerged as priorities are the SMART site owned by the City; the future Commuter Rail station site, owned by the City and Washington County, and the Post Office site, owned by the federal government. The next step was determining how to meet some the City housing need with these sites.</p> <p><b><u>What was achieved:</u></b></p> <ul style="list-style-type: none"> <li>Rental and ownership deficit and surplus</li> <li>Potential sites for senior and work force housing</li> <li>Challenges such Old Town and Town Center areas are the best locations for new senior residences (as City allow pedestrian access to residential services), and privately owned market-rate rental properties that are currently providing affordable housing will be candidates for sale/conversion as land demand rises.</li> <li>Lessons that can be shared with other communities</li> </ul>	<ul style="list-style-type: none"> <li><b>Metro</b> should continue the convening of local governments and experts through the Pilot Project Policy, as stated above under “Convener and Technical Assistance.”</li> </ul> <p><b><u>Recommendations for City of Wilsonville</u></b></p> <ul style="list-style-type: none"> <li><b>Trust Fund:</b> Establish a bridge loan to buy rent-restricted apartments funded with federal and state subsidy. The City may not buy the property directly, but can mobilize a non-profit to do so. Bridge financing or other tools are also critical for non-restricted low rent housing such as privately-owned apartments or mobile home parks. A designated fund can be used for the purchase of rent-restricted apartments or for units with expiring subsidies.</li> <li><b>Employees that commute:</b> Estimate the percentage of these residents for whom Wilsonville should strive to provide housing.</li> <li><b>Retention of rental units:</b> Develop strategies to preserve existing units that are currently renting to the very low-income households in &lt;30% MFI income bracket, such as a condo conversion ordinance that requires that the city be notified in advance of condo conversions, as existing tenants are.</li> <li><b>Retention of ownership units:</b> Develop strategies to preserve existing ownership units that are currently affordable to households in &lt;30%, 30% to 60% and 60 to 73% MFI income brackets;</li> <li><b>Subsidization of current rental units:</b> A surplus of rental units (1,113 units in the \$430-\$664 and \$665-\$909 ranges) suggests the need to subsidize these developments to make them affordable to very lower</li> </ul>



	Solutions	Explanation	Roles and Responsibilities
			<p>income households currently in the \$0 - \$429 rental affordability bracket<sup>28</sup>. A local government can create a mechanism for a property tax exemption or fee waiver, which would in turn allow lower rents.</p> <ul style="list-style-type: none"> <li>• <u>Future ownership units</u>: The demonstrated need for ownership units at almost every income level indicates a need to build more housing units, such as townhouses, detached dwellings, short towers and senior housing.</li> <li>• <u>Future annexation</u>: Negotiate the provision of affordable work force housing as a condition for annexation and approval of development plan.</li> </ul>

<b>Other Issues: Local Governments Reporting Requirements and Metro Budget for Housing</b>		
<b>A</b>	<b>How to measure local governments performance:</b> <ul style="list-style-type: none"> <li>i. Outcome based (units built and/or preserved)</li> <li>ii. Effort based (staff and resource allocation)</li> <li>iii. Both outcome and effort</li> </ul>	<ul style="list-style-type: none"> <li>• Replace current reporting requirements on land use and non-land use that is mostly administrative with a reporting system that focus on result oriented report</li> <li>• Local governments should be required to assist Metro to complete the housing supply survey.</li> </ul>
<b>B</b>	<b>Metro staffing and budget (see accompanying table)</b>	Commit resources to: <ul style="list-style-type: none"> <li>• Resource development (e.g., removing the ban on RETF)</li> <li>• A housing program (with a faces on it)</li> <li>• Technical assistance</li> </ul>

<sup>28</sup> Or investigate opportunities to convert some of these units to ownership units that would offer affordable to residents who are in the \$20,000 to \$50,000 income bracket?

## B. Metro Plans and Recommended Changes

Acknowledging that the Metro Council makes the final determination and decisions on new policies and therefore the most appropriate amendments in the Regional Framework Plan (RFP) and the Urban Growth Management Functional Plan (Functional Plan), HCTF recommended sections of the REP and Functional Plan that should be considered for amendment with the recommended solutions. This section contains recommendations for changes to the RFP and Functional Plan.

Metro implements the region's 2040 growth management vision and concept through two planning instruments: the Regional Framework Plan (RFP) and the Urban Growth Management Functional Plan (Functional Plan). The Functional Plan implements the RFP policies.

The RFP brings together regional policies to create an integrated land-use, transportation and open space framework. The plan is intended to ensure a coordinated, consistent approach to issues of regional significance.

