

**A G E N D A**

600 NORTHEAST GRAND AVENUE PORTLAND, OREGON 97232-2736



**METRO**

TEL 503-797-1540 FAX 503-797-1793

**MEETING: METRO POLICY ADVISORY COMMITTEE**

**DATE:** January 24, 2007

**DAY:** Wednesday, 5:00-7:00 p.m.

**PLACE:** Metro Council Chamber/Annex

NO	AGENDA ITEM	PRESENTER	ACTION	TIME
	CALL TO ORDER	Kidd		
1	SELF INTRODUCTIONS & COMMUNICATIONS	All		5 min.
2	CITIZEN COMMUNICATIONS FOR NON-AGENDA ITEMS			5 min.
3	CONSENT AGENDA <ul style="list-style-type: none"><li>January 10, 2007</li></ul>	Fuller	Decision	5 min.
4	COUNCIL UPDATE	Harrington	Update	5 min.
5	HOUSING AMENDMENTS TO REGIONAL FRAMEWORK PLAN & URBAN GROWTH MANAGEMENT FUNCTIONAL PLAN/ORDINANCE 06-1129	Uba/Benner	Presentation Discussion Decision	15 min. 15 min.
6	ORDINANCE 07-1137 TITLE 4 CHANGES	Benner	Presentation Discussion Decision	5 min. 10 min.
7	NEW LOOK <ul style="list-style-type: none"><li>Regional Transportation Plan Research Findings and Draft Policy Framework</li><li>Research Results on Agriculture/Urban Studies</li></ul>	Ellis/Kloster	Presentation Discussion Presentation Discussion	10 min. 15 min. 10 min. 15 min.

**UPCOMING MEETINGS:**

MPAC: February 14 & 28, 2007

MPAC Coordinating Committee, Room 270: February 14, 2007

For agenda and schedule information, call Kim Bardes at 503-797-1537. e-mail: bardes@metro.dst.or.us

MPAC normally meets the second and fourth Wednesday of the month.

To receive assistance per the Americans with Disabilities Act,  
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# **Metro Policy Advisory Committee**

January 24, 2007

Item 3 – Consent Agenda Meeting Summary for  
January 10, 2007

METRO POLICY ADVISORY COMMITTEE MEETING RECORD

January 10, 2007 – 5:00 p.m.

Metro Regional Center, Council Chambers

**Committee Members Present:** Shane Bemis, Jeff Cogen, Nathalie Darcy, Rob Drake, Andy Duyck, Dave Fuller, Bernie Giusto, Judie Hammerstad, John Hartsock, Richard Kidd, Charlotte Lehan, Alice Norris, Wilda Parks, Tom Potter, Martha Schrader, Chris Smith

**Committee Members Absent:** Ken Allen, Richard Burke, Larry Cooper, Erik Sten, Steve Stuart, Larry Smith, (Governing Body of School District –vacant)

**Alternates Present:** Aron Carleson, Lane Shetterly

**Also Present:** Robert Austin, City of Estacada; Bill Bash, City of Cornelius; Hal Bergsma, City of Beaverton; Al Burns, City of Portland; Carol Chesarek, Citizen; Bob Clay, City of Portland; Danielle Cowan, City of Wilsonville; Sara Culp, City of Portland; Brent Curtis, Washington County; Jillian Detweiler, TriMet; Kay Durtschi, MTAC; Suzanne Flynn, Metro Auditor; Ed Gallagher, City of Gresham; John Gessner, City of Fairview; Lincoln Herman, Stoel Rives; Jack Hoffman, Dunn Carney; Caroline Jones, Glenmorrie NHA – LO; Frank Groznik, City of Lake Oswego; Gil Kelley, City of Portland; Seth King, Perkins Coie; Irene Marvich, League of Women Voters; Leeanne MacColl, League of Women Voters; Jim McCauley, Home Builder Assoc.; Doug McClain, Clackamas County; Pat Ribellia, City of Hillsboro; Paul Savas, Clackamas County Special Districts Alternate; Karen Schilling, Multnomah County; Jonathan Schlueter, Westside Economic Alliance; Thane Tienson, Landye Bennett Blumstein; Veronica Valenzuela, City of Portland

**Metro Elected Officials Present:** Liaisons – Kathryn Harrington, Council District 4; Robert Liberty, Council District 6; Brian Newman, Council District 2 others in audience: David Bragdon, Council President; Rod Park, Council District 1

**Metro Staff Present:** Dick Benner, Dan Cooper, Chris Deffebach, Lake McTighe, Linnea Nelson, Sherry Oeser, Ken Ray, Reed Wagner

**1. SELF-INTRODUCTIONS & COMMUNICATIONS**

Chair Richard Kidd, called the meeting to order at 5:06 p.m. Chair Kidd asked those present to introduce themselves.

**2. CITIZEN COMMUNICATIONS FOR NON-AGENDA ITEMS**

Caroline Jones, Glenmorrie NHA – LO, spoke regarding Ordinance 07-1137 Title 4 Changes. She requested that property owners be notified of these changes.

**3. CONSENT AGENDA**

Meeting Summary for October 11, November 8 & 15, and December 13, 2006 and approval of MTAC Appointments:

Motion:	Mayor Martha Schrader, Clackamas County Commissioner, with a second from Chris Smith, Multnomah County Citizen Representative, moved to adopt the consent agendas with no revisions and to approve the MTAC Appointments.
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Vote:	The motion passed unanimously.
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#### **4. COUNCIL UPDATE**

Chair Kidd introduced Metro Councilor Kathryn Harrington, newly elected for Metro District 4. Councilor Harrington gave an update on Metro Council activities. Her talking points are attached and forms part of the record.

Councilor Brian Newman gave an update on the Expansion Area Planning program awards. He reviewed how the awards were determined and he distributed a list of the grant awards for the members. A copy of that list is attached and forms part of the record.

Dan Cooper, Metro Attorney, said that Metro had received the acknowledgement order from LCDC on Title 13, Nature in Neighborhoods, the former Goal 5 program. That was now official and the 60-day appeal period was running. He said that Metro was still waiting to receive the order from LCDC on the vote they took 7-months prior for approving the final industrial land decision in 2005.

#### **5. JPACT UPDATE**

Robin McArthur, Deputy Planning Director, reviewed the agenda for the next JPACT meeting.

#### **6. ELECTION OF 2007 OFFICERS**

Chair Kidd reported that David Fuller, City of Wood Village, was nominated as Chair for 2007, Alice Norris, City of Oregon City, was nominated as 1<sup>st</sup> Vice Chair, and the nomination for 2<sup>nd</sup> Vice Chair was still being discussed and will be voted on at a later date.

Motion:	Mayor Rob Drake, City of Beaverton, with a second from Martha Schrader, Clackamas County Commission, moved to elect Mayor David Fuller as MPAC Chair for 2007 and Mayor Alice Norris as 1 <sup>st</sup> Vice-Chair.
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Vote:	The motion passed unanimously: Shane Bemis, Aron Carleson, Jeff Cogen, Nathalie Darcy, Rob Drake, Andy Duyck, Dave Fuller, Bernie Giusto, Judie Hammerstad, John Hartsock, Richard Kidd, Charlotte Lehan, Alice Norris, Wilda Parks, Tom Potter, Martha Schrader, and Chris Smith voted aye.
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#### **7. CLARIFY EXPECTATIONS/ROLE OF MPAC**

Chair David Fuller, City of Wood Village, thanked Mayor Kidd for his service to MPAC. Chair Fuller gave an overview of the work that went into the material in the packet pertaining to MPAC Expectations/Role and explained why he felt it was important. He encouraged members to attend MPAC more frequently so that a quorum could be achieved at nearly every meeting.

Councilor Robert Liberty discussed the possible roles of MPAC as outlined in the packet material. He distributed a list of issues/topics for MPAC review during the course of the year. That list is attached and forms part of the record.

Mayor Charlotte Lehan said that MPAC had a larger role than just legislative review – which was also essential. She said she felt that item 3: Regional Issue Identification, Exploration and Policy Development was a part of that. She said legislation should be able to bubble up from MPAC to the Metro Council. She said she liked education and research part, but when most agendas had “information” items attendance would drop and there wouldn’t be quorums. She said that informational things needed to be included, but they shouldn’t stand alone on an agenda or there wouldn’t be a quorum for those meetings.

Chair Fuller asked how they would like to address the discussion about role and expectations.

Mayor Lehan said that they could have committees or round tables to work on it and then bring it back to MPAC. She said that she thought of MPAC just the same as her own planning commission.

Jeff Cogen, Clackamas County Commissioner, said that perhaps MPAC should not have 24 meetings per year.

Chair Fuller said that was one possibility to discuss.

Mayor Tom Potter, City of Portland, agreed that 24 meetings per year was tough on his schedule and he recommended having them once a month or quarterly. He said MPAC should ask MTAC to do basic policy research and forward recommendations so that when MPAC convened they would be discussing policy issues. He said he thought that they could do more by meeting less often. He made available a letter in the back of the room that outlined these ideas. That letter is attached and forms part of the record.

Mayor Judie Hammerstad, City of Lake Oswego, said that there were some very weighty issues that had not yet been discussed that very much needed to be discussed. She said that there were big questions that the body of MPAC needed to talk about. She said that those important discussions could happen with more meaningful meetings.

Chair Fuller said that the needs of Metro needed to support the needs of the jurisdictions.

Bernie Guisto, TriMet, said that often the most meaningful work seemed to come out of sub-committees. He said that issues seemed to be on a never-ending cycle and they were often revisited. He said that there needed to be more targeted discussion. He agreed that meetings needed to be more focused.

Mayor Rob Drake, City of Beaverton, said that some of the more exciting discussions he was involved with over the years happened around the MPAC table. He said he understood Mayor Potter’s point and it was well taken, but MPAC was helping Metro to craft legislation and policy. He said that he thought it was critical to keep the cross section of people at the table and continue to have the open discussions. No where else in the country did these open discussions take place and with such diverse representation. He said that Metro usually listened. He agreed that some of the topics had been a little mundane, but he felt that with the list of agenda topics distributed early in the year there would be some indication of when meetings needed to be held and how frequently.

Mayor Kidd recommended that they did not at this time reduce the number of meetings, but rather reserve the right to drop them when not needed.

Nathalie Darcy, Washington County Citizen Representative, supported keeping the 24 meetings as scheduled with the caveat of dropping them if they were not needed. She said she would like to have a meeting to discuss Big Box at some point in 2007.

Mayor Alice Norris, City of Oregon City, moved that a sub-committee be formed to focus on the agendas and that the focus should be quality generated and not quantity generated.

Chair Fuller said that he would like to see a more detailed agenda for the year and he asked for volunteers to form a subcommittee: Charlotte Lehan, Martha Schrader, Alice Norris, Richard Kidd, Nathalie Darcy, and Dave Fuller agreed to make up the committee. He stipulated that the work by this committee be done by the second meeting in February. It was requested that MPAC members be notified of all meeting dates and times.

**8. RESOLUTION ENDORSING 2007 LEGISLATIVE AGENDA**

Councilor Newman reviewed the process that led to the creation of the legislative agenda proposal for 2007 that was included in the packet material.

Mayor Drake expressed some concern about extending the cycle from 5-years to 7-years for the industrial land segment. He said that this was mainly because there weren't enough large lot industrial sites to entice big business to Oregon as the boundary now stood.

Councilor Newman said that there were many things that were not on the list, and they would like to keep the agenda open for new items, but he recommended members submitting ideas/information to the folks working on that.

Mayor Norris said that any changes/updates should be reported back to MPAC as they developed in Salem.

Mayor Drake said that MPAC had done a lot of work over the years on Affordable Housing and he was wondering if MPAC might consider endorsing that package in the legislative agenda.

Councilor Newman said that Affordable Housing would be before the Council shortly and it would be taken under consideration.

Motion:	Mayor Judie Hammerstad, City of Lake Oswego, with a second from Richard Kidd, City of Forest Grove, moved to endorse the regional legislative agenda and to keep working on it as well.
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Mayor Richard Kidd, City of Forest Grove, said it was a good idea to keep working on it, but that it needed to be moved forward as soon as possible.

Wilda Parks, Clackamas County Citizen Representative, said that when MPAC passed it and the Metro Council passed it, it should be taken to the jurisdictions and chambers to share.

Vote:	The motion passed unanimously.
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**9. ORDINANCE 07-1136 MEASURE 37 METRO CLAIMS PROCESS**

Richard Benner, Senior Attorney, gave a brief overview of the main changes to the process as outlined in the packet material.

Motion:	Commissioner John Hartsock, Clackamas County Special Districts, with a second from Martha Schrader, Clackamas County, moved to recommend approval of Ordinance 07-1136 Measure 37 Metro Claims Process to the Metro Council.
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Vote:	The motion passed unanimously.
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**10. ORDINANCE 06-1124 TITLE 4 CHANGES**

Chair Fuller mentioned the letter from Mayor Drake, City of Beaverton, which was available in the back of the room and is attached and forms part of the record.

Mayor Drake reviewed his concerns as outlined in the letter.

Mr. Cooper explained that if MPAC needed another two weeks to discuss and share the Title 4 information, it would not make their recommendation late as the Metro Council had scheduled decision on this item for their February 8, 2007 meeting.

John Hartsock, Clackamas County Special Districts, recused himself from the discussion as he had a conflict of interest with a client.

Mayor Norris said that she felt it was important, when new information was introduced, to be able to take that information back to her commission for discussion before voting on it.

Chris Smith, Multnomah County Citizen Representative, said that he was concerned about the time horizon issues and gap. He also had concern about the impact of the M37 claims as he did not consider that a completed issue as yet.

Commissioner Martha Schrader, Clackamas County, said she would like a little more time to review as well and that she supported sending it back to MTAC to have them take one last look at it.

Mayor Lehan said that regionally significant industrial land issues were very important because in the last go around Wilsonville got a large percentage of RSIA that they didn't want. She said that local needs should be taken into account as well as regional needs, especially those that were (or would be) impacted and have to deal with the ramifications of added land and growth. She said that she was fine with discussing it further.

Councilor Newman said there had to be strict and sound criteria to help weigh the regional impacts.

Councilor Harrington asked at what point they would decide that they had had enough discussion on a topic in order to make a decision.

It was generally decided to send Title 4 back to MTAC and then have it come back to MPAC for decision at the January 24, 2007 meeting.

Mr. Benner reviewed the material included in the packet and emphasized the changes in the document.

As a last order of business, Chair Fuller appointed Alice Norris to chair the appointed MPAC Expectations/Role and 2007 agenda sub-committee.

There being no further business, Chair Fuller adjourned the meeting at 7:02 p.m.

Respectfully submitted,



Kim Bardes  
MPAC Coordinator

ATTACHMENTS TO THE RECORD FOR JANUARY 10, 2007

The following have been included as part of the official public record:

<b>AGENDA ITEM</b>	<b>DOCUMENT DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT NO.</b>
<b>#3 Consent Agenda</b>	1/10/07	MTAC Appointments	011007-MPAC-01
<b>#4 Council Update</b>	1/10/07	Speaking Points on Metro Council Update for Kathryn Harrington	011007-MPAC-02
<b>#4 Council Update</b>	1/10/07	Metro news release: Metro awards \$6.3 million for planning in growth expansion areas	011007-MPAC-03
<b>#7 MPAC Role</b>	1/10/07	Letter from Mayor Potter, City of Portland, to MPAC re: MPAC Expectations/Role discussion	011007-MPAC-04
<b>#7 MPAC Role</b>	1/8/07	MPAC Tentative 2007 Agenda Items	011007-MPAC-05
<b>#10 Title 4</b>	1/10/07	Letter from Mayor Ogden, City of Tualatin to MPAC re: Title 4	011007-MPAC-06
<b>#10 Title 4</b>	1/9/07	Letter from Mayor Drake to MPAC re: Title 4	011007-MPAC-07



## **Metro Policy Advisory Committee**

January 24, 2007

Item 5 – Housing Amendments to Regional Framework Plan &  
Urban Growth Management Functional Plan – Ordinance 06-1129

Please review the following Housing Policy amendments prior to the January 24 MPAC meeting. The Metro Council is holding a hearing and may take action on this ordinance on **January 25**.  
Outcome: To make a recommendation on the ordinance to the Metro Council.

M E M O R A N D U M

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232 2736  
TEL 503 797 1530 | FAX 503 797 1792



METRO

DATE: January 4, 2007  
TO: MPAC  
FROM: Gerry Uba and Dick Benner  
RE: *Housing Choices: Ordinance No. 06-1129A*

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At your November 8, 2006 meeting, you discussed proposed amendments (Ordinance No. 06-1129A) to the Regional Framework Plan (Exhibit A) and Title 7 (Exhibit B) of the Urban Growth Management Functional Plan. The amendments are intended to implement the recommendations of the Housing Choice Task Force. At the November meeting, MPAC members' impression is that the proposed amendments in the Metro Code are in the right direction, and that future progress reporting by local governments should include local resources and staff devoted to the provision of affordable housing.

**MTAC Comment**

MTAC discussed the proposed amendments to the Regional Framework Plan and Title 7 of the Urban Growth Management Functional Plan Exhibit A and B of Ordinance 1129A respectively at its meetings on November 15 and December 6, 2006. Below are MTAC recommendations.

**A. Metro's Regional Housing Choice Implementation:**

MTAC recommended that Metro should communicate to stakeholders how it is implementing the recommendations of the Housing Choice Task Force (HCTF) accepted by the Metro Council in April 2006. Please refer to Gerry's separate memo for how Metro is implementing the recommendations of the task force.

**B. Proposed Amendments in the Regional Framework Plan:**

Recommendation 1 – New Policy 1.3.1:

A key Metro broad housing choice policy should be stated upfront, indicating the type of housing included in housing choice. In addition, some of the terms in the policies should be more precise.

A new Policy 1.3.1 was the result of this recommendation:

1.3.1 **Provide housing choices in the region, including single family, multi-family, ownership and rental housing, and housing offered by the private, public and nonprofit sectors.**

Minor word changes were made in the policies to make the terms in the policies to be more precise.

Comment on old Policy 1.3.1.c (new Policy 1.3.2.c):

Some MTAC members expressed concern about the deletion of this policy – “Providing an appropriate balance of jobs and housing of all types within subregions.” We continue to think jobs/housing balance is more appropriately addressed in the parts of Chapter 1, Land Use, of the RFP that influence or are directed toward the allocation of land to design types and subregions [see Urban Form 1.1.1, Economic Opportunity 1.4.2, Economic Vitality 1.5.4(b), Neighbor Cities 1.11(c)].”

