



**METRO**

**Agenda**

MEETING: METRO COUNCIL GREATEST PLACE WORK SESSION  
DATE: March 18, 2009  
DAY: Wednesday  
TIME: 2:00 PM  
PLACE: Metro Council Chamber

**CALL TO ORDER AND ROLL CALL**

**Objectives:**

- Review 2009 Metro Council Making the Greatest Place calendar
- Provide budget overview
- Confirm Councilor Hosticka's Role
- Identify key milestones/products/purpose of "local aspirations" work
- Council direction to Councilor Harrington on Urban and Rural Reserves
  - Adoption of updated Council guiding principles given project progression
  - Direction on county recommendations for urban and rural reserve candidate areas

**Agenda**

- I. Overview – Robin McArthur (15 minutes)
  - Recap of Council decisions made to date
  - Objectives for today's meeting
  - 2009 Metro Council MGP calendar (attached)
  
- II. MGP budget summary (15 minutes)
  - Urban Growth Report (UGR) (Malu Wilkinson)
  - Regional Transportation Plan (RTP) (Kim Ellis)
  - Reserves (John Williams)Reference Material: Planning and Development budget charts, UGR Work Program Summary, RTP Work Program Summary, Reserves Work Program Summary (attached)
  
- III. Confirm Councilor Hosticka's Role – Councilor Hosticka (15 minutes)  
(Material sent under separate cover)
  
- IV. Status of Local Aspirations Work/Next Steps -- Stephan Lashbrook, Chris Deffebach (60 minutes)
  - Why are we asking for local aspirations and what are we doing with the information?
  - Highlight potential investment opportunity areas emerging from local aspirations work to inform RTP, HCT, UGR and Metro technical/financial assistance priorities
  - Milestones and next steps

Reference Material: Stephan Lashbrook memo on “Moving from Policy Framework to Implementation”, Local Aspirations Work Program Summary (attached)

V. Break (10 minutes)

VI. Direction on Urban and Rural Reserves – Councilor Harrington, John Williams (60 minutes)

- Proposed updated Council Guiding Principles on Urban and Rural Reserves Designation and Analysis (attached)
  - 2009 Metro Council Reserves agenda items (see 2009 Metro Council MGP calendar listed in #I above)
  - Direction on county recommendations for urban and rural reserve candidate areas (attached)
- Reference Material: Urban and Rural Reserve Work Program Summary; draft Rural Reserve Candidate Areas for Evaluation map, and draft Urban Reserve Candidate Areas for Evaluation map (attached)

VII. Summary and Next Steps

## **2009 Making the Greatest Place Council Calendar**

3/9/09 Draft – subject to change

### March 18 MGP work session

- Adopt updated Council Guiding Principles on urban and rural reserves
- Direction on county recommendations for urban and rural reserve candidate areas
- Identify key milestones/products/purpose of “local aspiration” work
- Review 2009 MGP council calendar
- Provide budget overview

### March 19 Council Meeting

- Public release of 20- and 50-year forecast

### March 31

- Release of preliminary residential UGR

### April 22 MGP work session

- Discuss RTP Needs findings, Investment Principles and funding mechanisms
- Direction on urban and rural reserve candidate area evaluation process
- Discuss implications of local aspirations on HCT, RTP, UGR for guiding policy decisions

### April 28 Work Session

- Discussion and direction on preliminary Employment UGR

### May 20 work session

- Direction on RTP Investment Principles and funding mechanism
- Discuss candidate area evaluation results
- Direction on investment priorities to support local aspirations

### June 17 work session

- Decision on preliminary urban and rural reserve areas
- Approve revised reserve guiding principles
- Discussion and direction on recommended refinements to preliminary residential UGR

### July 15 work session

- Discuss recommended urban and rural reserve areas
- Discussion and direction on recommended refinements to preliminary employment UGR

### August 19 work session (reschedule to avoid council recess?)

- Coordinated MGP resolution and ordinance package to be released on September 1

### **September 1 PUBLIC RELEASE OF MGP LEGISLATION Review Drafts:**

- Resolution on consolidated draft 2035 RTP pending air quality conformity and findings for 30-day comment period
- Resolution on accepting Regional Range Forecast
- Resolution on Urban Growth Report (Capacity within current UGB)
- Ordinance on draft urban reserves

- Resolution to authorize IGAs to designate urban and rural reserves
- Draft Ordinance on Regional Framework Plan amendments for consideration in 2010
- Draft Ordinance on Urban Growth Management Functional Plan amendments for consideration in 2010
- Funding mechanisms to implement growth management and transportation strategies

October 15 Council meeting

- Ordinance on urban reserves (action)
- Resolution to authorize IGAs to designate urban and rural reserves (action)

November 19 Council meeting

- Resolution approving 2035 RTP pending air quality conformity and findings (action)

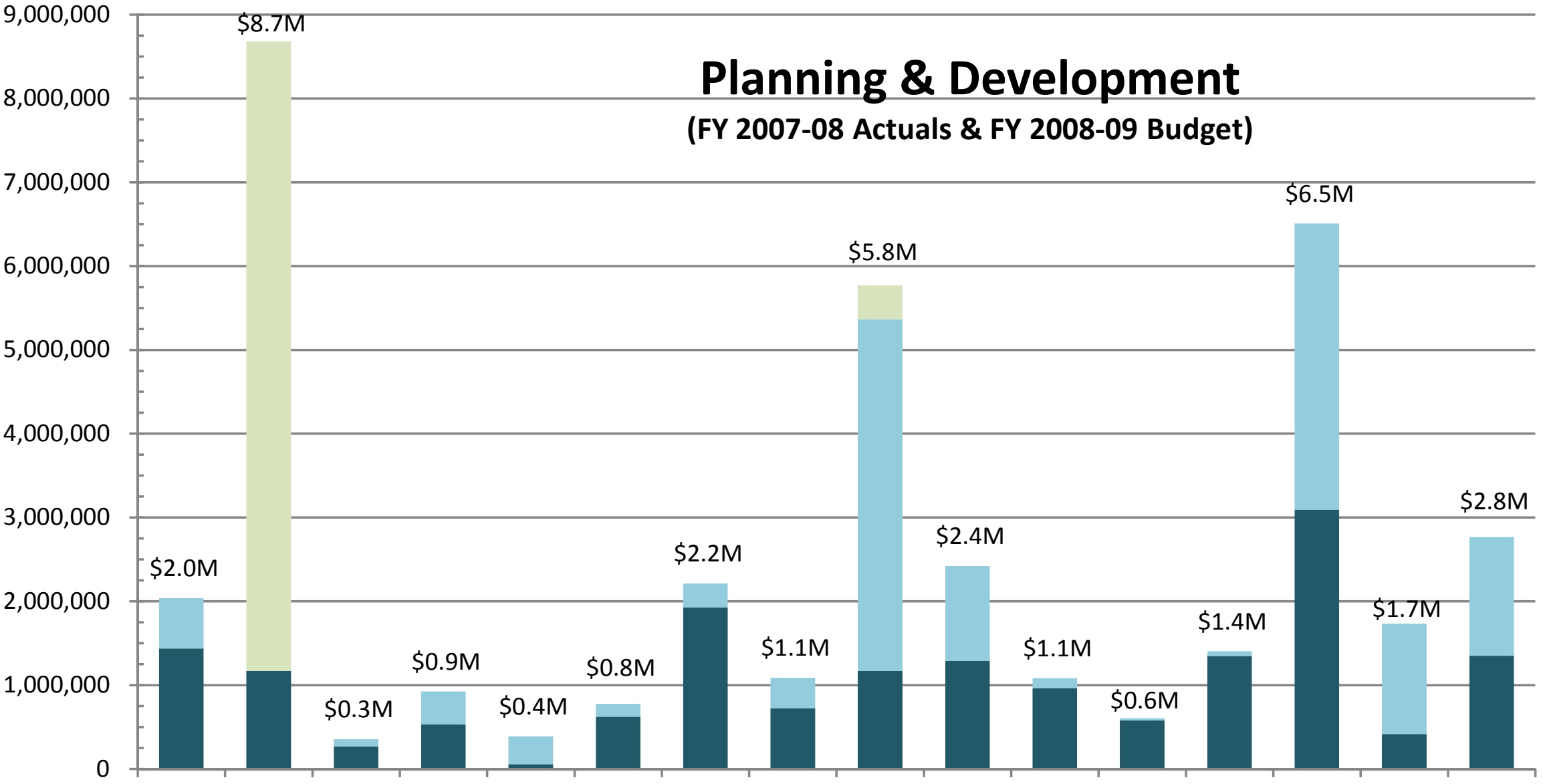
December 10 Council meeting

- Resolution on accepting regional range forecast and urban growth report (action)

(Fall public hearings schedule still to be determined).

