

 **Metro | Agenda**

Meeting: Joint Policy Advisory Committee on Transportation (JPACT)
Date: Thursday, Oct. 13, 2011
Time: 7:30 to 9 a.m.
Place: Metro Regional Center, Council Chambers

7:30 AM	1.	CALL TO ORDER & DECLARATION OF A QUORUM	Carlotta Collette, Chair
7:32 AM	2.	INTRODUCTIONS	Carlotta Collette, Chair
7:35 AM	3.	CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS	Carlotta Collette, Chair
7:40 AM	4.	COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS <ul style="list-style-type: none">• Climate Smart Communities Update* • OTREC Update* • Metro Research Center <i>Date to Decisions Open House</i>• State Legislative Agenda Update* • Housing and Urban Development (HUD) Sustainable Communities Grant Status Update	Randy Tucker Andy Cotugno
7:45 AM	5.	* Consideration of the JPACT Minutes for Sept. 8, 2011	
	6.	<u>INFORMATION/DISCUSSION ITEMS</u>	
7:50 AM	6.1	# Review TIGER III Applications – <u>DISCUSSION/DIRECTION</u>	Ted Leybold Andy Cotugno
8:05 AM	6.2	* Proposed Amendments to the Oregon Highway Plan (OHP) and Transportation Planning Rule (TPR) - <u>INFORMATION</u> <i>JPACT endorsement requested at Nov. 10 meeting</i>	Tom Kloster Lainie Smith, ODOT
8:20 AM	6.3	* ODOT Tolling Policies – <u>INFORMATION/DISCUSSION</u>	
8:45 AM	6.4	* TriMet’s Pedestrian Network Analysis – <u>INFORMATION</u>	Neil McFarlane, TriMet
9 AM	7.	ADJOURN	Carlotta Collette, Chair

* Material available electronically. # Material will be sent in a supplemental mailing. For agenda and schedule information, call Kelsey Newell at 503-797-1916, e-mail: kelsey.newell@oregonmetro.gov. To check on closure or cancellations during inclement weather please call 503-797-1700.

New Irving Street Garage visitor parking policy

Beginning Friday, Sept. 1, visitor parking will no longer be validated. [Click here](#) for a list of parking options for visitors conducting business at the Metro Regional Center:

- Irving Street Garage, 600 NE Grand Ave (\$6 daily)
- Lloyd Center Tower, 825 NE Multnomah (\$2 hourly; \$8 daily)
- Liberty Centre, 650 NE Holladay (\$2 hourly; \$8 daily)
- Lloyd 700 Building, 700 NE Multnomah (\$2 hourly; \$8 daily)
- 7th and Holladay (\$8 daily)
- 1201 Building, 1201 NE Lloyd (\$6 daily)
- Lloyd Doubletree, 1000 NE Multnomah (\$8 daily)
- State of Oregon (surface), 800 NE Oregon (\$1 hourly; \$8 daily)

For transit options, please see TriMet’s web site at: www.trimet.org.

2011 JPACT Work Program

10/6/11

<p><u>September 8, 2011 – Regular Meeting</u></p> <ul style="list-style-type: none">• Release of Draft Recommendation of RFFA for Public Comment<ul style="list-style-type: none">○ Region-wide programs○ Active Transportation & Complete Streets○ Green Economy and Freight Initiatives○ Vehicle Electrification recommendation• TIP Amendments: State Enhancements project awards, Carmen Drive ramp project.• HUD Grant – Action• TIGER III Applications – Action	<p><u>October 13, 2011 – Regular Meeting</u></p> <ul style="list-style-type: none">• Review TIGER III Applications – Discussion/direction• ODOT tolling policies - Information• Oregon Highway Plan (OHP) and Transportation Planning Rule (TPR) Update - Information/discussion• TriMet’s Pedestrian Network Analysis – Information <p>Sept. 13 to Oct. 13: 2014-15 Regional Flexible Fund Allocation Public Comment Period</p>
<p><u>November 10, 2011 – Regular Meeting</u></p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios Findings to be Submitted to 2012 Legislature – Discussion• Portland Air Toxics Solutions (PATs) project – Information• Oregon Highway Plan (OHP) and Transportation Planning Rule (TPR) Update - Action• ODOT TIP projects public comments summary• Visit from Congressman Earl Blumenauer	<p><u>December 2: Joint JPACT/MPAC Meeting</u> <i>Location:</i> Oregon Convention Center, Room TBD <i>Time:</i> 8 to 11 a.m. <i>Topic:</i> Climate Smart Communities Scenarios Findings</p> <p><u>December 8, 2011 – Regular Meeting</u></p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios Findings and Recommendations to be Submitted to 2012 Legislature – Discussion• Federal legislative agenda – Discussion <p>2014-15 Regional Flexible Fund Allocation – Action</p>

Parking Lot:

- Regional Indicators briefing in mid 2011.
- 2012-15 MTIP/STIP Approval and Air Quality Conformity – Action (Feb. 2012)
- Portland to Lake Oswego Transit Project (Winter 2012)



October 6, 2011

To: Joint Policy Advisory Committee on Transportation

From: Jennifer Dill, Director
Oregon Transportation Research and Education Consortium (OTREC)

re: Update on OTREC's progress, competition for federal funding

1. OTREC has entered its sixth year of operation

OTREC has been in operation as a partnership of PSU, OSU, UO and OIT since December 2006, during which time it has allocated nearly \$10 million to 89 faculty performing 153 projects as well as student groups and other education/workforce initiatives. Since 2009, OTREC has also become known for hosting the annual Oregon Transportation Summit, where research and other innovations are shared with the local transportation profession.

2. OTREC now has to compete for funding

OTREC has been funded under SAFETEA-LU at a level of \$3.5M/year; funding began in 2006 and will expire on September 30, 2012. There are 58 other University Transportation Centers in the U.S. and the total program is approximately \$80M/year, with most centers receiving much less than OTREC does.

U.S. DOT is holding a competition for future funding and while the program budget (\$80M/yr) will be maintained, the number of centers will be reduced to 22 (each receiving \$3.5M/year).

3. OTREC has asked Metro for a letter of support

In its Request for Proposals, U.S. DOT has asked for support letters that testify regarding tangible research benefits. Metro is one of the leading implementers of OTREC-funded work related to pioneering methods for modeling as well as research related to planning for active transportation; Metro's staff has also benefited significantly from training activities produced or hosted by OTREC.

4. OTREC welcomes all forms of support

In preparing our application, we are especially interested in anecdotes about how research (especially if it is from OTREC) benefits transportation planning in your organization. We are interested in how PSU, OSU, UO and OIT alumni are contributing to the profession.

Finally, political support is welcome in the form of outreach to members of Oregon's delegation, encouraging them to contact U.S. DOT in support of OTREC's application.

5. OTREC's plan for success

Once successful, OTREC will need to move quickly to make effective use of new funding. Non-federal match for research projects will be our priority concern and we would be happy, in the interim, to discuss your ideas for transportation research projects.

I welcome your comments and suggestions as we prepare our proposal for the October 26th deadline. You can contact me (jdill@otrec.us/503-725-2855) or Jon Makler (makler@otrec.us/503-725-2842).

Research Center open house

Test drive the tools that take you from
data to decisions

8 A.M. TO NOON FRIDAY, NOV. 18

Please join the Metro Research Center for an open house on Friday, Nov. 18 at the Oregon Convention Center.

- Learn from technical experts about the innovative tools that adapt to the evolving needs of our partners and support strategic decision-making.
- Join other project managers, planners, technical staff and practitioners from around the region to hone your skills and learn about the latest innovations in data analysis, economic forecasting, and transportation modeling.
- There has been significant advancement in the field including new tools and applications. See demonstrations and poster sessions on these cutting edge tools and applications that have been developed by Metro and its partners.



Oregon Convention Center

Rooms: D135 and D136
777 NE MLK Blvd., Portland, Ore.

8 a.m. Continental breakfast

8:30 a.m. Plenary session: Data to Decisions

10 to noon: Open house

TriMet bus and MAX light rail Oregon Convention Center stop. Covered bicycle parking is available near the main entrance.

For more information, contact the Metro Research Center at 503-797-1915.



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A. ABSTRACT

1. **Project Name:** Building sustainable communities through opportunity, equity and access to housing
2. **Lead Applicant:** Metro on behalf of The Portland Region Sustainable Communities Consortium
3. **Point of Contact, including Telephone Number with Area Code and Email Address:** Christina Deffebach, Metro Land Use Manager, 503-797-1921, Christina.deffebach@oregonmetro.gov
4. **Population Level (Large, Medium, Small/Rural), Total Population associated to the Category of Funding and Size Chart in Section II.C:** The grant application is for the Large Metropolitan Regions Category intended for regions of 500,000 and above. The Portland, OR – WA Urbanized Area Population is 1,774,850 (Source: HUD website tool) although the population for the geography for this grant that corresponds to Metro, the Portland, OR metropolitan planning organization is 1,500,628 (Source: 2010 Census block groups).
- 5) **Category of Application:** Category 2-Detailed Execution Plans and Programs
- 6) **Total Budget, including the HUD Requested Amount and Applicant Match:** Total Budget is \$8,639,563, of which \$4,991,567 is the HUD requested amount and \$3,184,823 is Applicant Match.
- 7) **Locations included as part of the Consortium** (list of independent cities/counties/parishes/other jurisdictions (or Tribal areas) included and their localities: The jurisdictional boundary of Metro (the MPO), Multnomah County, Clackamas County, Washington County, and the cities of Beaverton, Gresham, Hillsboro and Portland.
- 8) **Congressional Districts Covered:** OR-001, OR-003, OR-005

Summary of the Objectives: The Portland Region Sustainable Communities Consortium convenes a critical mass of community decision- and policymakers whose collective knowledge, experience and diversity can help address the disparities that hold communities back and further advance the region's sustainable development plan. A Sustainable Communities Regional Planning Grant, if awarded, will channel resources into the region to develop and implement a housing equity and opportunity strategy that links housing with other public service investments and supports existing communities with improved access to transportation, employment centers, health care and education opportunities. Over a two-year period, the Consortium will advance sustainable development in three major program elements: 1) development of a housing and opportunity strategy 2) pilot area development and 3) community capacity building. Each of these elements has subtasks that will involve technical analysis and engagement. Through the work of the Consortium, the grant will help develop and sustain a culture of inclusive decision-making to keep the region moving toward its vision for the future.

Expected Results: In 2010, the Metro Council adopted its own version of the HUD-DOT-EPA Livability principles into its Regional Framework Plan as policies to guide growth management decisions. These policies, supported by the region's advisory committees, call for a performance-based approach to growth management that aims to support desired outcomes for the region:

- people live, work and play in vibrant communities where their everyday needs are easily accessible
- 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.

The Consortium will use the grant to further incorporate these desired outcomes into the region's plans by building on existing strategies to promote the region's ability to promote vibrant communities, improve transportation choices, and reduce greenhouse gas emissions. In addition, the grant will help identify opportunities for residents to benefit from sustained economic competitiveness, and to distribute the benefits and burdens of growth and change – two areas where the region's plans have not been as well developed. With new partnerships from the Consortium, a blueprint for action in a fine-tuned plan for sustainable development, and a clear sense of what success looks like in the six desired livability principles, the time has come to reset the notion of livability and economic prosperity to reflect the reality of a growing and changing region.

The region's existing plans for sustainable development already address the eight HUD mandatory outcomes and support many additional outcomes. The Consortium's efforts will advance these outcomes and improve the measures that result from addressing equity and opportunity and access to housing. The housing and opportunity strategy efforts will specifically align local, regional and county housing plans and investment strategies and the Pilot Areas will result in comprehensive plan updates that link housing and transportation. Members of the Consortium will carry the recommendations back to their organizations, which will increase the alignment with other funds, such as Metro's flexible transportation funds or the state's housing program. The Community Capacity Building program will increase participation and decision-making by populations traditionally marginalized and will result in a new engagement model. The Opportunity Mapping will help the region's decision-makers identify investments that can improve access to opportunity for low income and communities of color while the regional fair housing analysis and Housing/Workforce Partnership will result in direct recommendations and service improvements. The Housing and Opportunity Strategy will identify actions to link housing, transportation and utility costs to promote affordable housing near jobs and transit, which will further reduce the region's vehicle miles traveled per capita and related emissions.

The Consortium's process to develop a regional plan for sustainable development rests on community engagement to ensure effective, sustained and participatory roles. The Consortium will engage a broad cross-section of the region. Leaders of organizations representing low income and communities of color will be key members of the structures overseeing this grant, ensuring that the needs and views of these populations are integrated into the program elements. Government partners in the Consortium provide the comprehensive framework to take on the issues associated with housing needs, equity and access to opportunity, can implement recommendations that may result from this grant process and have the capability to help the region understand and address the challenges. Philanthropic members bring grant-making expertise and special insight into the region's needs. Higher education institutions and other partners will help illustrate the choices, costs and benefits associated with meeting future housing and workforce needs. In addition, members of the private sector, such as those representing the housing and real estate market, will also be at the table where decisions are made, bringing to bear the needs of their constituencies. This multi-jurisdiction, multi-sector, and broad inclusion of members will allow for the range of activities of this grant to be focused on improving the regional economic growth experienced by all sectors of the population.

INTRODUCTION

The Portland metropolitan region has come a long way since 1995 when regional leaders adopted the 2040 Growth Concept as the long-range blueprint for sustainable growth. Almost 20 years ago, community leaders, private business owners, residents and elected officials recognized the importance of shaping the region with intention and acted to make it happen. With a clear sense of what success looked like, they translated shared values into six desired outcomes for the region that continue to guide the policy and investment choices that keep development sustainable and communities livable. By setting an urban growth boundary, the region's plan for sustainable development encourages development in downtowns, main streets and employment centers while protecting treasured farms, forests and natural areas. It links transportation to land use planning through innovative approaches that, when coupled with responsible resource use and climate protections, create a unique sense of place and quality of life that attract people and business to the region and inspire generations to call this place home. After investing decades of work building sustainable communities and preserving natural landscapes, the region is widely viewed as one of the most livable places in the country.

Yet the exceptional quality of life for which the region is known is not equitably shared by all who live here, especially people of color and members of low income and non-English speaking communities. The persistent challenges that reinforce inequities and segregation are further magnified by today's faltering economy. Stagnating wages across the region have had a disproportionate impact on these communities, raising child poverty and unemployment rates for people of color beyond those of the white population. These conditions have led to the displacement of the region's most vulnerable populations to areas of low opportunity with limited access to jobs, workforce training, transportation and location-efficient, affordable housing. Many community-based organizations that represent the most vulnerable populations in these areas lack the capacity to participate in the decision-making and implementation of the region's plan for sustainable development. The region cannot succeed in realizing the vision for 2040 unless residents have an equitable share in the livability the region has worked so hard to create and to live in communities that nourish their potential.

