

BEFORE THE COUNCIL OF THE
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF AMENDING THE)	RESOLUTION NO. 80-137
FY 1980 UNIFIED WORK PROGRAM TO)	
INCLUDE THE BANFIELD LIGHT RAIL)	Introduced by the
TRANSIT STATION AREA PLANNING)	Joint Policy Advisory
PROGRAM)	Committee on Trans-
)	portation

WHEREAS, The CRAG Board adopted CRAG Resolution No. BD 781213 reserving \$15,000,000 of I-505 Interstate Transfer funds for development of the Banfield Transitway; and

WHEREAS, The Urban Mass Transit Administration (UMTA) "Policy Toward Rail Transit, March 7, 1978," requires commitments to the development and implementation of a program of local supportive policies including appropriate zoning and development incentives in conjunction with major transit facilities; and

WHEREAS, The Interstate Transfer funds are the only available funds which may be used for planning and which can be secured within the time required for this planning effort; and

WHEREAS, The amount of funds authorized for the Banfield Light Rail Transit Station Area Planning Program a) is included in the transit portion of the \$161. million, b) according to Tri-Met, will not increase the total amount of the funds dedicated to the Banfield project, and c) does not affect that portion of the budget assigned to highway improvements; now, therefore,

BE IT RESOLVED,

1. That the Metro Council hereby amends the FY 1980 Unified Work Program to include the Banfield Light Rail Transit Station Area Planning Program.

2. That the Metro Council hereby authorizes the use of \$1,403,560 of the Banfield Transitway funds secured from the I-505 Interstate Transfer to support the program.

3. That the Metro Council finds the program to be consistent with the continuous, coordinated and comprehensive transportation planning process and, therefore, grants positive A-95 action.

4. That the Metro Council hereby authorizes the Executive Officer of Metro, together with Tri-Met, to take all administrative actions necessary to apply for Interstate Transfer funds.

ADOPTED by the Council of the Metropolitan Service District
this 27th day of March, 1980.


Presiding Officer

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Res 80-137

APPROVED BY THE METRO COUNCIL

AGENDA MANAGEMENT ~~THIS DATE~~ *27th* SUMMARY *March* 19*80*

Mary E. Carter
 CLERK OF THE COUNCIL

TO: Metro Council
 FROM: Executive Officer
 SUBJECT: Amending the FY 1980 Unified Work Program to Include the Banfield Light Rail Transit (LRT) Station Area Planning Program

I. RECOMMENDATIONS:

- A. ACTION REQUESTED: Adopt the attached Resolution amending the FY 1980 Unified Work Program (UWP) to include the Banfield/Burnside Transit Station Area Planning Program. The Resolution would also authorize the use of \$1,403,560 of I-505 Interstate Transfer funds to support the program. On February 14, 1980, the Joint Policy Advisory Committee on Transportation (JPACT) in voting to support this recommendation, requested that the participants in the project review the work program in an effort to reduce the total budget amount. Also, JPACT asked that the proposal indicate times during the project when the local governments will be expected to take actions binding them in regard to key issues resolved by the project. The Project Management Committee responded to these requests by reducing the budget from \$1,903,935 to \$1,651,247 and by setting forth a series of decision points as presented on page 5 of the attachment to this Summary. JPACT has reviewed and recommended approval of the attached Resolution. The Regional Planning Committee will have a recommendation for Council consideration at the meeting of March 27.

- B. POLICY IMPACT: CRAG Resolution No. BD 781213, adopted on December 21, 1978, allocated approximately \$15,000,000 from the I-505 Interstate Transfer funds for development of the Banfield Transitway. The Resolution which accompanies this Summary would authorize the use of some of these funds to support the development of detailed land use and development plans and implementing measures for station areas in the Corridor. This work is deemed important in order to assure at the onset of the transit construction that related matters such as physical design, economic development opportunities and land uses are fully planned and supported by effective implementing measures (See attachment for more information).

With initiation of this project, Metro assumes the responsibility of managing the program. The attachment also describes the management structure.

- C. BUDGET IMPACT: Metro's participation in this program will involve personnel and contractual costs of \$111,364 for

FY 1980, which includes the necessity of hiring a Project Coordinator and support staff. These additional costs will be covered by new revenues provided by the Interstate Transfer funds and local matching funds supplied by Tri-Met.