Recommendation 2 – old Policy 1.3.2 (new Policy 1.3.3):

Adding a clarification to the policy that the affordable housing production goals will be revised overtime as new information become available.

A revised/new Policy 1.3.3 was the result of this recommendation:

- 1.3.3 **Maintain** voluntary affordable housing production goals **for the region, to be revised over time as new information becomes available and displayed in Chapter 8 (Implementation), and encourage their adoption by the cities and counties of the region.**

Recommendation 3 – New Policy 1.3.4:

The voluntary land use strategies recommended to local governments – proposed to be removed from Title 7 – should be retained in the Regional Framework Plan. The strategies remain voluntary. Placing them in the RFP’s Housing Choice policies indicates that Metro continues to recommend these strategies, and will offer technical assistance to local governments that want to adopt them.

A new Policy 1.3.4 was the result of this recommendation:

- 1.3.4 Encourage local governments to consider the following tools and strategies to achieve the affordable housing production goals:
- a. Density bonuses for affordable housing;
  - b. A no-net-loss affordable housing policy;
  - c. A voluntary inclusionary zoning policy;
  - d. A transferable development credits program for affordable housing;
  - e. Policies to accommodate the housing needs of the elderly and disabled;
  - f. Removal of regulatory constraints on the provision of affordable housing; and
  - g. Policies to ensure that parking requirements do not discourage the provision of affordable housing.

Comment on old Policy 1.3.3 (new Policy 1.3.5): Proposed amendment is in the right direction.

Comment on old Policy 1.3.4 (new Policy 1.3.6): Proposed amendment is in the right direction. Minor word changes were made in the policy to make the terms in the policies to be more precise.

Comment on proposed Policy 1.3.5 (new Policy 1.3.7): Proposed amendment is in the right direction. The word “Technical” was added to make the terms in the policy to be more precise.

Comment on proposed Policy 1.3.6 (new Policy 1.3.8): Proposed amendment is in the right direction.

Recommendation 4 – Proposed Policy 1.3.7 (new Policy 1.3.9): The proposed policy should consider the importance of improving the balance of housing choice locally, with particular attention to ensuring adequate affordable housing.

A revised/new Policy 1.3.9 was the result of this recommendation:

- 1.3.9 When expanding the Urban Growth Boundary, assigning or amending 2040 Growth Concept design type designations or making other discretionary decisions, **seek agreements** with local governments and others to **improve the balance of housing choices with particular attention to affordable housing.**

Comment on proposed Policy 1.3.8 (new Policy 1.3.10): Proposed amendment is in the right direction.

Comment on proposed Policy 1.3.9 (new Policy 1.3.11): Proposed amendment is in the right direction. Minor word changes were made in the policy to make the terms in the policies to be more precise.

Recommendation 5 – Proposed Policy 1.3.10 (new Policy 1.3.12): The proposed definition of affordable housing takes away the emphasis on the core low income group and is counter to the recommendations of the 2000 Affordable Housing Technical Advisory Committee and the 2006 Housing Choice Task Force. In addition, the proposed definition of affordable housing did not consider affordable homeownership as stated above in the new Policy 1.3.1.

A revised/new Policy 1.3.12 was the result of this recommendation:

- 1.3.12 For purposes of these policies, “affordable housing” means housing that families earning less than **50 percent of the median household income for the region can reasonably afford to rent and earning as much as or less than 100 percent of the median household income for the region can reasonably afford to buy.**

Comment on the linkage between policies in the Regional Framework Plan and policies in the Functional Plan:

Some MTAC members stated that affordable housing is a major component of the region’s housing supply, hence the Regional Framework Plan should have a policy, implemented in Title 1 of the Functional Plan, that calls for allocation of affordable housing to cities and counties in the region. In addition, these members expressed concern that the policies of the Regional Framework Plan are weak and should be strengthened through Metro’s New Look process. These members suggest that Metro Council to direct a review of the titles of the Functional Plan, including Title 1, and direct amendments in some instances. For the time being, these suggestions are at odds with the overall direction being taken by the Council on affordable housing, which is to devote time, technical assistance and financial resources to building affordable housing rather than requiring it through regulation.

### **C. Proposed Amendments in Title 7 of the Urban Growth Management Functional Plan:**

Comment on Policy 3.07.710: Proposed amendment is in the right direction.

Comment on Policy 3.07.720: Proposed amendment is in the right direction.

Recommendation 1 – Policy 3.07.730:

The proposed deletion of the entire Policy 3.07.730, including the land use strategies, should be reconsidered in light of ensuring that local governments continue to make effort to find opportunities for providing affordable housing in their jurisdictions. Recognizing that the deleted land use strategies in subsection “B” of this policy were inserted in the Regional Framework Plan, the requirements in subsection “A” of this policy should not be deleted to ensure local efforts towards providing affordable housing.

Policy 3.07.740\*: Members did not comment on this policy.

\* Staff Recommendation: The date proposed initially for local governments to submit their first progress report, April 15, 2007, was based on the adoption of Ordinance 06-1129A by December 2006. It is therefore recommended that the proposed date for local governments to submit their first progress report should be July 15, 2007,

Recommendation 2 – Policy 3.07.750:

The proposed technical assistance that cities and counties are encouraged to take advantage of should include assistance on affordable housing data for reporting local progress on housing supply.

Comment on the Table 3.07-7, Five Year Affordable Housing Production Goals: Metro should note that the table will be updated in 2007.

**Request**

Discuss and review the attached Ordinance 06-1129A with proposed text changes in the exhibits (Regional Framework Plan and Functional Plan Title 7), and provide recommendations to the Metro Council at the January 24, 2007 meeting.

# M E M O R A N D U M

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232 2736  
TEL 503 797 1700 | FAX 503 797 1794



DATE: January 5, 2007  
TO: MPAC  
FROM: Gerry Uba, Housing Program Manager  
RE: **Regional Housing Choice Implementation**

The purpose of this memo is to explain how Metro will be implementing the recommendations of the Housing Choice Task Force (HCTF) accepted by the Metro Council in April 2006. The information in this memo also sheds light into how policies in the Regional Framework Plan and Functional Plan Title 7 fit into the overall implementation of HCTF recommendations.

## **Implementation of HCTF Recommendations**

Metro is developing a Housing Choice Work Plan containing a variety of techniques that will be employed to implement recommendations of the HCTF, as current budget would allow. The techniques includes:

- Establishment of housing choice technical assistant services (described below);
- Housing Choice Policy Advisory Committee to be created by the Metro Council;
- Ad-hoc Housing Finance Study Committee to be created by the Metro Council to develop political and fiscal mechanisms for implementing one-time \$10 million housing fund;
- Metro's membership on the Housing Alliance (The Housing Alliance is proposing a \$100 million Housing Opportunity Fund proposal for the 2007 Oregon legislative session);
- An informal communication network between Metro programs to facilitate the implementation of housing choice solutions and tools; and
- Formation of a Regional Housing Supply Inventory Team to develop base information for determining current affordable housing supply and need.

## **Technical Assistance and Other Housing Choice Strategies**

Metro's Housing Choice program staff will offer technical assistance to local governments to help identify and implement appropriate housing strategies and tools. Technical assistance activities of the Housing Choice program will be guided by existing policies adopted by the Metro Council, the solutions and tools recommended by the Housing Choice Task Force and accepted by the Metro Council, and additional tools developed by the New Look.

Technical assistance services and intended outcomes are grouped in the following tiers:

### **Tier I: Local Housing Choice Action Agenda**

Tier I technical assistance has been structured to inform a Local Housing Choice Action Agenda, a strategic framework for developing and implementing local policies in support of diverse housing

options. The Local Housing Choice Action Agenda is based on several analyses of current market and regulatory conditions, including:

- Baseline Housing Needs Assessment
- Available Land Survey
- “At-risk” Housing Assessment
- Review of Existing and Potential Incentives, including but not limited to those identified in the RFP
- Review of Messaging and Community Outreach Guidelines

Current program funding dictates that Housing Choice staff primarily focus on providing Tier I technical assistance in the first year of the program.

**Tier II: Implementation Tools & Policy Economics**

Tier II technical assistance builds off of the Local Housing Choice Action Agenda, and is designed to help jurisdictions understand the economic implications of alternative housing development approaches and equip them with tools to implement achievable plans for the production of affordable and workforce housing. Tier II technical assistance is especially valuable for local governments that seek the necessary tools to effectively engage and form partnerships with the regional development community.

Specific services include:

- Cost-Benefit Analysis of Potential Housing Incentives
- Model Affordable Housing Approval and Development Conditions
- Review Housing Choice Financing Tools
- Develop Negotiation Strategies for Public-Private Partnerships

**Tier III: Public-Private Partnerships**

Tier III technical assistance is designed to help jurisdictions form lasting partnerships with private and non-profit developers to share the risks and rewards, and make informed investments in the local community. A long-term objective of the Housing Choice program is to assist local governments in the preparation and review of developer RFPs. Additional technical assistance can be developed upon formation of the public-private partnership.

cc: Andy Cotugno, Director, Planning Department  
Robin McArthur, Regional Planning Director  
Chris Deffebach, Long Range Planning Manager

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE ) Ordinance No. 06-1129<sup>A</sup>  
REGIONAL FRAMEWORK PLAN TO REVISE )  
METRO POLICIES ON HOUSING CHOICE )  
AND AFFORDABLE HOUSING AND )  
AMENDING METRO CODE SECTIONS )  
3.07.710 THROUGH 3.07.760 TO IMPLEMENT ) Introduced by Councilors Rex Burkholder and  
THE NEW POLICIES ) 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, Metro established the Housing Choice Task Force (“HCTF”) to make recommendations to the Metro Council on strategies to increase the supply of affordable housing and housing choices in the region; and

WHEREAS, the HCTF submitted its Regional Housing Choice Implementation Strategy (“RHCIS”) to the Metro Council in March, 2006, with a comprehensive set of recommendations for policies and mechanisms to increase housing choice and the production and preservation of affordable housing; and

WHEREAS, the Metro Council accepted the recommendations of the HCTF contained in the RHCIS by Resolution No. 06-3677B (For the Purpose of Accepting the Regional Housing Choice Task Force Strategy Recommended by the Housing Choice Task Force Appointed by the Metro Council) on April 20, 2006; and

WHEREAS, the Metro Council, by the same Resolution No. 06-3677B, directed the Chief Operating Officer to prepare an ordinance for consideration by the Council to make appropriate amendments to the Regional Framework Plan and the Urban Growth Management Functional Plan to implement the recommendations of the RHCIS; and



WHEREAS, the Metropolitan Policy Advisory Council reviewed the proposed amendments and recommended that the Metro Council adopt the amendments; and

WHEREAS, the Metro Council held a public hearing on the proposed amendments on ~~December \_\_, 2006~~ January 25, 2007, and considered public comments in their decision-making; now, therefore,

BE IT RESOLVED that:

1. Policy 1.3 of the Regional Framework Plan is amended as indicated in Exhibit A, attached and incorporated into this ordinance.
2. Metro Code sections 3.07.710 through 3.07.760 (Title 7 of the Urban Growth Management Functional Plan) are amended as indicated in Exhibit B, attached and incorporated into this ordinance.
3. The amendments to the Regional Framework Plan and the Urban Growth Management Functional Plan comply with the statewide planning goals as indicated in Exhibit C, the Findings of Fact and Conclusions of Law, attached and incorporated into this ordinance.

ADOPTED by the Metro Council this \_\_ day of \_\_\_\_\_, 2007.

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

Attest:

Approved as to form:

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

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

**Exhibit A to Ordinance No. 06-1129<sup>A</sup>  
Amendments to the Regional Framework Plan Policy 1.3**

**1.3 ~~Housing and Affordable Housing~~ Choice**

It is the policy of the Metro Council to:

1.3.1 Provide housing choices in the region, including single family, multi-family, ownership and rental housing, and housing offered by the private, public and nonprofit sectors.

~~1.3.12~~ E~~As part of the effort to provide housing choices, encourage affordable housing opportunities in the region by~~ local governments to ensure that their land use regulations:

a. ~~Offering~~ Allow a diverse range of housing types, ~~available within the region, and within cities and counties inside Metro's Urban Growth Boundary.;~~

b. ~~Being~~ Make housing choices available to households of all income levels ~~that live or have a member working in each jurisdiction and subregion.;~~ and

c. ~~Providing an appropriate balance of jobs and housing of all types within subregions.~~

~~d.~~ Addressing current and future need for and supply of affordable housing production goals. Allow affordable housing, particularly in Centers and Corridors and other areas well-served with public services.

~~e.~~ Minimizing any concentration of poverty.

~~1.3.23~~ ~~Include in the Urban Growth Management Functional Plan~~ Maintain voluntary affordable housing production goals ~~for the region, to be revised over time as new information becomes available and displayed in Chapter 8 (Implementation), and encourage their adoption by the cities and counties of the region, to be adopted by local jurisdictions in the region as well as land use and non-land use affordable housing tools and strategies~~

1.3.4 Encourage local governments to consider the following tools and strategies to achieve the affordable housing production goals:

a. Density bonuses for affordable housing;

b. A no-net-loss affordable housing policy to be applied to quasi-judicial amendments to the comprehensive plan;

c. A voluntary inclusionary zoning policy;

d. A transferable development credits program for affordable housing;

e. Policies to accommodate the housing needs of the elderly and disabled;

f. Removal of regulatory constraints on the provision of affordable housing; and

- g. Policies to ensure that parking requirements do not discourage the provision of affordable housing.
- 1.3.35 Require local governments in the region to report progress towards increasing the supply of affordable housing and seek their assistance in periodic inventories of the supply of affordable housing.
- 1.3.46 ~~Acknowledge that there is a need to~~ Work in cooperation with local governments, state government, business groups, non-profit groups and citizens to create an affordable housing fund available region wide in order to leverage other affordable housing resources, and that, if the region is to be successful in increasing the amount of affordable housing, such a housing fund would need the support of a wide range of interests including local government, state and business groups.
- 1.3.7 Provide assistance to local governments to help them do their part in achieving regional goals for the production and preservation of housing choice and affordable housing.
- 1.3.8 Integrate Metro efforts to expand housing choices with other Metro activities, including transportation planning, land use planning and planning for parks and greenspaces.
- 1.3.9 When expanding the Urban Growth Boundary, assigning or amending 2040 Growth Concept design type designations or making other discretionary decisions, seek agreements with local governments and others to improve the balance of housing choices with particular attention to affordable housing.
- 1.3.10 Consider incentives, such as priority for planning grants and transportation funding, to local governments that obtain agreements from landowners and others to devote a portion of new residential capacity to affordable housing.
- 1.3.11 Help ensure opportunities for low-income housing types throughout the region so that families of modest means are not obliged to live concentrated in a few neighborhoods, because concentrating poverty is not desirable for the residents or the region.
- 1.3.12 For purposes of these policies, “affordable housing” means housing that families earning less than 50 percent of the median household income for the region can reasonably afford to rent and earn as much as or less than 100 percent of the median household income for the region can reasonably afford to buy. ~~without spending more than 30 percent of their after-tax income~~

**Exhibit A to Ordinance No. 06-1129A**  
**Amendments to the Regional Framework Plan Policy 1.3**

**1.3 Housing Choice**

It is the policy of the Metro Council to:

- 1.3.1 Provide housing choices in the region, including single family, multi-family, ownership and rental housing, and housing offered by the private, public and nonprofit sectors.
- 1.3.2 As part of the effort to provide housing choices, encourage local governments to ensure that their land use regulations:
  - a. Allow a diverse range of housing types;
  - b. Make housing choices available to households of all income levels; and
  - c. Allow affordable housing, particularly in Centers and Corridors and other areas well-served with public services.
- 1.3.3 Maintain voluntary affordable housing production goals for the region, to be revised over time as new information becomes available and displayed in Chapter 8 (Implementation), and encourage their adoption by the cities and counties of the region.
- 1.3.4 Encourage local governments to consider the following tools and strategies to achieve the affordable housing production goals:
  - a. Density bonuses for affordable housing;
  - b. A no-net-loss affordable housing policy to be applied to quasi-judicial amendments to the comprehensive plan;
  - c. A voluntary inclusionary zoning policy;
  - d. A transferable development credits program for affordable housing;
  - e. Policies to accommodate the housing needs of the elderly and disabled;
  - f. Removal of regulatory constraints on the provision of affordable housing; and
  - g. Policies to ensure that parking requirements do not discourage the provision of affordable housing.
- 1.3.5 Require local governments in the region to report progress towards increasing the supply of affordable housing and seek their assistance in periodic inventories of the supply of affordable housing.
- 1.3.6 Work in cooperation with local governments, state government, business groups, non-profit groups and citizens to create an affordable housing fund available region wide in order to leverage other affordable housing resources.

- 1.3.7 Provide assistance to local governments to help them do their part in achieving regional goals for the production and preservation of housing choice and affordable housing.
- 1.3.8 Integrate Metro efforts to expand housing choices with other Metro activities, including transportation planning, land use planning and planning for parks and greenspaces.
- 1.3.9 When expanding the Urban Growth Boundary, assigning or amending 2040 Growth Concept design type designations or making other discretionary decisions, seek agreements with local governments and others to improve the balance of housing choices with particular attention to affordable housing.
- 1.3.10 Consider incentives, such as priority for planning grants and transportation funding, to local governments that obtain agreements from landowners and others to devote a portion of new residential capacity to affordable housing.
- 1.3.11 Help ensure opportunities for low-income housing types throughout the region so that families of modest means are not obliged to live concentrated in a few neighborhoods, because concentrating poverty is not desirable for the residents or the region.
- 1.3.12 For purposes of these policies, “affordable housing” means housing that families earning less than 50 percent of the median household income for the region can reasonably afford to rent and earn as much as or less than 100 percent of the median household income for the region can reasonably afford to buy.