The Sustainable Communities Regional Planning Grant program presents a transformative opportunity for a region that's prepared to act. Over the last year, Metro – the regional government and Metropolitan Planning Organization – has been working with a Consortium of government agencies, community-based organizations, educational institutions, philanthropic and private sector partners to ensure all residents prosper from the region's economic strengths, and equitably share in the benefits and burdens of growth and change. The Portland Region Sustainable Communities Consortium convenes a critical mass of community decision- and policymakers whose collective knowledge, experience, diversity and locally focused thinking can help move the dial on addressing the disparities that hold communities back. A Sustainable Communities Regional Planning Grant, if awarded, will channel resources into the region to develop and implement a housing equity and opportunity strategy that links housing with other public service investments and supports existing communities with improved access to transportation, employment centers, health care and education opportunities. Through the work of the Consortium, the grant will help develop and sustain a culture of inclusive decision-making to keep the region moving toward its vision for the future. The region's efforts to build sustainable communities do not end with the award of grant funds; the most challenging and rewarding work lies ahead. With new partnerships from the Consortium, a blueprint for action in a fine-tuned plan for sustainable development, and a clear sense of what success looks like in the six desired outcomes, the time has come to reset the notion of livability and economic prosperity to reflect the reality of a growing and changing region.

Part B. RATING FACTORS NARRATIVE RESPONSE

1. CAPACITY AND ORGANIZATIONAL EXPERIENCE

Organizational capacity and qualifications Metro, the regional government for the Portland, Oregon metropolitan area, is taking the role of lead applicant and convener of the Portland Region Sustainable Communities Consortium ("the Consortium"). Metro provides the most appropriate platform upon which to assume this responsibility because: 1) It is an established unit of regional government operating under a home-rule charter approved by the voters and accountable to the voters through a directly elected Metro Council; 2) It has the authority to implement a coordinated plan for sustainable development with the appropriate links to state and federal mandates and with the ability to ensure consistency of local plans with the regional framework; 3) It has established relationships with the other units of state, regional and local government that have responsibility for providing public facilities and services; 4) It is the designated Metropolitan Planning Organization (MPO) with an integrated decision-making structure through the Joint Policy Advisory Committee on Transportation (JPACT) comprised of transportation service providers and local governments; and 5) It has the mechanism to coordinate land use through the Metropolitan Policy Advisory Committee (MPAC), a Metro Charter mandated advisory committee to the Metro Council, comprised of local elected officials, local service districts and state agencies.

Metro has taken the role of convener of the Consortium through the development of a Declaration of Cooperation (in Appendix) that has been executed by 16 units of state, regional and local governments representing local government, housing authorities, academia, transit and the state housing agency. It has also been executed by 15 non-government organizations representing a broad cross-section of Community Based Organizations (CBOs), philanthropic organizations, public health organizations, workforce training organizations and the home building industry. Metro has a long established track record in addressing large, complex regional problems in a comprehensive and collaborative manner. This success is measured through broadly supported visions and plans that have been implemented through a comprehensive regulatory and investment approach. Metro was formed in its present elected regional government structure in 1979 to take on the challenge of curbing sprawl through the establishment and maintenance of an urban growth boundary and to execute a new multi-modal transportation policy direction. It evolved into a home-rule charter form of elected regional government in 1992 and pioneered integrated regional land use, environmental and transportation planning through the examination of scenarios leading to adoption of the region's plan for sustainable development, the 2040 Growth Concept. Metro and its regional partners have been aggressively implementing the 2040 Growth Concept through construction of 81.6 miles of light rail, commuter rail and street car (71.3 miles operating and 10.3 miles under construction). Metro and its regional partners have protected nearly 50,000 acres of fish and wildlife habitat (or almost 20% of the land area within the urban growth boundary) through a comprehensive program of development regulations and natural area acquisition through voter approved levies. Thanks to the efforts of Metro and its regional partners, a more compact regional land use pattern is being successfully implemented, with rates of infill and redevelopment increasing and overall urbanized density increasing, rather than the prevailing U.S. pattern of decreasing metropolitan densities. Most recently, Metro and the three counties integrated their land use planning efforts through development and adoption of Urban and Rural Reserves, providing a 50-year designation of lands where the urban growth boundary will be expanded and lands where expansion of the urban growth boundary will be prohibited, giving long-term assurance to the farm industry. These regulations are memorialized in state law, administrative rules, and Metro and county land use ordinances. All of these efforts demonstrate the ability to match the appropriate decision-makers with the appropriate stakeholder and public engagement, supported by the technical resources to make fact-based policy decisions that have continued public support.

Metro's government partners in the Consortium provide the comprehensive framework to take on the issues associated with housing needs, equity and access to opportunity. They have been carefully selected based upon their responsibility to implement recommendations that may result from this grant process and the capability to help the region understand and address the challenges. The three counties and Portland are the major public service providers in the region and encompass 100% of the population of the area for this grant application (well above the minimum 50% requirement). 100% of the HUD Community Development Block Grant (CDBG) direct recipients in the region are Consortium members, (the three counties, three cities and four housing authorities). Two of the housing authorities (Home Forward in Multnomah County and Vancouver Housing Authority) are independent agencies, and two housing authorities are departments within their respective county government (the Housing Authority of Washington County and the Clackamas Housing Authority). In Washington County, the CDBG recipient is the Office of Community Development and their sub-recipient, the City of Hillsboro. The county representation also brings significant capability within public health departments particularly related to the environmental contributors to health conditions. TriMet, the regional transit service agency provides access to essential services and facilities. Oregon Housing and Community Services (OHCS) is the state agency that administers state and federal housing programs. In addition to OHCS's membership on the Consortium, Governor Kitzhaber and the Directors of the Departments of Transportation, Land Conservation and Development, Environmental Quality and Business Oregon (the Oregon Business Development Department) have pledged their full support and participation. Portland State University (PSU), with 28,000 undergraduate and graduate students, whose motto is "Let Knowledge Serve the City," brings the resources of higher education to achieve access to opportunity, with a wealth of knowledge and capability that the Consortium can use. Portland Community College (PCC), with the greatest enrollment of any institute of higher education in the state, provides the perspective of working with a broad cross-section of individuals seeking to advance their lives.

Finally, although this application is for the Portland, Oregon metropolitan area (as defined by the boundary of Metro, the MPO, and depicted on the enclosed map), the Consortium includes as ex-officio members four jurisdictions in Clark County, Washington (City of Vancouver, Clark County, the Regional Transportation Council of Southwest Washington (the MPO) and the Vancouver Housing Authority). Although the Oregon and Washington parts of the region operate under separate state enabling statutes and regulations with independent government decision-making bodies, they share recognition that the two parts of the region impact one another. By participating as ex-officio members, the Washington representatives can benefit from the same learning experience as the rest of the Consortium and can work with the Oregon organizations to coordinate implementing actions. This mirrors similar approaches to cooperation on transportation decision-making established between the two MPOs, which includes board members from the other side of the Columbia River in each case.

The non-government members of the Consortium provide a broad cross-section of organizations that represent historically disadvantaged populations, and private and non-profit service providers. All of the organizations have extensive experience in engaging the community and many are themselves coalitions, with their membership comprising a broader network of organizations that the Consortium can access for expertise and communication. The community-based organizations (CBOs) have a long track record in serving and advocating on behalf of historically disadvantaged populations. The Urban League of Portland has represented and served the African American community for the past 66 years. The Coalition of Communities of Color has a membership of over 40 organizations representing six communities of color – African, African American, Asian/Pacific Islander, Latino, Native American, and Slavic. The Housing Organization of Color Coalition is comprised of the three major non-profit providers of affordable housing that focus on communities of color. The Coalition for a Livable Future

(CLF) comprises over 100 organizations with a mission to protect, restore, and maintain healthy, equitable and sustainable communities, both human and natural, for the benefit of present and future residents of the region. The Consortium is taking advantage of the Equity Atlas pioneered by CLF as an early form of Opportunity Mapping. The Oregon Opportunity Network is a membership organization of the most active developers and owners of affordable housing with 21 members in the region. Community Action serving Washington County is the non-profit organization providing services to low income families.

Four philanthropic organizations are members of the Consortium, bringing broad and deep experience in providing service to and empowering disadvantaged communities. Meyer Memorial Trust provides grants for projects, capacity building and general operating support of CBOs. The Oregon Community Foundation, a statewide organization, is the largest foundation in the state and sixth largest in the country, providing grants to communities, individuals and businesses to provide leadership development, education and many more philanthropic purposes. The Northwest Health Foundation provides grants and advocacy related to environmental factors impacting public health. The United Way of the Columbia-Willamette provides grants that focus on health, education and income. All four organizations have worked together to administer grants to disadvantaged populations for capacity building and leadership training, a key objective of this grant.

The Consortium has three non-profit organizations. The Oregon Public Health Institute focuses on policy and environmental change initiatives to reduce childhood obesity and address social determinants of health. They advocate on the local, regional, statewide and national scale to conduct research, provide capacity building and disseminate best practices. Worksystems, Inc. and the Clackamas County Workforce Investment Council share the mission of coordinating a regional workforce system that supports individual prosperity and business competitiveness through strategic partnerships with business, economic development, industry and community organizations, educational institutions and organized labor. They partner with a broad network of organizations to operate a coordinated workforce system that aligns resources and services so that job seekers have access to the range of support and assistance they need to achieve economic independence.

The Home Builders Association of Metropolitan Portland, representing over 1,000 member developers, builders, remodelers and suppliers, and the Portland Metropolitan Association of Realtors, representing over 6,000 professionals, are the key trade associations promoting and delivering home ownership. They bring vast experience in understanding and delivering the majority of homes through market-based businesses and have experience in partnering with organizations that focus on delivering housing to diverse communities.

In summary, the Consortium, through its government and non-government, non-profit and business members, brings the depth and breadth of experience to take on this large and complex issue of housing, equity and access to opportunity. They bring the expertise to define and validate the issues, develop creative and effective approaches to addressing the issues, and have responsibility for implementing recommendations for actions that will come from this undertaking. While all of these organizations have extensive experience in working in complex public policy issues and many have extensive experience in partnering with each other, this is the first attempt to create such a comprehensive collaboration, bringing a regional perspective and capacity to advance the region's sustainable development plans.

Capability and qualification of key personnel Metro, as the lead applicant, is ready and able to initiate the grant work program within 90 days of award. Metro has pledged staff and management in-kind

support, providing initial staffing to organize the Consortium, execute contracts and intergovernmental agreements and begin work. The Consortium has chosen to hold off designating the overall Project Director and the Manager of the Community Capacity Building Program until the grant is awarded and the Consortium and its committees are organized. As more fully described in the Governance and Management section, the Executive Committee will be established with six public sector members and six non-government members from the Consortium and they will adopt formal Bylaws defining their responsibilities, authorities and manner of conduct. Once this body is formally organized, they will undertake a process to select the overall Project Director. This is an important step because the Executive Committee membership needs to be established with a composition that is broadly supported by the Consortium membership, and that the selection of the overall Project Director needs to be handled with the confidence and support of the Executive Committee. The individual will possess the skills to manage a large, complex public process and be accountable to a diverse organization. Metro staff will provide support to the Executive Committee in recruiting and selecting this position. The process can consider a Metro staff person nominated for the position, a new Metro staff person recruited to the position, a temporary staff assignment nominated from one of the Consortium members, or an individual recruited from the regional consultant pool. The Consortium will use a similar recruitment and selection process for the Manager of the Community Capacity Building Program. The four philanthropic organizations who have agreed to provide advice on the program definition and administration of grants and stipends will be responsible for selecting the Program Manager in whom they have confidence to develop and manage the program, subject to confirmation of the Executive Committee. Finally, there will be a competitive process to select a professional facilitator to assist the Consortium and the Executive Committee in carrying out their work. This facilitator could come from the consulting pool in the region or from PSU's National Policy Consensus Center.

Beyond these two key positions, the members of the Consortium are ready, willing and able to begin implementation of the work program. Team Leads developed the work program in collaboration with work teams that are already in place to begin implementation as follows:

- **Future Housing Needs Analysis** The Team Lead will be Ted Reid on Metro's staff. Ted is the Metro Land Use Planner responsible for managing the regional housing needs analysis developed as part of Metro's evaluation of the urban growth boundary carried out every five years. In addition, Ted has coordinated with local governments who are developing their local housing needs analysis.
- **Analysis of Impediments to Fair Housing** The Team Lead will be Andree Tremoulet, PhD. As a staff member of the Washington County Office of Community Development, Andree has had responsibility for managing their Analysis of Impediments to Fair Housing and has pioneered the use of Opportunity Mapping as an element of their analysis and Consolidated Plan.
- **Housing Authority/Workforce Training Partnership** The Team Lead is Rachel Devlin at Home Forward. Rachel has taken the lead over the past year to begin implementing the program to link their administration of Section 8 rental assistance vouchers with the case management of individuals involved in workforce training. In addition, she is implementing an element of the program funded through Metro's Regional Travel Options Program (the region's transportation demand management program) to provide these individuals with mobility counseling to better understand their housing location choices relative to their combined cost of housing and transportation.
- **Opportunity Mapping** The Team Co-Lead is Ted Reid on Metro's staff. Since 2010, Ted has led the effort with GIS support within Metro to create an initial set of Opportunity Maps for the region based upon readily available data. Team Co-Lead is CLF's Kristina Smock, PhD, who is managing the CLF Equity Atlas 2.0 Project that is being integrated with Metro's Opportunity Mapping undertaking.

- **East Portland/Rockwood Pilot area** The Team Lead for East Portland will be Chris Scarzello on the staff of the City of Portland Bureau of Planning and Sustainability. Chris is the planner serving as the liaison to the East Portland District, one of six districts in the City of Portland, with intimate knowledge of the issues and stakeholders in the area. The Team Lead for Rockwood will be Louise Dix on the City of Gresham staff. Louise is responsible for housing and neighborhood policy development associated with the city's CDBG, HOME and Neighborhood Stabilization Programs.
- **McLoughlin Boulevard Pilot area** The Team Lead will be David Queener on the staff for the Clackamas County Development Agency. David has been managing the community based McLoughlin Area planning process for the last three years. This effort will culminate in a plan that identifies projects and programs that will help realize the long-term vision developed by the community.
- **Housing and Opportunity Strategy** In the second year of this grant work program, it is the intent to draw upon the research, analysis and outreach associated with the previous tasks to develop the policy recommendations for action in the form of a Housing and Opportunity Strategy. Under the direction of the overall Project Director, Ted Reid on Metro's staff will be the Team Lead.

Key personnel throughout the Consortium bring additional broad and deep expertise to contribute to the success of this program. They have been working in their field and involved in integrating their work with that of others at the local, regional, state and national level. Within the government agencies, staff and elected officials are accustomed to working through issues of common interest in cooperation with Metro and are committed to doing so with this program as well. The four housing authorities initiated their efforts to coordinate their administration of rent assistance vouchers before this grant opportunity became a possibility. Within the CBOs, the organizations that support or provide services to low income and communities of color have worked together extensively to document and address disparities for their constituency. The four philanthropic organizations have worked to ensure their programs are coordinated and comprehensively address the needs of disadvantaged populations. The workforce training agencies have been working together to coordinate their programs for the different parts of the region and ensure they are responsive to the needs of the community and employers. The home building industry understands changing market conditions, consumer demands and the role of a public policy making initiative such as this.