# Planning & Development

(FY 2007-08 Actuals & FY 2008-09 Budget)



Key on back

Personal Services
  Materials & Services
  Grant Dollars

## **KEY**

### **Centers / Corridors**

- Analysis of centers/corridors/employment areas (e.g., “State of the Centers” report)
- Development and marketing of Community Investment Toolkits (i.e., Financial Incentives, Design Code)
- Placemaking and communication (e.g., Mayors’ Institute of Community Design, activity spectrum, Vancouver B.C. tours)
- Technical and financial assistance to local governments (e.g., development pro-formas, station-area planning)

### **TOD**

- Technical and financial assistance in TOD projects (land, TOD easements, predevelopment costs)

### **Economic and Employment Analysis**

- Industrial land analysis (e.g., Todd Chase report)
- Coordination with regional partners on Goal 9: Economic Development, periodic review, etc.
- Tasks related to employment element of UGR including Eric Hovee contract on economic and employment capacity

### **Infrastructure Finance**

- Preparation and distribution of infrastructure analysis report
- Convening steering committee

### **Brownfields**

- Allocated \$200,000 in EPA grant money for brownfield site assessment to facilitate redevelopment
- Received and programmed second EPA grant of \$200,000 for 2009-2011

### **Performance Measures/UGR/Scenarios**

- Urban growth report preparation, engagement (including refinements to refill/redevelopment rate)
- Tasks related to residential element of UGR
- Scenario development and engagement
- Performance Based Growth Management activities, including May 2008 Council “Outcomes” resolution, identifying and testing performance measures
- Hosted events (e.g., MPAC/JPACT “framing choices” events in fall 2008) to generate regional dialogue on investment choices

### **RTP/MGP/Freight/Local TSP**

- Consultant and staff work needed to produce regionally-adopted RTP that meets federal requirements
- Provided Making the Greatest Place transportation support
- Developed and evaluated RTP performance measures and investment scenarios and prepared atlas of regional mobility corridors
- Developed Regional Freight Plan and integrated policies and actions in new RTP
- Provided local TSP technical support to implement new RTP policies

### **HCT**

- Consultant and staff work needed to produce regionally adopted HCT

### **RTO**

- Drive Less/Save More Campaign implementation
- Grants to local jurisdictions and non-profits (including Transportation Management Associations)
- Employer and commuter services (carpool matching, vanpool subsidies, employer outreach)
- Program evaluation and measurement, and technical assistance to partners.
- Convene RTO Subcommittee of TPAC

### **Compliance Administration**

- Processing minor UGB adjustments (3 in 2008)
- Administering \$6.3 million in Construction Excise Tax for concept planning
- Engage with local concept planning work to assure consistency with Region 2040
- Provide technical assistance and monitoring of Title 13 (Nature in Neighborhoods) compliance
- Processed map amendments, Title 4 (Industrial lands) code changes, etc.
- Committee engagement (MPAC, JPACT, MTAC, TPAC, etc.)

### **MPO (Metropolitan Planning Organization)**

- Federally mandated tasks associated with being an MPO

### **MTIP**

- Staff work needed to produce regionally adopted MTIP to allocated federal dollars in this region

### **Milwaukie DEIS/Lake Oswego to Portland DEIS**

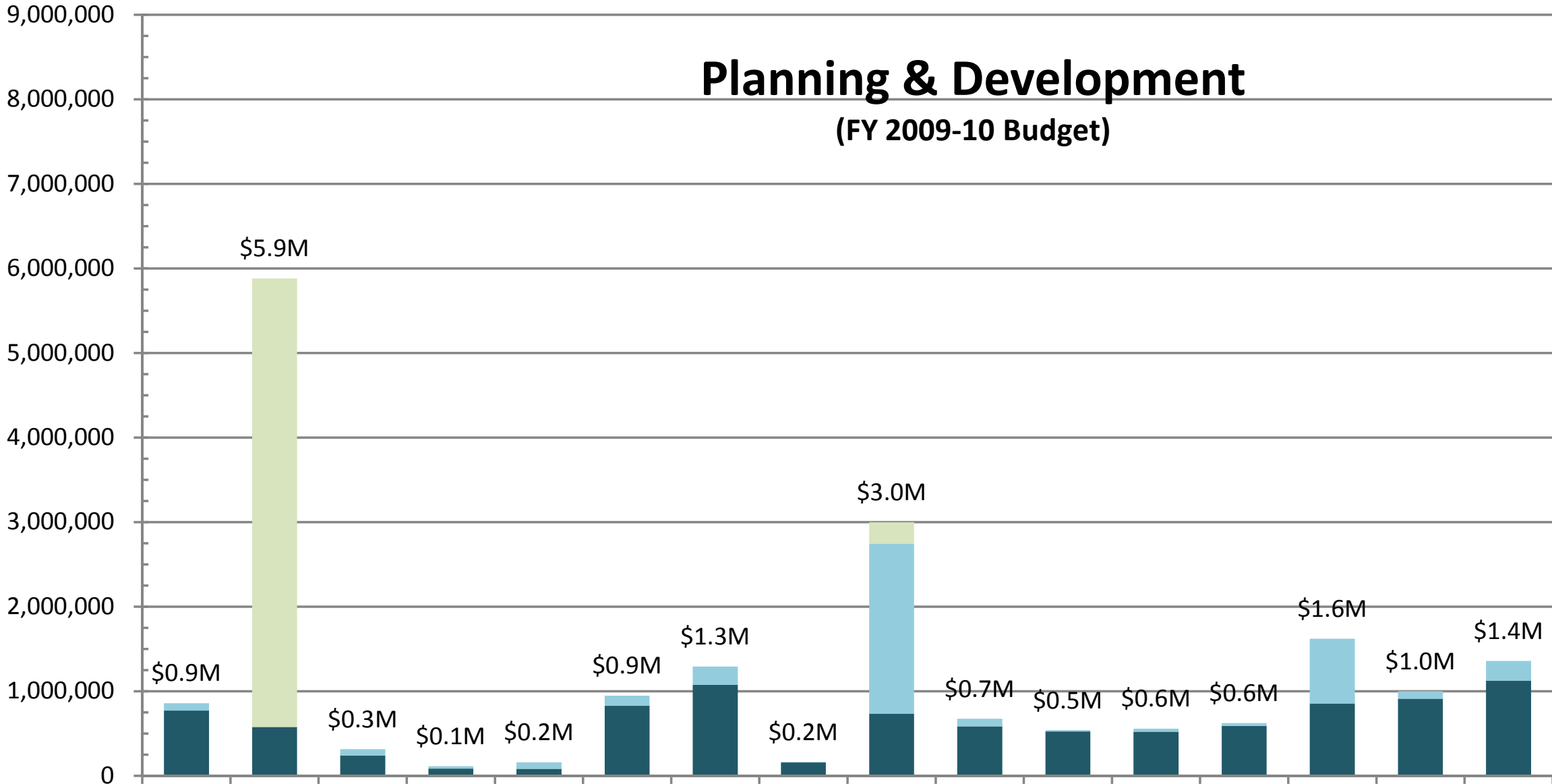
- Consultant and staff work needed to prepare FTA documents and engage stakeholders in process

### **Other Corridors**

- Metro costs associated with participation in corridor/project studies (e.g., CRC, Sellwood Bridge) initiated by other entities

# Planning & Development

(FY 2009-10 Budget)



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### **RTP/MGP/Freight/Local TSP**

- Consultant and staff work needed to produce regionally-adopted RTP that meets state and federal requirements
- Provide Making the Greatest Place transportation support
- Provide local TSP technical support to implement new RTP
- Conduct updates to Livable Streets best design practices handbooks to implement new RTP policies

### **HCT**

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## 2009 Urban Growth Report Summary

*Desired outcomes, guiding principles, key milestones, and events/products*

### March 9, 2009

The urban growth report (UGR) identifies the region's capacity and need for accommodating the next twenty years of population and employment growth. The 2009 UGR is intended to clearly describe the region's current capacity for accommodating future growth as a primary means of fostering an outcomes-based approach to growth management decisions. The current methodology for calculating residential capacity will be similar to the approach used in previous UGRs. A new paradigm is being developed for assessing employment capacity and demand that provides the Council with flexibility to make informed growth management decisions.