**Exhibit B to Ordinance No. 06-1129<sup>A</sup>**  
**Amendments to Metro Code Sections 3.07.720 through 3.07.760**

**TITLE 7: ~~AFFORDABLE~~ HOUSING CHOICE**

3.07.710 Intent

The Regional Framework Plan ~~stated the need to provide affordable housing opportunities through: a) a diverse range of housing types, available within the region, and within cities and counties inside Metro's Urban Growth Boundary; b) sufficient and affordable housing opportunities available to households of all income levels that live or have a member working in each jurisdiction and subregion; c) an appropriate balance of jobs and housing of all types within subregions; d) addressing current and future need for and supply of affordable housing in the process used to determine affordable housing production goals; and e) minimizing any concentration of poverty. The Regional Framework Plan directs that Metro's Urban Growth Management Functional Plan include~~ calls for establishment 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 governments and assistance from local governments on reports on. ~~The Regional Framework Plan also directs that Metro's Urban Growth Management Functional Plan include local governments' reporting progress towards increasing the supply of affordable housing. It is the intent of Title 7 to implement these policies of the Regional Framework Plan.~~

~~Title 1 of this functional plan requires cities and counties to change their zoning to accommodate development at higher densities in locations supportive of the transportation system. Increasing allowable densities and requiring minimum densities encourage compact communities, more efficient use of land and should result in additional affordable housing opportunities. These Title 1 requirements are parts of the regional affordable housing strategy.~~

3.07.720 Voluntary Affordable Housing Production Goals

Each city and county within the Metro region should adopt the Affordable Housing Production Goal indicated in Table 3.07-7, ~~for their city or county~~ as amended over time, as a guide to measure progress toward increasing housing choices and meeting the affordable housing needs of households with incomes between 0% and 50% of the regional median family income.

3.07.730 Requirements for Comprehensive Plan and Implementing Ordinance Changes

A. Cities and counties within the Metro region shall ensure that their comprehensive plans and implementing ordinances:

1. Include strategies to ensure a diverse range of housing types within their jurisdictional boundaries.
2. Include in their plans actions and implementation measures designed to maintain the existing supply of affordable housing as well as increase the opportunities for new dispersed affordable housing within their boundaries.
3. Include plan policies, actions, and implementation measures aimed at increasing opportunities for households of all income levels to live within their individual jurisdictions in affordable housing.

~~B. Cities and counties within the Metro region shall consider amendment of their comprehensive plans and implementing ordinances with the following affordable housing land use tools and strategies identified below. Compliance with this subsection is achieved when the governing body of a city or county considers each tool or strategy in this subsection and either amends its comprehensive plan and implementing ordinances to adopt the tool or strategy or explains in writing why it has decided not to adopt it.~~

~~1. Density Bonus. A density bonus is an incentive to facilitate the development of affordable housing. Local jurisdictions could consider tying the amount of bonus to the targeted income group to encourage the development of affordable units to meet affordable housing production goals.~~

~~2. Replacement Housing. No Net Loss housing policies for local jurisdictional review of requested quasi-judicial Comprehensive Plan Map amendments with approval criteria that would require the replacement of existing housing that would be lost through the Plan Map amendment.~~

~~3. Inclusionary Housing.~~

- ~~a. Implement voluntary inclusionary housing programs tied to the provision of incentives such as Density Bonus incentives to facilitate the development of affordable housing.~~
- ~~b. Develop housing design requirements for housing components such as single-car garages and maximum square footage that tend to result in affordable housing.~~
- ~~c. Consider impacts on affordable housing as a criterion for any legislative or quasi-judicial zone change.~~

~~4. Transfer of Development Rights.~~

- ~~a. Implement TDR programs tailored to the specific conditions of a local jurisdiction.~~
- ~~b. Implement TDR programs in Main Street or Town Center areas that involve upzoning.~~

~~5. Elderly and People with Disabilities. Examine zoning codes for conflicts in meeting locational needs of these populations.~~

~~6. Local Regulatory Constraints; Discrepancies in Planning and Zoning Codes; Local Permitting or Approval Process.~~

- ~~a. Revise the permitting process (conditional use permits, etc.).~~
- ~~b. Review development and design standards for impact on affordable housing.~~
- ~~c. Consider using a cost/benefit analysis to determine impact of new regulations on housing production.~~
- ~~d. Regularly review existing codes for usefulness and conflicts.~~
- ~~e. Reduce number of land use appeal opportunities.~~



~~f. Allow fast tracking of affordable housing.~~

~~7. Parking.~~

~~a. Review parking requirements to ensure they meet the needs of residents of all types of housing.~~

~~b. Coordinate strategies with developers, transportation planners and other regional efforts so as to reduce the cost of providing parking in affordable housing developments.~~

~~3.07.740 Requirements for Inventory and Progress Reports on Housing Supply~~

~~Progress made by local jurisdictions in amending comprehensive plans and implementing ordinances and consideration of land use related affordable housing tools and strategies to meet the voluntary affordable housing production goals shall be reported according to the following schedule:~~

~~A. By January 31, 2002, cities and counties within the Metro region shall submit a brief status report to Metro as to what items they have considered and which items remain to be considered. This analysis could include identification of affordable housing land use tools currently in use as well as consideration of the land use tools in Section 3.07.730(B).~~

~~B. By December 31, 2003, each city and county within the Metro region shall provide a report to Metro on the status of its comprehensive plan and implementing ordinances explaining how each tool and strategy in subsection 3.07.730B was considered by its governing body. The report shall describe comprehensive plan and implementing ordinance amendments pending or adopted to implement each tool and strategy, or shall explain why the city or county decided not to adopt it.~~

~~C. By June 30, 2004, each city and county within the Metro region shall report to Metro on the outcome of the amendments to its comprehensive plan and implementing ordinances pending at the time of submittal of the report described in subsection B of this section and on the public response, if any, to any implementation adopted by the city or county to increase the community's stock of affordable~~

~~housing, including but not limited to the tools and strategies in subsection 3.07.730B.~~

~~3.07.750 Metro Assessment of Progress~~

~~A. Metro Council and MPAC shall review progress reports submitted by cities and counties and may provide comments to the jurisdictions.~~

~~B. Metro Council shall:~~

~~1. In 2003, estimate 2000 baseline affordable housing units affordable to defined income groups (less than 30 percent, 31-50 percent, 51-80 percent of the region's median family income) using 2000 U.S. Census data;~~

~~2. By December 2004, formally assess the region's progress made in 2001-2003 to achieve the affordable housing production goals in Table 3.07-7;~~

~~3. By December 2004, review and assess affordable housing tools and strategies implemented by local governments and other public and private entities;~~

~~4. By December 2004, examine federal and state legislative changes;~~

~~5. By December 2004, review the availability of a regional funding source;~~

~~6. By December 2004, update the estimate of the region's affordable housing need; and~~

~~7. By December 2004, in consultation with MPAC, create an ad hoc affordable housing task force with representatives of MPAC, MTAC, homebuilders, affordable housing providers, advocate groups, financial institutions, citizens, local governments, state government, and U.S. Housing and Urban Development Department to use the assessment reports and census data to recommend by December 2005 any studies or any changes that are warranted to the existing process, tools and strategies, funding plans or goals to ensure that significant progress is made toward providing affordable housing for those most in need.~~

- A. Local governments shall assist Metro in the preparation of a biennial affordable housing inventory by fulfilling the reporting requirements in subsection 3.07.120D of Title 1 (Requirements for Housing and Employment Accommodation) and subsection B of this section.
- B. Local governments shall report their progress on increasing the supply of affordable housing to Metro on a form provided by Metro, to be included as part of the biennial housing inventory described in subsection A. Local governments shall submit their first progress reports on April 15, 2007, and by April 15 every two years following that date. Local governments may report their progress as part of the capacity reports required by subsection 3.07.120D of Title 1 (Requirements for Housing and Employment Accommodation). Progress reports shall include, at least, the following information:
1. The number and types of units of affordable housing preserved and income groups served during the reporting period, as defined in Metro's form;
  2. The number and types of units of affordable housing built and income groups served during the reporting period;
  3. Affordable housing built and preserved in Centers and Corridors; and
  4. City or county resources committed to the development of affordable housing, such as fee waivers and property tax exemptions.

~~3.07.760~~3.07.750 ~~Recommendations to Implement Other Affordable Housing Strategies~~Technical Assistance

- ~~A. Local jurisdictions are encouraged to consider implementation of the following affordable housing land use tools to increase the inventory of affordable housing throughout the region. Additional information on these strategies and other land use strategies that could be considered by local jurisdictions are described in Chapter Four of the Regional Affordable Housing Strategy and its Appendixes.~~

- ~~1. Replacement Housing. Consider policies to prevent the loss of affordable housing through demolition in urban renewal areas by implementing a replacement housing ordinance specific to urban renewal zones.~~
  - ~~2. Inclusionary Housing. When creating urban renewal districts that include housing, include voluntary inclusionary housing requirements where appropriate.~~
- ~~B. Local jurisdictions are encouraged to analyze, adopt and apply locally appropriate non land use tools, including fee waivers or funding incentives as a means to make progress toward the Affordable Housing Production Goal. Non land use tools and strategies that could be considered by local jurisdictions are described in Chapter Four of the Regional Affordable Housing Strategy and its Appendixes. Cities and Counties are also encouraged to report on the analysis, adoption and application of non land use tools at the same intervals that they are reporting on land use tools (in Section 3.07.740).~~
- ~~C. Local jurisdictions are also encouraged to continue their efforts to promote housing affordable to other households with incomes 50% to 80% and 80% to 120% of the regional median household income.~~
- ~~D. Local jurisdictions are encouraged to consider joint coordination or action to meet their combined affordable housing production goals.~~

Cities and counties are encouraged to take advantage of the programs of technical and financial assistance provided by Metro to help achieve the goal of increased production and preservation of housing choices and affordable housing and to help fulfill the monitoring and reporting requirements of this title.

**Table 3.07-7**  
**Five-Year Voluntary Affordable Housing Production Goals**  
 (Section 3.07.720)

<b>Jurisdiction</b>	<b>2001-2006 Affordable Housing Production Goals</b>		
	<i>Needed new housing units for households earning less than 30% of median household income</i>	<i>Needed new housing units for households earning 30-50% of median household income</i>	<i>Total</i>
Beaverton	427	229	656
Cornelius	40	10	50
Durham	6	4	10
Fairview	42	31	73
Forest Grove	55	10	65
Gladstone	43	10	53
Gresham	454	102	556
Happy Valley	29	28	57
Hillsboro	302	211	513
Johnson City	0	0	0
King City	5	0	5
Lake Oswego	185	154	339
Maywood Park	0	0	0
Milwaukie	102	0	102
Oregon City	123	35	158
Portland	1,791	0	1,791
Rivergrove	1	1	2
Sherwood	67	56	123
Tigard	216	103	319
Troutdale	75	56	131
Tualatin	120	69	189
West Linn	98	71	169
Wilsonville	100	80	180
Wood Village	16	1	17
Clackamas County, Urban, Unincorporated	729	374	1,103
Multnomah County, Urban, Unincorporated*	81	53	134
Washington County, Urban Unincorporated	1,312	940	2,252
<b>Total</b>	<b>6,419</b>	<b>2,628</b>	<b>9,047</b>

\* Strategies and implementation measures addressing these housing goals are in the Progress Reports of the Cities of Portland, Gresham and Troutdale.

**Exhibit B to Ordinance No. 06-1129A**  
**Amendments to Metro Code Sections 3.07.720 through 3.07.760**

**TITLE 7: HOUSING CHOICE**

3.07.710 Intent

The Regional Framework Plan calls for establishment of voluntary affordable housing production goals to be adopted by local governments and assistance from local governments on reports on progress towards increasing the supply of affordable housing. It is the intent of Title 7 to implement these policies of the Regional Framework Plan.

3.07.720 Voluntary Affordable Housing Production Goals

Each city and county within the Metro region should adopt the Affordable Housing Production Goal indicated in Table 3.07-7, as amended over time, as a guide to measure progress toward increasing housing choices and meeting the affordable housing needs of households with incomes between 0% and 50% of the regional median family income.

3.07.730 Requirements for Comprehensive Plan and Implementing Ordinance Changes

A. Cities and counties within the Metro region shall ensure that their comprehensive plans and implementing ordinances:

1. Include strategies to ensure a diverse range of housing types within their jurisdictional boundaries.
2. Include in their plans actions and implementation measures designed to maintain the existing supply of affordable housing as well as increase the opportunities for new dispersed affordable housing within their boundaries.
3. Include plan policies, actions, and implementation measures aimed at increasing opportunities for households of all income levels to live within their individual jurisdictions in affordable housing.

### 3.07.740 Inventory and Progress Reports on Housing Supply

- A. Local governments shall assist Metro in the preparation of a biennial affordable housing inventory by fulfilling the reporting requirements in subsection 3.07.120D of Title 1 (Requirements for Housing and Employment Accommodation) and subsection B of this section.
  
- B. Local governments shall report their progress on increasing the supply of affordable housing to Metro on a form provided by Metro, to be included as part of the biennial housing inventory described in subsection A. Local governments shall submit their first progress reports on April 15, 2007, and by April 15 every two years following that date. Local governments may report their progress as part of the capacity reports required by subsection 3.07.120D of Title 1 (Requirements for Housing and Employment Accommodation). Progress reports shall include, at least, the following information:
  - 1. The number and types of units of affordable housing preserved and income groups served during the reporting period, as defined in Metro's form;
  - 2. The number and types of units of affordable housing built and income groups served during the reporting period;
  - 3. Affordable housing built and preserved in Centers and Corridors; and
  - 4. City or county resources committed to the development of affordable housing, such as fee waivers and property tax exemptions.

### 3.07.750 Technical Assistance

Cities and counties are encouraged to take advantage of the programs of technical and financial assistance provided by Metro to help achieve the goal of increased production and preservation of housing choices and affordable housing and to help fulfill the monitoring and reporting requirements of this title.

**Table 3.07-7**  
**Five-Year Voluntary Affordable Housing Production Goals**  
 (Section 3.07.720)

<b>Jurisdiction</b>	<b>2001-2006 Affordable Housing Production Goals</b>		
	<i>Needed new housing units for households earning less than 30% of median household income</i>	<i>Needed new housing units for households earning 30-50% of median household income</i>	<i>Total</i>
Beaverton	<b>427</b>	<b>229</b>	<b>656</b>
Cornelius	<b>40</b>	<b>10</b>	<b>50</b>
Durham	<b>6</b>	<b>4</b>	<b>10</b>
Fairview	<b>42</b>	<b>31</b>	<b>73</b>
Forest Grove	<b>55</b>	<b>10</b>	<b>65</b>
Gladstone	<b>43</b>	<b>10</b>	<b>53</b>
Gresham	<b>454</b>	<b>102</b>	<b>556</b>
Happy Valley	<b>29</b>	<b>28</b>	<b>57</b>
Hillsboro	<b>302</b>	<b>211</b>	<b>513</b>
Johnson City	<b>0</b>	<b>0</b>	<b>0</b>
King City	<b>5</b>	<b>0</b>	<b>5</b>
Lake Oswego	<b>185</b>	<b>154</b>	<b>339</b>
Maywood Park	<b>0</b>	<b>0</b>	<b>0</b>
Milwaukie	<b>102</b>	<b>0</b>	<b>102</b>
Oregon City	<b>123</b>	<b>35</b>	<b>158</b>
Portland	<b>1,791</b>	<b>0</b>	<b>1,791</b>
Rivergrove	<b>1</b>	<b>1</b>	<b>2</b>
Sherwood	<b>67</b>	<b>56</b>	<b>123</b>
Tigard	<b>216</b>	<b>103</b>	<b>319</b>
Troutdale	<b>75</b>	<b>56</b>	<b>131</b>
Tualatin	<b>120</b>	<b>69</b>	<b>189</b>
West Linn	<b>98</b>	<b>71</b>	<b>169</b>
Wilsonville	<b>100</b>	<b>80</b>	<b>180</b>
Wood Village	<b>16</b>	<b>1</b>	<b>17</b>
Clackamas County, Urban, Unincorporated	<b>729</b>	<b>374</b>	<b>1,103</b>
Multnomah County, Urban, Unincorporated*	<b>81</b>	<b>53</b>	<b>134</b>
Washington County, Urban Unincorporated	<b>1,312</b>	<b>940</b>	<b>2,252</b>
<b>Total</b>	<b>6,419</b>	<b>2,628</b>	<b>9,047</b>

\* Strategies and implementation measures addressing these housing goals are in the Progress Reports of the Cities of Portland, Gresham and Troutdale.



**Exhibit C to Ordinance No. 06-1129A**  
**Findings of Fact and Conclusions of Law**

Ordinance No. 06-1129A amends Metro's Regional Framework Plan (RFP) and Title 7 (Affordable Housing) of the Urban Growth Management Functional Plan (UGMFP) in order to enhance local and regional efforts to provide housing choices and affordable housing to people of the region. The practical effects of these changes are as follows:

- By elevating the voluntary affordable housing production goals from Title 7 to Regional Framework Plan policies, Metro makes the production goals the guide for all regional efforts to provide affordable housing, not just the efforts of cities and counties under Title 7.
- By moving specified strategies and tools recommended by Metro to cities and counties from Title 7 to the Regional Framework Plan, Metro makes the strategies and tools the focus of its efforts to assist cities and counties.
- New policy moves the region from a recognition that it needs to a regional fund for affordable housing fund to a commitment to create such a fund.
- New policy commits Metro to seek agreements with cities, counties and private and public providers of affordable housing - when expanding the UGB and changing 2040 Growth Concept design-type designations - to devote a portion of new residential capacity to affordable housing.
- Clarifies city and county affordable housing reporting requirements in Title 7 by linking them to the reporting requirements in Title 1 (Requirements for Housing and Employment Accommodation).

These amendments to the Regional Framework Plan and Title 7 are a culmination of long efforts by affordable housing leaders in the region, as members of Metro's Housing Choice Task Force, to enhance the work of the region to provide housing choices and affordable housing. These efforts, and the reflection of them in this ordinance, continue the region's understanding that concerted, voluntary efforts by all sectors, public, private and non-profit, to provide affordable housing remain the best way to accomplish the region's affordable housing goals. The amendments to the RFP and Title 7 are consistent with state and regional planning goals, as explained below.

**I. STATEWIDE PLANNING GOALS**

Statewide Planning Goal 1 – Citizen Involvement: Metro provided notice of the proposed amendments to stakeholders and the general public by following the notification requirements in its acknowledged code. Metro provided notice to the Oregon Department of Land Conservation and Development Commission as provided in ORS 197.610 and OAR 660-018-0020. Metro sought and received comment from its Metropolitan Policy Advisory Committee (MPAC), which sought the advice of its Metropolitan Technical Advisory Committee (MTAC), both of which recommended approval of the amendments. The Metro Council held a public hearing on the proposed ordinance on January 25, 2007. The Council concludes that these activities conform to Metro's code and policies on citizen involvement and comply with Goal 1.