In addition to these capabilities, the Consortium can tap into the technical and policy resources of PSU, especially the Institute for Metropolitan Studies (IMS), the University of Oregon's Sustainable Cities Initiative and a very deep pool of talented consultants. There are regular partnership projects undertaken between PSU and many public sector, non-profit and business organizations throughout the region. PSU brings strong capabilities in the areas of: affordable housing policy; community economic and workforce development policy; community-based participatory research; quantitative and qualitative evaluation research in low income housing, workforce, economic development, and social services; statistical and economic analysis; demography and demographic forecasting; geography, GIS, and data visualization; collaborative decision-making and consensus building; and public involvement and civic engagement design and implementation.

Metro partnered with PSU's IMS to develop the modeling methodology for the housing needs analysis completed as part of Metro's most recent review of the urban growth boundary, and development of the pilot indicator set for Greater Portland Pulse and with PSU's Oregon Transportation Research and Education Consortium, for multi-modal travel demand modeling. In addition, IMS has worked with CLF on the Equity Atlas 1.0 and is now working on Equity Atlas 2.0 and with Worksystems, Inc. PSU also houses the National Policy Consensus Center which will be offering capabilities in the area of

professional facilitation for the Consortium and Executive Committee. Similarly, the University of Oregon's Sustainable Cities Initiative brings valuable resources to the Consortium as well. Although their campus is in Eugene, Oregon, the director of the program is a former Metro Councilor and Director of 1000 Friends of Oregon who is very familiar with the region's landscape. An additional advantage of both institutions is that they bring the ability to provide a portion of their capabilities through their own internship programs, further leveraging the HUD grant. Finally, the Consortium can take advantage of the valuable resources provided by Portland's consultant community. Since the Portland region has been the national pioneer in this field of developing and implementing integrated land use, transportation and environmental plans, there has been a significant capability developed. In summary, Metro and the other members of the Consortium are very accustomed to working with the academic and consultant community and can develop work scopes and execute contracts quickly and efficiently. (Bios and position descriptions are in the Appendix, along with the Rating Factor 1 Form and an Organization Chart.)

Capability to address economic and social disparities Low income and communities of color have been displaced from the region's vibrant communities. Recognizing and addressing this displacement has been this region's challenge. The Consortium has the ability to perform the analysis, planning, community engagement, leadership training and strategy development to directly confront a wide range of social and economic inequities in the region. In fact, this goal to integrate diversity and equity considerations as policies and programs are developed or revised is central to all the proposed activities. Metro and the partners have been working together to get a better picture about the demographic shifts and to develop relationships with organizations that work with these displaced communities.

The region has begun efforts to engage CBOs and the work being proposed in this grant will build on progress. For example, Metro has operated several grant programs that provide funding directly to non-profits and CBOs, including a program to award sponsorships to organizations for enrolling their constituents in Metro's online opinion panel, Opt In, to broaden the diversity of this polling tool.

Other consortium members offer additional capability to address economic and social disparities. In 2007, the City of Portland, with the help of community partners, developed the Diversity and Civic Leadership Program, which has been training and engaging leaders from underrepresented communities. In addition, the City of Portland will soon be establishing an Office of Equity. Multnomah County has made huge strides in framing the discussion around health and equity with their Health Equity Initiative and Equity and Empowerment Lens, which is being piloted throughout the county. Lastly, the Northwest Health Foundation launched the Convergence Partnership Fund, a grant program designed to improve opportunities for healthy eating and active living in communities of color and low income neighborhoods in Multnomah County. This HUD grant will offer an opportunity to leverage and coordinate these multiple efforts around the region, and to collaborate on the development and utilization of an equity framework and tools to systematize data collection and analysis, planning, decision-making and evaluation – incorporating criteria assessing impacts on diverse constituent communities. The work outlined in the Opportunity Mapping and the Community Capacity Building program elements, which will be further described in Section 3, will provide the Consortium with important analysis of needs and opportunities, as well as possible solutions and entry points into decision-making processes for those communities in need.

2. NEEDS/EXTENT OF THE PROBLEM

Need for a regional plan By many measures, the Portland metropolitan region has had successes, such as reducing people's dependence on the automobile, protecting natural areas, preserving prime

agricultural land, reinvigorating downtowns and main streets, and growing healthy economic clusters such as high-tech manufacturing, apparel and outdoor gear design, green-tech and software development. Other efforts, such as Climate Change Scenarios to develop vehicle emissions strategies, are underway. However, the glowing picture of the region that is painted by the national press overlooks the fact that new challenges have emerged: the region's incomes are not keeping pace with peer regions; income and education achievement gaps are widening; there are concentrations of minority, low income, and non-English speaking people in less central, opportunity-deficient locations; and the region's current housing plans may be inadequate for addressing changing demographics and legislative mandates to reduce carbon emissions and preserve agricultural lands.

Conditions that can be improved Incomes are stagnant in the region. In the early 1970s, the average wages in the Portland region were similar to those in Seattle, Denver and Minneapolis. Since then, the region's wages have not grown at the same rate. Portland region incomes are now: 4% below national average for all metropolitan areas; 10% below Minneapolis; 13% below Denver; and 17% below Seattle.¹ The region needs to better incorporate economic development concerns into its plans and needs to expand workforce training partnerships to meet the needs of the changing economy.

Stagnating wages have had a disproportionate impact on minorities and non-English speakers.² In Multnomah County, where the City of Portland is located, people of color earn about half what a white person earns; the child poverty rate is 33% for people of color, compared to 13% for whites; and communities of color have unemployment rates that are 36% higher than whites.

Today, the region's greatest concentrations of low income, non-English-speaking people, and people of color live in areas of low opportunity where there are inadequate facilities, services, and fewer family-wage jobs. This lack of opportunity leads to persistent and pernicious problems that reinforce inequities and segregation. Many blacks have been priced out of the gentrifying neighborhoods of inner North/Northeast Portland that were once the heart of the region's black community. In 1990, 84% of black Oregonians lived in the Portland region and 51% of them lived in North Portland. In 2005-07, 77% of black Oregonians lived in the Portland region and only 20% lived in North Portland.³ As part of the proposed work, three pilot areas have been identified (East Portland/Rockwood, Aloha-Reedville, and McLoughlin Boulevard), located within each of the region's three counties, where this trend has occurred. These three areas share some common features that are not unique in the region: they grew as unincorporated areas outside of cities, with minimal development requirements, which has led to inadequate streets, sidewalks, parks and other services, and a concentrated supply of low-cost, market-rate housing; and shown in the table in the Appendix, a larger share of the population in these areas is impoverished, non-white, and non-English speaking and those populations are growing at a faster rate than they are elsewhere in the region.

Statement of need The region needs new strategies for meeting a variety of *housing needs*. This calls for a better understanding of the housing needs of a changing population and, acknowledging that housing subsidies alone cannot solve the affordability problem, and determining ways that market-rate housing and improved access to opportunities can empower more people to meet their needs. This is particularly the case as the region faces new mandates to use land more efficiently to reduce carbon emissions and preserve agricultural lands. It is expected that these mandates will place a higher reliance

¹ Source: Portland Business Alliance (2010)

² Source: Coalition of Communities of Color Report (2010)

³ Source: Urban League: State of Black Oregon (2011)

on multi-family housing, which typically has higher construction costs per square foot than single-family housing. Confronting this issue and having a regionally consistent approach to assessing impediments to fair housing will be fundamental to ensuring that people can find housing close to where they work. Likewise, bureaucratic barriers that render Section 8 vouchers immobile from county to county need to be removed.

Providing housing alone is not enough. A better understanding is needed of how to provide more *equitable access to opportunities* around the region. Having access to opportunities increases long-term earning potential. Yet many people in the region, such as those in the grant pilot areas, lack access to things like a quality education, family-wage jobs, parks, sidewalks and everyday needs such as healthy food. For instance, preschool is important to a student's long-term academic success, but it is a rarity in many lower income neighborhoods where much of the region's population growth is occurring. At Earl Boyles Elementary (in the Rockwood/East Portland pilot area), just 11 of the 60 students that entered kindergarten this year had any preschool experience.⁴ Without improvements in income that come with access to a good education, housing affordability problems will persist. The region needs to do a better job of incorporating information about access to opportunities in its planning efforts and enabling people to use that information to advocate for needed improvements in their communities. The region's habit of planning for housing without planning for opportunity needs to come to an end.

All communities need to be *engaged in public decisions* that affect them. Open houses to discuss planning issues have been sparsely attended and Metro's current Opt In internet panel participation is heavily weighted towards white, affluent, older, urban and educated populations. Communities and CBOs need additional resources to allow them to fully participate. And, planning efforts need to do a better job of relaying information in ways that resonate with communities. For instance, what gets depicted in opportunity maps needs to be relevant to the decisions at hand, but should also be informed by community input regarding what opportunities matter the most. Some of that data may be qualitative. Further, housing needs analyses can no longer treat all households as interchangeable. Communities need to see themselves in the demographic underpinnings of future housing needs analyses.

Area of severe economic distress While the region as a whole does not meet the federal definition of an Area of Severe Economic Distress, these pilot areas and other areas like them in the region would be likely to qualify with poverty rates well above the federal 12.5% poverty level standard. This is likely to be particularly the case with historically disadvantaged populations such as people of color and non-English speakers. (See Rating Factor 2 Form for required data illustrating the region's need.)

The pilot areas have concentrations of cheaper market-rate and subsidized housing. 8,751 of the region's 34,533 subsidized units (25%) are in these pilot areas and 6,058 subsidized units are both within the pilot areas and within ½ mile of high-capacity transit (including frequent bus), which provides an opportunity to better leverage existing transportation investments. The McLoughlin pilot area will be served by the region's next high-capacity transit line and the East Portland/Rockwood area is served by the region's first rail line. It is crucial to plan these areas in a way that leverages transportation investments to improve the community, access to jobs and preserve affordability. (See table in the Appendix.)

3. SOUNDNESS OF APPROACH

Description of Plan and Program for a Regional Plan for Sustainable Development

⁴ Source: Portland Tribune (2011)

Contents of existing regional plan and how it will be improved The Portland region has many elements of a regional sustainable development plan in place and has successfully advanced a jobs-housing-transportation balance, compact urban form, efficient infrastructure investments, multi-modal transportation investments, and greenspace and open space protection. As a result, the region boasts relatively short commute times, high transit and bicycle use, farm and forestland preservation, good water and air quality, and healthy fish and wildlife habitat. Despite these advantages, the region's efforts toward advancing sustainable development are not complete. Every five years, Metro is responsible for forecasting population and employment growth for the region and demonstrating that the region has sufficient capacity within the urban growth boundary to meet the 20-year need for households and employment. This grant will improve the planning process by focusing more on how the various housing and employment needs of different demographic groups will be met rather than simply doing a 20-year capacity analysis.

Gaps and plans to address them To advance the region's sustainable development, the region needs to develop tools to: address the rising costs of jobs-housing balance and ensure affordable living; promote access to opportunity, including quality education, jobs, parks and other amenities; meet changing demographics and employment needs, including the housing mix and workforce training needs; provide opportunities for CBOs to effectively participate in policy and investment decisions; and build inclusive communities that reflect the income and ethnic diversity across the region.

The Consortium will advance sustainable development in three major program elements: 1) development of a housing and opportunity strategy 2) pilot area development and 3) community capacity building. Each of these elements has subtasks that will involve technical analysis and engagement.

Housing and Opportunity Strategy The Consortium will develop a strategy that will help the region meet the housing and employment needs of the future while promoting sustainable development and implementing livability principles that: promote affordable living by directing investments in transportation, utility and housing costs that reduces the total housing costs household budget; improve the ability to plan for the region's housing, environmental and workforce needs by understanding the effect of changing demographics and employment patterns, and greenhouse gas reduction requirements; identify, map and analyze the factors that affect the opportunity for health and welfare and promote the use of these opportunity maps for future investment decisions; reduce the impediments to fair housing across the region consistently and efficiently across all three counties and promote the prevalence of fair housing options; and remove barriers to economic opportunity for low income families by taking a regional approach to administering housing choice vouchers and linking families to targeted workforce training.

The Housing and Opportunity Strategy will be based on the results of several separate studies and pilot projects. An initial assessment and planning phase will include a Future Housing Needs Analysis, an Analysis of Impediments to Fair Housing, and the development of maps that illustrate the access by residents to jobs, education, parks, grocery stores and transit, correlated with demographics, health indicators and other available data that helps describe existing conditions, and an assessment of the barriers facing housing choice vouchers and job access. Later phases will test new administrative and strategic approaches for supporting employment for low income residents, promote Opportunity Maps as an equity framework and identify changes in codes, financial incentives, and investment strategies that support sustainable development practices. The overall intent is to establish the policy framework that employs an understanding of opportunity rich areas and opportunity poor areas relative to

concentrations of low income populations and communities of color. Based upon this understanding, affordable housing would be targeted to opportunity rich areas, allowing these households to take advantage of the opportunities available. Conversely, in opportunity poor areas, especially where there are high concentrations of low income populations and communities of color, there would be an emphasis on targeting investments to improve opportunity, rather than concentrating even more affordable housing. With this understanding of the “geography of opportunity” supporting this investment strategy, agencies with different responsibilities can work together to leverage their independent investments to greater benefit.

Pilot Area Development The Consortium will target resources to further the implementation of projects that increase access to health, jobs and other opportunities in targeted areas with low income and disadvantaged populations that have persistently experienced high unemployment, low education and problematic health issues. These pilot areas are located in East Portland/Rockwood in Multnomah County and along McLoughlin Boulevard in unincorporated Clackamas County. A similar pilot area project in the Aloha-Reedville area of unincorporated Washington County, already underway and funded in part by a 2010 HUD Challenge Grant, will provide the chance for leadership in all three counties to share lessons learned and benefit from the increased community engagement and resulting opportunities. Selection criteria for the pilot areas include: concentrations of publicly subsidized and low income housing; increasing poverty and changing racial and ethnic cultures; limited urban infrastructure to support walking, biking and local access; limited access to parks, trails and natural areas and other green infrastructure; potential to leverage underutilized land close to light rail stations; and previous work that lays the foundation for the initial identification of needs and proposed projects that have had extensive and broad community engagement; and political commitment to support increased access to opportunity.

Community Capacity Building The Consortium will advance the skills and ability by both the governmental agencies and CBOs for effective engagement and participation. The grant will facilitate the participation by low income and disadvantaged communities in investment decisions and improve access to opportunity by providing capacity building and engagement opportunities. Elements include:

- grants to support community engagement in the development of Housing and Opportunity Strategy and the Pilot area projects, as well as projects that support access to opportunity elsewhere in the region for historically marginalized populations to opportunity
- stipends to Consortium members for participation in committees that are formed to support the Pilot areas and the Housing and Opportunity Strategy
- a leadership and training program that will help develop the new community leaders to participate in community and regional decisions in the future and promote increased community engagement in portions of the region without such community structures today

As a result of this grant application, the Consortium will develop:

- a broader methodology to assess housing needs and align transportation, energy efficiency, workforce training, infrastructure and other investments to meet these needs
- improved access to job, education, recreation and other opportunities in pilot areas and prepare leaders to apply lessons learned in other areas
- new partnerships and tools to promote access to opportunity across the region
- a new cadre of community leaders that have the training and experience to engage in key investment decisions in established and emerging areas of low income and disadvantaged communities.