### DESIRED OUTCOMES

- Regional discussion and debate focused on actions to achieve outcomes and address capacity needs rather than quantitative question of capacity need itself.
- A UGR that provides a "statement of the facts" in regards to the region's current policies and how well they accommodate projected population and employment growth to lay the groundwork for local and regional actions to support the 2040 regional vision.
- Acceptance of a range forecast that allows policy makers to consider the implications and risks of planning for different points along that range.
- Groundwork laid for local and regional actions to make efficient use and re-use of land (including brownfields) in the current UGB to ensure centers, corridors and employment areas develop to their full potential before bringing new land in the UGB.

### GUIDING PRINCIPLES

- Outcome-oriented, guided by the "definition of a successful region"
- Transparent and allow for explicit weighing of community values and desired outcomes
- Use performance indicators that describe progress towards the region's goals in a way that illustrates people's everyday experiences and meets state requirements
- Support shared local and regional aspirations as well as responding to market and other global conditions
- Focus on a range population and employment forecast to frame choices and discuss tradeoffs
- Recognize that changes in policies and investments influence future land needs
- Lead with policy choices and outcomes rather than with technical analysis and numbers

### KEY MILESTONES AND DECISIONS TIMELINE

1. Agreement on outcomes-based approach and schedule	October 2008 ✓
2. Economic and employment trends summary	February 2009 ✓
3. 20 & 50 year range population and employment forecast	March 2009
4. Preliminary residential UGR	March 2009
5. Preliminary employment UGR	April 2009
6. Draft residential and employment UGR	September 2009
7. Metro adopts resolution on final UGR and forecast	December 2009

## EVENTS AND PRODUCTS TO ACTUALIZE KEY MILESTONES

### **Milestone 1 – Agreement on outcomes-based approach and schedule**✓

- Outcomes-based UGB one-page summary completed 10/08

### **Milestone 2 – Economic and employment trends summary**✓

- Employment and economic trends powerpoint completed 2/09
- Employment and economic trends 2000-2006 completed 3/09
- Variable Affecting Location Decisions completed 2/09
- Business focus groups completed 1/09
- Presentations to Council, MPAC, MTAC, business community completed 3/09
- DVD of Hovee presentation 3/09

### **Milestone 3 – 20 & 50 year range population and employment forecast**

- Executive summary of 20 and 50 year range forecast 3/09
- Technical report 3/09

### **Milestone 4 – Preliminary residential UGR**

- Executive summary of preliminary residential UGR 3/09
- Full report: preliminary residential UGR includes: 3/09
  - Trends discussion to inform policy choices
  - Past performance
  - Demand and supply ranges
  - Housing needs analysis
  - Discussion of outcomes and how existing policies measure up
  - Policy choices

### **Milestone 5 –Preliminary employment UGR**

- Executive summary of preliminary employment UGR 4/09
- Full report: preliminary employment UGR includes: 4/09
  - Trends discussion to inform policy choices
  - Past performance
  - Demand and supply ranges
  - Discussion of outcomes and how existing policies measure up
  - Policy choices

### **Milestone 6 – Draft residential and employment UGR**

- Revised executive summary for residential and employment UGRs 8/09
- Revised analysis and full reports 8/09

### **Milestone 7 – Metro adopts resolution on final UGR and forecast**

- Resolution adopting UGR and range 20-year forecast for planning purposes 11/09
- Final UGR report and range 20-year forecast 11/09
- Findings 11/09
- Outline of local and regional policy actions and investments for discussion in 2010 11/09

**Key Making the Greatest Place linkages:**

- Reserves
  - 40-50 year population and employment range forecast informs demand side of reserves project; allows discussion of risks and opportunities of planning for different places within the range
  - UGR discussion of trends and policy questions informs policy discussion for reserves
  - UGR’s discussion of supply and demand ranges informs sizing of reserve areas
  - Employment trends report informs understanding of long-range employment land needs
- Local Aspirations
  - Community aspirations inform UGR, local actions put in place by end of 2009 can be counted in final UGR, local actions in 2010 will influence growth management decisions
- Regional Transportation Plan/High Capacity Transit Plan (5/09)
  - Provision of transportation services influences growth management decisions
- Regional Infrastructure (7/08)
  - Regional infrastructure analysis informs growth management decisions

**COUNCIL ROLES/RESPONSIBILITIES**

- Council members maintain support in their district for the outcomes-based process, reminding stakeholders that the UGR is an opportunity to advance regional policies, public priorities and local efforts to implement the 2040 Growth Concept
- Council members lead discussions with elected officials from around the region at MPAC and other settings to maintain support for a process that best works towards regional desired outcomes
- Council members work with local stakeholder groups, media, and citizens in their district and share information received with the full Council and staff as appropriate
- Council provides policy direction for UGR and adopts UGR in December 2009

**BUDGET**

	<b>Actual FY 2007-2008</b>	<b>Adopted FY 2008-2009</b>	<b>Proposed 2009-2010</b>
FTE	1.87	4.52	8.35
Personal Services	322,855	569,486	1,066,946
Materials & Services	48,926	191,159	192,417
Total	371,781	760,645	1,259,363

**Budget Notes:**

1. FTE and Personal Services includes costs related to administration and technical analysis (data analysis, modeling, mapping).
2. UGR costs summarized here include:
  - a. Performance Based Growth Management activities, including May 2008 Council “Outcomes” resolution and identifying/testing performance measures as well as Fall 2008 hosted events (e.g., MPAC/JPACT “framing choices” event”), scenario development, and printed materials.
  - b. Economic and employment analysis work, including industrial land analysis and tasks related to employment element of UGR.

## **2035 Regional Transportation Plan Work Program Summary**

**March 10, 2009**

The Regional Transportation Plan (RTP) is a federal and state-mandated planning and investment tool that directs local and regional planning and project development activities in the region, and guides the expenditure of more than \$9 billion in federal, state, regional and local funds. Metro is required to update the plan every four years. The current RTP update is part of the *Making the Greatest Place* initiative, and includes development of the High Capacity Transit (HCT) Plan, Transportation System Management and Operations (TSMO) Plan and the Freight and Goods Movement Action Plan. The update will also integrate active transportation policy recommendations from the Blue Ribbon Committee (BRC) for Trails.

### **DESIRED OUTCOMES**

- Create an updated blueprint for a sustainable transportation system that links land use and transportation to manage growth, protect the environment and support the region's economy.
- Build a fiscally-responsible investment strategy to implement the blueprint that is framed by public values and supports local and regional aspirations.
- Establish a new, outcomes-based decision-making framework that considers not only the monetary costs, but also the land use, economic, environmental, public health, equity and transportation impacts and benefits of transportation decisions.

### **GUIDING PRINCIPLES**

- The RTP is a critical tool for implementing the 2040 Growth Concept by directing transportation investments toward fostering growth and private investment in designated 2040 growth areas – centers, corridors, industrial and employment areas.
- The success of the region in achieving its economic, environmental and land-use goals depends on transportation investments that are realized locally.
- Transportation investments are critical to the region's role as an international gateway and domestic hub for commerce, and the economic engine for the state of Oregon.
- The region has limited financial resources and needs to leverage them with careful consideration for their ability to achieve desired outcomes and to provide a positive return on public investments.
- This process represents an incremental step toward changing how transportation planning and investment decisions are made in the region to better advance regional policies, public priorities and local efforts to implement the 2040 Growth Concept.

The federal government recognizes JPACT and the Metro Council as the designated authority to adopt the RTP. One entity cannot adopt an RTP without the other. The RTP update is a land use action under state law, so MPAC also has a role in the state component of the RTP update. As on all issues of regional concern, MPAC makes recommendations to the Metro Council.