The Functional Plan is a set of regional requirements and recommendations to implement the Region 2040 Growth Concept<sup>29</sup>, adopted by the Metro Council, for cities and counties to implement. The Functional Plan addresses issues including projected housing and job growth, parking management, water quality and a regional road system. The establishment of the Housing Choice Task Force is an example of the recommendations in the Functional Plan.

### 1. **Recommendations for Changes to the Regional Framework Plan (Policy 1.3)**

- A. ***Housing Supply Survey:*** Amend existing policy to direct the development and implementation of a bi-annual housing survey reporting for the assessment of the progress toward achieving the region's housing choices implementation strategy. The survey should include affordable work force housing, preservation efforts and reporting on other housing types. The survey will also include housing in the 2040 Centers and transit corridors, accessory dwelling units and mobile home parks.

Amended policy should direct the incorporation of survey results into a "community housing score" that reflects effort towards new affordable units built and existing affordable units preserved that could be used as a factor in regional funding allocation

- B. ***Current Reporting Requirements in the Urban Growth Management Functional Plan:*** The current policy directing the inclusion of "voluntary affordable housing production goals to be adopted by local jurisdictions in the region as well as land use and non-land use affordable housing tools and strategies" should be amended to remove the reporting requirement on land use and non-land use tools and strategies, and retain only the voluntary affordable housing production goals.

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<sup>29</sup> Metro's 2040 Growth Concept is a regional land-use policy adopted by the Metro Council in December 1995 that: a) encourages compact growth development near transit to reduce land consumption; b) preserves existing neighborhoods; c) identifies rural areas that will not be added to the urban growth boundary; d) sets goals for permanent open space within the urban growth boundary; and e) recognizes that cooperation with neighboring cities – Canby, Sandy, North Plains – is necessary to address common issues.

- C. ***New Requirements for local governments to report progress:*** The current policy directing that local governments in the region to consider land use and non-land use strategies and to report progress towards increasing the supply of affordable housing should be replaced with a new reporting system that focuses on results oriented reports and not on process. Local governments should be required to work with Metro to complete the housing supply survey.
- D. ***Urban Growth Boundary Expansion Decision:*** Add new policy directing the use of UGB expansion decisions to negotiate voluntary landowner commitments to provide affordable work force housing. The policy should direct the use of local government and stakeholders' negotiated voluntary inclusionary housing to trigger UGB expansion.
- E. ***Convening and Technical Assistance:*** Add a new "Convening and Technical Assistance Policy" to direct the convening of local governments and experts interested in addressing the challenges and barriers to increase housing choices.
- F. ***Regional Funding for Housing:*** Add a new policy directing Metro to take leadership role to find a new regional funding for affordable work force housing.
- G. ***Advisory Committee for the Regional Housing Choice Implementation Strategy:*** Add a new policy directing the establishment of an ongoing role for an advisory committee in a similar manner as are other Metro programs such as greenspaces, transportation, solid waste, and industrial lands. The committee could meet on a quarterly basis. The structure and composition of the committee could be the same as the Housing Choices Task Force or downsized.

## 2. **Recommendations for Changes to the Urban Growth Management Functional Plan (Title 7)**

- A. ***New Reporting Requirements:*** Amend the current requirements of local governments to adopt "voluntary affordable housing production goals and as well consider adoption of land use and non-land use affordable housing tools and strategies to:
  - i. ***Existing Requirement to Report on Land Use and Non-land Use Tools:*** Remove the requirement of local governments to consider adoption of land use and non-land use affordable housing tools and strategies;
  - ii. ***Existing Title 7 Affordable Housing Production Goals:*** Add that Metro should "encourage local governments to adopt the affordable housing production goals" and remove the requirement to consider the goals.
  - iii. ***Proposed Housing Supply Survey and Community Housing Scorecard:*** Require local governments to assist Metro and regional stakeholders to complete the bi-annual housing survey that Metro will use to develop a "Community Housing Scorecard." Local governments assistance will include reviewing the survey result is an accurate reflection of supply changes regionally significant housing such as housing in the 2040 Centers, housing in the transit corridors, accessory dwelling units, mobile home parks, and affordable housing preserved. Local governments assistance should include other actions they deem relevant to increasing the supply of affordable housing in their jurisdictions.
- B. ***Metro's other option on current land use and non-land use requirement:*** If the Metro Council deem is necessary to require cities and counties to continue to

consider the land use and non-land use strategies and assist in conducting the biannual housing survey, it would have to add the requirement.