II. ANALYSIS:

- A. **BACKGROUND:** The planning program to be funded by this reallocation has been anticipated by the local governments (Portland, Gresham and Multnomah County) as necessary complements of their comprehensive planning programs; therefore, consistency and need for the program is assumed.

Detailed planning efforts of this type are regularly required by U. S. Department of Transportation (USDOT) to assure appropriate zoning and development incentives in conjunction with major transit facilities as covered by the Urban Mass Transit Administration's (UMTA) March 7, 1978 "Policy Toward Rail Transit."

Timing of the program is critical because of the advanced state of planning, engineering and authorizations for the Banfield LRT project.

Finally, the local government citizen involvement programs and processes will be formed to reflect citizen desires and to gain public support for the local plans, policies and projects which stem from this program.

- B. **ALTERNATIVES CONSIDERED:** The alternative of applying for UMTA Sec. 8 planning funds has been explored, resulting in information that insufficient funds are available.

The management arrangement has been agreed to after the alternative of Tri-Met responsibility was rejected because of the land use nature of the project. Also the local governments involved are not certified to receive the available funds.

- C. **CONCLUSION:** Metro's management role as described is recommended in order to assure timely application for the funds; to enhance the regional role in determining the land use and economic development corollaries to the LRT investment; and to facilitate the local government planning programs. Further, the Unified Work Program amendment is required by federal policy in order to secure the funds upon which this necessary planning program is based.

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TRANSIT STATION AREA PLANNING PROGRAM

PROJECT DESCRIPTION

The Banfield Light Rail Transit (LRT) system will be a new mode of transportation for persons throughout the Portland metropolitan area. As transit attracts a significant proportion of persons who might otherwise use automobiles, the necessity for major street widening and new highways will be reduced. The effects of the Banfield LRT system, however, will not be limited to transportation impacts. The system will have the potential to affect land use patterns, social and economic conditions, environmental quality, housing opportunities, and urban form and design. Consequently, much emphasis has been placed upon minimizing any potentially adverse effects, as well as maximizing the developmental opportunities presented by the LRT system. The vehicle to balance these often divergent concerns is a Transit Station Area Planning Program.

The Transit Station Area Planning Program is essential in order to achieve the maximum social and economic returns from the Banfield LRT program. The aim of the program is to identify how transit stations can affect the development, redevelopment or conservation of neighborhoods. Carried out by the three affected local governments, the Transit Station Area Planning Program will require two years, and will result in the preparation of feasible land use, urban design and circulation plans, together with a detailed implementation strategy for each of the 28 transit stations along the Banfield LRT system.

A planning program of this kind is necessary to assist local communities in the preparation of individual station area plans, to capture transit supportive joint development opportunities, to provide a strategy for the entire Corridor to ensure the formulation of consistent development strategies among station sites. The Transit Station Area Planning Program will be carried out by the cities of Portland and Gresham, and Multnomah County, and coordinated through a Project Management Committee. Close coordination will obviously be necessary between the jurisdictions involved, their planning staffs, property owners, residents, business people, community organizations and others who have an interest in the future of the transit station areas.

The local jurisdictions along the Banfield LRT Corridor have spent many years and millions of dollars to prepare and move towards adoption of overall comprehensive plans. The plans include policies and plan designations which reinforce the link between transit and land use by increasing the density and intensity of development along designated corridors and around light rail stations. Yet the level, scale and detail of land use planning activities necessary to prepare for light rail are clearly beyond the "broad brush stroke" of traditional comprehensive planning. The Transit Station Area Planning Program has been conceived as an additive process designed to build upon the policy framework and extensive data base of local

comprehensive plans with an eye towards implementation.

Transit station area planning is an essential link between joint development activities and the region's ongoing planning activities. "Joint development" refers to the multiple use of transportation corridors and transit stops to maximize the economic return on public investment and to achieve and improve environmental relationships between transportation and adjacent land uses. Since transportation is generally a public sector responsibility and land development primarily a private function, joint development requires a successful partnership between both sectors to effect a proper relationship between transportation and land use. The effectiveness of the Banfield LRT project will undoubtedly be enhanced by joint development projects resulting from the Transit Station Area Planning Program. In this manner, the program proposed is consistent with and supportive of the Administration's Urban Initiatives Program, and the UMTA Joint Development Program.

The Transit Station Area Planning Program described in this grant application is consistent with UMTA funded planning occurring in conjunction with both the preliminary and final engineering phases of all new fixed guideway systems.