Statewide Planning Goal 2 – Land Use Planning: Metro sought and received comment from the local governments that comprise the metropolitan region and from the general public. The Metro Charter establishes MPAC, composed principally of representatives of local governments in the region, and requires the Metro Council to seek its advice on amendments to the Regional Framework Plan and its components, such as the UGMFP. MPAC reviewed the ordinance and recommended revisions to the draft, which the Metro Council adopted. The Council concludes that the ordinance complies with Goal 2.

Statewide Planning Goal 3 – Agricultural Lands: Ordinance No. 06-1129A does not apply to land outside the UGB. Goal 3 does not apply to the ordinance.

Statewide Planning Goal 4 – Forest Lands: Ordinance No. 06-1129A does not apply to land outside the UGB. Goal 4 does not apply to the ordinance.

Statewide Planning Goal 5 – Natural Resources, Scenic and Historic Areas, and Open Spaces: Ordinance No. 06-1129A does not revise acknowledged land use regulations that protect Goal 5 resources. The amendments made by the ordinance do not change the boundaries on any regulatory map that applies to resources protected by Goal 5. The Council concludes that the ordinance is consistent with Goal 5.

Statewide Planning Goal 6 – Air, Land and Water Resources Quality: Ordinance No. 06-1129A does not affect resources protected by Goal 6 or revise land use regulations that protect those resources. The Council concludes that the amendments are consistent with Goal 6.

Statewide Planning Goal 7 – Areas Subject to Natural Disasters and Hazards: Ordinance No. 06-1129A does not affect areas subject to natural disasters and hazards or revise land use regulations that protect those resources. The Council concludes that the amendments are consistent with Goal 7.

Statewide Planning Goal 8 – Recreational Needs: Ordinance No. 06-1129A does not affect resources protected by Goal 8 or revise land use regulations that provide for recreation needs. The Council concludes that the amendments comply with Goal 8.

Statewide Planning Goal 9 – Economic Development: Ordinance No. 06-1129A calls for the creation of a regional affordable housing fund. Goal 9 does not apply to Metro. Nonetheless, if such a fund is created and funded, it will result in construction of new housing units. The Council concludes that the amendments are consistent with Goal 9.

Statewide Planning Goal 10 – Housing: Goals 10 calls for an inventory of buildable lands for residential use and encouragement for the availability of adequate numbers of needed housing units at price ranges and rent levels commensurate with the financial capabilities of Oregon households. The Metropolitan Housing Rule (OAR 660 Division 007) sets housing density and housing type mix standards for the Portland metropolitan region. The rule requires cities and counties to establish specific comprehensive plan designations and clear and objective review standards for review of proposed residential development. The rule expressly charges Metro with “regional coordination”:

“(1) At each periodic review of the Metro UGB, Metro shall review the findings for the UGB. They shall determine whether the buildable land within the UGB satisfies housing needs by type and density for the region's long-range population and housing projections.

(2) Metro shall ensure that needed housing is provided for on a regional basis through coordinated comprehensive plans. “

LCDC acknowledged Title 1 (Requirements for Housing and Employment Accommodation) of Metro's Urban Growth Management Functional Plan (UGMFP), which requires each city and county to provide a specified capacity for housing and to allow accessory dwelling units in zones that authorize dwelling units, for compliance with the statewide planning goals on December 8, 2000. The Commission acknowledged amendments to Title 1 made by Ordinance No. 02-969B on December 5, 2002, for compliance with the goals on July 7, 2003.

LCDC acknowledged the policies of the Regional Framework Plan, including Policy 1.3 (Housing and Affordable Housing), on December 8, 2000. Amendments to Policy 1.3 by Ordinance No. 05-1086 on August 18, 2005, were acknowledged by operation of law on September 9, 2005.

Title 7 of the UGMFP and a series of amendments to it were acknowledged by operation of law by Ordinances 98-769 on September 10, 1998, 00-882C on January 18, 2001, and 03-1005A on June 29, 2003.

Metro fulfilled its periodic review “regional coordination” requirements under section 660-007-0050 of the Metropolitan Housing Rule (set forth above) by adoption of Ordinance No. 02-969B. LCDC acknowledged Ordinance No. 02-969B, including the Housing Needs Analysis (HNA) (Periodic Review Subtask 12b) and the 2002-2022 Urban Growth Report: A Residential Land Needs Analysis (Periodic Review Subtask 14a), on July 7, 2003. The Council incorporates its findings on Goal 10 from Ordinance No. 02-969B (Exhibit P, Section IC, page 2) here. In its order acknowledging Metro Ordinance No. 02-969B, LCDC discussed the HNA and Title 7:

“Although the HNA reflects and increase in rental households paying more than 30 percent of household income on housing in the next 20 years, Metro expects its Title 7 affordable housing programs, adopted as part of the Urban Growth Management Functional Plan (UGMFP), to offset much of the increase....Ultimately, through the combination of adequate land supply within the UGB and other measures, Metro has ‘encourage[d] the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households[.]’”

Ordinance No. 06-1129A makes no changes to the housing requirements of Title 1. It also makes no changes to the acknowledged HNA or the Urban Growth Report. The ordinance adds new sub-policies to Policy 1.3 (Housing Choice) that strengthen Metro's commitment to

affordable housing, as described in the first paragraph of these findings. The ordinance clarifies city and county reporting requirements and deletes provisions from Title 7 that were voluntary only for cities and counties of the region. Based upon the work and recommendations to Metro of the Housing Choice Task Force, the Council expects that regional housing programs under the amended Regional Framework Plan and Title 7, especially the call in Policy 1.3.6 for a regional affordable housing fund and in Policy 1.3.7 for technical assistance to local governments, will improve the region's prospects for meeting the need for affordable housing identified in the HNA. The Council concludes that Ordinance No. 06-1129A makes complies with Goal 10.

Statewide Planning Goal 11 – Public Facilities and Services: Ordinance No. 06-1129A does not affect acknowledged public facility plans or revise land use regulations affecting those plans. The Council concludes that the amendments are consistent with Goal 11.

Statewide Planning Goal 12 – Transportation: Ordinance No. 06-1129A does not directly affect transportation or revise the acknowledged Regional Transportation Plan or acknowledged city or county transportation system plans. Nor does it require changes to those plans. The Council concludes that the amendments are consistent with Goal 12.

Statewide Planning Goal 13 – Energy Conservation: Ordinance No. 06-1129A does not affect resources protected by Goal 13 or revise land use regulations that protect those resources. The Council concludes that the amendments are consistent with Goal 13.

Statewide Planning Goal 14 – Urbanization: Ordinance No. 06-1129A does not amend or involve the UGB. Nor does the ordinance affect urbanizable land or revise Metro regulations to protect the urban potential of urbanizable land. Goal 14 governs the establishment and change of UGBs. For these reasons, the Council concludes that the amendments are consistent with Goal 14.

Statewide Planning Goal 15 – Willamette River Greenway: Ordinance No. 06-1129A does not affect the Willamette River Greenway. The Council concludes that Goal 15 does not apply to the amendments.

### III. REGIONAL FRAMEWORK PLAN

Policy 1.1 – Urban Form: This policy calls for a compact urban form and affordable housing choices. New policies in the RFP adopted by Ordinance No. 06-1129A (1.3.2; 1.3.6 and 1.3.8) will increase the likelihood that affordable housing will be built in Centers and Corridors, leading to a more compact urban form in the region. The Council concludes that the amendments are consistent with Policy 1.1.

Policy 1.2 – Built Environment: This policy seeks fair-share and equitable growth. New policies in the RFP adopted by Ordinance No. 06-1129A (1.3.1; 1.3.3; 1.3.9 and 1.3.11) will increase the likelihood that housing choices and affordable housing will be more equitably distributed around the region. The Council concludes that the amendments are consistent with Policy 1.2.

Policy 1.3 – Affordable Housing: This policy seeks opportunities for a wide range of housing opportunities. New policies in the RFP adopted by Ordinance No. 06-1129A (1.3.1; 1.3.6; 1.3.7; 1.3.9 and 1.3.10) will increase housing choice and affordable housing. The Council concludes that the amendments are consistent with Policy 1.3.

Policy 1.4 – Economic Opportunity: For the reasons set forth in the findings under Statewide Planning Goal 14, the Council concludes that Ordinance No. 06-1129A is consistent with Policy 1.4.

Policy 1.6 – Growth Management: This policy calls for efficient management of urban land, among other things. For the reasons set forth in the discussion of the application of Policy 1.1 to the amendments, the Council concludes that the amendments are consistent with Policy 1.6.

Policy 1.9 – Urban Growth Boundary: For the reasons set forth in the findings under Statewide Planning Goal 14, the Council concludes that the amendments are consistent with Policy 1.9.

Policy 1.13 – Participation of Citizens: The public involvement actions described above under Statewide Planning Goal 1 comply with Metro’s code and Policy 1.13.

Policy 2.1 - Public Involvement: The public involvement actions described above under Statewide Planning Goal 1 comply with Metro’s code and Policy 2.1

Policy 2.2 – Intergovernmental Coordination: For the reasons set forth in the findings under Statewide Planning Goal 2, the Council concludes that the amendments are consistent with Policy 2.1.

Policy 2.3 – Urban Form: For the reasons set forth in the findings under Policy 1.1, the Council concludes that the amendments are consistent with Policy 2.3.

Policy 2.4 – Consistency between Land Use and Transportation Planning: New policies in the RFP adopted by Ordinance No. 06-1129A (1.3.2; 1.3.6 and 1.3.8) will increase the likelihood that affordable housing will be built in Centers and Corridors, leading to a more compact urban form in the region. The region’s transportation system is based upon the development of a compact urban form. The Council concludes that the amendments are consistent with Policy 2.2.

Policy 2.5 – Barrier-Free Transportation: For reasons set forth in the findings under Policy 1.1, Ordinance No. 06-1129A will improve transportation choices.

Policy 2.6 – Interim Job Access and Reverse Commute Policy: For reasons set forth in the findings under Policy 1.2, Ordinance No. 06-1129A will better meet the transportation needs of the economically disadvantaged.

Policy 2.7 – Transportation Safety and Education: This policy does not apply to Ordinance No. 06-1129A.

Policy 2.8 – The Natural Environment: For the reasons set forth in the findings under Statewide Planning Goal 5, the Council concludes that the amendments are consistent with Policy 2.8.

Policy 2.9 – Water Quality: For the reasons set forth in the findings under Statewide Planning Goal 6, the Council concludes that the amendments are consistent with Policy 2.9.

Policy 2.10 – Clean Air: For the reasons set forth in the findings under Statewide Planning Goal 6, the Council concludes that the amendments are consistent with Policy 2.10.

Policy 2.11 – Energy Efficiency: For the reasons set forth in the findings under Statewide Planning Goal 13 and Policy 1.1, the Council concludes that the amendments are consistent with Policy 2.11.

Policies 2.12 through 2.43: These policies do not apply to Ordinance No. 06-1129A.

## STAFF REPORT

### IN CONSIDERATION OF ORDINANCE NO. 06-1129 FOR THE PURPOSE OF AMENDING THE REGIONAL FRAMEWORK PLAN TO REVISE METRO POLICIES ON HOUSING CHOICE AND AFFORDABLE HOUSING AND AMENDING METRO CODE SECTIONS 3.07.710 THROUGH 3.07.760 TO IMPLEMENT THE NEW POLICIES

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Date: [January 3, 2006](#)

Prepared by: Gerry Uba

#### BACKGROUND

On January 18, 2001, the Metro Council adopted Ordinance No. 00-882C, amending the affordable housing policy in the Regional Framework Plan and amending the Urban Growth Management Functional Plan Title 7, entitled "Affordable Housing." Title 7 required local governments to adopt voluntary local affordable housing production goals, amend their comprehensive plans and implementing ordinances by adopting land use tools and strategies, and submit progress reports in 2002, 2003 and 2004.

Reviews of local government's progress reports in the Annual Compliance Report for the Urban Growth Management Functional Plan by MPAC, MTAC and the Metro Council in 2004 and 2005 concluded that it was important to determine the reasons for very limited actions by local governments. On February 15, 2005, MPAC chair, Jack Hoffman and Metro Council President, David Bragdon sent a letter to local governments to assess: 1) local interest in exploring the possibility of implementing an affordable housing plan developed by local and regional housing experts to meet their share of regional affordable housing production goals; 2) housing units built in the communities and sold for \$120,000 or less; and 3) rents for apartment units that have been built or rehabilitated since 2000. The assessment revealed the following categories of barriers and interest to local governments' 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"
- "We will welcome assistance to explore opportunities available for affordable housing development and redevelopment"

Following the requirements in Title 7 and the result of the MPAC and Metro Council assessment, the Metro Council created the Housing Choice Task Force (HCTF) on February 10, 2005 by action of Resolution No. 05-3536. The HCTF was charged to meet for one year (March 2005 to March 2006), and was charged 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
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.
4. Recommend how Metro could 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 of the Task Force was 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.

#### HCTF Report and Recommendations:

The HCTF built on the lessons learned from the 1998 Affordable Housing Technical Advisory Committee and local governments implementation of Title 7 to develop an implementation strategy for increasing the supply of housing choice, and specifically affordable housing in the locations with services, so as to reduce expenditures for low income households. In March 2006, the HCTF submitted its recommendations in the report entitled the "Regional Housing Choice Implementation Strategy" to the Metro Council. Following is the summary of the key recommendations for Metro:

- a) Integrate housing supply concerns, and specifically affordable housing, into all policy making and funding allocations
- b) Create a permanent Housing Choice Advisory Committee to advise the Metro Council
- c) Work toward development of a new, permanent regional resource
- d) Seek increased funding at the federal, state and regional levels
- e) Work to remove regulatory barriers for affordable housing supply
- f) Work to reduce the cost of developing housing, and specifically affordable housing in the 2040 centers and corridors
- g) Provide technical assistance to local governments
- h) Current policy directing local jurisdictions to adopt land use and non-land use affordable housing tools and strategies should be amended to remove the reporting requirement
- i) Current policy directing local governments to adopt the voluntary affordable housing production goals for the assessment of their progress should be retained, while focusing on results oriented reporting process.
- j) Conduct biennial housing survey for the assessment of the progress toward achieving the region's housing choices implementation strategy.
- k) Require local governments to assist Metro in a biennial housing survey.

#### Metro Council Action on the HCTF Recommendations:

On April 20, 2006, the Metro Council directed staff to:

1. Prepare an ordinance for appropriate amendments to the Regional Framework Plan and the Urban Growth Management Functional Plan to implement the recommendations in the Regional Housing Choice Implementation Strategy, 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;
2. Prepare a resolution for the creation of a Housing Choice Policy Advisory Committee with representatives of MPAC, MTAC, and other stakeholders.
3. 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 to develop a politically feasible mechanism for implementing the funding solutions recommended by the Housing Choice Task Force.
4. Work cooperatively with local governments in the region to provide technical assistance to preserve and develop affordable housing, including inventorying of publicly owned land that could be potential sites for establishing housing choice.

#### Proposed Changes in the Regional Framework Plan and Functional Plan:

*Regional Framework Plan: The summary of changes is as follows:*

A. Metro's policies on how it will work with local governments to implement housing choices:

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- Local governments will be encouraged to implement land use regulations (allowing diverse range of housing types and affordable housing especially in the 2040 Centers and Corridors, making housing choices available for all income levels), adopt affordable housing production goals, and assist Metro to conduct affordable housing inventory.
  - Local governments will be required to report on their progress.
- B. Metro's policies on how it will implement housing choices:
- Work with stakeholders to create a regional fund to leverage other affordable housing resources
  - Integrate housing issues and solutions with other Metro programs, including consideration of affordable housing in the prioritization of grants
  - During UGB expansion process, see opportunities to devote a portion of residential capacity to affordable housing
  - Create opportunities that will discourage concentration of poverty

*Functional Plan Title 7: The summary of changes is as follows:*

- A. Local governments are encouraged to adopt affordable housing production goals as a guide to measure progress
- B. Local governments are required to assist Metro to conduct affordable housing inventory
- C. Local governments are required to report on their progress, with first report due on April 15, 2007, and by April 15 every other two years
- D. Local governments are encouraged to use Metro's technical and financial assistance services

Other Metro Actions:

Metro staff is developing a "Regional Housing Choice Work Plan" and have started collaborating with local governments' staff to establish a regional housing inventory team and develop a regional affordable housing database. Local programs currently participating in the inventory are the Housing Authorities of Clackamas County, Portland, Washington County and Clark County, Washington, and the Portland Development Commission and the City of Beaverton.

**ANALYSIS/INFORMATION**

**1. Known Opposition**

Staff is not aware of any opposition to the proposed legislation

**2. Legal Antecedents**

Metro Regional Framework Plan established a policy to encourage local governments to ensure diversity of housing types available to households of all income level. Metro Code 3.07.710 established course of actions for affordable housing for local governments and Metro to comply.

**3. Anticipated Effects**

Ordinance No. 06-1129 would amend Title 7 of the Urban Growth Management Functional Plan to help focus local efforts on results oriented progress reporting and Metro technical assistance.

**4. Budget Impacts**

The provision and expansion of technical assistance services to local governments will require additional resources in the future.

### **RECOMMENDED ACTION**

Staff recommends the adoption of Ordinance No. 06-1129 to encourage local governments to assist Metro to assess the region's effort to increase affordable housing supply, and take advantage of Metro's technical assistance services to increase the supply of housing choices in the centers, corridors and other areas of their jurisdictions.

# **Metro Policy Advisory Committee**

January 24, 2007

Item 6 – Ordinance 07-1137 Title 4 Changes

Objective: To discuss the proposed process and criteria for amendments to the Title 4 map.