### 3. Recommendations for Metro's Level of Investment

#### Metro staffing and budget options for FY 2006/07

The recommendations in the HCTF report have implications for Metro's budget. Table 12 below identifies possible commitment levels for Metro to implement the recommendations for increasing regional funding, providing technical assistance, initiating a regional housing supply survey, increasing public awareness of housing affordability, and developing new policies and investment tools to increase the supply of housing choices in the 2040 Centers, corridors and new urban areas. Level 1 reflects the level of funding included in the current proposal for Metro budget for FY0607. Level 2 and 3 would require additional investment in planning, legal, and communications efforts. The Metro Council is encouraged to consider these options and allocate adequate resources to implement the options or solutions.

**Table 12: Optional Levels of Investment for Metro**

<b>Level 1<sup>30</sup></b>	<b>Level 2 [Metro Lead Expected]</b>	<b>Level 3 [Metro Lead Expected]</b>
<b>Resource Development:</b> <ul style="list-style-type: none"> <li>• Participate with other organizations to help establish regional funding tools</li> </ul>		<b>Resource Development:</b> <ul style="list-style-type: none"> <li>• Create a Tax Study Committee to recommend funding tool/s</li> <li>• Convince State legislature to remove ban on RETF</li> </ul>
	<b>Create a Housing Program:</b> <ul style="list-style-type: none"> <li>• Elevate regional housing with a face to the program</li> <li>• Create an advisory committee to advice quarterly on technical assistance provided</li> </ul>	<b>Create a Housing Program:</b> <ul style="list-style-type: none"> <li>• Elevate regional housing with a face to the program</li> <li>• Create an advisory committee to advice quarterly on technical assistance provided</li> </ul>
<b>Technical Assistance:</b> <ul style="list-style-type: none"> <li>• Inventory potential sites for affordable work force housing in selected areas in partnership with local government and housing experts</li> </ul>	<b>Technical Assistance:</b> <ul style="list-style-type: none"> <li>• Assist local governments to identify opportunities and negotiate partnership agreements to construct and preserve affordable work force housing</li> <li>• Assist local governments to use local and regional for</li> </ul>	<b>Technical Assistance:</b> <ul style="list-style-type: none"> <li>• Inventory potential sites for affordable work force housing in selected locations in partnership with local government and housing experts</li> <li>• Assist local governments to negotiate development</li> </ul>

<sup>30</sup> Level 1 assumes the Wilsonville Pilot Project and amendments to Metro's Regional Framework Plan and Functional Plan for housing are completed before July 2006.

Level 1 <sup>30</sup>	Level 2 [Metro Lead Expected]	Level 3 [Metro Lead Expected]
	<p>changes to zoning, extension of urban services, annexations or UGB expansions to set policies for provision of affordable work force housing</p> <ul style="list-style-type: none"> <li>• Assist local governments in revising code to provide incentives for affordable housing</li> </ul>	<p>conditions, including structuring financial and contractual housing partnerships</p> <ul style="list-style-type: none"> <li>• Assist local governments in revising code to provide incentives for affordable housing</li> </ul>
<p><b>Housing Supply Survey:</b></p> <ul style="list-style-type: none"> <li>• Initiate bi-annual housing supply survey to assess the region's progress in meeting Title 7 production goals</li> </ul>	<p><b>Housing Supply Survey</b></p> <ul style="list-style-type: none"> <li>• Initiate bi-annual housing supply survey to assess the region's progress in meeting Title 7 production goals</li> </ul>	<p><b>Housing Supply Survey</b></p> <ul style="list-style-type: none"> <li>• Initiate bi-annual housing supply survey to assess the region's progress in meeting Title 7 production goals</li> </ul>
	<p><b>Education/Awareness</b></p> <ul style="list-style-type: none"> <li>• Assess and publicize regional housing needs</li> <li>• Develop a visual communications program to increase awareness</li> </ul>	<p><b>Education/Awareness</b></p> <ul style="list-style-type: none"> <li>• Develop a visual communications program to increase awareness</li> <li>• Develop a guidebook of model approval and development conditions illustrating successful regulatory approaches</li> <li>• Develop a guidebook to illustrate successful financial tools for affordable housing</li> </ul>
<p><b>Regional Policies and Tools:</b></p> <ul style="list-style-type: none"> <li>• Evaluate opportunities to change parking and height policies and other tools to support affordable housing in centers and corridors and elsewhere as areas urbanize in the New Look Work Program</li> </ul>	<p><b>Regional Policies and Tools:</b></p> <ul style="list-style-type: none"> <li>• Evaluate opportunities to change parking and height policies and other tools to support affordable housing in centers and corridors and elsewhere as areas urbanize in the New Look Work Program</li> </ul>	<p><b>Regional Policies and Tools:</b></p> <ul style="list-style-type: none"> <li>• Evaluate opportunities to change parking and height policies and other tools to support affordable housing in centers and corridors and elsewhere as areas urbanize in the New Look Work Program</li> </ul>