The following presents the key milestones and products to realize the desired outcomes for the 2035 RTP:

**KEY MILESTONES AND DECISIONS TIMELINE**

1. MPAC, JPACT and Metro Council approve RTP work program (Resolution No. 06-3661)	June 2006	✓
<b>2. MPAC, JPACT and Metro Council approve of RTP Policy Framework (Resolution No. 07-3793)</b>	<b>March 2007</b>	✓
<b>3. MPAC, JPACT and Metro Council approve federal 2035 RTP, pending conformity analysis and findings (Resolution No. 07-3831B)</b>	<b>December 2007</b>	✓
4. U.S. Department of Transportation approval of federal 2035 RTP	February 29, 2008	✓
5. MPAC, JPACT and Metro Council confirm RTP investment scenarios construct	April 2008	✓
6. MPAC, JPACT and Metro Council provide preliminary direction on scenarios implications for RTP investment priorities and policy refinements	Oct.-Dec. '08	✓
7. MPAC, JPACT and Metro Council discuss completed RTP Needs Assessment for community building and mobility corridors and implications for RTP investment priorities and policy refinements	April 2009	
8. MPAC, JPACT and Metro Council confirm RTP Investment principles and funding mechanisms to guide RTP investment priorities and policy refinements	June 2009	
9. Draft RTP that includes updated investment priorities and funding strategy released for 30-day public comment period and hearings	September 1, 2009	
<b>10. MPAC, JPACT and Metro Council action on draft RTP (by Resolution), pending final analysis and findings</b>	<b>November 2009</b>	
<b>11. MPAC, JPACT and Metro Council final action on RTP (by Ordinance) initiating local plan updates, future corridor refinement planning and other research activities to implement RTP</b>	<b>June 2010</b>	

NOTE: FORMAL ACTIONS ARE BOLDED AND HIGHLIGHTED IN GRAY; COMPLETED MILESTONES ARE INDICATED WITH A CHECK MARK.

**EVENTS AND PRODUCTS TO ACTUALIZE KEY MILESTONES****Milestone 1:**

- Regional forum on process outcomes and issues to address **completed 6/06**
- 2035 RTP Work Program and Public Participation Plan **completed 6/06**

**Milestone 2:**

- Background research reports **completed 1/07**
  - **Environmental Justice** in Metro's Transportation Planning Process
  - A Profile of **Security** in the Portland Metropolitan Region
  - A Profile of the **Regional Trends and Travel Characteristics**
  - A Profile of the **Regional Bicycle System**
  - A Profile of the **Regional Transit System**
  - A Profile of the **Regional Pedestrian System**
  - A Profile of **Regional Travel Options and Parking Management Systems**
  - A Profile of the **Regional Freight Transportation System**
  - **Preliminary Financial Analysis** for the 2035 RTP Update
  - A Profile of **Safety** in the Portland Metropolitan Region

- A Profile of the **Regional Roadway System**
- A Profile of **Key Environmental Issues and Metro's Mitigation-Related Activities**
- Reports on regional forums, stakeholder workshops and public opinion research on desired outcomes, needs and priorities *completed 1/07*
- Business and community group presentations *completed 2/07*
- RTP policy framework – updated goals, objectives, actions *completed 3/07*

**Milestone 3:**

- Draft investment strategy priorities (financially constrained system) *completed 8/07*
- Transportation modeling and analysis *completed 8/07*
- Consultation with CETAS on environmental considerations *completed 10/07*
- Business and community group presentations *completed 10/07*
- **Public hearings and open houses** *completed 11/07*
- Public comment report *completed 11/07*
- Summary of comments and recommendations for plan refinements *completed 11/07*

**Milestone 4:**

- Transportation modeling and Air Quality Conformity Analysis *completed 2/08*
- Air Quality Conformity Determination *completed 2/08*
- Federal findings *completed 2/08*

**Milestone 5:**

- Documentation of RTP investment scenarios construct *completed 4/08*

**Milestone 6:**

- Land use and transportation investment scenarios modeling and analysis *completed 10/08*
- Draft bicycle policy refinements *completed 10/08*
- Land use and transportation investment scenarios discussion guide *completed 11/08*
- Documentation of RTP evaluation framework and updated measures *completed 12/08*

**Milestone 7:**

- Freight and Goods Movement Plan needs assessment *completed 2/09*
- Local agency mobility corridor interviews summary *completed 2/09*
- Transportation System Management Operations needs assessment *completed 3/09*
- Local aspirations interviews and HCT workshops *Feb.-March '09*
- Community building needs assessment *late-March '09*
- Atlas of regional mobility corridors *late-March'09*
- Local agency mobility corridor workshops and needs assessment *late-Mar.- mid-April '09*
- High Capacity Transit Corridor Evaluation *April '09*

**Milestone 8**

- Discussions with County Coordinating Committees and targeted business/community groups *April-May '09*
- Documentation of potential funding mechanisms and options *May '09*
- Documentation of draft policy framework refinements *May '09*

- *Regional system definition*
- *RTP system maps*
- *High capacity transit system policy framework*
- *Transportation system management and operations policies*
- *Blue Ribbon Committee for Trails active transportation policies*
- Documentation of RTP Investment principles that incorporate RTP policies and products from Milestone 7 *May '09*

**Milestone 9:**

- Draft investment strategy priorities and funding strategy *July '09*
- Transportation modeling and analysis *July-August '09*
- Draft resolution and draft plan document *September '09*

**Milestone 10:**

- Discussions with County Coordinating Committees and targeted business/community groups *Sept.-Oct. '09*
- Consultation with OTC and LCDC *September '09*
- Consultation with CETAS on environmental considerations *September '09*
- **Public hearing(s)** ***Sept.-Oct. '09***
- Public comment report *October '09*
- Summary of comments and recommendations for plan refinements *October '09*

**Milestone 11:**

- Transportation modeling and Air Quality Conformity Analysis *Jan.-Feb. '10*
- Air Quality Conformity Determination *March '10*
- Final regional, state and federal findings *April '10*
- Ordinance and final plan document *April '10*
- Discussions with County Coordinating Committees and targeted business/community groups *April '10*
- **Public hearings** ***May '10***
- Public comment report *May '10*
- Summary of comments and recommendations for plan refinements *May '10*

**COUNCIL ROLES/RESPONSIBILITIES**

- Council members build support and cultivate champions in their district for RTP policies and outcomes-based framework and establish the understanding that this update represents an incremental step to better advance regional policies, public priorities and local efforts to implement the 2040 Growth Concept.
- Council members challenge local governments and stakeholders to support the most promising and cost-effective land use and transportation tools to achieve local and regional aspirations.
- Council members work with constituents to understand the connection between investment decisions and actualizing local and regional aspirations for 2040.
- Council members work with region’s decision-makers to develop an updated investment strategy and long-term funding strategy for transportation priorities.

**BUDGET SUMMARY FOR REGIONAL TRANSPORTATION PROGRAM FUNCTIONS**

Period: June 1, 2006 through June 30, 2010

	Actual June 2006	Actual FY 2006-07	Actual FY 2007-08	Budget FY 2008-09	Budget FY 2009-10	Total
<b>2035 RTP Update</b>						
FTE	0.219	3.829	3.747	2.940	3.556	<b>14.291</b>
PS	25,912	444,146	427,383	388,340	353,961	<b>1,639,743</b>
M&S	14,784	360,676	62,512	112,619	127,302	<b>677,893</b>
	40,696	804,822	489,895	500,960	481,263	<b>2,317,636</b>
<b>Other RTP-Update related Functions<sup>1</sup></b>						
FTE	0.208	2.882	5.191	2.140	3.270	<b>13.691</b>
PS	20,412	306,003	591,776	244,740	532,257	<b>1,695,187</b>
M&S	131	3,744	11,613	13,958	17,647	<b>47,093</b>
	20,543	309,747	603,388	258,698	549,904	<b>1,742,279</b>
<b>Other Regional Transportation Program Functions<sup>2</sup></b>						
FTE	0.227	2.135	0.865	1.390	1.500	<b>6.118</b>
PS	20,406	203,287	93,673	181,673	193,302	<b>692,342</b>
M&S	471	16,394	11,467	73,353	73,978	<b>175,663</b>
	20,877	219,682	105,140	255,026	267,280	<b>868,005</b>
<b>Total</b>						
FTE	0.654	8.847	9.804	6.470	8.326	<b>34.100</b>
PS	66,730	953,436	1,112,832	814,753	1,079,520	<b>4,027,272</b>
M&S	15,386	380,815	85,591	199,930	218,926	<b>900,649</b>
	82,116	1,334,251	1,198,424	1,014,684	1,298,446	<b>4,927,920</b>

Table notes:

1. This includes administrative activities in support of the RTP update, local transportation system plan (TSP) and periodic review implementation of federal 2035 RTP, 2040 indicators work, and RTP staff support for other Making the Greatest Place work programs (including the transportation investment scenarios analysis and transportation support for the Urban Growth Report and Reserves Study Area Analysis).
2. This includes development of the Regional Freight and Goods Movement Plan, ongoing implementation of the Best Design Practices in Transportation Program and RTP staff support for the Connecting Green Initiative and the Blue Ribbon Committee for Trails.
3. FTE includes administrative support and staff from the following areas: RTP program, Regional Travel Options, Corridor Planning, Transportation Research and Modeling Services and Data Resource Center (now under Research Center), Strategy Center and Public Affairs.