These results and long-lasting partnerships will position Metro to make future growth management decisions to meet the region's housing and employment needs in 2014 and guide local implementation plans. The table where these decisions will be made will be more diverse, and an equity framework will be developed to apply to policy and investment decisions. This work will further implement the livability principles that Metro has already adopted that guide regional and local investments and help the region meet new mandates for greenhouse gas emission reductions. The experiences gained through the pilot area work will help demonstrate to elected leadership and the local communities, how identified needs can be addressed through collaborative project development and investments, and position leadership to apply similar approaches elsewhere.

Addressing the livability principles Metro has been a national leader in promoting livability. It has accomplished this through its regional responsibility for coordinating land use and transportation planning, its regulatory authority to ensure local plans promote compact development, and its role in promoting federal transportation funds to support transit and active transportation investments. It has also promoted livability principles through dedicating resources to programmatic efforts that promote transit-oriented development, brownfield redevelopment and environmental stewardship, and by providing regional leadership to support successful bond measures for the construction of the convention center as an economic development tool, for land acquisition for parks and open space, and for operation and improvement of the zoo. In 2010, the Metro Council adopted its own version of the HUD-DOT-EPA Livability principles into its Regional Framework Plan as policies to guide growth management decisions. These policies, supported unanimously by the region's advisory committees, call for a performance-based approach to growth management that aims to support desired outcomes for the region:

- people live, work and play in vibrant communities where their everyday needs are easily accessible
- 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.

The Consortium will use the grant to further incorporate these desired outcomes into the region's plans by building on existing strategies to promote the region's ability to promote vibrant communities, improve transportation choices, and reduce greenhouse gas emissions. In addition, the grant will help identify opportunities for residents to benefit from sustained economic competitiveness, and to distribute the benefits and burdens of growth and change – two areas where the region's plans have not been as well developed.

Leveraging critical assets The region has critical and valuable assets that the Consortium can leverage to advance sustainability. These include infrastructure assets, such as the region's transit system and station areas that have underutilized land that can be used for housing to offset higher housing costs, create new jobs and link housing and jobs. This work can leverage the region's next new major high-capacity planning effort currently underway to promote housing and job access and can make greater use of the region's multi-modal transportation system that facilitates active transportation, associated with good health and lower transportation costs through bike and walk use for multiple trip purposes. The region's commitment to maintaining an urban growth boundary promotes efficient and economical use of infrastructure and walkable downtowns and main streets and further leverages these investments. The grant can leverage economic assets such as the region's emerging strength in the green-tech

industries and the forecasted job growth. These provide job training and career advancement opportunities. The grant leverages leadership in sustainable practices and research tools, vocational and workforce training in community colleges and universities. The grant can leverage the region's environmental quality that is the envy of the nation and is often cited as a reason the region continues its economic strength and attracts younger creative populations that can fuel the jobs of tomorrow. The grant can leverage institutional assets including: regional governments with the authority and experience in promoting sustainable development patterns; newly formed organizations, such as Greater Portland Pulse, a new collaboration to track regional progress, and Greater Portland, Inc. which is poised to develop a new coordinated regional economic strategy and help prepare for future job growth; experienced public housing authorities and workforce training institutions that are committed to experimenting with new administrative and budgetary approaches and breaking down institutional barriers to meet client needs. The region can also leverage other financial resources, such as existing grants to housing authorities and resources among community development corporations that can be aligned with transit investments; workforce training grants that bring the workforce training agencies together to collaborate on identifying training needs and partners; and Metro regional bond funds, leveraged with local share, that can be directed toward improving access to open spaces and natural areas, parks and trails in areas currently underserved.

Building inclusive communities As shown in Section 2, the Portland region, though relatively wealthy and healthy, has low income and disadvantaged populations that have historically been marginalized as key investment decisions have been made. Many of these decisions, such as the construction of I-5 in North Portland areas predominately composed of communities of color, or the early urban renewal projects in low income immigrant neighborhoods, have had lingering impacts. To avoid the adverse impacts of the past decisions, the Consortium will use this grant to continue the process already underway to build inclusive communities free from discrimination and advance access to economic opportunity for all segments of the population. Key to this process is the Consortium membership itself, which includes representatives from low income and communities of color and those who provide services to these communities. In addition to the value of the increased awareness of discrimination that will develop as part of this process, the grant will develop recommendations to address impediments to fair housing at the regional scale, furthering the objectives of Civil Rights laws.

Process to Improve and Further Develop Existing Plans

Engaging a broad cross-section The Consortium's process to develop a regional plan for sustainable development rests on community engagement to ensure effective, sustained and participatory roles. The Consortium and the Executive Committee will be instrumental in ensuring the Consortium engages a broad cross-section of the region. Leaders of organizations representing low income and communities of color will be key members of the structures overseeing this grant, ensuring that the needs and views of these populations are integrated into the program elements. In addition, members of the private sector, such as those representing the housing and real estate market, will also be at the table where decisions are made, bringing to bear the needs of their constituencies. This broad inclusion will allow for the range of activities of this grant to be focused on improving the regional economic growth experienced by all sectors of the population.

Community Capacity Building program The key mechanism for engaging a broad cross-section is the development of the Community Capacity Building program element, which includes the development of a fund for CBOs to build capacity to participate in the region's decision-making processes. CBOs representing low income and communities of color need resources to increase their organizational capacity to participate in decisions that lead to the implementation of the region's plans for sustainable

development. The absence of their voice has often led to policies that ignore the needs of their communities, resulting in a lack of equity considerations in the decision-making process, unintended consequences and sustainability deficits as poverty shifts across the region. CBOs have consistently told government agencies that despite their desire to participate in decision-making process, barriers exist. These barriers include time and money to attend public outreach activities, including membership on committees, a lack of knowledge about the decision-making process, a lack of familiarity with the formal or statutory processes of the issues being considered, the jargon used by practitioners, the use of outreach activities that are not relevant to their communities, and a general feeling of non-inclusiveness. The governmental planning culture in the Portland region could be described as not aware or sensitive to these barriers. With the changing population demographics resulting in a more diverse region, it is imperative that government institutions ensure that CBOs, which have existing relationships with diverse and lower income populations, meaningfully participate in decision-making processes. For these reasons, the Community Capacity Building element will include funds for CBOs to participate in the region's decision-making processes and advance sustainable development. This fund will consist of three prongs: 1) grants to community-based organizations to undertake community specific analysis or engagement activities related to the work elements of the regional strategy 2) a leadership training and development program that will create a learning network to help CBO leaders become effective participants in processes that can be complex and 3) stipend program to provide funds for full participation in work related to this grant. An oversight group made up of four area philanthropic organizations will serve as the advisory council for the fund. A Program Manager, selected by the oversight group and confirmed by the Executive Committee, will administer the fund. The program manager will closely consult with CBOs to define and prioritize the specific needs to be addressed in the program.

Grants to CBOs will primarily target those that work with low income, non-English speaking, and communities of color. There will be some flexibility to support non-traditional partners that do not exclusively work with these communities, but that have expertise in areas that could bring opportunities to these communities. Examples of potential non-traditional partners include public health and energy efficient organizations that bring added value that is rarely tapped in traditional planning activities. Funded activities will directly influence programmatic and policy level decisions across all program elements. For example, a possible grant may fund a CBO working with a Hispanic community in the Rockwood pilot area to create maps showing amenities in their community that are most relevant to them, as well as the gaps that exist. These maps would help CBOs develop a plan to share this data with a range of policy-making bodies and influence investment decisions. Funded activities outside of the Pilot areas could help CBOs promote affordable housing in opportunity rich areas and increase opportunities in low income areas with opportunity deficits. The second prong includes leadership training and development in topic areas such as: levels of government (city, county, regional, state), governance structures, committee membership, communicating with elected officials, and engaging community members on policy issues. The purpose of this training program is to encourage the development of relationships that can result in a long-lasting dialogue around how issues affecting these communities should be addressed in policies developed by the region's jurisdictions. Lastly, a needs-based stipend program will be initiated to eliminate economic barriers so that members of CBOs representing low income and communities of color can attend meetings. Eligibility of the stipends will be tied to the committees related to this grant, described under governance later in this section. While these described activities will be funded for a two-year period, the intention of this grant is to redefine how public agencies design and conduct community engagement activities, broaden the voices at the table when decisions are made, change the culture of planning agencies, and develop an equity framework to apply to decision-making processes. Public agencies, private sector partners, and CBOs

will have opportunities to learn from each other, strengthen working relationships, and invest time in ensuring that changes are made to the policy-making process that allow for the needs of these populations to be addressed. Additionally, these activities will work to foster long-term engagement of CBO leaders on boards and committees that have planning and oversight roles on issues of community development.

To achieve the engagement and ensure sustained and participatory roles, Metro will play a convening role around issues of disparities and economic growth, and provide a forum for private and government partners to learn about the needs of communities that have persistent problems, and understand what questions need to be asked to ensure future policy and investment decisions are relevant to all communities. This process will provide opportunities for all of Consortium members to come together to develop solutions that will provide jobs, economic growth, and an improved quality of life for all residents of this region.

Identified gaps and plans to address them The region's plans do not fully address housing, equity and access to opportunity. Addressing these gaps more specifically include: a coordinated regional analysis and plan for addressing housing needs of the future and coordination between housing needs analysis for the comprehensive plan, consolidated plan and regional needs analysis; a coordinated and consistent approach to promoting fair housing; plans and procedures among public housing authorities that allow programs to meet the changing workforce needs of residents; a shared approach to addressing workforce development, economic inclusion and an expansion of best practice approaches to broader community scale; a unified practice of mapping opportunity structures in the region and utilization of this practice to steer strategic investments to improve community opportunity; a method of including diverse community voices into policy and investment decisions; and an equitable approach to neighborhood planning that can emerge from the work in several distinct neighborhoods and communities and informs a broader regional approach to integrating neighborhoods equity needs into broader system strategies. The Consortium will address these gaps in the following ways:

Future Housing Needs Analysis Within the region, housing needs are analyzed at the local, regional and county level to meet different city, Metro and federal requirements at different times. While not incorrect, the inconsistent methods lead to uncoordinated strategies. The methods use different household demand forecasts, assumptions about future housing preferences and approaches to inventorying housing supply. For example, Metro's analysis of housing needs, completed every five years, takes into consideration the cost of housing, transportation and utility costs, while others do not. Metro uses the analysis to determine the need for efficiency actions and/or expansions of the urban growth boundary to meet the 20-year requirements. To meet goals established by Metro to reduce the number of transportation plus housing cost-burdened households, the region needs a coordinated approach to make these goals a reality. The grant will provide the opportunity to link the long-range housing needs conducted by Metro and the short-range housing needs of selected disadvantaged populations developed by the CDBG agencies together. In addition, the region needs to update its estimate of housing preferences to reflect changing demographics and employment trends, an aging population, household budgets and other factors. Compared to past 60/40 single family/multi-family construction, Metro forecasts new construction patterns more like 40/60 multi-family/single family over the next 20 years due to changing demographics and consumer preferences, limited land supply and promotion of livability principles. The region faces a challenge of how to develop housing in new formats that meets people's needs.

To complete the housing need analysis, Metro will work with government partners and representatives from the housing industry and CBOs to: identify opportunities for improving coordination of housing needs analysis; conduct a statistically valid stated housing preference survey to better understand economic tradeoffs that different households consider; update estimates of current and projected housing, transportation and utility costs using Metro's existing integrated land use and transportation modeling and integrate/differentiate methods developed by The Center for Transit-Oriented Technology; identify strategies to respond to housing preferences, such as better small house designs and multi-family housing that is suitable for families with children; improve regional models housing needs by updating new preference and data and making the outputs relevant to planning at the local and county level; account for expected market trends versus local aspirations to change those trends; and produce draft regional housing needs analysis that quantifies future housing needs for a variety of household types for use in developing strategies ranging from transportation, workforce/job locations, utility costs and housing types that promotes livability principles.

Analysis of Impediments to Fair Housing The three counties have either recently completed or are underway with their analysis of impediments to fair housing. These efforts illustrate gaps in the current approach. The analysis has identified additional research that would best be approached at a regional scale because the underlying conditions are regional in scope and deeper analysis requires resources beyond what one county can support. In addition, the plans to address the barriers to fair housing have some common recommended actions, some of which lend themselves to being undertaken regionally to achieve better coordination and economies of scale. Finally, the current approach results in gaps or uneven coverage of issues, raising questions about legitimate differences in conditions from area to area, and misses the spill-over impact that may be occurring across county lines. The approach to these gaps is to augment, not replace, the work already underway, focusing on areas identified in existing plans as needing follow-up research. Recommendations will focus on actions that are best addressed at a regional scale; capitalize on engagement efforts funded through this grant to improve access to other protected classes; integrate information from the opportunity maps to improve understanding of the disparities in accessing housing and opportunities and, with the housing needs analysis, aligning these with comprehensive, consolidated and regional plans; and include fair housing recommendations within the overall Housing and Opportunity Strategy, uniting a number of disparate planning threads into a whole.

Opportunity mapping In late 2011, Metro and a collaborative of public and non-profit partners will complete its first version of an opportunity map, taking a first cut at illuminating how well different neighborhoods and populations are able to access the resources and opportunities necessary for meeting their basic needs and advancing their health and well-being. By illustrating the region's "geography of opportunity," this first opportunity map offers a powerful tool for promoting greater equity through policy and planning. The maps will inform a wide range of decisions related to local public and private investments in housing, transit, employment, and other key amenities such as parks and sidewalks. This initial effort uses Metro's Context Tool (an innovative web-based GIS application) to measure access to a range of key opportunities across the region, such as quality education, employment, housing, transportation, human services, health, parks and livable neighborhoods. It also builds upon CLF's experience with the Equity Atlas 1.0 and leverages their current work to create Equity Atlas 2.0.

The Consortium will use this grant to institutionalized Opportunity Mapping in five ways: 1) Refine and complete the mapping tool, continuing in the same collaborative partnership. Health data, for example, is limited in the current version and would be improved through this grant with health partners; 2) Complete an opportunity assessment, identifying structural disparities across the region and providing insights into how to address underlying factors that cause disparities; 3) Institutionalize the mapping tool

by establishing a system for data updates and building ongoing capacity to manage the tool and update the data. This task will involve identifying where the ongoing update is housed and how it will be funded. Under consideration are Metro, the PSU IMS or the Greater Portland Pulse, being formed through a partnership of Metro and PSU; 4) Conduct outreach and education to enable government partners and the broader community to use the mapping tool. This will require some technical tools, such as web access, as well as engagement and tutorials to describe the maps and help the community and decision-makers understand the information; and 5) Use the maps to incorporate an equity framework into public and private decision-making, beginning with the Consortium and the Housing and Opportunity Strategy.