## **Appendix**

### **Appendix A**

#### **Comprehensive list of Course of Actions Identified by the HCTF for the Determination of Solutions for Overcoming Housing Barriers**

##### **1) Housing Production Goal Pilot Projects: [Current HCTF Project]**

a pilot project to develop a portfolio of feasible projects that would achieve their Title 7 goals in conjunction with other community development objectives

##### **2) Land Use Policies for Increasing the Supply of Housing and Affordable Housing Across the Region: [Current HCTF Project]**

Determine how state, regional and local governments land use policies can better support the co-location of jobs and housing, leverage UGB expansion policies to increase the supply of affordable housing, and address equity and fairness in the production and location of affordable housing across the region.

##### **3) Regional Funding Program(s): [HCTF PROJECT]**

Identify regional funding options for housing and affordable housing that may be less politically difficult to implement. The task will include review of funding sources identified by previous efforts.

##### **4) Regional Technical Assistance Program: [Staff is developing this using HCTF meeting discussions]**

Identify local technical assistance needs of 2040 Centers and corridors and how/who to meet them. Outcome will help local governments put together housing development deals, develop their "2040 Development Strategy" and build long-lasting investment in the communities

##### **5) Employer Assisted Housing: [Staff is developing this using "brown bag" discussion and information]**

Identify employers and type of support they will provide to expand workforce housing, include homeownership programs that build equity for the region's work force. Potential partners may be enlisted.

##### **6) Regional Land Banking: [To be developed]**

Create a proposal to establish a regional land trust that would assemble land for the development of the right type of housing at various locations. The proposal will demonstrate how a land banking program will: a) work with DEQ to acquire and decontaminate brownfields; b) work with ODOT and Portland School District to acquire unused land and buildings; and c) acquire land in new areas such as the Stafford Triangle to hold for future production of work force housing.

#### ***HCTF recommended that Metro should address and develop the following course of actions in the future:***

##### **1) Regional Housing Conference and Awards: (Ranking of Achievements?)**

Develop the scope of a regional housing conference and awards program to share housing and affordable housing productions information, and recognize outstanding commitment and leadership of individuals and communities, including creative and effective partnerships and successful designs. Address how the conference and awards will expose development features,

qualities and economic efficiency of housing projects that would increase housing choice in the region.

## **2) Web-based “Resource Guide”: Visual Library**

Initiate the development of a resource guide for informing local governments, developers, and citizens about various actions that would lead to housing production. Outcome of the Past Successes project will be included in the guide. Other products of the guide includes: a) methodology for local governments to assess the benefits and costs of waiving/reducing SDCs, permit fees, property tax, etc; b) types of land uses, financial and other incentives available in various communities in the region; c) designs for changing negative public perception of affordable multifamily and single family housing; d) advantages of “Accessory Dwelling Units” (ADU), how compatibility concerns can be addressed, and changes in zoning code and other requirements enacted to facilitate construction; e) pro-forma analysis of projects in various locations; and f) opportunities in the undeveloped and underdeveloped areas. These could be organized by income level: “At \$40,000/year, a family of four can live in:” followed by images of housing in different regional neighborhoods.

## **3) Past Successes:**

Identify site-specific development examples where barriers have been overcome, or are currently being successfully overcome.

## **Appendix B**

### **Uses of the new regional funding: Capital Project - Land Acquisition**

Land acquisition was identified by the HCTF as the most pressing and important capital project. The cost and availability of vacant land available for affordable housing projects is the single biggest issue facing affordable housing production. Land near jobs, in central city areas, and areas that are already highly developed is often too expensive for many affordable housing projects. Land acquisition can be used to strategically address job/housing imbalance and housing affordability. Key parcels that are available for immediate or mid-term development can be secured for affordable housing development. Land acquisition can result in considerable savings to a jurisdiction seeking to ensure an adequate supply of land for affordable and workforce housing.

Land acquisition includes:

- The preservation/retention of affordable housing developments.
- The rehabilitation/retention of affordable housing developments.
- The acquisition of unimproved parcels for future development.
- The acquisition of parcels for immediate development.

Funds for land acquisition could be available through a variety of mechanisms, such as matching grants or revolving loan funds available to local jurisdictions, for profit and non-profit developers, and affordable housing organizations. A regional fund that supports land acquisition frees up other funds to be used for construction.