## Urban and Rural Reserves Summary

*Desired outcomes, guiding principles, key milestones, and events/products*

**March 9, 2009**

Metro and Multnomah, Clackamas and Washington counties are jointly leading an innovative regional effort to study and designate areas outside of the current urban growth boundary that are suitable for accommodating future population and job growth over the next 40 to 50 years (urban reserves) as well as areas that should be preserved and protected for agriculture, forestry and natural resource purposes (rural reserves). The designation of urban and rural reserves will be made through formal agreements between Metro and the counties, which will be completed in the second half of 2009.

### DESIRED OUTCOMES

- Greater certainty about the location of future growth outside of the current urban growth boundary and about the ability of future urban areas to become great communities.
- Long-term protection for farms, forests and natural features that define the character of this region.

### GUIDING PRINCIPLES

- The reserves analysis will be quality-based, not “numbers-based.”
- Reserve locations will be relevant to urbanization pressures.
- Not all land outside the current urban growth boundary will be urban or rural reserves.
- Future urban growth boundary expansion areas will be drawn from the urban reserves.
- Natural and man-made features will help establish “hard edges.”
- Areas will be considered as either urban or rural reserves.
- Area characteristics will define the unit of analysis for study areas.
- Urban reserve designations will support implementation of the 2040 Growth Concept.
- The reserve analysis will recognize that multiple factors make a great community.
- Rural reserves do not reflect down zones.

### KEY MILESTONES AND DECISIONS TIMELINE

1. Agreement on analytical approach and public involvement process	March 2008 ✓
2. Reserve study area endorsed	August 2008 ✓
3. Preliminary reserve areas recommended	July 2009
4. Reserve areas recommended via intergovernmental agreement	September 2009
5. Metro designates urban reserves; counties designate rural reserves	December 2009

## EVENTS AND PRODUCTS TO ACTUALIZE KEY MILESTONES

### **Milestone 1 – Agreement on analytical approach and public involvement process (March 2008)** ✓

- Regional Reserves Steering Committee structure and operating principles completed 3/08
- County Advisory Committee structure completed 3/08
- Coordinated Public Involvement Plan completed 3/08

### **Milestone 2 – Reserve study area endorsed (August 2008)** ✓

- Initial 40-50 year population and employment range forecast completed 5/08
- Intensive public outreach process on reserves process and study area completed 7/08
- Approve study area map and screening methodology completed 8/08
- Develop initial screening methodology completed 9/08

### **Milestone 3 – Preliminary reserve areas recommended (July 2009)**

- Technical products related to initial screening, leading to definition of candidate areas:
  - Oregon Department of Agriculture analysis of metro-area agricultural lands received 1/07
  - Oregon Department of Forestry analysis of lands within study area received 3/08
  - Refined natural landscape features inventory completed 9/08
  - Preliminary analysis of areas potentially subject to Urbanization over planning period in reserves study area completed 1/09
  - Preliminary analyses of providing urban level water, sewer and transportation service within reserves study area completed 2/09
- Evaluation of candidate areas:
  - Technical memo summarizing evaluation process 4/09
  - Evaluation results 5/09
    - Suitability analysis of urban reserve candidate areas including very conceptual options for design and capacity of each area and narrative description of how areas measure up to great community factors established under administrative rules (may include MetroScope analysis of candidate areas)
    - Suitability analysis of rural reserve areas including narrative description of how areas measure up to rural reserve factors established under administrative rules
    - Refined analysis of potential for urbanization
  - Council: discussion of policy choices including MGP linkages leading to preliminary urban and rural reserve areas (as listed on MGP work session agendas, provided separately)
  - Proposed preliminary urban and rural reserve areas 7/09
- Key Making the Greatest Place linkages:
  - Preliminary Urban Growth Report Res. 3/09; Emp. 4/09
    - 40-50 year population and employment range
    - forecast informs demand side of reserves project; allows discussion of risks and opportunities of planning for different places within the range

- UGR discussion of trends and policy questions informs policy discussion for reserves
- UGR’s discussion of supply and demand ranges informs sizing of reserve areas
- Employment trends report informs understanding of long-range employment land needs
- Local Aspirations 3/09
  - Community aspirations inform reserves suitability analysis (urban and rural reserves can complement a community’s aspirations for within their existing boundaries)
  - Areas of interest identified by cities informs selection of candidate areas and suitability analysis (governance - great community factor)
- Regional Transportation Plan/High Capacity Transit Plan 5/09
  - Provision of transportation services is a key great community factor
- Regional Infrastructure 7/08
  - Regional infrastructure analysis informs suitability work

**Milestone 4 – Reserve areas recommended via intergovernmental agreement (September 2009)**

- Intensive public outreach results 7,8/09
- Regional Reserves Steering Committee input on public comment 9/09
- Revised map of urban and rural reserve areas 9/09
- Draft findings of compliance with administrative rules 9/09
- Public hearings around the region 10/09

**Milestone 5 – Metro designates urban reserves; counties designate rural reserves (December 2009)**

- Public hearings around the region 11/09
- Functional and framework plan amendments including 2040 map changes 11/09
- Compilation of public record for submittal to LCDC 1/10
- LCDC acknowledgment 2010

**“PARKING LOT” (NOT PART OF RESERVES WORK PROGRAM)**

- Detailed concept planning for urban reserve areas
- Phasing proposal for utilization of urban reserve areas
- Conservation easement acquisitions/test program

**COUNCIL ROLES/RESPONSIBILITIES**

- Council approves and, at key points revises, Guiding Principles for the reserves project to provide direction for technical analysis and for Councilor Harrington’s role as Core 4 liaison
- Council members maintain support in their district for the cooperative reserves process, reminding stakeholders that this innovative project represents an opportunity to advance regional policies, public priorities and local efforts to implement the 2040 Growth Concept.
- Council members lead discussions with elected officials from around the region at MPAC and other settings to move the reserves process forward and maintain support for regional desired outcomes

- Council members work with local stakeholder groups, media, and citizens in their district and share information received with the full Council and staff as appropriate

**BUDGET**

	<b>Actual FY 2007-2008</b>	<b>Adopted FY 2008-2009</b>	<b>Proposed 2009-2010</b>
FTE	2.875	7.475	3.75
Personal Services	304,230	983,566	573,760
Materials & Services	74,197	1,058,352	89,840
Total	378,427	2,041,918	663,600

Budget Notes:

1. FTE and personal services costs include budgeted administrative, technical (mapping, data analysis and modeling) and communications functions related to reserves program. FY 07-08 expenses were lower than budgeted and we anticipate the same will be true for FY 08-09.
2. Materials & Services includes certain costs that will be shared equally by the Core 4 jurisdictions, such as the RSC/Core 4 facilitation contract.

# Metro | Agenda

To: Metro Council  
From: Stephan Lashbrook, Deputy Director of Planning and Placemaking  
Date: Wednesday, March 11, 2009  
Re: Making the Greatest Place: Moving from Policy Framework to Implementation

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## **Making the Greatest Place (MGP) – What Is It?**

MGP is about implementation. It is about implementing local and regional goals in a way that creates vibrant, healthy, and sustainable communities. It is about investing regional resources, and encouraging the investment of city and county resources, in ways that leverage private development at appropriate locations.