Outcome: To make a recommendation on the ordinance to the Metro Council

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING METRO CODE	)	
SECTIONS 3.07.120, 3.07.130 AND 3.07.1120;	)	Ordinance No. 07-1137
ADDING METRO CODE SECTION 3.07.450 TO	)	
ESTABLISH A PROCESS AND CRITERIA FOR	)	Introduced by Chief Operating Officer
CHANGES TO THE EMPLOYMENT AND	)	Michael J. Jordan, with the concurrence of
INDUSTRIAL AREAS MAP; AND DECLARING AN	)	Council President David Bragdon
EMERGENCY	)	

WHEREAS, Title 4 (Industrial and Other Employment Areas) of the Urban Growth Management Functional Plan (“UGMFP”) prescribes limitations on certain uses in Industrial Areas, Regionally Significant Industrial Areas and Employment Areas and makes reference to an “Employment and Industrial Areas Map,” which depicts the boundaries of these areas for regulatory purposes; and

WHEREAS, the Metro Council wishes to provide a process and criteria for making changes to the designations of Regionally Significant Industrial Areas, Industrial Areas and Employment Areas on the Title 4 Employment and Industrial Areas Map; and

WHEREAS, the Metropolitan Policy Advisory Committee has reviewed the proposed amendments and recommends their approval; and

WHEREAS, the Council held a public hearing on the proposed amendments on January 18, 2007, and considered public comment on the amendments; now, therefore,

THE METRO COUNCIL ORDAINS as follows:

**SECTION 1.** Metro Code Sections 3.07.120 and 3.07.130 are amended to read as follows: Sections 3.07.120 and 3.07.130 of Title 1 (Requirements for Housing and Employment Accommodation) of the UGMFP are hereby amended as shown in Exhibit A, attached and incorporated into this ordinance, to clarify mapping procedures for territory added to the UGB.

**SECTION 2.** Metro Code Section 3.07.450 is amended to read as follows: Section 3.07.450 is hereby added to Title 4 (Industrial and Other Employment Areas) of the UGMFP as shown in Exhibit B, attached and incorporated into this ordinance, to prescribe a process and criteria for amendments to the Employment and Industrial Areas Map.

**SECTION 3.** Metro Code Section 3.07.1120 is amended to read as follows: Section 3.07.1120 of Title 11 (Planning for New Urban Areas) of the UGMFP is hereby amended as shown in Exhibit C, attached and incorporated into this ordinance, to clarify mapping procedures for territory added to the UGB.

**SECTION 4.** The Findings of Fact and Conclusions of Law in Exhibit D, attached and incorporated into this ordinance, explain how these amendments comply with Metro’s Regional Framework Plan and state land use planning laws.

**SECTION 5.** This ordinance is necessary for the immediate preservation of public health, safety and welfare because, without this ordinance, there is no clear process for amending the Employment and Industrial Areas Map in Title 4 of the UGMFP and no specific criteria for such amendments. Metro has received a number of requests from local governments for amendments that involve economic development and need immediate attention. This ordinance provides a process and criteria for amendments to the map. Therefore, a emergency is declared to exist. This ordinance shall take effect immediately, pursuant to section 39(1) of the Metro Charter.

ADOPTED by the Metro Council this \_\_ day of \_\_\_\_\_, 2007.

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

Attest:

Approved as to form:

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

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

**Exhibit A to Ordinance No. 07-1137**  
**Amendments to Title 1 of the Urban Growth Management Functional Plan**

**TITLE 1: REQUIREMENTS FOR HOUSING AND EMPLOYMENT ACCOMMODATION**

3.07.120 Housing and Employment Capacity

- A. Each city and county shall determine its capacity for housing and employment in order to ensure that it provides and continues to provide at least the capacity for the city or county specified in Table ~~3.01-7~~ 3.07-1, supplemented by capacity resulting from addition of territory to the UGB. Local governments shall use data provided by Metro unless the Metro Council or the Chief Operating Officer determines that data preferred by a city or county is more accurate.
- B. A city or county shall determine its capacity for dwelling units by cumulating the minimum number of dwelling units authorized in each zoning district in which dwelling units are authorized. A city or county may use a higher number of dwellings than the minimum density for a zoning district if development in the five years prior to the determination has actually occurred at the higher number.
- C. If a city annexes county territory, the city shall ensure that there is no net loss in regional housing or employment capacity, as shown on Table 3.07-1, as a result of amendments of comprehensive plan or land use regulations that apply to the annexed territory.
- D. After completion of its initial determination of capacity, each city or county shall report changes in its capacity by April 15 of the first calendar year following completion of its initial determination and by April 15 of every following year.

3.07.130 Design Type Boundaries Requirement

For each of the following 2040 Growth Concept design types, city and county comprehensive plans shall be amended to include the boundaries of each area, determined by the city or county consistent with the general locations shown on the 2040 Growth Concept Map or on maps adopted by ordinances adding territory to the UGB:

Central City--Downtown Portland is the Central City which serves as the major regional center, an employment and cultural center for the metropolitan area.

Regional Centers--Seven regional centers will become the focus of compact development, redevelopment and high-quality transit service and multimodal street networks.

Station Communities--Nodes of development centered approximately one-half mile around a light rail or high capacity transit station that feature a high-quality pedestrian environment.

Town Centers--Local retail and services will be provided in town centers with compact development and transit service.

Main Streets--Neighborhoods will be served by main streets with retail and service developments served by transit.

Corridors--Along good quality transit lines, corridors feature a high-quality pedestrian environment, convenient access to transit, and somewhat higher than current densities.

Employment Areas--Various types of employment and some residential development are encouraged in employment areas with limited commercial uses.

Industrial Areas--Industrial areas are set aside primarily for industrial activities with limited supporting uses.

Regionally Significant Industrial Areas--Industrial areas with site characteristics that are relatively rare in the region that render them especially suitable for industrial use.

Inner Neighborhoods--Residential areas accessible to jobs and neighborhood businesses with smaller lot sizes are inner neighborhoods.

Outer Neighborhoods--Residential neighborhoods farther away from large employment centers with larger lot sizes and lower densities are outer neighborhoods.

**Exhibit B to Ordinance No. 07-1137**  
**Amendments to Title 4 Of the Urban Growth Management Functional Plan**

**TITLE 4: INDUSTRIAL AND OTHER EMPLOYMENT AREAS**

*Add the following section:*

**3.07.450 Employment and Industrial Areas Map**

- A. The Employment and Industrial Areas Map is the official depiction of the boundaries of Regionally Significant Industrial Areas, Industrial Areas and Employment Areas.
- B. If the Metro Council adds territory to the UGB and designates all or part of the territory Regionally Significant Industrial Area, Industrial Area or Employment Area, after completion of Title 11 planning by the responsible city or county, the Chief Operating Officer shall issue an order to conform the map to the boundaries established by the responsible city or county. The order shall also make necessary amendments to the Habitat Conservation Areas Map, described in section 3.07.1320 of Title 13 of this chapter, to ensure implementation of Title 13.
- C. A city or county may amend its comprehensive plan or zoning regulations to change its designation of land on the Employment and Industrial Areas Map in order to allow uses not allowed by Title 4 upon a demonstration that:
  - 1. The property is not surrounded by land designated on the map as Industrial Area, Regionally Significant Industrial Area or a combination of the two;
  - 2. The amendment will not reduce the jobs capacity of the city or county below the number shown on Table 3.07-1 of Title 1 of the Urban Growth Management Functional Plan, or the amount of the reduction is replaced by separate and concurrent action by the city or county;
  - 3. If the map designates the property as Regionally Significant Industrial Area, the subject property does not have access to specialized services, such as redundant electrical power or industrial gases, and is not proximate to freight loading and unloading facilities, such as trans-shipment facilities;
  - 4. The amendment would not allow uses that would reduce off-peak performance on Major Roadway Routes and Roadway Connectors shown on Metro's 2004 Regional Freight System Map below standards in the Regional Transportation Plan, or



exceed volume-to-capacity ratios on Table 7 of the 1999 Oregon Highway Plan for state highways, and would not require added road capacity to stay within the standards or ratios;

5. The amendment would not diminish the intended function of the Central City or Regional or Town Centers as the principal locations of retail, cultural and civic services in their market areas; and
  6. If the map designates the property as Regionally Significant Industrial Area, the property subject to the amendment is ten acres or less; if designated Industrial Area, the property subject to the amendment is 20 acres or less; if designated Employment Area, the property subject to the amendment is 40 acres or less.
- D. The Chief Operating Officer shall revise the Employment and Industrial Areas Map by order to conform to an amendment made by a city or county pursuant to subsection C of this section within 30 days after notification by the city or county that no appeal of the amendment was filed pursuant to ORS 197.825 or, if an appeal was filed, that the amendment was upheld in the final appeal process.
- E. After consultation with Metropolitan Policy Advisory Committee, the Council may issue an order suspending operation of subsection C in any calendar year in which the cumulative amount of land for which the Employment and Industrial Areas Map is changed during that year from Regionally Significant Industrial Area or Industrial Area to Employment Area or other 2040 Growth Concept design type designation exceeds the industrial land surplus. The industrial land surplus is the amount by which the current supply of vacant land designated Regionally Significant Industrial Area and Industrial Area exceeds the 20-year need for industrial land, as determined by the most recent "Urban Growth Report: An Employment Land Need Analysis", reduced by an equal annual increment for the number of years since the report.
- F. The Metro Council may amend the Employment and Industrial Areas Map by ordinance at any time to better achieve the policies of the Regional Framework Plan. To approve an amendment, the Council must conclude that the amendment:
1. Would not reduce the jobs capacity of the city or county below the number shown on Table 3.07-1 of Title 1 of the Urban Growth Management Functional Plan;
  2. Would not allow uses that would reduce off-peak performance on Major Roadway Routes and Roadway Connectors shown on Metro's 2004 Regional Freight System Map below standards in

the Regional Transportation Plan, or exceed volume-to-capacity ratios on Table 7 of the 1999 Oregon Highway Plan for state highways, and would not require added road capacity to stay within the standards or ratios;

3. Would not diminish the intended function of the Central City or Regional or Town Centers as the principal locations of retail, cultural and civic services in their market areas;
  4. Would not reduce the integrity or viability of a traded sector cluster of industries;
  5. Would not create or worsen a significant imbalance between jobs and housing in a regional market area; and
  6. If the subject property is designated Regionally Significant Industrial Area, would not remove from that designation land that is especially suitable for industrial use due to the availability of specialized services, such as redundant electrical power or industrial gases, or due to proximity to freight transport facilities, such as trans-shipment facilities.
- G. Amendments to the Employment and Industrial Areas Map made in compliance with the process and criteria in this section shall be deemed to comply with the Regional Framework Plan.
- H. The Council may establish conditions upon approval of an amendment to the Employment and Industrial Areas Map under subsection F to ensure that the amendment complies with the Regional Framework Plan and state land use planning laws.
- I. By January 31 of each year, the Chief Operating Officer (COO) shall submit a written report to the Council and the Metropolitan Policy Advisory Committee on the cumulative effects on employment land in the region of the amendments to the Employment and Industrial Areas Map made pursuant to this section during the preceding year. The report shall include any recommendations the COO deems appropriate on measures the Council might take to address the effects.

**Exhibit C to Ordinance No. 07-1137**  
**Amendments to Title 11 of the Urban Growth Management Functional Plan**

**TITLE 11: PLANNING FOR NEW URBAN AREAS**

~~3.07.1120—Urban Growth Boundary Amendment Urban Reserve Plan Requirements~~ Planning for Territory Added to the UGB

All territory added to the ~~Urban Growth Boundary~~ UGB as either a major amendment or a legislative amendment pursuant to Metro Code chapter 3.01 shall be subject to adopted comprehensive plan provisions consistent with the requirements of all applicable titles of the Metro Urban Growth Management Functional Plan and in particular this Title 11. The comprehensive plan provisions shall be fully coordinated with all other applicable plans. The comprehensive plan provisions shall contain an urban growth plan diagram and policies that demonstrate compliance with the RUGGO, including the Metro Council adopted 2040 Growth Concept design types. Comprehensive plan amendments shall include:

- A. Specific plan designation boundaries derived from the general boundaries of design type designations assigned by the Council in the ordinance adding the territory to the UGB.
- ~~AB.~~ Provision for annexation to the district and to a city or any necessary service districts prior to urbanization of the territory or incorporation of a city or necessary service districts to provide all required urban services.
- ~~BC.~~ Provision for average residential densities of at least 10 dwelling units per net developable residential acre or such other densities that the Council specifies pursuant to section 3.01.040 of the Urban Growth Management Functional Plan.
- ~~CD.~~ Demonstrable measures that will provide a diversity of housing stock that will fulfill needed housing requirements as defined by ORS 197.303. Measures may include, but are not limited to, implementation of recommendations in Title 7 of the Urban Growth Management Functional Plan.
- ~~DE.~~ Demonstration of how residential developments will include, without public subsidy, housing affordable to households with incomes at or below area median incomes for home ownership and at or below 80 percent of area median incomes for rental as defined by U.S. Department of Housing and Urban Development for the adjacent urban jurisdiction. Public subsidies shall not be interpreted to mean the following: density bonuses, streamlined

permitting processes, extensions to the time at which systems development charges (SDCs) and other fees are collected, and other exercises of the regulatory and zoning powers.

- EF. Provision for sufficient commercial and industrial development for the needs of the area to be developed consistent with 2040 Growth Concept design types. Commercial and industrial designations in nearby areas inside the Urban Growth Boundary shall be considered in comprehensive plans to maintain design type consistency.
- FG. A conceptual transportation plan consistent with the applicable provision of the Regional Transportation Plan, Title 6 of the Urban Growth Management Functional Plan, and that is also consistent with the protection of natural resources either identified in acknowledged comprehensive plan inventories or as required by Title 3 of the Urban Growth Management Functional Plan. The plan shall, consistent with OAR Chapter 660, Division 11, include preliminary cost estimates and funding strategies, including likely financing approaches.
- GH. Identification and mapping of areas to be protected from development due to fish and wildlife habitat protection, water quality enhancement and mitigation, and natural hazards mitigation, including, without limitation, all Habitat Conservation Areas, Water Quality Resource Areas, and Flood Management Areas. A natural resource protection plan to protect fish and wildlife habitat, water quality enhancement areas, and natural hazard areas shall be completed as part of the comprehensive plan and zoning for lands added to the Urban Growth Boundary prior to urban development. The plan shall include zoning strategies to avoid and minimize the conflicts between planned future development and the protection of Habitat Conservation Areas, Water Quality Resource Areas, Flood Management Areas, and other natural hazard areas. The plan shall also include a preliminary cost estimate and funding strategy, including likely financing approaches, for options such as mitigation, site acquisition, restoration, enhancement, and easement dedication to ensure that all significant natural resources are protected.
- HI. A conceptual public facilities and services plan for the provision of sanitary sewer, water, storm drainage, transportation, parks and police and fire protection. The plan shall, consistent with OAR Chapter 660, Division 11, include preliminary cost estimates and funding strategies, including likely financing approaches.

~~I~~J. A conceptual school plan that provides for the amount of land and improvements needed, if any, for school facilities on new or existing sites that will serve the territory added to the UGB. The estimate of need shall be coordinated with affected local governments and special districts.

~~J~~K. An urban growth diagram for the designated planning area showing, at least, the following, when applicable:

1. General locations of arterial, collector and essential local streets and connections and necessary public facilities such as sanitary sewer, storm sewer and water to demonstrate that the area can be served;
2. Location of steep slopes and unbuildable lands including but not limited to wetlands, floodplains and riparian areas;
3. Location of Habitat Conservation Areas;
4. General locations for mixed use areas, commercial and industrial lands;
5. General locations for single and multi-family housing;
6. General locations for public open space, plazas and neighborhood centers; and
7. General locations or alternative locations for any needed school, park or fire hall sites.

L. A determination of the zoned dwelling unit capacity of zoning districts that allow housing.

~~K~~M. The plan amendments shall be coordinated among the city, county, school district and other service districts.

# **Metro Policy Advisory Committee**

January 24, 2007  
Item 7 – New Look

**Objective:** To review changes and highlights of the working draft of the RTP Vision.

**Outcome:** To sharpen the focus of the RTP on those transportation actions that most affect the implementation of the 2040 Growth Concept and to respond to key finding and implications of the research conducted during Phase 2 of the RTP update.



DATE: January 5, 2007

TO: RTP Interested Parties

FROM: Tom Kloster, Transportation Planning Manager  
Kim Ellis, Principal Transportation Planner

SUBJECT: Regional Transportation Plan Vision - Working Draft 1.0

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The attached working draft is a proposed new structure for Chapter 1 of the Regional Transportation Plan (RTP) that will eventually replace more than 40 pages of current policy language. The result is a dramatically simplified, more concise statement of intent for the plan that will guide planning for and investment in the region's transportation system.

The purpose of this transition is to sharpen the focus of the RTP on those transportation actions that most affect the implementation of the 2040 Growth Concept and to respond to the key findings and implications of the research conducted during Phase 2 of the RTP update.

The updated Chapter 1 is organized as follows:

- **Section I** describes the history and values surrounding the region's long-term vision for growth – Region 2040 - and the RTP as a key tool for implementing the Region 2040 vision.
- **Section II** describes the desired outcomes the RTP is trying to achieve and how to measure success when evaluating investment alternatives and making decisions about future transportation investments. The RTP vision is a set of goals and measurable objectives that describe long- and short-term desired outcomes for the regional transportation system to best support the Region 2040 vision and protect the region's quality of life. The goals and measurable objectives are organized into two sections: system design and management and governance.

More specific strategies (actions) will be developed for how to achieve these goals and objectives during Phase 3 of the RTP update.

To simplify Chapter 1, there are several components that are either replaced or consolidated in the new format. This is a working document in early draft form, so the following summary of major edits will grow as the document evolves:

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- There are just two system maps - one for the design of the street system, and one for the design of the transit system. The merging of other modal system maps is discussed below.

***Rationale for change:*** *This consolidation emphasizes a systems perspective rather than a modal perspective for the design, management and governance of the regional transportation system.*

- The motor vehicle functional classification system is dropped, with the remaining design and performance objectives for this system merged with street design objectives and a street design classification map.

***Rationale for change:*** *The current two system map perspective for the design and function of the regional street system has been confusing, and in many cases ignored, during local implementation.*

- The current motor vehicle level-of-service (LOS) policy is updated, and replaced with multi-modal design objectives set forth in the system design section and a multi-modal corridor performance measure set forth in the system management section.