The HCTF identified several specific projects in which land could be purchased immediately, initiating affordable housing developments. The following list provides a few examples of parcels that could be purchased through a regional affordable housing fund:

- Parcels in the Downtown Regional Center in Beaverton. The City has set aside \$660,000 of CDBG funds to buy land for affordable housing projects in the Downtown Regional Center. Given the cost of land in our downtown area, however (approaching \$25/square foot, not including the cost of existing improvements) the amount of money set aside will not buy much. If, however, the revenue is matched with funds from a regional affordable housing fund a larger site could potentially be acquired. Alternatively, the funds could be used to assist in the construction of an affordable housing project on land acquired with the CDBG funds.
- A regional housing fund could be used to fund the rehabilitation of existing multi-family complexes in Beaverton, primarily in the downtown area and along Allen Blvd. and Main Street. The City frequently receives requests for assistance in rehabilitating such housing complexes, the most recent involving a proposal for apartments near the Beaverton Transit Center. Any agreement to rehabilitate an apartment complex would be contingent on a written commitment by the owner to retain the affordable housing status of the apartments for a specified period of time.
- Northeast corner of Hall Blvd. and Sussex, in Beaverton. Beaverton has previously assisted Habitat for Humanity in acquiring a site to build several affordable units. Habitat for Humanity is now attempting to acquire an adjacent property, at the northeast corner of Hall Blvd. and Sussex, to build between 6 and 8 additional units. The owner occupied units constructed are affordable to households at 50% of median income. A regional



affordable housing fund could be used to assist in that land acquisition, freeing up City HOME funds that could be used to fund other affordable housing projects in the city.

- Three parcels in Washington County. Willamette West Habitat is currently trying to purchase three parcels that will yield about 20 homes. Two of the parcels are owned by Washington County and are remnant parcels from the SW 170th road improvement project. One is north of Farmington and one is south of Farmington. The third parcel is in Beaverton off of Hall Blvd between Allen and Denny. This parcel is owned by a private individual. The cost for the three parcels is about \$1,050,000 and the infrastructure costs will be about \$700,000. Habitat regulations do not allow the use Government funds to build houses so once the lots are ready for homes, the funds to build houses must come from private donors and businesses. Willamette West Habitat for Humanity serves an area outside of the Portland city limits west of the Willamette River to Cornelius.
- Land just west of the Merlo LRT station in Beaverton. Tualatin Valley Housing Partners (TVHP) is planning to build approximately 130 affordable housing units for families on land they are acquiring from Tri-Met just west of the Merlo LRT station. Most of the units will contain 3 or 4 bedrooms. TVHP is targeting households at or below 60% of median income. A few of the units will target households at 30% of median income. For this project revenue from a regional affordable housing fund could be used to pay for development and building fees, pay for systems development charges, and subsidize construction costs so as to reduce rents and target lower income households.

In support of the 2040 Growth Concept, funding could also be used to close financing gaps in the development of housing in centers and corridors. Funding could also subsidize affordable rentals for lower income groups in TOD projects than are currently available. Stimulating new TOD projects may lead to the creation of denser development, which in turn would offer a wider range of housing choices

### **Appendix C (a separate document)**

#### **Other information and comments with which HCTF based its recommendations**

## **STAFF REPORT**

CONSIDERATION OF RESOLUTION NO. 06-3677 FOR THE PURPOSE OF ACCEPTING THE REGIONAL HOUSING CHOICE IMPLEMENTATION STRATEGY PREPARED BY THE HOUSING CHOICE TASK FORCE APPOINTED BY THE METRO COUNCIL.

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Date: March 23, 2006

Presented by: Gerry Uba

## **PROPOSED ACTION**

This resolution would accept the Regional Housing Choice Implementation Strategy (RHCIS) by the Housing Choice Task Force (HCTF) and direct staff to prepare proposed amendments to the Regional Framework Plan and Urban Growth Management Functional Plan and other proposals for Metro Council consideration to implement the HCTF recommendations.

## **BACKGROUND**

Following the requirements in Title 7 of the Functional Plan, the Metro Council created the Housing Choice Task Force (HCTF) of February 10, 2005 (Resolution No. 05-3536). The creation of HCTF brought together the resources of non-profit and for-profit developers, real estate professionals, as well as local, regional, state officials and other organizations with a stake in increasing housing supply and choice. The Council charged the HCTF to use one year (March 2005 to March 2006) to:

1. Offer recommendations for policies and programs to facilitate housing production in 2040 mixed-use areas and to meet the Five-Year Affordable Housing Production Goals in the Urban Growth Management Functional Plan. The recommendations will address how this mission can be achieved in particular communities, using a mix of private sector, nonprofit and nongovernmental and governmental housing investments, employing and applying realistic strategies and tools, including those outlined in the Regional Affordable Housing Strategy.
2. Help build support for regional housing supply solutions by working closely with those individuals and organizations that are in a position to help implement them.
3. Recommend to the Metro Council actions that they should take as part of the broader strategy for implementing regional housing supply solutions.