"Localities building or planning to build new rail lines with Federal assistance will be required to commit themselves to (1) the development of a financial plan; and (2) a program of local supportive actions to enhance the project's cost-effectiveness, patronage and prospect for economic viability."

The Program has been closely coordinated with the design, construction and operation of the adjacent Banfield LRT system to be constructed by Tri-Met and the Oregon State Department of Transportation. Upon adoption of a recommended plan for a station, implementation will begin. Thus, both the construction of the LRT system and improvements agreed upon as a result of the Transit Station Area Planning Program can commence together. Roadway improvements in the vicinity of transit stations will be initiated, public facilities needed to serve the study area will be planned and zoning and other development control changes will be processed.

Finally, as the Banfield LRT system nears the start of operation, the initial phase of development around the transit stations will likely begin. Private developers who have reviewed the plans and recognize the unique potential of the station areas will work with local jurisdictions in beginning development or redevelopment. Guided by the principles specified in the Transit Station Area Planning Program, this new development will fit the station area, complement the adjacent neighborhood and relate to the transit station.

PROJECT MANAGEMENT AND ADMINISTRATION

The nature of the Transit Station Area Planning Program is such that

it encompasses three local jurisdictions--the cities of Portland and Gresham, and Multnomah County. All responsibility for land use planning activities and citizen involvement efforts leading to adoption of individual station area plans rests solely with these local governments. Tri-Met will have no active role in, nor contractual responsibility for any land use planning activities.

Responsibility for the administration of the Transit Station Area Planning Program will be divided among the Project Management Committee and its Chairperson, the Project Coordinator and local jurisdiction project managers.

The Project Management Committee consists of the Project Coordinator, three Project Managers, and representatives from the Metropolitan Service District (Metro) and the Oregon Department of Transportation. The Project Management Committee will be chaired by Metro. The Committee will meet at least once a month, and will be responsible for the joint administration of the project. In addition, the Project Management Committee will deal with multi-jurisdictional and Corridor issues, consultant selection and peer review of land use planning activities being carried out by local jurisdictions.

The Project Coordinator is responsible for monitoring consultant contracts, establishing meeting dates and serving as secretary to the Project Management Committee. In that capacity, the Project Coordinator produces minutes of meetings, coordinates communication and work programs among program participants, submits monthly progress reports to the Director of the Banfield LRT project, and prepares reports and memoranda for acceptance and release by the Project Management Committee. The Project Coordinator will serve on contract to Metro and be responsible to the Chairperson of the Project Management Committee. The Project Management Committee will provide general guidance.

Each jurisdiction will have a Project Manager responsible for coordination and managing station area land use planning. The Project Manager must also submit monthly reports, describing project progress and budget delays to the Project Management Committee.

Tri-Met will be responsible for coordinating all aspects of this program with the Banfield LRT project. This will include station design, station area circulation and final engineering. Further, Tri-Met will have responsibility for administration of the Transit Station Area Planning Program funds.

Consultant support for the study would be secured jointly by the Project Management Committee. Separate contracts will be developed for each local jurisdiction to cover the scope of involvement of each element of the project. For example, one economic consultant would be hired for the entire Corridor, then the City of Portland, Multnomah County, and the city of Gresham would negotiate separate contracts with the consultant. In this way, costs and redundancies can be reduced while allowing for greater flexibility to meet the

needs of individual jurisdictions.

A Policy Committee comprised of agency heads and elected officials from the governmental entities will review major products and provide policy guidance to the program. With that overall coordination, each agency will also be responsible for accomplishing those work tasks needed to meet its own requirements.

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TRANSIT STATION AREA PLANNING PROGRAM

DECISION-MAKING

Restructuring the fabric of development around transit stations requires good analysis and information for decision-makers and citizens to produce plans which can be adopted by local government.

Citizen Participation

The Transit Station Area Planning Program is structured to maximize the involvement of citizens throughout the life of the program. Local governments using their established citizen participation channels will be responsible for their own citizen involvement programs.