***Rationale for change:*** *The current LOS policy is not realistically attainable given other desired outcomes for land use, the economy, equity, fiscal stewardship and the environment. Recent amendments to the Oregon Transportation Plan also recognize the issues inherent with traditional approaches to dealing with congestion. This change moves the RTP away from level-of-service as the primary tool used to determine transportation needs and how big to size the system. The updated Chapter 1 uses aggregate, multi-modal system design objectives and a person-trip capacity measure to inform sizing of the transportation system over time. Reliability of the system, particularly for freight and goods movement, is also emphasized through travel time objectives and performance measures. The traditional level-of-service measures (e.g., demand-to-capacity ratios and travel speeds) would continue to be used as a diagnostic tool to identify problem areas, monitor performance of the system and inform phasing of transportation investments needed to complete the system over time. More specific strategies will be developed for how to achieve these objectives.*

- The regional freight functional classification system is dropped, and replaced with a regional freight corridors map that simply informs design and management objectives for critical freight access routes that includes road, rail, air and waterways.

***Rationale for change:*** *The focus of the RTP should be ensuring critical freight access routes are provided and that they be reliable and designed to facilitate efficient freight and goods movement. A functional classification system map is not needed to accomplish these objectives. More specific strategies will be developed for how to achieve these objectives.*

- The regional bicycle and pedestrian classification systems are dropped, and replaced with design objectives that expected to be implemented for all streets in the region.

***Rationale for change:*** *The current system map approach for the design and function of the regional bicycle and pedestrian systems has been confusing, and in some cases ignored, during local implementation. The focus of the RTP should be ensuring a safe, continuous and attractive network of bikeways and pedestrian facilities on all streets in the region. A functional classification system map is not needed to accomplish these objectives. The regional street design*



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*guidelines and livable streets handbooks will continue to guide the design of streets to promote walking, biking and access to transit in the region. More specific strategies will be developed for how to achieve these objectives.*

- The transit system map will be expanded to reflect a design and management approach for providing radial bus service to 2040 centers from their respective, overlapping radial systems to serve cross-town market areas of regional centers and town centers.

***Rationale for change:*** *This change responds to changing travel patterns in the region in response to significant growth in population and jobs in areas outside the Central City that are not well-served by the traditional hub and spoke system that has been in place in the Portland metropolitan region since the 1980's. RTP background research demonstrated a growing demand and desire for a web of convenient travel service connections between suburban areas of the region that also remain linked to the Central City. The RTP vision retains the regional transit service elements from the current RTP integrates them in a different way to serve this growing demand. More specific strategies will be developed for how to achieve these objectives, with particular attention to supporting the total transit trip as well as transit-oriented development and pedestrian access needed to support transit service.*

- A system management perspective is more prominently emphasized, encompassing the transportation system management and operations (TSMO) and transportation demand management (TDM) work currently underway in the region.

***Rationale for change:*** *This change responds to policy recent direction from the federal and state levels to better link system management to planning for the region's transportation system as a cost-effective approach to improve travel choices in addition to the performance and reliability of the system. The management objectives focus on optimizing corridors for people and goods movement. More specific strategies will be developed for how to achieve these objectives.*

- Green Corridors are dropped as an RTP feature, and the policy components merged with the Parkway design designation for the purpose of the RTP. The Green Corridor designation would remain in the 2040 Growth Concept and Urban Growth Management Functional Plan, with the Parkway design as the basic RTP implementing strategy.

***Rationale for change:*** *This change responds to the complexity of Green Corridors implementation that is more appropriately addressed through Metro's Urban Growth Management Functional Plan and intergovernmental agreements.*



# WORKING DRAFT 1.0

## Chapter 1 Regional Transportation Vision

### Preface

Transportation shapes our communities and our daily lives in profound and lasting ways. What we plan for today will affect the health of our communities, our economy and our environment for many years to come.

Looking ahead, the Portland metropolitan region is at an important crossroads.

- Our region is experiencing unprecedented growth and with that increasing congestion that threatens the economic competitiveness of state.
- Our system of roads and bridges is aging – much of it built 50 years ago.
- There is increasing competition for transportation funds, yet fewer dollars to maintain the infrastructure we have, let alone fund new high-cost solutions.

While the Portland metropolitan region is faced with many difficult challenges that also face other metropolitan areas throughout the nation – these issues also pose an opportunity for the region’s elected officials and business and community leaders to work together and be innovative in how we move forward to protect our quality of life and economy. This important work begins with updating the vision for the region’s transportation system to re-define the responsibility of the Regional Transportation Plan (RTP) to keep this region a great place to live and work for everyone, and preserve its unique qualities and natural beauty.

Our work will be both challenging and exciting, requiring a new level of collaboration between the Metro Council, public and private sector leaders, community groups, businesses and the residents of the region. Our success in addressing these complex challenges will be measured in many ways and by many people – including future generations who will live and work in the region.

#### **Document Organization**

This document is organized into two sections:

- **Section I.** describes the history and values surrounding the region’s long-term vision for growth – Region 2040 - and the RTP as a key tool for implementing the Region 2040 vision.

- **Section II.** describes a vision of what the RTP is trying to achieve and how to measure whether or not we are successful when evaluating investment alternatives and making decisions about future transportation investments.

A **glossary** of terms is provided at the end of the document for reference.

The RTP Goals and Measurable Objectives defined in this document represent a statement of the vision (desired outcomes) for the region's transportation system to best support the Region 2040 vision and will be used to evaluate and prioritize transportation investments during Phase 3 of the RTP update. The methods for conducting this evaluation will be described in a separate technical memorandum.

Eventually, this document will become a chapter in the updated Regional Transportation Plan that is anticipated to be approved by JPACT and the Metro Council in November 2007, pending air quality analysis.

# WORKING DRAFT 1.0

## CHAPTER 1

# Regional Transportation Vision For the Portland Metropolitan Region

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## **I. REGIONAL CONTEXT**

### **Metro Charter**

In 1978, the voters within the metropolitan areas of Clackamas, Multnomah and Washington counties approved a ballot measure that made Metro the nation's first directly elected regional government. That vote gave Metro the responsibility for coordinating the land use plans of the 28 jurisdictions in the region as well as other issues of "regional significance." In 1992, the voters of the region approved a charter that gave Metro jurisdiction over matters of metropolitan concern and required the adoption of a Regional Framework Plan.

*We, the people of the Portland area metropolitan service district, in order to establish an elected, visible and accountable regional government that is responsive to the citizens of the region and works cooperatively with our local governments; that undertakes, **as its most important service, planning and policy making to preserve and enhance the quality of life and the environment for ourselves and future generations**; and that provides regional services needed and desired by the citizens in an efficient and effective manner, do ordain this charter for the Portland area metropolitan service district, to be known as Metro.<sup>1</sup> (emphasis added)*

The preamble to the Metro Charter, which defines the agency's most important service as "...to preserve and enhance the quality of life and the environment for ourselves and future generations," lays the groundwork for all of Metro's regional planning activities to directly address sustainability, including development of the Regional Transportation Plan (RTP).

### **Ethics of Sustainability and The Regional Transportation Plan**

There are many definitions of sustainability, but all of them have three common ethics that address equity, environment and economy. To ensure integration of these ethics of sustainability into the larger RTP vision and desired outcomes the implementation of the plan is trying to achieve, the following ethics of sustainability must be the foundation for all planning activities governed by the RTP:

**Equity** - the responsibility of the plan to all current and future residents and businesses of the region. The RTP shall provide a comprehensive system of transportation services and infrastructure that provides safe and affordable travel choices and ensures equitable access to work, education and nature for the people of region.

**Environment** - the responsibility of the plan to the landscape. The RTP shall ensure that transportation services and infrastructure protect and enhance human health and the natural environment.

**Economy** - the responsibility of the plan to of the economy of the region. The RTP shall provide for transportation services and infrastructure that reflect and help implement the region's long-term vision for growth and support the health of our economy.

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<sup>1</sup> Metro. *Preamble of Metro Charter as approved in 1992 and amended in 2000.*

## 2040 Growth Concept

Adoption of the 2040 Growth Concept in 1995 responded to the mission called out in the Metro Charter and established a new direction for planning in the Portland metropolitan region by linking transportation investments to desired outcomes for urban form, the economy and the environment. The unifying theme of the 2040 Growth Concept is to preserve the region's economic health and livability while planning for expected growth in this region in an equitable and fiscally sustainable manner. This new direction reflected a regional commitment to implementation of a long-term strategy to protect the things that the residents of the Portland metropolitan region have consistently said they value: vibrant communities, a strong regional economy, access to jobs, affordable housing and nature, protecting habitat and the environment for wildlife and people, transportation choices and resources for future generations.

The following are descriptions of each of the 2040 Growth Concept land-use components and the transportation system envisioned to serve them. The 2040 Growth Concept land-use components, called 2040 Design Types, are grouped into a hierarchy that serves as a framework to guide RTP investment priorities. Table 1 lists each 2040 Design Type, based on this hierarchy.<sup>2</sup>

**Table 1. Hierarchy of 2040 Design Types**

<b>Primary land-use components</b>	<b>Secondary land-use components</b>
Central city	Local industrial areas
Regional centers	Station communities
Regionally significant industrial areas	Town centers
Intermodal facilities	Main streets
	Corridors
<b>Other urban land-use components</b>	
Employment areas	
Inner neighborhoods	
Outer neighborhoods	

Decisions about land use and transportation cannot be, and should not be separated. Success of the 2040 Growth Concept, in large part, hinges on achieving the regional transportation goals and objectives identified in this plan.

## 2040 Fundamentals

In 1996, the Metro Council approved policies<sup>3</sup> (*actions*) to implement the 2040 Growth Concept and committed to monitoring the progress of these actions. In 1997, the growth concept vision was condensed into eight fundamental values that express the region's vision for implementation of the 2040 Growth Concept and desired outcomes for urban form and the health of our communities, our economy and our environment.

<sup>2</sup> More detailed descriptions of the land use and transportation elements of each 2040 Design Type can be found in the Regional Urban Growth Goals and Objectives and Regional Framework Plan.

<sup>3</sup> Metro. Urban Growth Management Functional Plan.



Adopted by the region in 1997 as part of the Regional Framework Plan, the 2040 Fundamentals focused the scope of efforts to monitor implementation of the Region 2040 plan and the degree to which the actions taken are achieving the Region 2040 vision over time. The 2040 Fundamentals embrace the ethics of sustainability described earlier for all Metro's planning and 2040 implementation activities.

The Regional Transportation Plan is a key tool for implementing the 2040 Growth Concept vision as well as other federal and state mandates for transportation planning.<sup>4</sup> Planning and investments in the transportation system are the means to an end - citizens of the region do not measure their quality of life by how good a plan is or how many bike lanes or highway miles are constructed in their community. Quality of life is measured by how well they live and the extent to which where they live is economically prosperous and affordable, and the quality of the natural, community and social environments. These elements are what people value and transportation planning and investments are a means to assure the region's quality of life and economy are protected.

The Regional Transportation Plan (RTP) vision described in this chapter relies on the 2040 Fundamentals as an expression of what the citizens of this region value to provide focus for what the RTP will address and monitor over time and to measure whether the plan is helping to maintain regional quality of life for its citizens. For purposes of the RTP, the 2040 Fundamentals have been consolidated into the 6 fundamentals described below:

- 1. Vibrant Communities** - *A vibrant place to live and work, and compact development that uses both land and infrastructure efficiently and focuses development in 2040 centers, corridors, and industrial and employment areas.*
- 2. Healthy Economy** - *A healthy economy that generates jobs and business opportunities and sustains the region's agricultural industry.*
- 3. Healthy Environment** - *Forests, rivers, streams, wetlands, air quality and natural areas are restored and protected.*
- 4. Transportation Choices** - *An integrated transportation system that supports land use and provides reliable, safe and attractive travel choices for people and goods.*
- 5. Equity** - *Equitable access to affordable housing, jobs, transportation, recreation and services for people in all income levels is provided.*
- 6. Fiscal Stewardship** - *Stewardship of the public infrastructure ensures that the needs and expectations of the public are met in an efficient and fiscally sustainable manner.*

## **II. REGIONAL TRANSPORTATION PLAN VISION**

### **Overview**

The Regional Transportation Plan (RTP) is the vision for the major transportation system in the Portland metropolitan region. The plan establishes the framework for the design, management and governance of all major system investments, and is a statement of positive future

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<sup>4</sup> Development of the Regional Transportation Plan must also respond to a variety of mandates included in Oregon Transportation Plan, Oregon Transportation Planning Rule, and federal legislation such as the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU).

outcomes that reflect public opinion and support the things the residents of the region most value.

This RTP reflects the continued evolution of regional transportation planning from a primarily project-driven endeavor to one that is framed by the larger set of outcomes that affect people's everyday lives and the quality of life in this region. An outcomes-based plan requires careful monitoring to ensure that incremental decisions to implement the plan through corridor and project planning are consistent with the plan vision, as measured by specific outcomes, and flexible enough to adapt to the challenges of the 21<sup>st</sup> century.

### **Organizational Structure for RTP Vision (Goals and Objectives)**

The RTP vision is organized into a series of *goals* and *measurable objectives* that have been identified to guide the design, management and governance of the region's transportation system to best support the 2040 Fundamentals.

- **Goals** are statements of purpose that describe long-term desired outcomes (or a vision) for the region's transportation system to support and implement the Region 2040 vision.
- **Measurable objectives** comprise two elements - an objective statement and a performance measure – that represent even more specific outcomes the RTP is trying to achieve.
  - **Objectives** are similar to goals as they also represent a desired outcome. However, an objective is an intermediate, shorter-term result that must be realized to reach the long-term goals the RTP is trying to achieve.
  - **Performance measures** characterize the objective with quantitative or qualitative data to assess how well objectives are being met. They can be applied at a system level and project level, and provide the planning process with a basis for evaluating alternatives and making decisions on future transportation investments.

The goals and measurable objectives are further organized into two sections. These sections are:

1. **System Design and Management** – Goals and measurable objectives that define desired outcomes for the physical design and management of the transportation system over time to best support the Region 2040 vision as expressed through the 2040 Fundamentals.
2. **Governance** - Goals and measurable objectives for that define desired outcomes for jurisdictional and fiscal governance of the transportation system to ensure meaningful public involvement, maximization of public investments and accountability to the public to build and maintain public trust in government.

A summary of the goals and measurable objectives is provided in Table 2.

**Table 2. Regional Transportation Plan Goals**

<b>Transportation Design and Management</b>
<b>Goal 1 Compact Urban Form and Economic Competitiveness</b> Decisions about land use and transportation services and infrastructure are integrated to support efficient development, promote job and housing proximity and strengthen the economy.
<b>Goal 2 Equitable Access</b> Transportation services and infrastructure provide all residents of the region with equitable access to affordable housing, jobs, shopping, educational, cultural and recreational opportunities and business access to the workforce.
<b>Goal 3 Mobility and Reliability</b> Transportation services and infrastructure provide a seamless and well-connected network of throughways, arterials and transit services to ensure effective and reliable travel choices for people and goods movement.
<b>Goal 4 Safety and Security</b> Transportation services and infrastructure are safe and secure for the public and goods movement.
<b>Goal 5 Human Health and the Environment</b> Transportation services and infrastructure protect and enhance the quality of human health and the natural environment.
<b>Governance</b>
<b>Goal 6 Effective Public Involvement</b> All major transportation decisions are open and transparent, and grounded in meaningful public involvement of the public, including those traditionally under-represented, businesses, community groups and local, regional and state jurisdictions that own and operate the region's transportation system.
<b>Goal 7 Fiscal Stewardship</b> Regional transportation planning and investment decisions maximize the public investment in infrastructure, preserving past investments for the future and prioritizing cost-effective solutions that reinforce Region 2040 to address transportation needs.
<b>Goal 8 Accountability</b> The region's government, business and community leaders work together so the public experiences transportation services and infrastructure as a seamless, comprehensive system of transportation facilities and services that bridge institutional and fiscal barriers.

Collectively, the RTP goals and measurable objectives described in this chapter will be used to prioritize critical transportation investments that best support the long-term vision for managing growth in our region and the broader sustainability mission identified in the Metro Charter. The goals and measurable objectives will also be the basis for monitoring performance of the plan over time. Through evaluation and monitoring, the region can be sure that investments in the transportation system are achieving desired outcomes.

## **System Design and Management**

### **Overview**

Since the adoption of the Region 2040 Growth Concept in the mid-1990s, the region has embarked on an aggressive effort to further define urban form through design and management of the transportation system. For transportation, this effort has included a new emphasis on an interconnected multi-modal network and facility design and management that reinforces planned urban form, supports a healthy economy, protects natural systems and rural reserves and serves access needs for all people, including children, seniors and people with disabilities.

Regional street design guidelines contained in Metro's Livable Streets handbooks<sup>5</sup> address federal, state and regional transportation planning mandates with street design concepts intended to support local and regional implementation of the 2040 Growth Concept. In addition, the evolution of new design and operations practices is allowing for better management of stormwater runoff and the impact of transportation systems on wildlife habitat and migration corridors.

Effective design and management of the transportation system support many desired outcomes, as set forth in the Region 2040 vision, including:

- promotes an efficient and compact urban form that creates vibrant communities and minimizes urban sprawl in a growing region, which in turn helps protect natural resources and rural reserves.
- supports the region's economy by providing for the cost-effective and reliable movement of people and goods through an interconnected system of throughways, arterial streets, transit, air, marine and rail systems.
- provides affordable and equitable travel choices in the region so all residents of the region have an opportunity to meet their daily needs and meaningfully participate in their community.
- maximizes the public return on transportation investments in streets and transit by optimizing the existing system and focusing future growth in areas where public infrastructure already exists, or can be reasonably expanded.
- promotes active living through the development of safe, convenient and attractive multi-modal systems that increase walking and bicycling, which in turn, has public health and environmental benefits.

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<sup>5</sup> The handbooks are: Creating Livable Streets: Streets for 2040, Green Streets: Innovative Solutions for Stormwater and Stream Crossings and Trees for Green Streets.