Metro also created the HCTF in order to move beyond current requirements for local government reporting on their implementation of specific land use and non-land use strategies in Functional Plan Title 7. The goal is to refocus the efforts of the region's policy makers and housing providers on the task of overcoming obstacles to bolstering the region's supply of a broad range of housing, particularly in the 2040 Centers and corridors.

Functional Plan Title 7 directed local governments to assist in increasing the supply of affordable housing from 2001 through 2004. The legislative background is as follows:

1. On November 20, 1997 (Resolution 97-2583B), the Metro Council established the first Affordable Housing Technical Advisory Committee (HTAC)
2. On December 11, 1997 (Ordinance 97-715B), the Metro Council adopted the Regional Framework Plan containing the establishment of the HTAC;

3. The appeal of the Regional Framework Plan provisions by some local governments resulted in a settlement agreement that amended the housing section in the Regional Framework Plan;
4. On September 10, 1998, the Council adopted Ordinance 98-769 that amended the Regional Framework Plan provisions and appointed the initial members of HTAC;
5. On June 22, 2000 (Resolution 00-2956B), the Metro Council accepted the recommendations of the HTAC contained in its report, Regional Affordable Housing Strategy (RAHS);
6. The housing sections of the Regional Framework Plan (Policy 1.3, Housing and Affordable Housing) and Urban Growth Management Functional Plan (Title 7) were amended and adopted on January 18, 2001 (Ordinance 00-882C); Title 7 required Local governments to:
  - a) Ensure that their comprehensive plans and implementing ordinances include policies that encourage and increase affordable housing;
  - b) Consider amendment of their comprehensive plans and implementing ordinances by adopting land use tools and strategies; and
  - c) Prepare and submit progress reports at 12 month (January 2002), 24 month (January 2003) and 36 month (January 2004) intervals.

Title 7 also encouraged local governments to adopt voluntary affordable housing production goals to as a guide to measure progress.

7. On June 26, 2003, the Metro Council amended Title 7 (Ordinance No. 03-1005A) to clarify that it is the responsibility of the governing body of cities and counties to consider each tool or strategy and either amend its comprehensive plan and implementing ordinances to adopt the tool or strategy or explains why it decided not to adopt it.

The three annual progress reports submitted by local governments provided important information about the challenges local governments face in providing housing affordable to a range of the region's citizens. The progress reports also revealed some picture of successes such as: \$100,000 contribution budgeted by Beaverton toward the Community Housing Trust Fund; \$11 million budgeted by Portland for housing programs; 112-unit RV park allowed by Troutdale to accommodate long-term affordable housing; Manufactured homes allowed in all residential zones by Wood Village to facilitate affordable housing production. Local governments used the Title 7 compliance process to inform Metro of the barriers that exist to implementing affordable housing. These barriers were:

- "We're already in compliance through implementation of State housing requirements"
- "One size doesn't fit all due to unique local conditions"
- "It costs too much – no funding/not enough staff"
- "Little vacant land exist or land is too expensive"
- "Political barriers due to local charter provisions that limits actions"

#### HCTF Report and Recommendations

HCTF built on the lessons learned from the research and recommendations in the RAHS and in Title 7 implementation to develop a broad strategy for increasing the regional housing supply, and to advise Metro on its role in developing and revising policies and programs in support of that strategy. The task force placed particular emphasis on strategies to increase workforce

housing in 2040 mixed use areas and corridors, and strategies to increase the supply of affordable housing for families earning less than 50% of the region median family income. The task force considered how this increase could be achieved in distinct communities in the region using a mix of private sector, nonprofit and nongovernmental and governmental housing investments, employing and applying realistic strategies and tools.

Over the year of their work, HCTF assessed current trends in housing affordability, and reviewed barriers to increasing housing choice and affordable housing supply. The task created three “Solution Teams” to analyze and recommend:

- Regional funding solutions to address the supply and affordability
- Land use policies and regulations for reducing cost of housing and increasing the supply of affordable housing across the region
- Metro convening solutions through pilot project and technical assistance

HCTF identified other courses of action, including regional land banking, web-based resource guide, and regional housing conference and awards. Due to time and resource limitation, these strategies were not addressed.

The Task Force considered several possible sources for a regional housing fund, several solutions for addressing the housing needs of low and moderate income families especially in the 2040 Centers and corridors, and conducted a pilot project in the City of Wilsonville to gain better understanding of the types of regional technical assistance that can be effectively implemented. The pilot project was successful in building City Council support for affordable housing projects by working closely with local officials and those individuals that are in a position to help implement housing choice strategies.