Policies identify shared goals and outcomes, and plans provide a blueprint for focused public sector actions to stimulate private sector development consistent with Region 2040. Plans are just the beginning of the continuum however. Specific, community-based, development-oriented actions are needed to move those plans to reality.

The purpose of this memo is to identify the array of community-based activities in which Metro is currently engaged and to highlight how Planning and Development resources are being reoriented to those activities. In June 2008, the Metro Council, with the endorsement of MPAC, adopted a resolution identifying desired outcomes for our region:

- People live and work in vibrant communities where they can choose to walk for pleasure and to meet their everyday needs.
- Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
- People have safe and reliable transportation choices that enhance their quality of life.
- The region is a leader in minimizing contributions to global warming.
- Current and future generations enjoy clean air, clean water and healthy ecosystems.
- The benefits and burdens of growth and change are distributed equitably.

By the end of 2009, the Metro Council and its partners will adopt plans and policies to achieve those outcomes by:

- Targeting downtowns, mainstreets and employment areas for focused development and community revitalization efforts;
- Identifying transportation investments including high capacity transit, freight, bike, pedestrian and demand and system management components;
- Defining the shape of the region for the next 40-50 years – identifying which areas are conducive to urbanization consistent with Region 2040 and which natural and agricultural areas warrant long-term protection.

**Moving From Plans to Implementation: Reorienting Metro's Functions** – Metro's policy and planning work to date, especially our efforts working with community partners to identify local aspirations, is key to helping us reorient and target our resources to those communities that seek assistance and have local leadership and capacity to stimulate market forces. Following are some examples of our work to date.

**Leveling the playing field for Region 2040 style development** – Many communities desire vibrant downtowns and mainstreets but are constrained by outdated codes and tools. Recognizing this, the Planning and Development Department is developing and marketing tool kits that highlight investment tools and design and development code changes. Local jurisdictions are using these toolkits and have requested Metro's involvement in a number of initiatives:

- **Hillsboro:** Participating on Downtown Plan Technical Advisory Committee and pro-forma/code analysis and assisting with the urban renewal effort.
- **Wood Village:** Allocated \$5K for model cottage cluster design and development code amendment. Completed environmental assessment work that led to the cleanup of the City Hall property, in preparation for the eventual sale and mixed-use, vertical redevelopment of the site. Note that Wood Village is also preparing to do other redevelopment work including use of the vertical housing program (tax relief) as recommended in Metro's *Financial Incentives* Toolkit.
- **Oregon City:** Allocated \$10k for a case study of an impact-based System Development Charges (SDC) approach.
- **Milwaukie:** Now discussing the implementation of a model impact-based SDC approach.

**Fostering development on the ground (Placemaking Projects)** – Real examples of mixed-use, transit-oriented projects serve as catalysts to other development. Staff has been using one-time "Placemaking" money provided by the Council to engage local jurisdictions in development projects.

- **Tigard:** Signed an IGA with Tigard to provide \$30k of "Placemaking" funds for a Redevelopment Feasibility Analysis of the Tigard Transit Center Site and selected Johnson Reid and SERA Architects as consultant team.
- **Beaverton:** TOD staff has collaborated with Beaverton staff to develop a draft scope of work for a Development Implementation Plan for the Beaverton Central Plant Service District. Metro will contribute \$30K of "Placemaking" funding to support this effort. A scope will not be finalized until the city completes individual outreach to adjacent property owners.
- **Region-wide:** Placemaking Installations Design Competition is under consideration by staff.

**Preparing land for redevelopment** – Metro helps communities prepare sites for redevelopment through:

- Metro's brownfields recycling program;
- Transit Oriented Design assistance;
- Nature in Neighborhoods.

**Selecting locations for High Capacity Transit investments** – HCT corridors are being analyzed this spring in coordination with local jurisdictions. Corridor priorities and implementation will be prioritized, not only on the transportation needs of a corridor, but also on the aspirations of each local community to enhance the land uses supported by HCT, and complete the infrastructure needs to provide access to HCT.

**Financing mixed-use projects** – Metro's TOD Program provides financial incentives to promote transit oriented development projects and promote 2040 urban development across the region.

- Patton Park Apartments – TOD easement just opened (Interstate MAX).

- Russellville Park III – TOD easement, on senior housing nearing completion (eastside MAX 102nd).
- NW 3rd and Miller – TOD easement, nearing completion, (Gresham RC - historic downtown).
- Bside 6 – TOD easement, under construction (Frequent Bus – Central City).
- Town Center Station – TOD easement will begin construction in April (Green Line MAX – Clackamas RC).
- The Prescott – TOD easement, design and development stage (Interstate MAX).
- Killingsworth Station – TOD easement design and development stage (Interstate MAX).
- One 19 Towers – TOD easement, design and development stage (Eastside MAX 122nd).
- Project X – TOD easement, design and development stage (Frequent Bus – Mississippi).
- 400 Roberts – TOD easement, design and development stage (Gresham RC – historic downtown).
- Steed Creek – TOD easement, design and development stage (Elmonica MAX Station on SW 170<sup>th</sup> in unincorporated Washington Co.).
- Gresham Civic MAX Station and Plaza – TriMet MAX station and TOD-supportive plaza, consultant team developing concept and 30% preliminary plan (Gresham RC, Civic neighborhood).

Identifying infrastructure needs and related tasks – Infrastructure is a basic building block of development. Infrastructure needs vary across the region. Some communities need to upgrade existing systems while others need to create new systems. Metro activities to seek infrastructure financing include:

- Pursuing an aggressive policy agenda for federal transportation reauthorization and a comprehensive, multi-modal appropriations and reauthorization project list.
- Seeking adoption of a state transportation package to fund regional priorities.
- Collaborating with regional partners on the development of a future regional transportation funding ballot measure.
- JPACT/Metro Council adopted a federal stimulus transportation package in March.
- The agency is developing (2009) and implementing (2010) a regional proposal to increase funding for infrastructure that supports the region's growth and development goals.

**LOCAL ASPIRATIONS:**

**Targeting investments to support centers, corridors and employment areas**

**3/10/09**

Implementation of the 2040 Growth Concept, a blueprint for community development, is dependent on adopted policies, such as zoned capacity, market realities and political leadership. Each of these is affected by a community's aspirations for growth and development. Though the region has the zoning in place to meet projected growth for years, the ability to achieve the growth in a way that supports the elements of a successful region starts with having the local aspirations in place. Linking investments with growth aspirations and using limited financial and technical resources wisely are necessary to further the implementation of the 2040 Growth Concept and key goals for Making the Greatest Place. Local Aspirations continues the effort initiated under the Centers and Corridors and Investing in Communities programs.

**DESIRED OUTCOMES AND PURPOSE:**

- Demonstrate the relationship between local aspirations and regional investment decisions.
- Support communities to revise or align local aspirations to implement the 2040 Growth Concept and support elements of a successful region.
- Identify resources that are needed to achieve these aspirations
- Identify and secure commitments that local and regional governments are willing to make to achieve these aspirations.

**GUIDING PRINCIPLES FOR THE LOCAL ASPIRATION PROCESS:**

- The success of the region is linked to local actions and depends on a cooperative process of identifying and implementing aspirations.
- The region's investment in transportation, especially HCT, is the major tool that the region will use to leverage local aspirations.
- The local aspirations process will foster decisions over years to come that strengthen the link between an investment strategy and a growth strategy.