Review by Policy-Makers

Elected officials will be kept abreast of the program through review and adoption of significant issues or proposed plans at specified points in the process. By initiating this procedure, policy-makers (local Planning Commissions, City Councils and the Policy Advisory Committee) can be advised of critical issues prior to the finalization of plans and policies. Six points in the work program (at months 4, 10, 13, 16, 18 and 23) have been identified at which decision-makers would be explicitly involved. Specifically:

- . Adoption of corridorwide goals and objectives.
- . Refine or select alternative station concept plans.
- . Review/Adoption of a station planning area boundary and establishment of concerns to be investigated in the balance of the sketch planning phase.
- . Review and identification of specific issues to be addressed around station sites in the detailed station area planning phase.
- . Refine or select policy options for detailed station area plans.
- . Final adoption of plans and zoning.

Understandings Regarding Progress

It is understood by the participating governments that progress and effective products are essential. Revenue to cover construction delay is not available. Therefore, mobility or failure on the part of local governments to make timely progress and decisions in keeping with the critical path schedule prepared for the Banfield LRT will be treated as follows:

If the question of progress or decision is not critical to

continuation of LRT design or construction, then a) work on the facility will proceed even though opportunities may be lost to the local government, and b) these planning funds will be considered at risk and subject to cutback or termination.

If the question of progress or decision is critical to continuation of the LRT design or construction, then Metro will arbitrate the issue in cooperation with Tri-Met and, if necessary, will take action to resolve the impasse.

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BUDGET SUMMARY

PERSONNEL BUDGET

Tri-Met/Metro	\$217,767		
Gresham	311,876		
Portland	253,784		
Multnomah County	<u>367,820</u>		
		TOTAL	\$1,151,247

CONSULTANT BUDGET

Transportation	\$ 85,000		
Economic/Market	150,000		
Implementation	180,000		
Capital Investment	35,000		
Urban Design	65,000		
Downtown Street Improvement (Portland)	45,000		
Hollywood Redevelopment	<u>40,000</u>		
		TOTAL	<u>\$ 500,000</u>

TOTAL PROJECT COST \$1,651,247

15% Local Match: \$ 247,687

85% UMTA \$1,403,560

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TRANSIT STATION AREA PLANNING PROGRAM

PROJECT ORGANIZATION

The Transit Station Area Planning Program is organized into three phases (see Figure 3). Phase I is directed to the inventory and organization of base information. Phase II will result in a series of alternative concept plans for each transit station area, and Phase III will result in locally adopted transit station area and Corridor segment plans. The following is a brief description of each of the phases. Figure 4 provides a timeline and shows responsibilities for the completion of each task.

Phase I

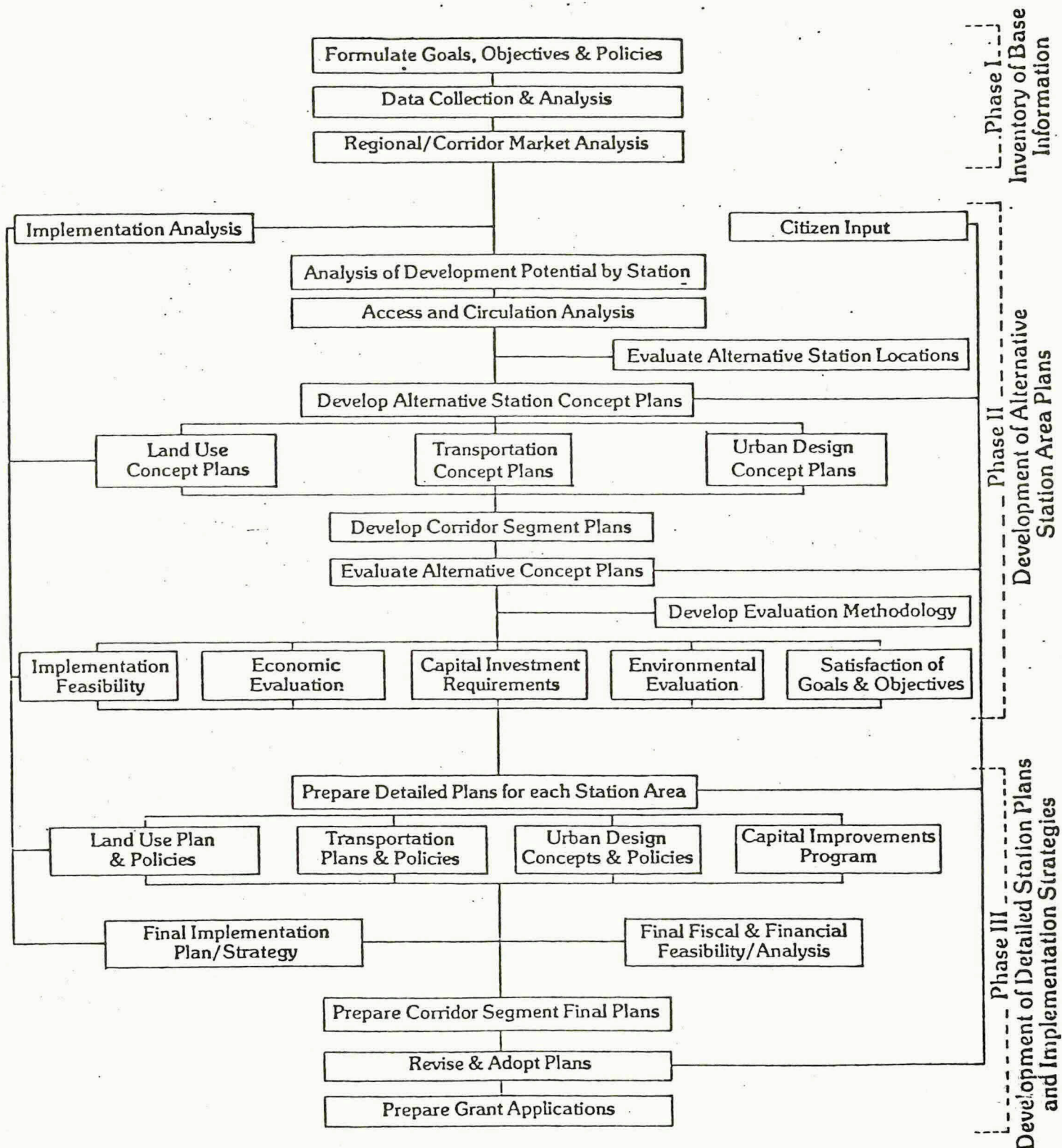
Phase I consists of four main tasks. These are:

1. Formulation of goals, objectives and policies--for each transit station. This will provide the overall framework for planning and development together with existing local comprehensive plans and policies.
2. Data collection and analysis--the inventory and organization of all available data on social, economic and physical characteristics around each station. This will constitute an inventory of base information suitable for input into subsequent phases of the Transit Station Area Planning Program. Data will be collected for specific transit station and Corridor impact areas.
3. Regional/Corridor Market Analysis--establishes a base case of forecasts of population, employment, housing and income by five-year increments, through the year 2000. This is one of four economic/market analyses which will be undertaken in the Transit Station Area Planning Program to provide a valid basis for expectations that the private sector can produce new development in the transit corridor and station areas.
4. A Citizen Participation Structure--developed by local jurisdictions and Tri-Met, for Phases II and III of the project. Close coordination will obviously be necessary between the affected jurisdictions, their planning staffs, property owners, residents, business people, community organizations and others who have an interest in the future of the transit station areas.

Each of the above tasks will form a base for tasks to be carried out in the next phases.

TRANSIT STATION AREA PLANNING PROGRAM

Work Program Flow



Work Program Flow

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 MONTHS

Phase I

- Formulate Goals Objectives & Policies ██████████
- Data Collection & Analysis ██████████
- Regional/Corridor Market Analysis ██████████

Phase II

- Implementation Analysis ██████████
- Analysis of Development Potential by Station ██████████
- Access and Circulation Analysis ██████████
- Evaluate Alternative Station Locations ██████████
- Develop Alternative Station Concept Plans ██████████
- Land Use Concept Plans ██████████
- Transportation Concept Plans ██████████
- Urban Design Concept Plans ██████████
- Develop Corridor Segment Plans ██████████
- Evaluate Alternative Concept Plans ██████████
- Develop Evaluation Methodology ██████████
- Implementation Feasibility ██████████
- Fiscal & Financial Feasibility/Analysis ██████████
- Capital Investment Requirements ██████████
- Satisfaction of Goals & Objectives ██████████

Phase III

- Prepare Detailed Plans for each Station Area ██████████
- Land Use Plan & Policies ██████████
- Transportation Plan & Policies ██████████
- Urban Design Concepts & Policies ██████████
- Capital Improvements Program ██████████
- Final Implementation Plan/Strategy ██████████
- Final Fiscal & Financial Feasibility/Analysis ██████████
- Prepare Corridor Segment Final Plans ██████████
- Revise & Adopt Plans ██████████ □ □ □ □
- Prepare Grant Applications ██████████