### HCTF Key Recommendations for Metro

The four key recommendations of HCTF are:

1. Metro should integrate housing supply concerns, and specifically affordable housing, into all policy making and funding allocations, in order to achieve regional housing choice equity through promotion of affordable housing as a regional function on par with transportation and green spaces. A permanent Housing Choice Advisory Committee should be established to assist in this effort.
2. Metro should direct effort towards development of resources, and especially a new, permanent regional resource for affordable housing, and join and lead advocacy for increased funding at the Federal, State, regional levels.
3. Metro should promote strategies identified by the HCTF to remove regulatory barriers and reduce the cost of developing housing.
4. Metro’s budget for housing should be prioritized to providing technical assistance to local governments (land/site inventory, model codes, etc.)

Following is the overall summary of HCTF recommended solutions for local governments,

Metro and other entities, and what will be achieved. The solutions are divided into those that reduce cost of housing and increase supply in the region's 2040 Centers and Corridors, and those that deal with affordability.

#### Solutions for Reducing Cost of Housing and Increasing Supply in the 2040 Centers and Corridors

##### A. Funding Solutions:

1. Form a Construction Excise Tax study committee to identify the need for and collection, allocation and administration of a tax for housing.
2. Establish an initial one-time fund with a \$10 million revenue bond to establish a regional funding program.
3. Support a long term funding source that will generate about \$50 million annually (e.g., real estate transfer fee or document recording fee, urbanization windfall tax, general obligation bond).

##### B. Land Use and Regulatory Solutions for immediate implementation:

1. Expedite review for affordable housing - work with cities and counties to assess existing regulatory processes to determine how to expedite affordable housing projects.
2. Work with Metro in-house expertise or other experts (e.g. PDC) to provide technical assistance to shepherd qualifying projects in cities and counties.

##### C. Land Use and Regulatory Solutions to be further addressed as part of Metro's New Look program:

1. Update the regional parking ratio requirements, and consider implementing parking management in centers
2. Plan for complete communities that include housing choices
3. Encourage housing development in centers and corridors and other transit-friendly locations
4. Evaluate opportunities to implement form-based codes and other strategies to speed up project approval process

##### D. Technical Assistance Solutions:

1. Available land inventory: Utilize Metro data and staff to assist local governments to develop a "portfolio" of developable sites in the 2040 Centers, Corridors and other locations
2. Model Affordable Housing Approval: Provide a guidebook of model approval and development conditions and/or provide staff to assist local governments to incent provision of affordable housing in 2040 Centers, Corridors and other locations
3. Illustrated affordable housing toolbox: Contract consultant to assist Metro in identifying financial tools for affordable housing development.

### Solutions for Dealing with Affordability

A. Funding Solutions: Same as those in the previous section.

B. Land Use and Regulatory Solutions for immediate implementation:

1. Establish a housing supply survey for accurate assessment of progress toward achieving the region's affordable housing goals
2. Regional policies:
  - Use the urban growth boundary (UGB) expansion decisions to negotiate voluntary landowner commitments to provide affordable housing;
  - Allow local governments and their stakeholders to trigger UGB expansion if voluntary inclusionary housing has been negotiated.
  - Give preference to proposed expansion areas (that have satisfied state expansion priorities) where local governments have a credible, implementable plan that utilizes tools and strategies to assure the production of affordable housing.
3. Work with regional partners to pursue removing prohibition on inclusionary zoning

C. Metro Convening Solutions:

1. Continue the convening of local government officials and housing experts in other jurisdictions expressing interest to identify development opportunities in cities and counties

D. Technical Assistance Solutions:

1. Housing needs assessment/basic market study: Work with State Housing & Community Services to adjust the State Housing Model to reflect future need.
2. Contract consultant to assist Metro & local governments to populate the State Housing Model after the adjustment
3. Model Affordable Housing Approval: (same as above, in the previous section)
4. Communications and awareness: Develop a communication toolbox utilizing visuals of successful projects in the region that could be used to visualize what affordable housing looks like and how it can be built

E. Preservation Solutions:

1. Use housing supply survey to identify expiring federally subsidized apartments, and work with non-profits and governments to buy and preserve the properties.
2. Develop model condo conversion ordinances
3. Develop and adopt ordinances to mitigate the impact of mobile home park closure

### What will be Achieved with the Recommended Solutions?

Following are some of the expected impacts of the recommended solutions in the HCTF report:

1. Reduced cost of building housing and passing the savings to potential owners and tenants
2. Identify federally subsidized properties that have expiration dates and make it possible for partnerships to be created to buy and preserve the properties
3. Acquire federally subsidized properties that have expiration dates