Housing Authority/Workforce Training Partnership Project The four housing authorities and the three workforce training agencies in the Portland/Vancouver area have identified a gap in existing programs that make it difficult for their Section 8 rental assistance clients to access employment opportunities of their choice. To address this gap, three Oregon PHAs developed formal partnerships with their local workforce agencies involving set-asides of workforce training funds for designated housing choice voucher participants, provision of assertive case management by PHA staff, and the utilization of liaison positions to facilitate communication between the PHAs and workforce agencies. As part of this initial effort, a grant has been awarded from Metro's Regional Travel Options Program to establish a Mobility Counselor to assist individuals in making their best housing location decision, taking into account their training and work location and the combined housing plus transportation cost of their choices. The Consortium will support administrative refinements necessary to take the next step in this process, which is to align resources and tie the individual efforts in each jurisdiction together in an effort to make the program truly regional. This program has the potential to significantly advance sustainable development by making it easier for voucher participants to access workforce programs and employment opportunities, ensuring continuity of services and reducing housing plus transportation costs. The partnership will test the elimination of jurisdictional barriers to service provision, and open the door for future opportunities for change and alignment to meet workforce needs.

Pilot areas The pilot areas provide the chance to increase access to opportunity in an area with a demonstrated lack of opportunity and concentrated low income households and communities of color . This pilot can also serve as a means of testing the opportunity mapping and provide guidance on adjusting or interpreting the results. The pilot provides an opportunity to coordinate the housing needs analysis with an actual test area and a model to employ elsewhere in the region in the future. Work plans for these pilot areas build on previous planning and extensive community engagement. The Consortium will support further refinement of these plans and use the lessons learned from the process to support efforts to increase opportunity elsewhere in the region within all three counties. In addition to these pilot areas Community Capacity Building grants will support other projects to to increase access to opportunity for low income and communities of color elsewhere in the region, as described earlier under Community Capacity Building.

McLoughlin Boulevard Previous phases of the McLoughlin Area Plan (MAP) have been completed over the last three years, resulting in an adopted a vision and guiding principles for the corridor with 16 capital investments and program recommendations. The MAP is unique in that it was led by neighborhood associations in the corridor, after previous plans for revitalizing the corridor had been developed and then set aside, due in part to lack of community support. The Consortium will apply grant funds to further refine and implement the recommendations by developing strategies to: develop the blighted areas along McLoughlin Blvd with an assessment of vacant and underutilized land that helps set priorities for targeted investments in key nodes; establish priorities for pedestrian link improvements,

particularly to link safe routes to the six elementary schools and for neighborhood access to services and jobs; develop financial and other implementation tools for the full set of recommendations; and develop a community design plan that set priorities for greenspaces, tackles the problem of highway as a barrier and refines the community vision, and incorporates implementation actions into the transportation system plan, zoning ordinance and comprehensive plan. These efforts will be supported through continued engagement of neighborhood and special interest groups. As a result, the MAP will improve access to opportunities that the community has identified as needed – better design elements and approach to the highway, safe walking access and redevelopment for key services and housing. The timing of this effort is important, too, since the northern part of the corridor includes the terminus of the region's next light rail line and the community plans for the light rail station area helped catalyze interest in the corridor as a whole.

East Portland/Rockwood These two neighborhoods, developed as unincorporated Multnomah County, are now part of two cities, yet retain similarities in their lack of urban amenities, infrastructure and access to other opportunities that have kept the area as one of the more low income and disadvantaged in the region. The Consortium will support the implementation of six separate initiatives that each have multiple partners and build from previous planning and engagement: 1) Design and development of transportation and connectivity projects in the East Portland in Motion plan leveraging resources targeted by Portland; 2) Program development and implementation of early childhood learning initiatives at the Earl Boyles Elementary School in East Portland, in partnership with David Douglas School District, Multnomah Education Service District and others; 3) Prepare, design and develop the Gateway Green park, 35 acres of available right of way to serve recreation needs; 4) Financial feasibility of the Hacienda Community Development Corporation Mercado Project which will create a Latino public market as part of an effort to promote business development and opportunities among Latino residents; 5) Develop a business plan and financial model for M-Power project to support multifamily energy retrofit projects. Building off of the similar project developed by Portland for single family homes that is now a statewide non-profit Oregon Energy Works, this project will develop a model that reduces energy costs to low income residents while also creating skill development and opportunities for minority contractors and low income individuals; and 6) Develop a Rockwood Neighborhood improvement plan by conducting surveys and other engagement tools to identify improvement priorities and develop implementation strategies that could position the area for future urban renewal resources. Lessons learned from these pilot areas will be shared with the Consortium and recommended changes to the comprehensive plan, code and other tools will be developed and shared as regional examples.

Housing and Opportunity Strategy The Consortium will turn lessons learned through this grant application into recommendations for the Housing and Opportunity Strategy. These recommendations will address gaps in the plans and the process for developing and implementing plans that include low income and communities of color. The Consortium members will highlight key findings and actions for consideration at MPAC, JPACT, Metro Council and other respective boards and commissions. Having the private housing market representatives at the table, and the CDCs and PHA, workforce training, education and philanthropic institutions will help shape the recommendations through a lens that reflects a full range of experiences.

Use of information to further plans Through extensive surveys, data collection and modeling, Metro and its regional partners have learned about the factors that shape development patterns and the policy levers that can alter these patterns. The Consortium will have additional information to use in developing its recommendations, including: demographic and population shifts; workforce training and employment needs; refined models of housing, transportation and utility costs for forecasting and

analysis; rising land and construction costs for multi-family housing; the effect of infrastructure investments on the housing market; the effect of land use changes on greenhouse gas emissions; new and effective engagement strategies for working with CBOs, especially those serving historically marginalized populations; and a new base of burgeoning, diverse CBO leadership from which to draw added expertise.

The Consortium will learn new engagement strategies and have a more complete picture of needs from the Community Capacity Building program. Through the capacity building grants, CBOs will have the resources to engage their communities in exploring issues that are most relevant to them and develop solutions that will most meet their needs. This information will greatly enhance the other work going on to address housing and workforce needs through this grant. In particular, it will provide the experience to better understand how to use CBOs as a tool for outreach that will be taken into consideration in future project work program scoping. In addition, it will provide the basis for defining the parameters of a successful stipend program, including under what circumstances it is appropriate, for what dollar amount and the resulting obligations of the person receiving the stipend. Additionally, the research and outreach that will be conducted through these CBO grants can inform the development of a regional equity framework that will help inform future policy and investment decisions. The leadership development and stipend programs will provide direct training and access to community leaders to participate in actual decision-making processes. Their involvement will help the region understand the need to change the way it makes decisions, to change the current culture to one of transparency and inclusiveness. Most importantly, all aspects of the Community Capacity Building element will provide public agencies, private sector, and CBOs opportunities to learn from each other, develop stronger working relationships, and invest time in ensuring that changes are made to the policy-making processes that allow for the needs of these populations. Strengthening these relationships is a cornerstone to creating real change in this region and a main goal of the Consortium.

Moving from recommendation to action The Consortium will develop recommendations for meeting the region's housing and employment needs and promoting sustainable development. Moving from these recommendations to action requires several additional steps by all Consortium members: 1) Portland, Gresham and Clackamas County can incorporate comprehensive plan and implementing ordinances from pilot areas; 2) Metro can incorporate changes in the next urban growth report that documents housing and employment needs and the next Regional Transportation Plan; 3) MPAC and JPACT can recommend policy changes to Metro Council; 4) Local Transportation System Plans can incorporate investments that increase access opportunities; 5) Philanthropic institutions can shape their grant-making activities to respond to the new lessons learned; 6) PCC and other workforce training entities can target training and reinforce M-Power skills; 7) Home builders and realtors can promote market sector to respond to improved access to opportunity and to recognize future housing needs; 8) TriMet, housing authorities and CDCs can partner to increase housing near transit; 9) Local governments can take actions to provide employment opportunities and support housing needs and work with local chambers of commerce and other organizations in support of these needs; 10) CBOs can apply their capacity building to emerging areas, creating stronger and organized community leaders who actively participate in investment decisions; 11) CDBG agencies can incorporate the results into their next Consolidated Plan; and 12) Metro can partner with higher education institutions and others to help illustrate the choices, costs and benefits associated with meeting future housing and workforce needs.

Other public agencies have a role in advancing the plan The Governor has submitted a letter of support, along with key department heads, for the Consortium's recommendations. Examples of how the state could help include modifying transportation priorities; revising administrative procedures for

meeting housing needs and employment needs that support greater regional coordination; and targeted Oregon Business Development Department resources. Another key partner is the higher education system. In addition to PCC and PSU, already signed on as Consortium members, the University of Oregon's Sustainability Center has submitted a letter of support that highlights opportunities for future refinement and piloting of concepts. Lastly, Oregon's congressional delegation has submitted a letter of support and will be open to suggestions of future opportunities at the federal level to support implementation.

Governance and Management

Rationale for selection of consortium members Metro invited members to join the Consortium that bring expertise in the subject areas that are being evaluated: housing, workforce training, health, transportation access and other government services. The selected members bring the viewpoint of low income and communities of color to the table and members who have key responsibilities for implementing the region's sustainable plans. Metro specifically invited umbrella organizations with broad memberships to extend the reach of this work. Members of the Consortium have committed to work with each other in a collaborative manner that develops trust and brings forward interests to be addressed in a supportive manner. The Consortium will add new members, as needed to address a missing issue. For example, the two key organizations that are just forming and have expressed an interest in joining. Greater Portland, Inc., recently consolidated the public and private sector economic development organizations into a single organization with a combined public-private board of directors. When the organization is fully operational and stable, they may take action to join. Similarly, Greater Portland Pulse is a partnership being formed to use data and dialogue to encourage coordinated action for better results across the region in the areas of economy, education, health, safety, the arts, civic engagement, environment, housing and transportation. They may join when it is organized and operational. Finally, while there is representation from higher education through Portland State University (PSU) and Portland Community College, there is a need to engage the K-12 sector and broader representation from higher education.

Role of each consortium member Metro will serve as the fiscal and administrative agent on behalf of the Consortium and will assume lead and co-lead roles for task elements and provide technical resources. The consortium's government members will provide access to data, staff resources and lead roles on specific tasks. Non-government partners bring expertise in key areas such as community and work force needs and health access. The philanthropic organizations will guide the program development for capacity building and work force training. The private sector partners bring the perspective of the private housing market. Finally, the members from the education sector will advise on technical research and strategies.

Formal structure of the consortium The membership of the Consortium includes a diverse mix of organizations and interests from the public sector, education, non-profits, philanthropy and business. At 31 members, the Consortium is too large to function as a working Committee. It will meet on a quarterly basis to monitor progress, learn from the results and endorse conclusions and recommendations. The Consortium members will participate in sub-Committees to gain a deeper understanding of the issues and develop new partnerships to formulate and implement recommendations. An *Executive Committee* will be established to make decisions about the allocation of resources, provide policy oversight, maintain responsibility for developing policy recommendations and serve as a conduit for the recommendations back to the Consortium and to organizations responsible for implementation. In this capacity, the Executive Committee will have responsibility for selecting the overall Project Director and Facilitator and to confirm the Community Capacity Building Program Manager, based upon a

recommendation from the philanthropic organizations. The Executive Committee will be comprised of 12 members, six from the government and six from non-government members who represent public, private and non-profit perspectives. Two government representatives will be appointed from each of the Metro Council, the MPAC and the JPACT, thereby providing a conduit back to these regional decision-making bodies and through them to the responsible jurisdiction or agency. The non-profit and private representatives will be selected by the community-based and private business members of the Consortium and ensure diverse representation across the interests of the Consortium and the full geographic scope of the region. The Executive Committee will operate on a consensus-seeking basis. In the event the Consortium cannot reach consensus, the Executive Committee will take action and rely on both a majority of the government members of the Executive Committee and a majority of the non-government members. The Executive Committee will be chaired by a Metro Councilor and will adopt Bylaws upon initiation.

A Housing and Opportunity Strategy Committee will integrate the conclusions reached from the Housing Needs, Opportunity Mapping, Analysis of Impediments to Fair Housing, Housing Authority/Workforce Training Partnership Project and Pilot area work programs to formulate policy recommendations for consideration by the Executive Committee. Technical Advisory Committees for each of the task areas will be formed as needed to support each respective Team Lead. A *Community Capacity Building Committee* comprising the four philanthropic organizations will oversee the CBO capacity building grant program in consultation with Consortium members that represent these CBOs. An *East Portland/Rockwood Advisory Committee* will oversee development of this pilot area implementation plan, including all aspects of policy setting, technical support and community outreach. The Committee will be co-chaired by the cities of Portland and Gresham. A *McLoughlin Boulevard Advisory Committee* will oversee development of this pilot area implementation plan, including all aspects of policy setting, technical support and community outreach. The Committee will be chaired by Clackamas County. A *Project Management/Grant Management Group* will consist of Team Leads for the work program elements with the assistance of their respective grant management staff. This will ensure compliance, coordinate work and ensure appropriate engagement of the agencies and community in work related to completion of the grant work program. The Project Management/Grant Management Group will provide support to the Project Director.

Dedicated budget resources An essential part of this grant proposal is the Community Capacity Building Program (described earlier), designed to ensure participants from CBOs that represent or provide services to communities of low income and communities of color can effectively participate in this process. Nearly 30% of the budget has been dedicated to ensure that such capacity and equity building activities will occur, as shown in Budget Worksheet and Narrative.

Data management plan The Portland region is accustomed to addressing large, complex public policy initiatives based upon rigorous data and analysis that support an objective, fact-based decision-making process. For decades, Metro has maintained the Regional Land Information System (RLIS) providing continuously updated information about land and development characteristics at a finely grained level of detail. Maintenance of such a comprehensive database has been possible through data sharing agreements that assign data maintenance responsibility to the party that needs the accuracy the greatest. For example, the 911 Emergency response system must have accurate street address systems, while the planning department maintains the latest zoning designation. The philosophy established for this undertaking is to ensure the region and its partners are using the best available information so that the focus can be to argue about the policy issues rather than the validity of the data. This has served the region well in the original development of the 2040 Growth Concept, the Regional Transportation Plan,

establishment of development regulations to protect wetlands and riparian corridors, definition of the program to win voter approval of funds to acquire natural areas, periodic review of the adequacy of the urban growth boundary, and ongoing work to define methods to reduce greenhouse gas emissions from automobiles. In addition, PSU Institute of Metropolitan Studies has developed a regional database function and taken on the responsibility of the state population center to estimate population for tax distribution purposes. Metro and PSU have partnered on a number of data sharing projects including Greater Portland Pulse, a regional indicators project that tracks changes in these indicators and provides a mechanism for pursuing important policy initiatives. The CBOs have relied on PSU's and Metro's data including *Communities of Color in Multnomah County: An Unsettling Profile* produced on behalf of the Communities of Color Coalition and the document *The State of Black Oregon* produced on behalf of the Urban League of Portland, and the Coalition for a Livable Future's Equity Atlas 1.0. These data management systems are in place for use by the Consortium. The design of the work program and the governance structure is key to successfully integrating and maintaining the data systems, ensuring that decisions are well-informed and communicated across jurisdictions. Through the comprehensive representation of the Consortium and the broad-based membership profile of each organization, the data can be effectively used to support a community dialogue leading to conclusions and recommendations reflecting an equitable representation of priorities leading to across the region implementation. The data and analysis itself will be generated and reviewed by stakeholder agencies and organizations.