Primary Responsibility for Completion of Tasks

- Local Jurisdictions ██████
- Market/Economic Consultant ██████
- Implementation Consultant ██████
- Transportation Consultant ██████
- Urban Design Consultant █ █
- Capital Investment Consultant ██████

Phase II

Phase II consists of three principal areas: planning input; development of alternative land use, transportation and urban design concept plans; and evaluation of these plans. The areas include the following:

Planning Input

1. Implementation Analysis--this will provide an assessment of the adequacy of the powers (existing and missing) of affected local governments, related to aiding, intensifying, and/or limiting development opportunities created by the Banfield LRT project. To realize station area planning objectives, public action will be required which may involve both modification of existing legal authority and defining new authority, where necessary.
2. Access Circulation Analysis--will form the base for detailed development and evaluation of transportation plans for both Corridor segments and station areas. The analysis represents a base case of future conditions without transit related traffic, nor traffic assumed from station area development changes.
3. Evaluate Alternative Station Locations--a separate study which will take into account community needs and desires, and all of the relevant access, transfer, parking, development, facility engineering and impact factors. Considerable discretion must be exercised in evaluating alternative station location since changes in location could have substantial impacts on the timing and construction of the LRT project.

Development of Alternative Concept Plans

Alternative station concept plans will be developed for each station and Corridor influence through a series of steps beginning with space allocation and zoning and traffic envelope analysis. Alternative plans will be developed for review by citizens and committees. These plans will consist of the following individual plans:

1. Land use concept plans emphasizing the integration of future land use with existing development;
2. Transportation concept plans integrating station access facilities, bus circulation, bikeways and the road network with a land use plan;
3. Urban design concept plans presenting a three dimensional description of land use and transportation plans together with pedestrian circulation and landscape features.

Evaluation of Alternatives

Evaluation of alternatives encompasses balancing the range of impact and feasibility factors identified to produce a concept plan for each Corridor segment and station area. The criteria used in evaluating concept plans include: financial feasibility, capital investment requirements, implementation strategies and compatibility with goals and objectives.

1. The financial feasibility analysis covers the evaluation of project financial feasibility as viewed by the private sector.
2. The capital investment requirements is a "micro" level analysis of probable capital investments required to support any particular project staged over a period of time.
3. Implementation feasibility is concerned with the levels of public and private commitment required to implement a project and with the feasibility of using a range of techniques in each station area.
4. Goals and objectives encompass a wide range of concerns at the local, regional and neighborhood levels.

Phase III

The third phase of the Transit Station Area Planning Program will consist of those elements required to produce and adopt final station area and Corridor segment plans, together with the required implementation tools. As such, it will include preparation of final reports, identification of implementation responsibilities, required legal powers, required funding and funding sources, etc. Stations having the highest short-term development potential or that require a strong public policy focus during the early implementation stages of the Banfield LRT system will be considered priority stations. For these stations, more detailed analysis will be undertaken in this phase. The tasks to be carried out in Phase II include:

1. Financial and fiscal feasibility analysis for priority stations--will evaluate the market potential and investment aspects (both public and private) of a particular development scheme leading to implementation. The results of this analysis will be a feasible implementation plan and strategy for priority stations. The analysis includes the following: evaluation of land and air rights values, project capital and operating costs, project income, financing and equity requirements, and an analysis of the cash flow and returned equity.
2. Final implementation strategy--will be prepared for each station. It will identify the public sector and phasing requirements necessary for implementation of the detailed

station plan. For priority stations, a detailed implementation plan will be prepared. The implementation analysis is aimed at short-term achievable development opportunities. However, it would be phased over time to address the development opportunities at the initiation of transit operations and for achieving the ultimate plans for each station area.

3. Detailed plans--will be prepared for each station and Corridor segment to guide development and correlate interrelated developments. These plans will consist of physical designs, policies and programs related to both initial transit service and ultimate area development. Each plan will include the following: land use plans and policies, urban design concepts and policies, transportation plans and policies and a capital improvement program.