4. Support the rehabilitation of existing multi-family complexes, primarily in 2040 Centers and Corridors
5. Negotiate incentives to build or preserve affordable work force housing
6. Improve our knowledge of the relationship between housing and other issues (transportation system, school funding, etc)
7. Reduce the stress on public service such as the transportation system impacted by jobs-housing imbalance
8. Reduce the stress on schools (increasing class size and free lunch) in the outer areas through provision of affordable housing in the inner areas, particularly in the 2040 Centers and Corridors
9. Assist local governments that want help to identify opportunities that will aid them to create partnerships that will increase affordable work force housing built and preserved in their communities
10. Minimize the disparity in property tax base capacity of jurisdictions
11. Avoid shifting the burden of low income housing from one jurisdiction to another
12. Improve monitoring of the system, and our knowledge of housing built and preserved in 2040 Centers and other locations
13. Eliminate local jurisdictions' Title 7 reporting requirements on land use tools

### Local Response and Interpretation

Prior to the creation of HCTF, Councilor Burkholder presented the new regional housing choice initiative to the Metro Policy Advisory Committee (MPAC) on December 8, 2004), and requested them to recommend members.

HCTF members updated MTAC several times with its work (August 13, 2005, February 1, 2006, February 15, 2006, March 1, 2006) for comments. HCTF also updated MPAC several times with its work (January 11, 2006, January 25, 2006, February 8, 2006, February 22, 2006, March 8, 2006) for comments.

HCTF members also presented its draft report and recommendations to the Oregon Housing Council (February 24, 2006) and to the City of Wilsonville City Council (February 28, 2006) for comments. At the request of the Housing Advocacy Group of Washington County, staff presented the HCTF report to the Group for comments.

Both MPAC and MTAC acknowledged the complexity of housing choice issue and many viewpoints were presented and discussed. Consequently MTAC did not come to conclusion, however, it did agree on three things:

- Defining the problem: The Task Force and others need to do a better job of defining the problem of housing affordability and the population that would be served by the recommended solutions;
- Variation of problem in the communities: The nature of the problem in each community needs to be explained, especially the differences in affordable housing supply. For example, some communities such as Gresham may have an adequate supply, so that community efforts can be focused appropriately, on creating new units or retaining current supply

- Implementation: Provide access to expertise and technical assistance.

MTAC had serious reservation about two of the recommended solutions:

- A. Linking affordable housing to greenspaces and transportation funding; and
- B. Inclusionary Zoning.

Regarding potential role of Metro, MTAC offered the following comments:

- A. *Public education on work force and affordable housing need*: incentives should be emphasized over requirement, and the issues should be made real to audiences.
- B. *Advocacy*: Advocate at state level for local control of issues such as inclusionary zoning and real estate transfer fee.
- C. *Research*: study the linkage between affordable housing and transportation system performance, employment, economic development, schools and student performance, etc., the linkage between tax equity and affordable housing. In addition, use new survey to determine regional priority on needs relative to other important needs such as education and transportation.
- D. *Technical Assistance*: Provide technical assistance to local governments and a platform for peer support, while avoiding duplication of the work of existing entities like the Housing Development Center.

## **ANALYSIS/INFORMATION**

### **Known Opposition**

Staff is not aware of any opposition to the proposed legislation beyond concerns raised by MTAC

### **Legal Antecedents**

Metro Code 3.07.750 established the need to create a task force/advisory committee.

### **Anticipated Effects**

Recommendations will be presented to the Metro Council and MPAC for amendment of the affordable housing sections of the Regional Framework Plan and Urban Growth Management Functional Plan (Title 7). The work of the Task Force, including the recommended solutions, may influence and support public, private and non profit organizations, including Metro, in working together to meet the housing choice needs of the region, especially in areas with abundant services, such as the 2040 Centers and Corridors. The Task Force work may also influence the affordable housing preservation efforts of public and non-profit agencies in the region.

### **Budget Impacts**

The FY 2006-07 proposed budget designates 0.55 FTE and \$40,000 M&S funds from continuing revenue sources and \$60,000 from one-time-only revenue sources to be expended through June 2007. Additional resources will be required in the FY 2006-07 Budget to implement the HCTF recommendations. Other resources would also have to be identified in future fiscal years' budgets to implement recommendations that impact those years.

## **RECOMMENDED ACTION:**



Staff recommends the adoption of Resolution 06-3677. This Resolution would: 1) accept the “Regional Housing Implementation Strategy” as meeting HCTF’s assignment in the Regional Framework Plan and Urban Growth Management Functional Plan; and 2) direct staff to prepare draft Regional Framework Plan and Urban Growth Management Functional Plan amendments for consideration of changes to the existing regional housing policies.