Ensuring implementation The region has a successful track record of implementing complex, multi-jurisdictional recommendations. This track record, together with the Consortium's governance and committee structure, multi-jurisdictional and multi-sector membership, will ensure the implementation of the Consortium's recommendations. The Executive Committee will be the focus of engaging high level policy individuals in drawing conclusions and developing recommendations. Because the organizations participating in the Consortium and Executive Committee have implementing responsibilities, their participation is important, not as a single representative, but as a mechanism for developing support from their membership and implementing the regional plan. Through this relationship, there will be follow-on linkages back to Metro's land use and transportation functions, as well as to other government service delivery functions and that of non-government organizations. Consortium members will provide a variety of communications mechanisms to disseminate the data, including social media, print and electronic newsletters, public presentations and published papers. The Consortium intends to publish reports (in print on recycled paper and in electronic format), project briefs, leaflets, and information releases.

Funding commitments for elements of the work program are secured through the structure of the individual work plans. For example, the implementation of the 2040 Growth Concept is already funded through the Metro's required role of maintaining the urban growth boundary. Cities in the region are required to regularly update and fund their comprehensive plans, the mechanism for implementing the regional plan at the local level. As part of their updating process, these plans will fold in aspects of the new regional plan. The community housing agencies and workforce training partnership will have some administrative set-up costs, but will then retool their existing work plans to integrate program elements outlined in the grant. The pilot areas have potential funding sources through urban renewal and other tools.

Project Completion Schedule

Implementation schedule and milestones The Consortium will complete the project in two years. Key milestones include the development of the Community Capacity Building grant program in the first six months and distribution of the grants within the remaining 18 months. Key milestones for the Pilot

Areas include disbursement of funds to the various activities in these areas and the resulting neighborhood improvement plans, business plans, design plans and comprehensive plan changes that will result. Key milestones in the Housing and Opportunity Strategy include completion the surveys, model updates, new estimates of housing need, distribution of updated opportunity maps, implementation of the housing/workforce training partnership, and regional plans to promote fair housing. Key milestones, activity dates and expected results are illustrated in Rating Factor 5 form and the project schedule in the Appendix. These projects will resolve challenges to community engagement and data collection and maintenance that will help inform policy decisions that are more responsive to the needs of low income and communities of color. Through new partnerships, priorities and local, regional county plan alignment, implementation of these recommendations will improve housing, jobs and transportation links, resulting in environmental and economic benefits that are equitably distributed and further advancing the region's sustainable development plans.

HUD's Departmental Policy Priorities

This application supports the relevant HUD departmental five Core Goals and six Policy Priorities. For example, the Housing Authority/Workforce Training Partnership will utilize housing as a platform for improving quality of life (HUD Goal 3); create jobs (HUD Policy Priority 1), and further fair housing (HUD Policy Priority 3) by having PHAs and workforce agencies improve outcomes for families receiving HUD rental subsidies (HUD Policy Priority 4). Several projects in the Pilot Areas will directly support job creation. The Consortium's efforts will support HUD's priority for *Capacity Building and Knowledge Sharing* by focusing on areas of concentrated poverty, targeting workforce training for Section 8 voucher holders, connecting housing closer to jobs and transit, decreasing housing and transportation costs, aligning investment strategies in local, regional, county and state plans and through the Community Capacity Building element. Leadership and training programs, grants and stipends will increase skills while other elements, such as the distribution and engagement of the opportunity maps, will promote additional attention to the needs across the region. The Community Capacity Building program will conduct a scan of CBO needs to identify topic areas and potential participants for the leadership program and which is expected to include: workshops, seminars and lectures on public policy and equity issues, inviting both CBOs and government staff in an effort to encourage dialogue and relationship building; and capacity building activities for organizations serving low income and communities of color in need of help around issues of advocacy and engagement.

The Program Manager for this area will develop evaluation tools to measure the effect of this training and collect data on the program's effectiveness, including an increased number of CBOs on local and regional committees and participation in public processes; the recruitment of participants from organizations who have never been engaged in implementing the region's sustainable development plans; an increase in the number of meetings community-based leaders hold with area elected officials on issues relevant to their communities; the integration of equity into decision-making processes; and the development of longer-term relationships between CBOs and government entities. The Consortium will also work with HUD to support knowledge sharing and innovation by disseminating best practices, encouraging peer learning, publishing data analysis and research, and helping to incubate and test new ideas. The HUD Program Goals that are most applicable to this Community Capacity Building work plan are Goal 4) Build Inclusive and Sustainable Communities Free from Discrimination and Policy Priorities 4 and 6. By facilitating strong alliances of residents and regional interest groups that are able to maintain a long-term vision for a region over time and simultaneously support progress through incremental sustainable development practices, the Consortium will also build greater transparency and accountability into planning and implementation efforts.

The Portland region is well-positioned to use the work elements in this grant to meet HUD's goal to *Expand Cross-Cutting Policy Knowledge* will also be carried out across all other program elements. For example, in Opportunity Mapping element includes outreach and education to enable government partners and the broader community to use the mapping tool. To broaden the ability of stakeholders to understand and use the opportunity maps, web-based tutorials, user handbooks and educational materials will be developed. Metro and CLF will sponsor a series of workshops to introduce the mapping tool to government partners and CBOs, with an emphasis on reaching out to communities that are directly impacted by the disparities illustrated in the maps. CLF will also sponsor a Community-Based Participatory Research project to engage members of historically disenfranchised communities in using qualitative research strategies to examine equity conditions in their communities in greater depth and build the capacity of CBOs to utilize the opportunity maps to influence both private and public decision-making. Metro will work with the Consortium's Executive Committee to develop a model to guide other government partners about how the maps can be used to inform policy and planning. Other new tools, such as the housing/transportation/utility cost model will also expand policy knowledge that will inform policy and investment decisions. The Consortium will develop recommendations that promote these tools in the context of developing a regional Housing and Opportunity Strategy.

4. MATCH, LEVERAGING RESOURCES AND PROGRAM INTEGRATION

The Consortium has committed a match of 63.8 % (\$3,184,823) and a leverage of \$224,973 in HUD resources and \$247,200 in other federal resources, including Transportation and Labor funds. This match and leverage is supported by an alignment of additional a \$3,200,000 in DOT Challenge Grant, HUD grant and local funds for the Aloha Reedville Study. The philanthropic and community based organizations have an additional \$1,400,000 in health and job training funds for alignment. See Rating Factor 4 form and the Appendix for Commitment Letters.

5. ACHIEVING RESULTS AND PROGRAM EVALUATION

The region's existing plans for sustainable development already address the eight mandatory outcomes and support the additional outcomes. The Consortium's efforts will advance these outcomes and improve the measures that result from addressing equity and opportunity and access to housing. The housing and opportunity strategy efforts will specifically align local, regional and county housing plans and investment strategies and the Pilot Areas will result in comprehensive plan updates that will link housing and transportation. Members of the Consortium will carry the recommendations back to their organizations, which will increase the alignment with other funds, such as Metro's flexible transportation funds or the state's housing program. The Community Capacity Building program will increase participation and decision-making by traditionally marginalized populations, leading to new engagement model. The Opportunity Mapping will help the region's decision-makers identify investments that can improve access to opportunity for low income and communities of color while the regional fair housing analysis and Housing/Workforce Partnership will result in direct recommendations and service improvements. The Housing and Opportunity Strategy will identify actions to link housing, transportation and utility costs to promote affordable housing near jobs and transit, which will further reduce the region's vehicle miles traveled per capita and related emissions. The models that result from this effort will inform the region plan's for future investments. The housing/workforce partnership will reduce VMT per capita beginning immediately with the new voucher training program. The strategies will support the region's ongoing plans to promote infill and redevelopment, with near term results expected in the Pilot Areas and in other parts of the region through the Community Capacity Building grants. Metro calculates infill and redevelopment rates regularly and will continue to track these changes. As a result of the Opportunity Mapping, access to jobs, housing and other services will be illustrated and promoted for use in targeting investments that are aimed at reducing transit travel times

for low income households. These maps will also support targeted efforts for economic development planning underway by consortium members at the state and local level and inform other efforts to improve education, workforce training, health and other services that other consortium members provide. Please refer to Rating Factor 5 form. All eight mandatory outcomes will be achieved, as noted on Rating Factor 5 form, as will additional potential outcomes.

6. Preferred Sustainability Status. Applicable. Please see signed form in Appendix.

7. RC/EZ/EC-II. Not applicable



JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION

September 8, 2011

Metro Regional Center, Council Chambers

MEMBERS PRESENT

Rex Burkholder
Carlotta Collette, Chair
Shirley Craddick
Nina DeConcini
Craig Dirksen
Donna Jordan
Deborah Kafoury
Ann Lininger
Neil McFarlane
Roy Rogers
Jason Tell
Don Wagner
Bill Wyatt

AFFILIATION

Metro Council
Metro Council
Metro Council
Oregon Department of Environmental Quality
City of Tigard, representing Cities of Washington Co.
City of Lake Oswego, representing Cities of Clackamas Co.
Multnomah County
Clackamas County
TriMet
Washington County
Oregon Department of Transportation, Region 1
Washington State Department of Transportation
Port of Portland

MEMBERS EXCUSED

Sam Adams
Shane Bemis
Jack Burkman
Steve Stuart

AFFILIATION

City of Portland
City of Gresham, representing Cities of Multnomah Co.
City of Vancouver, representing SW Washington RTC
Clark County

ALTERNATES PRESENT

Lisa Barton Mullins
Dean Lookingbill

AFFILIATION.

City of Gresham, representing Cities of Multnomah Co.
City of Vancouver, representing SW Washington RTC

STAFF: Aaron Brown, Andy Cotugno, Elissa Gertler, Alison Kean-Campbell, Ted Leybold, Kelsey Newell, Dylan Rivera, Amy Rose, Randy Tucker, Sheena VanLeuven

1. CALL TO ORDER AND DECLARATION OF A QUORUM

Chair Carlotta Collette declared a quorum and called the meeting to order at 7:30 a.m.

2. INTRODUCTIONS

3. CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS

There were none.

4. COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS

Chair Collette announced that Gail Acheterman is stepping down from her position at the Oregon Transportation Commission, and that parking at the Metro Regional Center Parking Garage would no longer be validated for non-elected officials during JPACT meetings. Questions on Metro's parking policy should be directed to Kelsey Newell. Chair Collette also summarized discussions held by the JPACT subcommittee on finance in the previous two months, noting that these discussions about prioritizing regional investments is an important step for the region to remain competitive for receiving necessary federal funds.

Chair Collette directed the committee to the new draft Highway Mobility Policy, which is aimed at changing state law to encourage the Oregon Department of Transportation's (ODOT's) policies to allow for extra flexibility to address local community concerns when planning for transportation infrastructure. Mr. Jason Tell of ODOT concurred, noting that these changes, requested by Oregon Senate Bill 795, demonstrates ODOT's commitment to working with local jurisdictions and adapting policy to address issues such as mobility and community along with access and throughput traffic. A new draft is expected shortly, and the document will have a public comment period.

5. CONSENT AGENDA

Chair Collette briefly summarized the consent agenda, noting that it contained the minutes from the July 14 JPACT meeting and two Resolutions (No. 11-4286, No. 11-4287) to amend the Metropolitan Transportation Improvement Program (MTIP) for three sidewalk projects from Transportation Enhancement funds and for the I-5 Carman Drive Ramp Operations Project.

MOTION: Commissioner Roy Rogers moved, Mr. Don Wagner seconded, to approve the Consent Agenda.

ACTION TAKEN: With all in favor, the motion passes.

6. ACTION ITEMS

6.1 Release of Draft Recommendation of Regional Flexible Fund Allocation for Public Comment

Ted Leybold and Amy Rose of Metro gave a presentation to JPACT members to discuss the process through which Regional Flexible Fund Allocations (RFFA) are released and available for public comment. Mr. Leybold presented that the Transportation Policy and Alternatives Committee (TPAC) asked the Vehicle Electrification Funds (VEF) subgroup to make a recommendation to JPACT that addresses their opinions on the best use of RFFA resources to promote vehicle electrification. The subcommittee anticipates adopting a direction in December. The slides of their presentation are included in the meeting packet.

6.2 TIGER III Applications

Andy Cotugno of Metro gave a presentation detailing the Transportation Investments Generating Economic Recovery III (TIGER III) Application process. The federal grant has become remarkably competitive, and Mr. Cotugno presented to JPACT the recommendation forwarded

to the committee from TPAC that the region should consider a process of evaluating future federal grant applications to ensure that the region's applications are qualified and suitable for receiving limited funds. This process could ask TPAC (or potentially a subcommittee formed of TPAC's citizen representatives) to apply a set of criteria to regional projects to ensure that the region only nominates projects most likely to receive federal funding. This process of committee review could also help improve individual applications through suggesting particular changes to the written proposals.

Mr. Cotugno solicited feedback from the committee; discussion included:

- A general consensus from JPACT members that the TIGER criteria are already rigorous enough, and that it would be unnecessary for any potential subcommittee to evaluate any other criteria beyond those required by the TIGER application. Mr. Cotugno had asked the committee if the region should evaluate these projects with any other requirements or considerations in mind.
- Concern that the region would have the ability to tell independent jurisdictions to not submit applications for TIGER III or future federal grants. Mr. Cotugno noted that the submission of a poor application doesn't hurt the chances of just that particular jurisdiction but that a series of poor applications hurts the chances of all of the applications submitted by a particular region, and that it might be prudent to limit the number of requests submitted by the Portland region. Commissioner Deborah Kafoury noted that Multnomah County had been working on an TIGER application for the Sellwood Bridge for nearly a year, and that the County intended to submit their proposal for funds even if the project wasn't recommended by a regional subcommittee.
- Concern about the "impartiality" of TPAC citizen representatives. Metro staff noted that the proposal for TPAC citizen representatives to review applications assumed that unlike TPAC members who represented and were employed by regional jurisdictions, the citizens would have the least bias and the best interests of the region at hand when determining which projects should move forward. Some JPACT members expressed concern that citizen representatives might not have the technical skills necessary to evaluate the technical, transportation engineering components of these applications.
- The amount of value added to each application by having extra review of these applications.

Char Collette asked the committee if they agreed that a review of applications would strengthen the region's chances at receiving federal funds, and that the region could decide in October if one or two of the projects in particular stood out as worthy of recommendation. JPACT members gave a general vote of confidence for this review process.

6.3 Resolution No. 11-4290, For the Purpose of Endorsing a Consortium Grant Application to the U.S. Department of Housing and Urban Development for a Sustainable Communities Regional Planning Grant

Mr. Cotugno continued to address the committee and asked for endorsement of Resolution No. 11-4290. This resolution would allow the Metro Council as the region's Metropolitan Planning Organization (MPO) to acknowledge the formation of a consortium to apply for the federal Sustainable Communities Regional Planning Grant Program. This application, due October 6 to

the federal Housing and Urban Development (HUD), requires MPOs to partner with local governments, local HUD recipients, and community based organizations that represent disadvantaged populations to create a consortium to think about housing provisions on a metropolitan level. Mr. Cotugno noted that they are proposing to create an executive committee of this larger consortium, who would be able to make decisions relative to the grant.

MOTION: Mr. Neil McFarlane motions, and Councilor Donna Jordan seconds, to recommend Resolution No. 11-4290 to the Metro Council.

ACTION TAKEN: With all in favor, the motion passes.