**System Design and Management Goals and Objectives**

The following goals and measurable objectives define the vision for the design and management of the regional transportation system to support the region’s long-term vision for growth in the Portland metropolitan region

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 1 Compact Urban Form and Economic Competitiveness</b>                      Decisions about land use and transportation services and infrastructure are integrated to support efficient development, promote job and housing proximity and strengthen the economy.</p>	<p><b>Objective 1.1 Compact Urban Form</b> - Reinforce growth in and access to 2040 centers, industrial areas, freight and passenger intermodal facilities, corridors and employment areas with investment decisions.</p>	<ul style="list-style-type: none"> <li>• <i>Transportation investments (by 2040 land use).</i></li> </ul>
	<p><b>Objective 1.2 Economic Competitiveness and Job Creation</b> - Promote the expansion and diversification of the region’s economy and business opportunities through the efficient and effective movement of people, goods, services and information.</p>	<ul style="list-style-type: none"> <li>• <i>Tons of freight transported (by mode).</i></li> </ul>
	<p><b>Objective 1.3 Reliable Market Area Access</b> - Ensure that 2040 Centers, Industrial Areas and Intermodal Facilities have adequate access to surrounding market areas as measured in travel time, as defined in Table 2.</p>	<ul style="list-style-type: none"> <li>• <i>Travel time between key locations.</i></li> </ul>
	<p><b>Objective 1.4 Freight Reliability</b> - Protect and enhance investments on regional freight routes to maintain off-peak reliability for moving freight into, through and within the region.</p>	<ul style="list-style-type: none"> <li>• <i>Average daily truck delay for regional freight corridors.</i></li> <li>• <i>Off-peak hour traffic congestion on regional freight corridors.</i></li> </ul>
	<p><b>Objective 1.5 Travel Choices</b> - Provide a multi-modal transportation system to reduce reliance on the automobile for people movement and provide businesses choice in goods movement.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of trips to work by walking, biking, transit and shared ride (by 2040 land use).</i></li> <li>• <i>Progress toward Modal Targets in Table 3.</i></li> <li>• <i>Percent on freight tonnage by mode.</i></li> </ul>

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
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<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 2 Equitable Access</b> Transportation services and infrastructure provide all residents of the region with equitable access to jobs, shopping, educational, cultural and recreational opportunities and business access to the workforce.</p>	<p><b>Objective 2.1 Equitable Access to Travel Choices -</b> Provide all residents and businesses of the region with equitable access to travel choices to carry out their essential daily activities.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of homes within 30 minutes travel time of employment by auto and transit during peak periods.</i></li> <li>• <i>Percent of jobs within 30 minutes of travel time to workforce by auto and transit during peak periods.</i></li> <li>• <i>Percent of homes and parks within one-quarter mile of regional multi-use trail system.</i></li> </ul>
	<p><b>Objective 2.2 Barrier Free Transportation -</b> Provide a seamless and coordinated system that is barrier-free and serves transportation needs for all people, including people with low income, children, seniors and people with disabilities.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of seniors and people with disabilities within one-quarter mile of regional transit service.</i></li> <li>• <i>Percent of low-income households within one-quarter mile of regional transit service.</i></li> </ul>

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
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<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 3 Mobility and Reliability</b>                      Transportation services and infrastructure provide a seamless and well-connected network of throughways, freight rail, air and water networks, arterials and transit services to ensure effective and reliable travel choices for people and goods movement.</p>	<p><b>Objective 3.1 Off-Peak Reliability</b> – The regional system is managed to maintain off-peak reliability to support goods movement throughout the region.</p>	<ul style="list-style-type: none"> <li>• <i>Travel times in key corridors.</i></li> </ul>
	<p><b>Objective 3.2 Effective People and Goods Movement</b> – The regional throughway system is monitored in the context of broad corridors that extend to adjacent arterial and transit systems within one mile to maintain total person-trip capacity during peak travel periods (see Figure 2).</p>	<ul style="list-style-type: none"> <li>• <i>Total person-trip and freight capacity for key corridors.</i></li> </ul>
	<p><b>Objective 3.2.1 Throughway Connectivity</b> - Provide a network of limited-access throughways that connect the Central City, Regional Centers, Industrial areas, and freight Intermodal Facilities to primarily serve interstate, intercity and inter-regional movement.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of Regional Centers, Industrial Areas and Freight Intermodal Facilities served by direct arterial connections to throughways.</i></li> </ul>
	<p><b>Objective 3.2.2 Street and Regional Transit Connectivity</b> - Provide a complementary network of regional arterials at one-mile spacing, and community arterials streets at half-mile spacing and local streets at one-tenth mile spacing, with regional transit service on all arterial streets.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of homes and jobs within one-quarter mile of regional transit service.</i></li> </ul>
	<p><b>Objective 3.2.3 High Capacity Transit Connectivity</b> - Provide a network of high capacity transit service that connects the Central City, Regional Centers and passenger intermodal facilities.</p>	<ul style="list-style-type: none"> <li>• <i>Percent served by high capacity transit service (by 2040 land use).</i></li> <li>• <i>Percent of homes within one-half mile of high capacity transit service.</i></li> </ul>
	<p><b>Objective 3.2.4 Community Transit Connectivity</b> - Provide a complementary network of community bus services connections that serve 2040 Growth Concept centers, industrial areas, employment areas and corridors, and provide access to the regional high capacity transit network.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of homes and jobs within one-quarter mile of community transit service.</i></li> </ul>
	<p><b>Objective 3.2.5 Regional Freight Connectivity</b> – Designate a multimodal network of well-connected and efficient regional freight routes on arterial streets that provide direct freight access from industrial areas and freight intermodal facilities to throughways.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of Industrial areas and freight intermodal facilities served by direct arterial connections to throughways.</i></li> </ul>
	<p><b>Objective 3.2.6 Bike Connectivity</b> - Provide a continuous network of safe, convenient and attractive bikeways on all streets and improve access to transit facilities.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of street system with bikeways.</i></li> </ul>
	<p><b>Objective 3.2.7 Pedestrian Connectivity</b> - Provide a continuous network of safe, convenient and attractive pedestrian facilities on all streets and improve access to transit facilities.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of street system with sidewalks.</i></li> <li>• <i>Percent of regional transit stops with connecting sidewalks.</i></li> </ul>

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
	<p><b>Objective 3.10 Regional Multi-Use Trail Connectivity</b> - Provide a complementary network of regional multi-use trails with a transportation function that connect primary 2040 land uses, on-street bikeways, and pedestrian and transit facilities.</p>	<ul style="list-style-type: none"> <li>• <i>Percent of regional multi-use trails with a transportation function completed.</i></li> </ul>
<p><b>Goal 4 Safety and Security</b>                      Transportation services and infrastructure are safe and secure for the public and goods movement.</p>	<p><b>Objective 4.1 Improve Safety</b> - Reduce traffic fatalities and crashes per capita for all modes of travel.</p>	<ul style="list-style-type: none"> <li>• <i>Per capita traffic crashes and fatalities (by mode).</i></li> </ul>
	<p><b>Objective 4.2 System Deficiencies</b> - Eliminate deficiencies in the regional transportation system that threaten the safety and security of the public and goods movement.</p>	<ul style="list-style-type: none"> <li>• <i>Percent and number of Safety Priority Index System (SPIS) locations addressed.</i></li> </ul>
	<p><b>Objective 4.3 Improve Security</b> - Reduce vulnerability of the public, goods movement and critical transportation infrastructure from terrorist actions and natural hazard emergencies (e.g., severe storms, earthquakes, landslides and flooding).</p>	



<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 5 Human Health and the Environment</b>                      Transportation services and infrastructure protect and enhance the quality of human health and the natural environment.</p>	<p><b>Objective 5.1 Compact urban form</b> - Reinforce the development of a compact urban form to minimize the impact of growth and urban sprawl on natural systems.</p>	
	<p><b>Objective 5.2 Natural Environment</b> - Protect and minimize impacts on habitat connectivity, ecological viability and water quality.</p>	<ul style="list-style-type: none"> <li>• <i>Acres of environmentally-sensitive land impacted by new transportation infrastructure.</i></li> <li>• <i>Number of culverts on regional road system that inhibit fish passage.</i></li> <li>• <i>Acres of riparian corridors impacted by new transportation infrastructure.</i></li> <li>• <i>Percent of street system with street trees that provide canopy for interception of precipitation.</i></li> <li>• <i>Percent of street system with infiltration capacity.</i></li> </ul>
	<p><b>Objective 5.3 Air Quality</b> - Protect and enhance air quality so that as growth occurs, human health and visibility of the Cascades and the Coast Range from within the region is maintained.</p>	<ul style="list-style-type: none"> <li>• <i>Daily tons of smog forming, particulate and air toxics pollutants released.</i></li> </ul>
	<p><b>Objective 5.4 Human Health</b> - Promote physical activity, reduce noise impacts and advance efficient trip-making patterns in the region.</p>	<ul style="list-style-type: none"> <li>• <i>Number of trips per capita per day.</i></li> <li>• <i>Daily vehicle miles traveled per person.</i></li> <li>• <i>Average trip length.</i></li> <li>• <i>Average auto occupancy.</i></li> <li>• <i>Percent of non-single occupancy vehicle trips (e.g., walking, bicycling, transit and shared ride).</i></li> </ul>

## **System Design Concept**

This section describes the elements that make up the system design concepts shown in Figures 1 and 2. The system design concept defines a vision for build-out of the regional transportation system.

### **Overview**

The design of the transportation system has profound and lasting impacts on a community. The following transportation system design elements reflect the fact that streets perform many functions, and the need to provide a well-designed transportation system to make the transportation system safer and more effective for all modes of travel while also support the Region 2040 vision. Implementation of the design elements is intended to promote community livability by balancing all modes of travel and address the function and character of surrounding land uses when designing streets of regional significance.

## **Street Design Elements**

### **Throughways**

Limited-access facilities designed for cross-regional travel with average lengths of 5 miles or more.

- *Freeways* - limited-access facilities of 4-6 lanes with interchanges at spacing of no less than one mile.
- *Highways* - limited access facilities of 4-6 lanes with a mix of at-grade and separate-grade interchanges.
- *Parkways* - limited access facilities of 4 lanes with a mix of at-grade and separate-grade interchanges, multi-use trail system and adjacent greenway.

### **Regional Arterials**

General access facilities that provide for sub-regional travel and access to throughways, with average trip lengths of less than 5 miles.

- *Regional Boulevards*: Four-lane facilities with turn lanes designed to emphasize transit, bicycle and pedestrian travel in 2040 Centers, Main Streets and Station Communities, while accommodating high traffic volumes.
- *Regional Streets*: Four-lane facilities with turn lanes designed to serve all modes of travel in 2040 Industrial Areas, Corridors Employment Areas and Neighborhoods, while accommodating high traffic volumes.

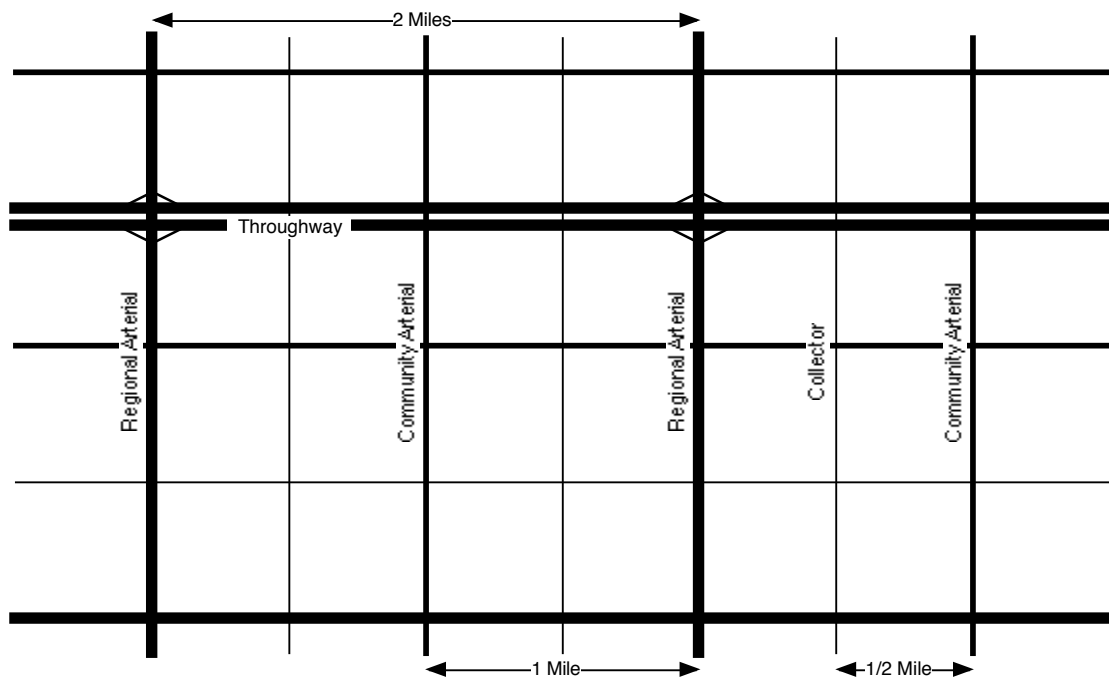
### **Community Arterials**

General access facilities that provide for community travel and connections to regional arterials, with average trip lengths of less than 3 miles.

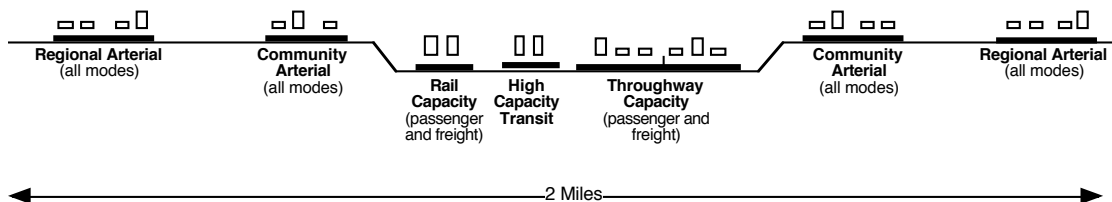
- *Community Boulevard*: Two or four-lane facilities with turn lanes designed to emphasize transit, bicycle, pedestrian travel and on-street parking in 2040 Centers, Main Streets and Station Communities.

- *Community Street:* Two or four-lane facilities with turn lanes designed to serve all modes of travel in 2040 Industrial Areas, Corridors Employment Areas and Neighborhoods.

**Figure 1**  
**Regional Street System Concept**



**Figure 2**  
**Regional Multi-Modal Corridor Capacity Concept**

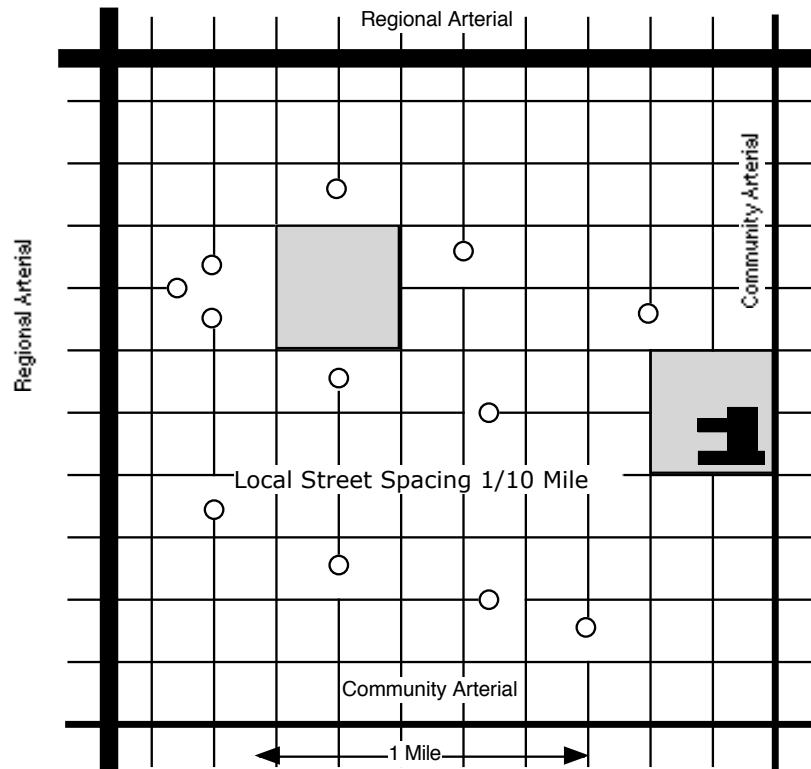


**Collector and Local Streets**

General access facilities that provide for community and neighborhood circulation, with average trip lengths of less than 2 miles. Collector streets have two travel lanes and provide connections to the regional and community arterial system. Local streets have one or two travel lanes and a pavement width of 20-32 feet, on-street parking and sidewalks on two sides. Local and collector

streets are spaced at one-tenth mile intervals, or more frequent bike and pedestrian connections made where streets cannot be constructed.

**Figure 3**  
**Local Street System Concept**



### **Transit System Design Concept**

This section describes the elements that make up the transit system design concept shown in Figure 3. The transit system design concept defines a vision for build-out of the regional transit system.

This section describes elements of the regional and local transit system.