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TRANSIT STATION AREA PLANNING PROGRAM

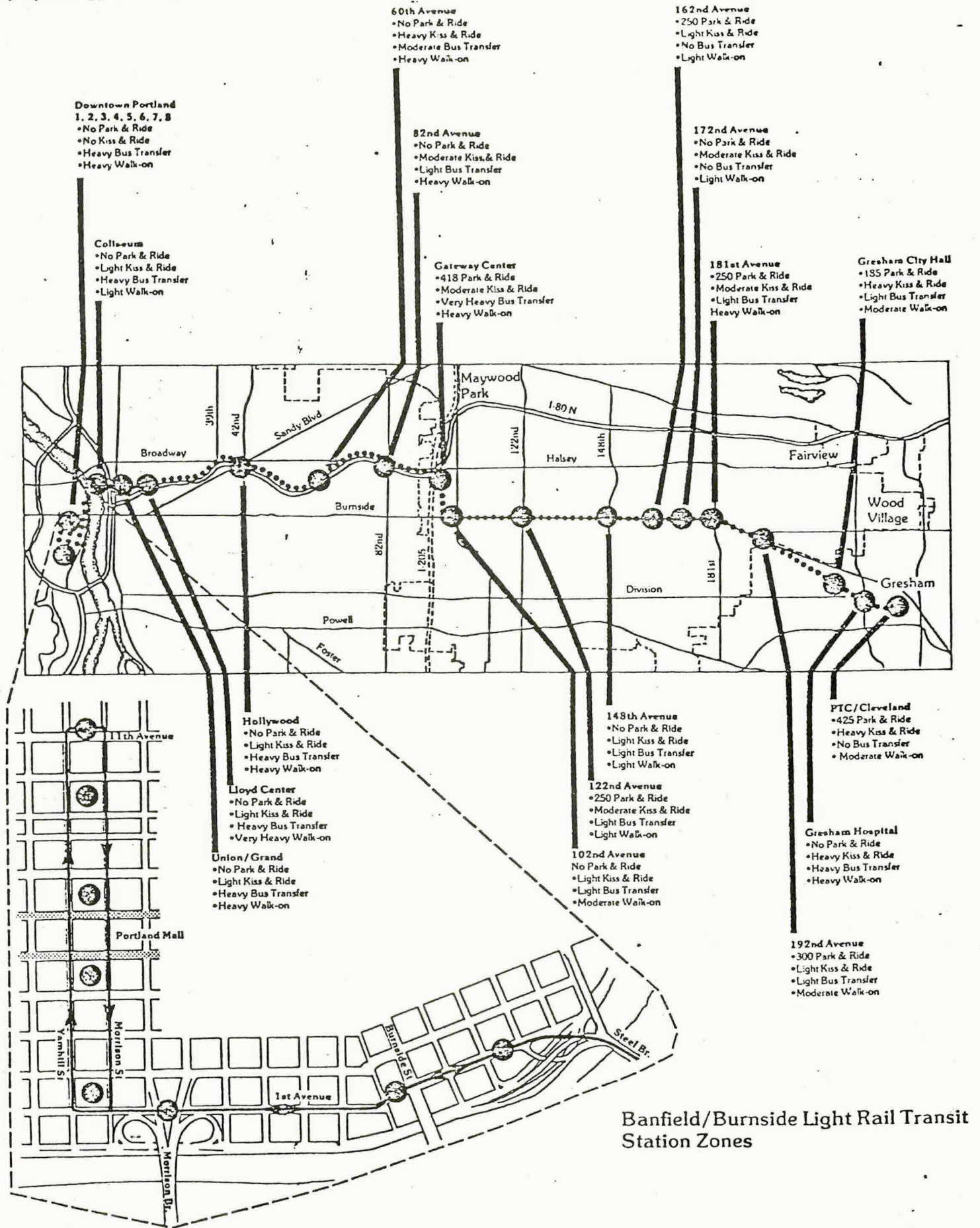
PROJECT REPORTING

A final report and summary report will be prepared for each of the stations studied in the project. In addition, interim reports and work papers will be prepared for various products and tasks described in the Scope of Work.

Report production and publication will also include any community presentation materials, brochures and audio visual aids used in presentations. Local jurisdictions and consultants will prepare monthly progress reports of their staff activities for submission to the Project Management Committee and estimates of balances of work to be done.

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There are several types of Light Rail Transit stations, depending on the uses. This map notes each Light Rail Transit station and its proposed types of uses.



Banfield/Burnside Light Rail Transit Station Zones

RECOMMENDED LIGHT RAIL ALIGNMENT AND STATIONS