7. ADJOURN

Chair Collette adjourned the meeting at 8:59 a.m.

Respectfully submitted,



Aaron Brown
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR SEPTEMBER 8, 2011

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

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
6.1	Powerpoint	9/08/11	2014-15 Regional Flexible Funds: Process update & release of projects for public comment	090811j-01

OHP Policy 1F Proposed Revisions

Public Review DRAFT

1 1999 OREGON HIGHWAY PLAN

4 HIGHWAY MOBILITY POLICY

6 Background

8 The Highway Mobility Policy establishes state highway mobility targets that implement
9 the objectives of the Oregon Transportation Plan (OTP) and other OHP policies. The
10 policy does not rely on a single approach to determine transportation needs necessary to
11 maintain acceptable and reliable levels of mobility on the state highway system. It offers
12 the flexibility to consider and develop methodologies to measure mobility that are
13 reflective of current and anticipated land use, transportation and economic conditions of
14 the state and in a community.

16 While ODOT measures vehicular highway mobility performance through volume to
17 capacity (v/c) ratios (see Tables 6 and 7) when making initial determinations of facility
18 needs necessary to maintain acceptable and reliable levels of mobility on the state
19 highway system, achieving v/c targets will not necessarily be the determinant of the
20 transportation solution(s). Policy 1F recognizes and emphasizes opportunities for
21 developing alternative mobility targets (including measures that are not v/c-based) that
22 provide a more effective tool to identify transportation needs and solutions and better
23 balance state and local community needs and objectives.

25 Several policies in the Highway Plan establish general mobility objectives and
26 approaches for maintaining mobility.

- 28 • Policy 1A (State Highway Classification System) describes in general the
29 functions and objectives for several categories of state highways. Greater mobility
30 is expected on Interstate and Statewide Highways than on Regional and District
31 Highways.
- 33 • Policy 1B (Land Use and Transportation) has an objective of coordinating land
34 use and transportation decisions to maintain the mobility of the highway system.
35 The policy identifies several land use types and describes in general the levels of
36 mobility objectives appropriate for each.
- 38 • Policy 1C (State Highway Freight System) has an objective of maintaining
39 efficient through movement on major truck Freight Routes. The policy identifies
40 the highways that are Freight Routes.
- 42 • Policy 1G (Major Improvements) has the purpose of maintaining highway
43 performance and improving highway safety by improving system efficiency and
44 management before adding capacity.

1
2 Although each of these policies addresses mobility, none provide measures by which to
3 describe and understand levels of mobility and evaluate what levels are acceptable for the
4 various classifications of state highway facilities.

5
6 The Highway Mobility Policy identifies how the State measures mobility and establishes
7 targets that are reasonable and consistent with the direction of the OTP and Highway Plan
8 policies. This policy carries out Policies 1A and 1C by establishing mobility targets for
9 Interstate Highways, Freight Routes and other Statewide Highways that reflect the
10 expectation that these facilities maintain a level of mobility to safely and efficiently
11 support statewide economic development while balancing available financial resources. It
12 carries out Policy 1B by acknowledging that lower vehicular mobility in Special
13 Transportation Areas (STAs) and highly developed urban areas is the expectation and
14 assigns a mobility target that accepts a higher level of congestion in these situations. The
15 targets set for Regional and District Highways in STAs and highly urbanized areas allow
16 for lower vehicular mobility to better balance other objectives, including a multimodal
17 system. In these areas traffic congestion will regularly reach levels where peak hour
18 traffic flow is highly unstable and greater traffic congestion will occur. In order to better
19 support state and local economic activity, targets for Freight Routes are set to provide for
20 less congestion than would be acceptable for other state highways. Interstate Highways
21 and Expressways are incompatible with slower traffic and higher level of vehicular
22 congestion and therefore, STA designations will not be applied to these highway
23 classifications. For Interstate and Expressway facilities it will be important to manage
24 congestion to support regional and state economic development goals.

25
26 The mobility targets are contained in Tables 6 and 7 and in Action 1F.1. Tables 6 and 7
27 refer only to vehicle mobility on the state highway system. At the same time, it is
28 recognized that other transportation modes and regional and local planning objectives
29 need to be considered and balanced when evaluating performance, operation and
30 improvements to the state highway system. Implementation of the Highway Mobility
31 Policy will require state, regional and local agencies to assess mobility targets and
32 balance actions within the context of multiple technical and policy objectives. While the
33 mobility targets are important tools for assessing the transportation condition of the
34 system, mobility is only one of a number of objectives that will be considered when
35 developing transportation solutions.

36
37 The highway mobility targets are used in three distinct ways:

- 38
- 39 • Transportation System Planning: Mobility targets identify state highway mobility
40 performance expectations and provide a measure by which the existing and future
41 performance of the highway system can be evaluated. Plan development may
42 necessitate adopting methodologies and targets that deviate from adopted mobility
43 targets in order to balance regional and local performance expectations.
 - 44
 - 45 • Plan Amendments and Development Review: Mobility targets are used to review
46 amendments to comprehensive plans and land use regulations pursuant to the

1 Transportation Planning Rule (TPR) to assess if the proposed changes are
2 consistent with the planned function, capacity and performance standards of state
3 highway facilities.

- 4
- 5 • Operations: Mobility targets assist in making traffic operations decisions such as
6 managing access and traffic control systems to maintain acceptable highway
7 performance.

8

9 The Highway Mobility Policy applies primarily to transportation and land use planning
10 decisions. By defining targeted levels of highway system mobility, the policy provides
11 direction for identifying (vehicular) highway system deficiencies. The policy does not,
12 however, determine what actions should be taken to address the deficiencies.

13

14 Mobility in the policy is measured using a volume to capacity ratio or v/c. This policy
15 also provides opportunities to seek OTC approval for alternative mobility targets that are
16 not v/c-based.

17

18 It is also important to note that regardless of the performance measure, v/c or other, the
19 Highway Mobility Policy recognizes the importance of considering the performance of
20 other modes of travel. While the policy does not prescribe mobility targets for other
21 modes of travel, it does allow and encourage ODOT and local jurisdictions to consider
22 mobility broadly – through multimodal measures or within the context of regional or
23 local land use objectives. Providing for better multimodal operations is a legitimate
24 justification for developing alternatives to established OHP mobility targets.

25

26 The Highway Mobility Policy will affect land use decisions through the requirements of
27 the TPR. The TPR requires that regional and local transportation system plans (TSP) be
28 consistent with plans adopted by the OTC. The TPR also requires that local governments
29 ensure that comprehensive plan amendments, zone changes and amendments to land use
30 regulations that significantly affect a transportation facility are consistent with the
31 identified function, capacity and performance of the affected state facility. The Highway
32 Mobility Policy establishes ODOT’s mobility targets for state highways as the standards
33 for determining compliance with the TPR (OAR 660-012-0060).

34

35 Policy 1F does not apply to highway design. Separate design mobility standards are
36 contained in ODOT’s Highway Design Manual (HDM). While HDM design standards
37 and OHP mobility targets in Policy 1F may not be the same, ODOT’s intention is to
38 continue to balance statewide mobility and economic development objectives with
39 community mobility, livability and economic development objectives through
40 coordination between planning and design. Where the OTC adopts alternative mobility
41 targets in accordance with this policy, they are establishing an agreement with the local
42 jurisdiction to manage and develop the state system to the expected and planned levels of
43 performance, consistent with the jurisdiction’s underlying planning objectives (as set out
44 in local comprehensive plan policy and land use regulations). However, coordination on
45 exceptions to design mobility standards may still be required.

46

1 ODOT's intention is that the mobility targets be used to identify system mobility
2 deficiencies over the course of a reasonable planning horizon. The planning horizon shall
3 be:

- 4
- 5 • At least 20 years for the development of state, regional and local transportation
6 plans, including ODOT's corridor plans; and
7
- 8 • The greater of 15 years or the planning horizon of the applicable local and
9 regional transportation system plans for amendments to transportation plans,
10 comprehensive plans or land use regulations.
11

12 ODOT measures vehicular highway mobility performance through v/c ratios. The v/c
13 ratio was selected after an extensive analysis of highway performance measures prior to
14 adoption of the 1999 Highway Plan. The review included the effectiveness of the
15 measure to achieving other highway plan policies (particularly OHP Policy 1B, Land Use
16 and Transportation), implications for growth patterns, how specifically should ODOT
17 policy integrate with land use, flexibility for modifying targets, and the effects of
18 Portland metro area targets on the major state highways in the region. V/C based
19 measures were chosen for reasons of application consistency and flexibility, manageable
20 data requirements, forecasting accuracy, and the ability to aggregate into area-wide
21 targets that are fairly easy to understand and specify. In addition, since v/c is responsive
22 to changes in demand as well as in capacity, it reflects the results of demand
23 management, land use and multimodal policies. However, it is recognized that there are
24 limitations in applying v/c, especially in highly congested conditions and in a multimodal
25 environment. OHP policies allow options for other measures, or combinations of
26 measures, to be considered.
27

28 Mobility targets are a measure by which the state assesses the functionality of a facility
29 and are used, along with consideration of other policy objectives, to plan for system
30 improvements. These mobility targets are shown in Table 6 and vary, depending on the
31 category of highway, the location of the facility – within a STA, MPO, UGB,
32 unincorporated community or rural lands – and the posted speed of the facility. Table 6
33 also reflects Policy 1B (Land Use and Transportation) and the State's commitment to
34 support increased density and development activities in urban areas. Through higher v/c
35 ratios and the adoption of alternative mobility targets, the State acknowledges that it is
36 appropriate and anticipated that certain areas will have more traffic congestion because of
37 the land use pattern that a region or local jurisdiction has committed to through adopted
38 local policy.
39

40 Separate mobility targets for the Portland metropolitan area have been included in the
41 policy (Table 7). These targets have been adopted with an understanding of the unique
42 context and policy choices that have been made by local governments in that area
43 including:
44

- 1 • A regional plan that links land use and transportation decisions and investments to
2 support land uses in urban centers and corridors and supports multi-modal
3 transportation options;
- 4
- 5 • Implementation of Transportation System Management and Operations (TSMO)
6 strategies, including freeway ramp meters, real time traffic monitoring and
7 incident response to maintain adequate traffic flow; and
8
- 9 • An air quality attainment/maintenance plan that relies heavily on reducing auto
10 trips through land use changes and increases in transit service.
11

12 The Portland Metro targets have been adopted specifically for the Portland metropolitan
13 area with a mutual understanding that these mobility targets better reflect the congestion
14 that already exists within the constraints of the metro area's transportation system and
15 which will not be alleviated by state highway improvements. The targets contained in
16 Table 7 are meant for interim use only. The OTC expects the Portland Metro area to work
17 with ODOT to explore a variety of measures to assess mobility and to develop alternative
18 targets that best reflect the multiple transportation, land use and economic objectives of
19 the region.
20

21 The mobility targets included in the Highway Mobility Policy must be used for the initial
22 deficiency analysis of state highways. However, where it can be shown that it is
23 infeasible or impractical to meet the targets, local governments may work with ODOT to
24 consider and evaluate alternatives to the mobility targets in Tables 6 and 7. Any variance
25 from the targets in Tables 6 and 7 will require OTC adoption. Increasingly, urban and
26 urbanizing areas are facing traffic and land use pressures due to population growth, aging
27 infrastructure, and reduced revenues for roadway and related infrastructure projects. In
28 response to state funding constraints and the need to balance multiple objectives, system
29 management solutions and enhancement of alternative modes of travel, rather than major
30 highway improvements, are increasingly relied upon to address congestion issues.
31 Developing mobility targets that are tailored to specific facility needs, consistent with
32 local expectations, values and land use context will need to be part of the solution for
33 some highway locations. Furthermore, certain urban areas may need area-specific targets
34 to better balance state and local policies pertaining to land use and economic
35 development. Examples where conditions may not match state mobility targets include
36 metropolitan areas, STAs, areas with high seasonal traffic, and areas constrained by the
37 existing built or natural environment.
38

39 Alternatives to the mobility targets and methodologies in the tables must be adopted
40 through an amendment to the OHP. The OTC must adopt the new targets supported by
41 findings that explain and justify the supporting methodology.
42

43 Policy 1F is not the only transportation policy that influences how the state assesses the
44 adequacy of a highway facility and vehicle mobility is not the only objective. Facilitating
45 state, regional and local economic development, enhancing livability for Oregon's
46 communities, and encouraging multiple modes are also important policy areas that guide

1 state transportation investment and planning. Policy 1B recognizes that the state will
2 coordinate land use and transportation decisions to efficiently use public infrastructure
3 investments to enhance economic competitiveness, livability and other objectives.
4 Economic viability considerations help define when to make major transportation
5 investments (Policy 1G). Goal 4, Travel Alternatives, articulates the state’s goal to
6 maintain a well-coordinated and integrated multimodal system that accommodates
7 efficient inter-modal connections for people and freight and promotes appropriate multi-
8 modal choices. Making decisions about the appropriate level of mobility for any given
9 part of the statewide highway system must be balanced by these, and other relevant OTP
10 and OHP policies.