**KEY MILESTONES, DECISIONS TIMELINE**

1. Local aspirations, and the investments needed to achieve them, defined at the community level	April 2009
2. Local aspirations used to define HCT, RTP investment priorities and future capacity options	May 2009
3. Investment opportunities to support aspirations recommended for local and regional action	Sept 2009
4. Investment actions support aspirations and frame a long term collaboration process.	2010



## EVENTS AND PRODUCTS TO ACTUALIZE MILESTONES

### **Milestone 1 : Local aspirations, and the investments needed to achieve them, are defined at the community level** **April 09**

- Vancouver BC trips illustrate alternative approaches to elected officials and stakeholders 2006, 2007
- Mayors Institute of City Design demonstrates approaches to achieve aspirations 2008
- Financial Incentives and Community Investment Toolkits demonstrate useful tools to help achieve aspirations 2007, 2008
- Scenarios illustrate the link between investments and aspirations fall 08
- Memo to planning directors requesting aspirations Nov 08
- State of the Centers Report with activity spectrum for use in considering aspirations Jan 08
- Aspirations submitted by each jurisdiction Feb 09
- Summary of aspirations with key investment opportunities and resource needs highlighted for review by Metro Council, MPAC and JPACT April 09

### **Milestone 2: Local aspirations used to define HCT and RTP investment priorities and future capacity options** **May 09**

- HCT workshops illustrate how local aspirations affect potential investment priorities Mar 09
- Local aspirations help inform function and needs at mobility corridor workshops Mar 09
- Local aspirations for centers, corridors and employment areas support analysis of: May 09
  - HCT recommendations including analysis of local aspirations
  - Alternative capacity ranges considered in UGR
  - RTP mobility and community building needs
  - Great communities factors for Urban Reserves

### **Milestone 3: Investment opportunities to support aspirations recommended for local and regional action** **Sept 09**

- Technical and financial assistance needs and priorities to support local aspirations reviewed with Metro Council May 09
- Draft ordinance (or resolution) for Metro Council consideration of Regional Framework Plan and Urban Growth Management Functional Plan amendments in 2010 Sept 09
- RTP recommendations, including HCT recommendations reflect local aspirations Sept 09
- Reserves recommendations reflect local aspirations July 09
- UGR reflects recently adopted aspirations for capacity Sept 09
- New metroscope scenario illustrates how potential local aspirations not yet adopted could affect elements of a successful region Sept 09
- Metro Council and MPAC review actions to implement aspirations, including:
  - Oregon City SDC Case Study (May 09)
  - Wood Village Cottage Housing Case Study (Aug 09)

### **Milestone 4: Investment actions support aspirations and frame a long term collaboration process** **2010**

- MPAC and Metro Council approval of resolution for local and regional growth Dec 09

management commitments, including modifications to the Framework and Functional Plan

- Metro Council targets financial resources and technical assistance to support local aspirations and leverage investments 2010
- MPAC and Metro Council modifies Framework and Functional Plans by ordinance 2010
- Documentation of local and regional actions that meet capacity needs for DLCD Dec 2010

**COUNCIL ROLES AND RESPONSIBILITIES**

- Council members partner with elected peers and colleagues to foster vibrant, healthy and sustainable communities.
- Council members develop confidence and support for an approach that relies on building leadership, influencing the market and taking local and regional actions in line with community aspirations to meet the state requirements for a 20 year capacity need.
- Council members dedicate the resources to support local communities develop leadership and provide financial and technical resources to implement the 2040 Growth Concept.
- Council members use the Making the Greatest Place decisions to demonstrate the power of combining investment strategies with vision.

**BUDGET (AS DESCRIBED FOR CENTERS AND CORRIDORS)**

	<b>Actual FY 2007-2008</b>	<b>Adopted FY 2008-2009</b>	<b>Proposed 2009-2010</b>
FTE	4.46	6.36	3.92
Personal Services	664,882	771,317	578,475
Materials & Services	173,460	425,971	86,596
<b>Total</b>	<b>838,342</b>	<b>1,197,288</b>	<b>665,071</b>

Budget Notes:

1. FTE and personal services costs include budgeted administrative and technical (mapping, data analysis and modeling) functions.
2. Local aspirations costs described here include a variety of activities, including:
  - a. Analysis of centers/corridors/employment areas (e.g. “State of the Centers” report, activity spectrum)
  - b. Development and marketing of Community Investment Toolkits (i.e., Financial Incentives, Innovative Design and Development Codes)
  - c. Placemaking and communication (e.g., Mayors’ Institute of Community Design, Vancouver BC tour)
  - d. Technical and financial assistance to local governments (e.g., development pro-formas, station-area planning)

## Guiding Principles for Urban and Rural Reserves Analysis and Designation

March 2009

According to the Lead Council Rights and Responsibilities definition, guiding principles are defined as the “*outcomes, positions and direction for the project that are held and agreed to by the council as a whole.*”

The legislation and administrative rule set the primary guiding principles for the urban and rural reserve analysis and designation, including guidelines for considering the great community factors, foundation, important and conflicted agriculture land and natural features. Within that framework, the Council has the opportunity to direct how the work proceeds and express their preferences.

The following summarizes the guiding principles that Council has discussed at various times to guide the analysis of the reserve areas. In response, these are the principles that staff will follow in conducting the reserves analysis.

### Guiding Principles

- 1) **The reserves analyses will be quality-based, not “numbers-based.”** The analysis will start with the characteristics of the land and its suitability and compatibility for future urban and rural uses. It will foster a discussion that is not based on meeting a forecast population and job number and will not be tied to the need to identify a specific number of acres. The desired outcome is **quality reserves (including of the right size) in the right location** that have potential for success, not acreage numbers. Over time, the urban reserves will be urbanized in response to changing economic and demographic trends.
  - a) [For consideration by Council]: Ultimate urban reserve (designation) sizing and location is dependent upon local aspirations for existing centers, example regional centers and town centers in cities/urban areas and the active management/evolution of those centers with planning concepts of Great Communities and PBGM (see #8 as well).
- 2) **Reserve locations will be relevant to urbanization pressures.** The focus for consideration of reserves will be those areas with the greatest proximity to the urban growth boundary and those along major transportation corridors and other areas where development pressure is highest.
  - a) [For consideration by Council]: all land which is potentially subject to urbanization should either be in an urban reserves or a rural reserve.
- 3) **Not all land is urban or rural reserve.** Not all lands outside of the UGB in the three-county area will be included in either an urban reserve or a rural reserve. Some lands will have no reserve designation at all, reflecting a lower priority for urbanization. The rural and urban reserve areas will be specifically delineated and not extend infinitely in any direction.
- 4) **Future urban growth boundary expansion areas will be drawn from the urban reserves.** Areas that are not urban reserves will not be considered for future additions to the urban growth boundary. The planning process for the urban reserves will help identify the location, sizing and timing of need for land to be included in the urban growth boundary. After

designation of the reserves, a concept plan will be developed for the urban reserves which will address financing, governance and other issues to a greater level of detail than is possible in the reserve designation process and which will help identify the suitability of land for inclusion in the urban growth boundary.

- 5) **Natural and man-made features will help establish “hard edges.”** Urban and rural reserve designations will use natural and man-made features to help establish boundaries that provide logical or intuitive edges to urbanization in the long term.
- 6) **Areas will be considered as either urban or rural reserves.** As directed by the statute and administrative rule, the analysis and designation process will consider **all** of the relevant great community, agriculture and natural feature factors – no one factor will trump another as a matter of principle. For each study area, the following questions will need to be answered:
  - Should the study area be included in a reserve study area or not?
  - Should the study area be considered for an urban reserve or a rural reserve, or does it have qualities of both?
  - For those study areas that could be either urban or rural, what qualities seem to indicate strength or value one way or the other?
- 7) **Area characteristics will define the unit of analysis for study areas.** The correct size of the unit for analysis will depend on the issues or characteristics in the evaluation for each study area. The unit of analysis (e.g., 100 acres or 1 square mile) may be larger for the initial analysis that leads to the identification of study areas and smaller for the analysis leading to the actual reserve designation.
- 8) **Urban reserve designations will support implementation of the 2040 Growth Concept.** Consistent with the Great Community factors identified in the statute and rule, the urban reserve analysis will demonstrate how the establishment of a reserve will support implementation of the goals in the 2040 growth concept. For example, the designations will demonstrate how adding land can help make a center more vibrant. In addition to local compatibility factors, the analysis will include regional considerations, such as infrastructure cost and financing impacts, air and water quality. The analysis will list the impacts, both pro and con, on the existing urban areas, including the effect on the social, environmental and economic factors that support sustainability.
- 9) **The reserve analysis will recognize that multiple factors make a Great Community.** Land availability is one of many tools that can help make a Great Community and the need for an urban reserve. Additional investments in existing communities – in transportation, other infrastructure or development – can substitute for the need for additional land to meet the region’s growth needs. The urban reserve analysis will consider all of these tools.
- 10) **Rural reserves do not reflect down zones.** The designation of a rural reserve is not intended to restrict that activity which is already allowed. Rather, the designation is intended to reflect regional commitment to supporting the agriculture economy and natural features by providing long-term certainty necessary for long-term investments and by limiting conflicting urban development patterns.