### **High Capacity Transit Network**

High capacity transit provides the backbone of the transit network connecting the Central City, Regional Centers, and passenger intermodal facilities. It operates on a fixed guideway within an exclusive right-of-way to the extent possible. High levels of passenger amenities are provided at transit stations and station communities including schedule information, ticket machines, special lighting, benches, shelters, bicycle parking, and commercial services. Speed and schedule reliability are maintained using signal preemption at at-grade crossings and/or intersections. Types of high capacity transit facilities and services include:

- Light Rail
- Commuter Rail

- Bus Rapid Transit
- Intermodal Passenger Facilities (Amtrak & Greyhound)

### **Regional Transit Network**

The regional transit network relies on transit service headways of 15-minutes or less on all arterial roadways (the time of day will be determined). This service also includes preferential treatments at major transit stops and high ridership locations such as signal preemption and enhanced passenger amenities such as covered bus shelters, curb extensions and special lighting. Types of regional transit facilities include:

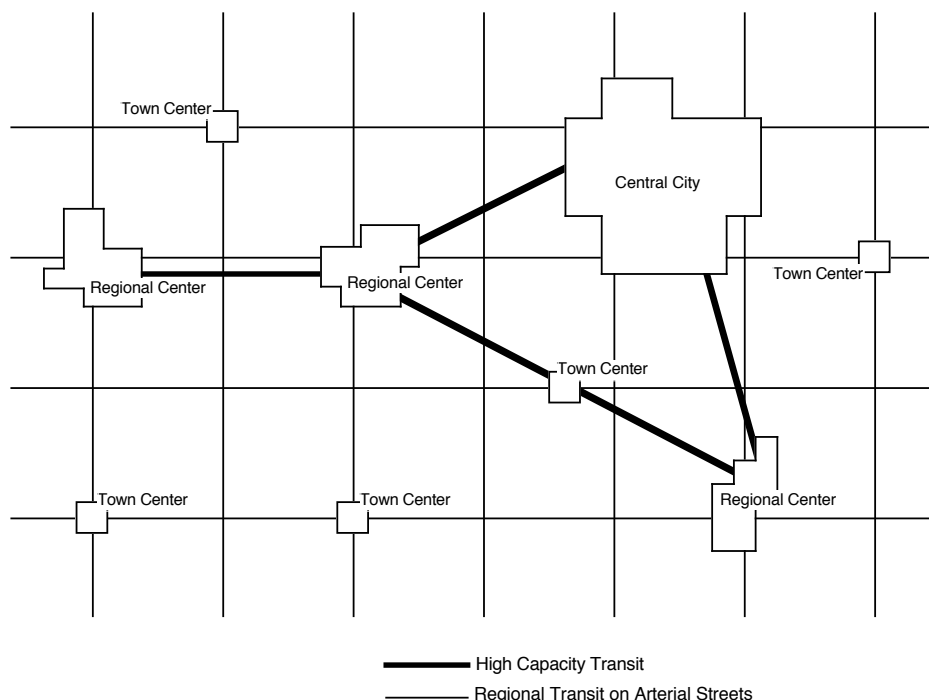
- Frequent & Regional Bus
- Streetcar
- Park-and-Ride Lots
- Major Transit Stops

### **Local Transit Network**

The local transit network provides basic service and access to the regional and high capacity transit networks. It also offers coverage and access to primary and secondary land-use components. Transit preferential treatments and passenger amenities are appropriate at high ridership locations. Types include:

- Local Bus
- Park-and-Ride Lots
- Mini-Bus
- Para-Transit

**Figure 4**  
**Regional Transit System Concept**



## **Transportation Management Concept**

The preceding section on system design and management, five goals were listed:

- Compact Urban Form and Economic Competitiveness
- Equitable Access
- Mobility and Reliability
- Safety and Security
- Human Health and Environment.

These goals and measurable objectives also guide management of the regional transportation system.

### **Overview**

Transportation infrastructure represents a major public investment. Roads, bridges and Port facilities often constitute the largest assets owned by local governments and Port authorities.

Despite the effort put into designing an ideal system, the street, freight and transit networks sometimes do not perform up to their true potential. A road or rail line that does not provide good service to its users is similar to buying a stock that goes nowhere: both have a low return on investment. Therefore, managing the system so that the full potential is realized is a cost-effective way to increase the rate of return on the public's investment in the transportation system and a necessary step before investing in further expansion of transportation infrastructure.

To accomplish this, many states and metropolitan areas are therefore looking at new models for managing the capacity that already exists on regional transportation systems, and for managing the addition of new capacity. Strategies that allow the region to better use the existing transportation system benefit all users of it.

The concept of transportation management has two components. The first component includes strategies that focus on making the infrastructure better serve the users. The second component includes programs that enable the users to take advantage of everything the system has to offer. These components are commonly known as system and demand management, respectively.

- System Management Elements

System management, which is also known as Transportation System Management and Operations (TSMO), requires a careful balance between safety and performance. Perhaps the most rudimentary example is the speed limit: lower speeds reduce capacity but increase safety. The same is true of traffic signals. A common TSMO strategy involves optimizing traffic signal timing to reduce congestion and delay without compromising safety. Signals, speed limits, access management and many other elements can be managed to improve the performance of existing infrastructure and thereby maximize the value of the public investment.

- Demand Management Elements

Demand management, which is also known as Transportation Demand Management (TDM), focuses on the user of the system, the barriers they encounter and the benefits of traveling efficiently for all trip purposes. TDM helps the system as a whole perform optimally by providing services, incentives, supportive infrastructure and awareness for travel options. Examples of each are: rideshare matching services; employer transit pass incentive programs; end-of-trip facilities like bike racks and showers; and, marketing programs that provide individualized travel information.

### **Application in the Portland Metropolitan Region**

In some parts of the Portland metropolitan region, the transportation system is already complete, while in other parts of the region, especially those where new development is planned, significant amounts of infrastructure will be added. In both contexts, management strategies have great value. Where the system is already built-out, such strategies may be the only ways to manage congestion and achieve other objectives. Where growth is occurring, system and demand management strategies can be integrated before and during development.

Notably, technology is playing an increasing role in the implementation of transportation management strategies. The application of advanced technology to transportation, referred to as Intelligent Transportation Systems (ITS), can multiply the benefits of some strategies and create opportunities where none existed before. For example, a common strategy for managing thoroughways is to try to respond quickly when an incident occurs. This simple approach to system management does not require any technology, but it benefits from surveillance devices that shorten the time it takes to determine that a crash or breakdown has occurred or communication technology that expedites the dispatching of a tow truck or police car.

### **System Management Elements**

There are many types of system management strategies. The categories employed here reflect the fact that some of these strategies are implemented continuously while others are deployed in response to certain events, some of which can be anticipated while others cannot.

- **Ongoing**

These are strategies that are carried out continuously, such as traffic signals and ramp meters. Through ongoing management, minor adjustments can be made, sometimes in real-time, to improve the system performance. In the transit realm, for example, the location of buses can be monitored so that dispatchers know if one is behind schedule or off route.

- **Preparedness**

These strategies are oriented to situations that may arise at any time and for which operators must be prepared. The most common example is traffic incidents, which includes crashes as well as breakdowns and stalls. When such an event occurs, the relevant operators are prepared to respond quickly so that traffic can be restored.

- **Advance Planning**

These strategies are also oriented to occasional situations but in this case, the events are known in advance, such as a parade, a major sporting event, a work zone or other kind of disruption. For example, with a major sporting event, departing spectators may create a strain on the local roads as well as the transit service. Operators can adjust signal timing, increase transit service and take other measures to limit the disruption.

## **Demand Management Elements**

Demand management strategies are equally diverse. A meaningful way to categorize them is according to the travel choices that individuals make, including when, where, and how to go from one place to another.

- **Fewer and Shorter Trips**

These programs promote the concept that by combining trips, a person can save time and money (such as the cost of gas if they are driving). For example, doing several errands on one trip often requires less driving than making each errand separately. Living near work, school and shopping shortens trip length, allowing for walking trips which increases community health. Working from home via phone or computer is an option for some people to eliminate commute trips. Such programs depend on raising awareness, showing costs and benefits, and providing incentives.

- **Mode choice**

These programs promote benefits and reduce barriers to travel options, helping people efficiently get to work, school, shopping, and other trip purposes. While some trips may require travel by car, others are possible by walking, biking or taking transit. Some programs focus on travelers who are not using these options because they lack information that would increase their comfort. For example, many people would like to ride their bikes to work or school but are unaware of a map that can guide them to safe routes. Other programs in this category seek to increase use of options by such means as providing rideshare matching services, partially financing vanpools and reserving parking spaces for these vehicles. This example demonstrates that mode choice programs depend on providing services, incentives and supportive infrastructure while raising awareness.

- **Choice of route and timing**

These programs seek to help travelers find the best route and timing for their trips. For example, some driving commuters take one route out of habit even though another route might be more reliable. Other programs work closely with employers to allow employees to commute before or after the peak travel periods. Such programs depend on public-private partnerships to share knowledge and expertise.

## **Governance**

### **Overview**

While this RTP reflects a more fiscally-constrained approach to managing the transportation system, it also seeks to stabilize funding at a strategic level needed to support the Region 2040 Growth Concept and meet the desired outcomes described in the plan. Reaching a consensus on how best to deliver a transportation system that meets public expectations rests on a level of public involvement, fiscal stewardship and accountability that helps build public trust in government's ability to meet the region's transportation challenges today and in the future. The goals in this section are the vision for gaining that public trust.



**Governance Goals and Objectives**

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 6 Effective Public Involvement<sup>6</sup></b> All major transportation decisions are open and transparent, and grounded in meaningful involvement and education of the public, including those traditionally under-represented, businesses, community groups and local, regional and state jurisdictions that own and operate the region’s transportation system.</p>	<p><b>Objective 6.1 Meaningful Input Opportunities</b> Develop a public involvement plan early in the planning process that includes timelines, key decision points and opportunities for meaningful input throughout the decision-making process consistent with Metro’s adopted public involvement policy for transportation planning.</p>	<p><i>Inclusiveness of planning process and opportunities for involvement.</i></p>
	<p><b>Objective 6.2 Inclusion of Underrepresented -</b> Involve those in the decision-making process who have traditionally been underrepresented in such processes and consider their needs in developing the transportation plan.</p>	<p><i>Inclusiveness of planning process and opportunities for involvement.</i></p>
	<p><b>Objective 6.3 Inclusion of Affected Stakeholders -</b> Involve affected stakeholders, including resource agencies, business and community stakeholders, and local, regional and state jurisdictions that own and operate the region’s transportation system in plan development and review.</p>	<p><i>Inclusiveness of planning process and opportunities for involvement.</i></p>

<sup>6</sup> Note that Goal numbering continues from Transportation Design and Management section.

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 7 Fiscal Stewardship</b>                      Regional transportation planning and investment decisions maximize the public investment in infrastructure, preserving past investments for the future and prioritizing cost-effective solutions that reinforce Region 2040 to address transportation needs.</p>	<p><b>Objective 7.1 Preservation</b> – Emphasize the preservation and maintenance of existing transportation services and infrastructure in the region in a cost-effective and efficient manner.</p>	<p><i>Condition of transportation system (by type).</i></p> <p><i>Percent of road maintenance and preservation needs funded at local and state levels.</i></p>
	<p><b>Objective 7.2 Cost-effectiveness</b> - Invest limited transportation financial resources in a cost-effective and efficient manner, prioritizing investments that achieve multiple goals.</p>	<p><i>Cost per vehicle hours of delay reduced.</i></p> <p><i>Cost per lane miles of congestion reduced.</i></p> <p><i>Transit trips per transit revenue hour.</i></p> <p><i>Relative cost comparison for roadway and transit operations and maintenance.</i></p> <p><i>Percent of funding spent on high-priority projects that achieve multiple goals.</i></p>
	<p><b>Objective 7.3 Protect Public Investments</b> - Reinforce growth in centers, industrial areas, intermodal facilities, corridors and employment areas and ensure land use decisions protect public investments in infrastructure.</p>	<p><i>Transportation investments (by 2040 land use).</i></p> <p><i>Agreements between transit service providers and local jurisdictions on the provision of transit service and the build-out of priority 2040 land-use areas and related street infrastructure.</i></p>
	<p><b>Objective 7.4 Innovative Partnerships</b> - Develop innovative partnerships to advance long-term Region 2040 vision and establish appropriate revenue sources and financing mechanisms that provide consistent stable funding for operations, maintenance and preservation activities and priority regional transportation investments.</p>	<p><i>Transportation investments by funding source or strategy.</i></p> <p><i>Public and private commitments to pursue appropriate revenue sources.</i></p>

<b>Goal</b>	<b>Objectives</b>	<b>Potential Performance Measures</b>
<p><b>Goal 8 Accountability</b> The region’s government, business and community leaders work together so the public experiences transportation services and infrastructure as a seamless, comprehensive system of transportation facilities and services that bridge institutional and fiscal barriers.</p>	<p><b>Objective 8.1 Representative Decision-Making-</b> Ensure representation in regional decision-making is equitable.</p>	<p><i>Geographic distribution of JPACT and MPAC representation.</i></p>
	<p><b>Objective 8.2 Coordination and Cooperation -</b> Improve coordination and cooperation among the local, regional and state jurisdictions that own and operate the region’s transportation system to remove barriers so the system can function as one system and to better provide for state and regional transportation needs.</p>	<p><i>Percent of regional roadways connected to central operations center and ODOT operations center.</i></p>
	<p><b>Objective 8.3 Equitable Distribution -</b> Develop a regionally balanced plan that provides equity in the distribution of investments (benefits and impacts).</p>	<p><i>Distribution of transportation investments (by environmental justice target area).</i></p>
	<p><b>Objective 8.4 Collaboration -</b> Improve public and private sector collaboration to fund the desired regional transportation system.</p>	<p><i>New transportation funding secured beyond existing resources, including those forecasted as necessary for the financially constrained and the illustrative systems.</i></p>

## **GLOSSARY OF TERMS**

**Bus Rapid Transit:** Bus Rapid Transit (BRT) service emulates LRT service in speed, frequency and comfort, serving major transit routes with limited stops. This service runs at least every 15 minutes during the weekday and weekend mid-day base periods. Passenger amenities are concentrated at transit centers. Regional rapid bus passenger amenities include schedule information, ticket machines, special lighting, benches, covered bus shelters and bicycle parking.

**Commuter rail:** Commuter rail is the use of existing freight railroad tracks either exclusively or shared with freight use, for passenger service. The service is typically focused on peak commute periods but can be offered other times of the day when demand exists and where rail capacity is available. The stations are typically located one or more miles apart, depending on the overall route length. Stations offer basic amenities for passengers, bus and LRT transfer opportunities and parking if supported by adjacent land uses.

**Cross-regional travel:** longer trips that span the region, including interstate and intrastate travel, but occur within the larger metropolitan travelshed.

**Frequent Bus:** Frequent bus service provides slightly slower, but more frequent, local bus service than rapid bus along selected transit corridors. This service runs at least every 10 minutes and includes transit preferential treatments such as reserved bus lanes and signal preemption and enhanced passenger amenities along the corridor and at major bus stops such as covered bus shelters, curb extensions, special lighting and median stations.

**Inter-city bus:** Inter-city bus connects points within the region to nearby destinations, including neighboring cities, recreational activities and tourist destinations. Several private inter-city bus services are currently provided in the region.

**Light Rail Transit:** Light rail transit (LRT) is a frequent and high-capacity service that operates on a fixed guideway within an exclusive right-of-way to the extent possible, connecting the central city with regional centers. LRT also serves existing regional public attractions such as Civic Stadium, the Oregon Convention Center and the Rose Garden, and station communities. LRT service runs at least every 10 minutes during the weekday and weekend midday base periods with limited stops and operates at higher speed outside of downtown Portland. A high level of passenger amenities are provided at transit stations and station communities including schedule information, ticket machines, special lighting, benches, shelters, bicycle parking and commercial services. The speed and schedule reliability of LRT can be maintained by the provision of signal preemption at-grade crossings and/or intersections.

**Local Bus:** Local bus lines provide coverage and access to primary and secondary land-use components. Local bus service runs as often as every 30 minutes on weekdays. Weekend service is provided as demand warrants.

**Major transit stops.** Major transit stops are intended to provide a high degree of transit passenger comfort and access. Major transit stops are located at stops on light rail, commuter rail, rapid bus, frequent bus or streetcar lines in the central city,

regional and town centers, main streets and corridors. Major transit stops may also be located where bus lines intersect or serve intermodal facilities, major hospitals, colleges and universities. Major transit stops shall provide schedule information, lighting, benches, shelters and trash cans. Other features may include real time information, special lighting or shelter design, public art and bicycle parking.

**Mini-bus:** Mini-bus service provides coverage in lower density areas by providing transit connections to primary and secondary land-use components. Mini-bus services, which may range from fixed route to purely demand responsive including dial-a-ride, employer shuttles and bus pools, provide at least a 60-minute response time on weekdays. Weekend service is provided as demand warrants.

**Modal Targets.** Targets for increased walking, biking, transit and shared ride as a percentage of all trips. The targets apply to trips *to, from and within* each 2040 Design Type. The targets reflect mode shares for the year 2040 needed to comply with Oregon Transportation Planning Rule objectives to reduce reliance on single-occupancy vehicles.

### **2040 Regional Non-SOV Modal Targets**

<b>2040 Design Type</b>	<b>Non-SOV Modal Target</b>
<b>Central city</b>	60-70%
<b>Regional centers</b>	
<b>Town centers</b>	
<b>Main streets</b>	45-55%
<b>Station communities</b>	
<b>Corridors</b>	
<b>Industrial areas</b>	
<b>Intermodal facilities</b>	
<b>Employment areas</b>	40-45%
<b>Inner neighborhoods</b>	
<b>Outer neighborhoods</b>	

**Para-transit:** Para-transit service is defined as non-fixed route service that serves special transit markets, including "ADA" service throughout the greater metro region.

**Park-and-ride.** Park-and-ride facilities provide convenient auto access to regional trunk route service for areas not directly served by transit. Bicycle and pedestrian access as well as parking and storage accommodations for bicyclists are considered in the siting process of new park-and-ride facilities. In addition, the need for a complementary relationship between park-and-ride facilities and regional and local land use goals exists and requires periodic evaluation over time for continued appropriateness.

**Passenger intermodal facilities:** Passenger intermodal facilities serve as the hub for various passenger modes and the transfer point between modes. These facilities are closely interconnected with urban public transportation service and highly accessible by all modes. They include Portland International Airport, Union Station and inter-city bus stations.

**Passenger rail:** Inter-city high-speed rail (up to 79 miles per hour) is part of the state transportation system and extends from the Willamette Valley north to British Columbia. Amtrak already provides service south to California, east to the rest of the continental United States and north to Canada. These systems should be integrated with other public transportation services within the metropolitan region with connections to passenger intermodal facilities. High-speed rail needs to be complemented by urban transit systems within the region.

**Pedestrian district.** A pedestrian district is a comprehensive plan designation or implementing land use regulations designed to provide safe and convenient pedestrian circulation, with a mix of uses, density, and design that support high levels of pedestrian activity and transit use. The pedestrian district can be a concentrated area of pedestrian activity or a corridor. Pedestrian districts can be designated within the 2040 Design types of Central City, Regional and Town Centers, Corridors and Main Streets, as designated in local plans. Pedestrian districts emphasize a safe and convenient pedestrian environment, and facilities to support and integrate efficient use of several modes within one area (e.g., pedestrian, auto, transit, and bike).

**Streetcar:** Street cars provide fixed-route transit service for more locally oriented trips in higher density mixed-use centers. This service runs at least every 15 minutes and includes transit preferential treatments such as signal preemption and enhanced passenger amenities along the corridor such as covered bus shelters, curb extensions and special lighting.

**Regional bus:** Regional bus service is provided on most major urban streets. This type of bus service operates with maximum frequencies of 15 minutes with conventional stop spacing along the route. Transit preferential treatments and passenger amenities such as covered bus shelters, special lighting, signal preemption and curb extensions are appropriate at high ridership locations.