## Guiding Principles for Urban and Rural Reserves Analysis and Designation

~~January 2008~~ March 2009

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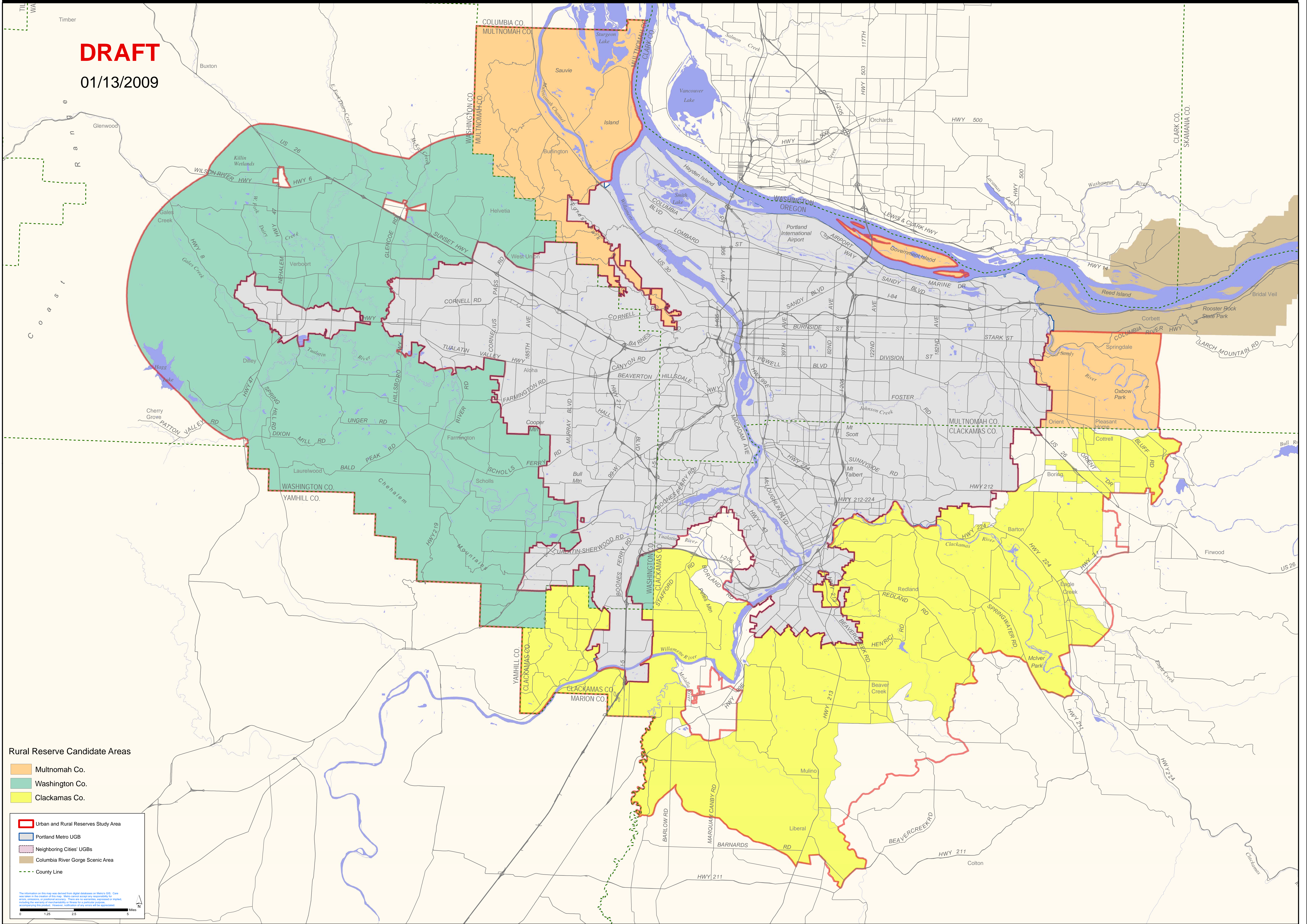
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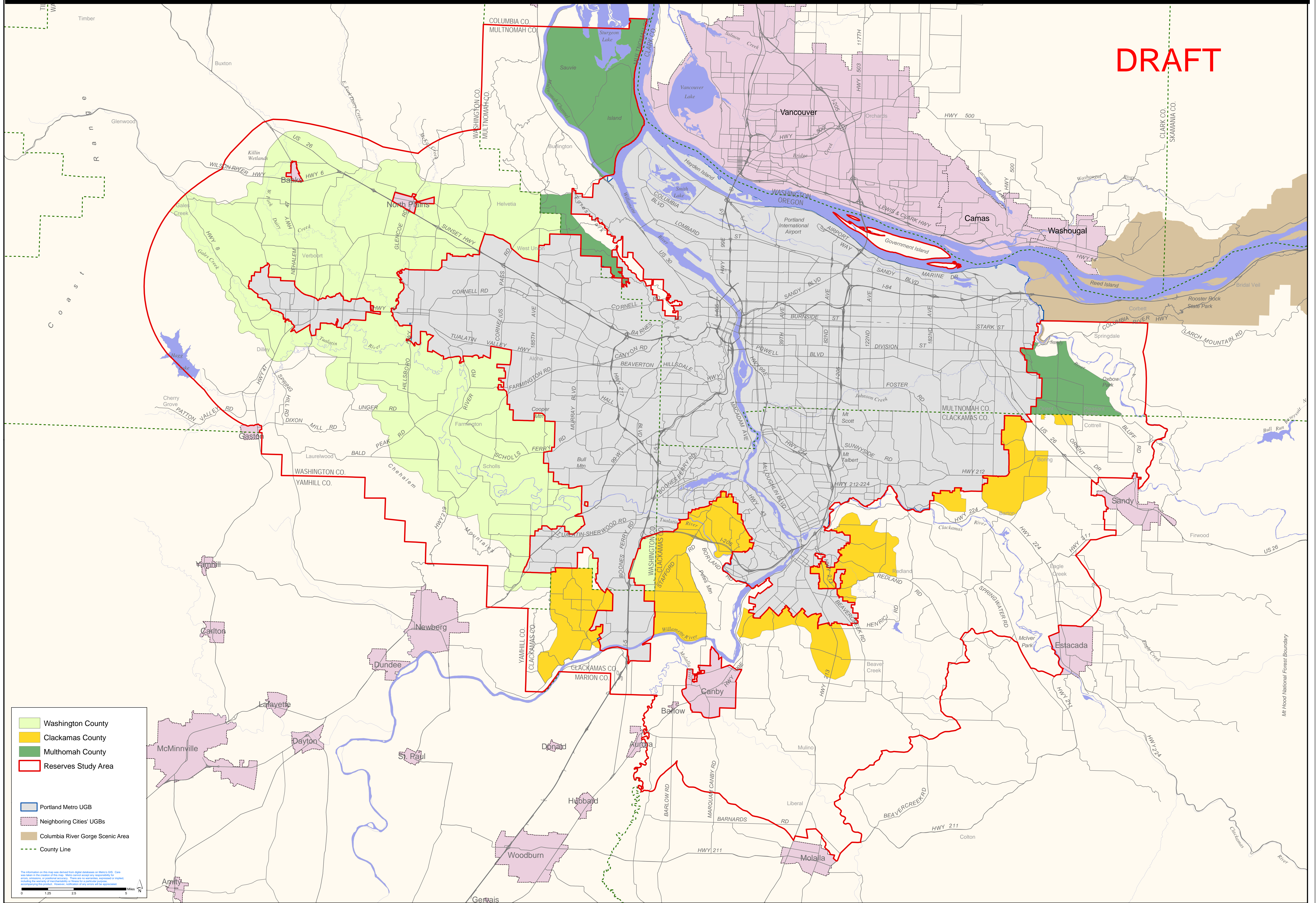
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**DRAFT**  
01/13/2009



**DRAFT**



Washington County  
 Clackamas County  
 Multnomah County  
 Reserves Study Area  
 Portland Metro UGB  
 Neighboring Cities' UGBs  
 Columbia River Gorge Scenic Area  
 County Line

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