11
12
13 **Policy 1F: Highway Mobility Policy**

14
15 *It is the policy of the State of Oregon to maintain acceptable and reliable levels of*
16 *mobility on the state highway system, consistent with the expectations for each facility*
17 *type, location and functional objectives. Highway mobility targets will be the initial tool*
18 *to identify deficiencies and consider solutions for vehicular mobility on the state system.*
19 *Specifically, mobility targets shall be used for:*

- 20
21
 - *Identifying state highway mobility performance expectations for planning and*
22 *plan implementation;*
 - *Evaluating the impacts on state highways of amendments to transportation plans,*
23 *acknowledged comprehensive plans and land use regulations pursuant to the*
24 *Transportation Planning Rule (OAR 660-12-0060); and*
 - *Guiding operational decisions such as managing access and traffic control*
25 *systems to maintain acceptable highway performance.*

26
27
28
29
30
31 *Where it is infeasible or impractical to meet the mobility targets, acceptable and reliable*
32 *levels of mobility for a specific facility, corridor or area will be determined through an*
33 *efficient, collaborative process between ODOT and the local jurisdiction(s) with land use*
34 *authority. The resulting mobility targets will reflect the balance between relevant*
35 *objectives related to land use, economic development, social equity, and mobility and*
36 *safety for all modes of transportation. Alternative mobility targets for the specific facility*
37 *shall be adopted by the OTC as part of the OHP.*

38
39 *OTC adoption of alternative mobility targets through system and facility plans should be*
40 *accompanied by acknowledgement in local policy that state highway improvements to*
41 *further reduce congestion and improve traffic mobility issues in the subject area are not*
42 *expected.*

43
44 *Traffic mobility exemptions in compliance with the TPR do not obligate state highway*
45 *improvements that further reduce congestion and improve traffic mobility issues in the*
46 *subject area.*

1 ***Action 1F.1***

2
3 Mobility targets are the measure by which the state assesses the existing or forecasted
4 operational conditions of a facility and, as such, are a key component ODOT uses to
5 determine the need for or feasibility of providing highway or other transportation system
6 improvements. These mobility targets are shown in Table 6 and Table 7. For purposes of
7 assessing state highway performance:

- 8
9 • Use the mobility targets below and in Table 6 when initially assessing all state
10 highway sections located outside of the Portland metropolitan area urban growth
11 boundary.
- 12
13 • Use the mobility targets below and in Table 7 when initially assessing all state
14 highway sections located within the Portland metropolitan area urban growth
15 boundary.
- 16
17 • For highways segments where there are no intersections, achieving the volume to
18 capacity ratios in Tables 6 and 7 for either direction of travel on the highway
19 demonstrates that state mobility targets are being met.
- 20
21 • For unsignalized intersections, achieving the volume to capacity ratios in Tables 6
22 and 7 for the state highway approaches indicates that state mobility targets are
23 being met. In order to maintain safe operation of the intersection, non-state
24 highway approaches are expected to meet or not to exceed the volume to capacity
25 ratios for District/Local Interest Roads in Table 6, except within the Portland
26 metropolitan area UGB where non-state highway approaches are expected to meet
27 or not to exceed a v/c of 0.99.
- 28
29 • At signalized intersections other than interchange ramp terminals (see below), the
30 overall intersection v/c ratio is expected to meet or not to exceed the volume to
31 capacity ratios in Tables 6 and 7. Where Tables 6 and 7 v/c ratios differ by legs of
32 the intersection, the more restrictive of the volume to capacity ratios in the tables
33 shall apply. Where a state highway intersects with a local road or street, the
34 volume to capacity ratio for the state highway shall apply.
- 35
36 • Although an interchange serves both the mainline and the crossroad to which it
37 connects, it is important that the interchange be managed to maintain safe and
38 efficient operation of the mainline through the interchange area. The main
39 objective is to avoid the formation of traffic queues on off-ramps which back up
40 into the portions of the ramps needed for safe deceleration from mainline speeds
41 or onto the mainline itself. This is a significant traffic safety concern. The primary
42 cause of traffic queuing at off-ramps is inadequate capacity at the intersections of
43 the ramps with the crossroad. These intersections are referred to as ramp
44 terminals. In many instances where ramp terminals connect with another state
45 highway, the mobility target for the connecting highway will generally signify
46 that traffic backups onto the mainline can be avoided. However, in some instances

1 where the crossroad is another state highway or a local road, the mobility target
2 will not be a good indicator of possible future queuing problems. Therefore, the
3 better indication is a maximum volume to capacity ratio for the ramp terminals of
4 interchange ramps that is the more restrictive volume to capacity ratio for the
5 crossroad, or 0.85.
6

- 7 • At an interchange within an urban area the mobility target used may be increased
8 to as much as 0.90 v/c, but no higher than the target for the crossroad, if:
9
 - 10 1. It can be determined, with a probability equal to or greater than 95
11 percent, that vehicle queues would not extend onto the mainline or into the
12 portion of the ramp needed to accommodate deceleration from mainline
13 speed; and
 - 14 2. An adopted Interchange Area Management Plan (IAMP) is present, or
15 through an IAMP adoption process, which must be approved by the OTC.
16
- 17 • Because the ramps serve as an area where vehicles accelerate or decelerate to or
18 from mainline speeds, the mobility target for the interchange ramps exclusive of
19 the crossroad terminals is the same as that for the mainline. Metered on-ramps,
20 where entering traffic is managed to maintain efficient operation of the mainline
21 through the interchange area, may allow for greater volume to capacity ratios.
22
23

24 ***Action 1F.2***

- 25 • Apply mobility targets over at least a 20-year planning horizon when developing
26 state, regional or local transportation system plans, including ODOT's corridor
27 plans.
28
- 29 • When evaluating highway mobility for amendments to transportation system
30 plans, acknowledged comprehensive plans and land use regulations, use the
31 planning horizons in adopted local and regional transportation system plans or a
32 planning horizon of 15 years from the proposed date of amendment adoption,
33 whichever is greater. To determine the effect that an amendment to an
34 acknowledged comprehensive plan or land use regulation has on a state facility,
35 the capacity analysis shall include the forecasted growth of traffic on the state
36 highway due to regional and intercity travel and consistent with levels of planned
37 development according to the applicable acknowledged comprehensive plan over
38 the planning period. Planned development, for the purposes of this policy, means
39 the amount of population and employment growth and associated travel
40 anticipated by the community's acknowledged comprehensive plan over the
41 planning period. The OTC encourages communities to consider and adopt land
42 use plan amendments that would reallocate expected population and employment
43 growth to designated community centers as a means to help create conditions that
44 increase the use of transit and bicycles, encourage pedestrian activity, reduce
45

1 reliance on single occupant vehicle travel and minimize local traffic on state
2 highways.

3

4 ***Action 1F.3***

5

6 In the development of transportation system plans or ODOT facility plans, where it is
7 infeasible or impractical to meet the mobility targets in Table 6 or Table 7, or those
8 otherwise approved by the Commission, ODOT and local jurisdictions may explore
9 different target levels, methodologies and measures for assessing mobility and consider
10 adopting alternative mobility targets for the facility. While v/c remains the initial
11 methodology to measure system performance, measures other than those based on v/c
12 may be developed through a multi-modal transportation system planning process that
13 seeks to balance overall transportation system efficiency with multiple objectives of the
14 area being addressed.

15

16 Examples of where state mobility targets may not match local expectations for a specific
17 facility or may not reflect the surrounding land use, environmental or financial conditions
18 include:

19

- 20 • Metropolitan areas or portions thereof where mobility expectations cannot be
21 achieved and where they are in conflict with an adopted integrated land use and
22 transportation plan for promoting compact development, reducing the use of
23 automobiles and increasing the use of other modes of transportation, promoting
24 efficient use of transportation infrastructure, improving air quality, and supporting
25 greenhouse gas reduction objectives;
- 26
- 27 • When financial considerations or limitations preclude the opportunity to provide a
28 planned system improvement within the planning horizon;
- 29
- 30 • When other locally adopted policies must be balanced with vehicular mobility and
31 it can be shown that these policies are consistent with the broader goals and
32 objectives of OTP and OHP policy;
- 33
- 34 • Facilities with high seasonal traffic;
- 35
- 36 • Special Transportation Areas; and
- 37
- 38 • Areas where severe environmental or land use constraints¹³ make infeasible or
39 impractical the transportation improvements necessary to accommodate planned
40 land uses or to accommodate comprehensive plan changes that carry out the Land
41 Use and Transportation Policy (1B).

42

43 ¹³ Examples of severe environmental and land use constraints include, but are not limited to, endangered
44 species, sensitive wetlands, areas with severe or unstable slopes, river or bay crossings, and historic
45 districts.

46

1 Any proposed mobility target that deviates from the mobility targets in Table 6 or Table
2 7, or those otherwise approved by the Commission, shall be clear and objective and shall
3 provide standardized procedures to ensure consistent application of the selected measure.
4 The alternative mobility target(s) shall be adopted by the OTC as an amendment to the
5 OHP.

6
7 The OTC has sole authority to adopt mobility targets for state highways. It will be
8 necessary for affected local jurisdictions to agree to and acknowledge the alternative
9 mobility target for the state highway facility as part of a local transportation system plan
10 and regional plan (MPO) as applicable. Findings shall demonstrate why the particular
11 mobility target is necessary, including the finding that it is infeasible or impractical to
12 meet the mobility targets in Table 6 or Table 7, or those otherwise approved by the
13 Commission.

14
15 If alternative targets are needed but cannot be established through the system planning
16 process prior to adoption of a new or updated TSP, they should be identified as necessary
17 and committed to as a future refinement plan work item with an associated timeframe for
18 completion and adoption. In this case, the mobility targets in Table 6 or Table 7, or those
19 otherwise approved by the Commission, shall continue to apply until the alternative
20 mobility targets are formally adopted by the OTC.

21
22 Modifications to the mobility targets could include changing the hour measured from the
23 30th highest hour, using multiple hour measures, or considering weekday or seasonal
24 adjustments. Development of corridor or area mobility targets is also allowed. ODOT's
25 policy is to utilize a v/c based target and methodology as the initial measure, as this will
26 standardize and simplify implementation issues throughout the state. Where v/c-based
27 approaches may not meet all needs and objectives, development of alternative mobility
28 targets utilizing non v-c-based measures, may also be pursued.

29
30 In support of establishing the alternative mobility target, the plan shall include feasible
31 actions for:

- 32
- 33 • Providing a network of local streets, collectors and arterials to relieve traffic
34 demand on state highways and to provide convenient pedestrian and bicycle
35 ways;
 - 36
 - 37 • Managing access and traffic operations to minimize traffic accidents, avoid traffic
38 backups on ramps, accommodate freight vehicles and make the most efficient use
39 of existing and planned highway capacity;
 - 40
 - 41 • Managing traffic demand and incorporating transportation system management
42 tools and information, where feasible, to manage peak hour traffic loads on state
43 highways;
 - 44
 - 45 • Providing and enhancing multiple modes of transportation; and
 - 46

- Managing land use to limit vehicular demand on state highways consistent with Policy 1B (Land Use and Transportation Policy).

The plan shall include a financially feasible implementation program and shall demonstrate that the proposed mobility target(s) are consistent with and support locally adopted land use, economic development, and multimodal transportation policy and objectives. In addition, the plan shall demonstrate strong local commitment, through adopted policy and implementation strategies, to carry out the identified improvements and other actions.

ODOT understands that in certain areas of the state, achieving the established mobility targets will be difficult and that regional and local policies must be balanced with transportation system performance. ODOT is committed to work with MPOs and local jurisdictions on system-level analysis of alternative mobility targets and to participate in public policy-level discussions where balancing mobility and other regional and community objectives can be adequately addressed.

In developing and applying alternative mobility targets and methodologies for facilities throughout the state, ODOT will consider tools and methods that have been successfully used previously for a particular facility and/or within a specific metropolitan area or region. Specific mobility targets may vary from one community or area to another depending on local circumstances. It is the objective of this policy to maintain consistency in the selection and application of analysis and implementation methodologies over time as they are applied to a specific facility or to a system of related facilities within a defined community or region.

ODOT will provide guidance documents and will work with local jurisdictions and others to apply best practices that streamline development of alternative mobility targets.

Action 1F.4

Alternative mobility targets may also be developed for facilities where an investment has been or is planned to be made which provides significantly more capacity than is needed to serve the forecasted traffic demand based on the existing adopted local comprehensive plan and it is possible to preserve that excess capacity for traffic growth beyond the established planning horizon or traffic growth resulting from local legislative plan amendments or plan amendments associated with OAR 731-017.

Action 1F.5

For purposes of evaluating amendments to transportation system plans, acknowledged comprehensive plans and land use regulations subject to OAR 660-12-0060, in situations where the volume to capacity ratio or alternative mobility target for a highway segment, intersection or interchange is above the mobility targets in Table 6 or Table 7, or those otherwise approved by the Commission, and transportation improvements are not planned within the planning horizon to bring performance to the established target, the

1 mobility target is to avoid further degradation. If an amendment to a transportation
2 system plan, acknowledged comprehensive plan or land use regulation increases the
3 volume to capacity ratio further, or degrades the performance of an adopted mobility
4 target, it will significantly affect the facility unless addressed through the language below
5 regarding determination of a small increase in traffic. In addition to the capacity
6 increasing improvements that may be required as a condition of approval, other
7 performance improving actions to consider include, but are not limited to:

- 8
- 9 • System connectivity improvements for vehicles, bicycles and pedestrians.
- 10
- 11 • Transportation demand management (TDM) methods to reduce the need for
12 additional capacity.
- 13
- 14 • Multi-modal (bicycle, pedestrian, transit) opportunities to reduce vehicle demand.
- 15
- 16 • Operational improvements to maximize use of the existing system.
- 17
- 18 • Land use techniques such as trip caps / budgets to manage trip generation.
- 19

20 In applying “avoid further degradation” for state highway facilities already operating
21 above the mobility targets in Table 6 or Table 7 or those otherwise approved by the
22 Commission, a small increase in traffic does not cause “further degradation” of the
23 facility.

24

25 The threshold for a small increase in traffic between the existing plan and the proposed
26 amendment is defined in terms of the increase in average daily trip volumes as follows:

- 27
- 28 • Any proposed amendment that does not increase the average daily trips by more
29 than 400.
- 30
- 31 • Any proposed amendment that increases the average daily trips by more than 400
32 but less than 1001 for state facilities where:
 - 33 ○ The annual average daily traffic is less than 5,000 for a two-lane highway
 - 34 ○ The annual average daily traffic is less than 15,000 for a three-lane
35 highway
 - 36 ○ The annual average daily traffic is less than 10,000 for a four-lane
37 highway
 - 38 ○ The annual average daily traffic is less than 25,000 for a five-lane
39 highway
 - 40
- 41 • If the increase in traffic between the existing plan and the proposed amendment is
42 more than 1000 average daily trips, then it is not considered a small increase in
43 traffic and the amendment causes further degradation of the facility and would
44 follow existing processes for resolution.
- 45

1 In applying OHP mobility targets to analyze mitigation, ODOT recognizes that there are
2 many variables and levels of uncertainty in calculating volume-to-capacity ratios,
3 particularly over the planning horizon. After negotiating reasonable levels of mitigation
4 for actions required under OAR 660-012-0060, ODOT considers calculated values for v/c
5 ratios that are within 0.03 of the adopted target in the OHP to be considered in
6 compliance with the target. It is not the intent of the agency to consider variation within
7 modest levels of uncertainty in violation of mobility targets for reasonable mitigation.
8 The specific mobility target still applies for determining significant affect under OAR
9 660-012-0060.

10
11 ***Action 1F.6***

12
13 When making recommendations to local governments about development permit
14 applications and potential actions for mitigation related to local development proposals
15 and criteria consider and balance the following:

- 16
17 • OHP mobility targets;
- 18
19 • Community livability objectives;
- 20
21 • State and local economic development objectives;
- 22
23 • Safety for all modes of travel; and
- 24
25 • Opportunities to meet mobility needs for all modes of travel.

26
27 Encourage local jurisdictions to consider OHP mobility targets when preparing local
28 development ordinances and approval criteria to evaluate proposed development
29 applications that do not trigger Section 660-012-0060 of the TPR.

30
31 ***Action 1F.7***

32
33 Consider OHP mobility targets as guidance to ODOT's highway access management
34 program. Balance economic development objectives of properties abutting state highways
35 with transportation safety and access management objectives of state highways in a
36 manner consistent with local transportation system plans and the land uses permitted in
37 acknowledged local comprehensive plans.

38
39 When evaluating OHP mobility targets in access management decisions for unsignalized
40 intersections consider the following:

- 41
42 • The highest priority for OHP mobility targets in guiding access management
43 practices is to address the state highway through traffic movements and the
44 movements exiting the state highway facility.

- When evaluating traffic movements from an approach entering or crossing a state highway, the priority is to consider the safety of the movements. While a v/c ratio for a specific movement greater than 1.0 is an indication of a capacity problem, it does not necessarily mean the traffic movement is unsafe. Apply engineering practices and disciplines in the analysis and design of highway approaches to ensure traffic movements meet safety objectives for the program.

Private approaches at signalized intersections will be treated as all other signalized intersections under OHP Action 1F.1.

Action 1F.8

Consider OHP mobility targets when implementing operational improvements such as traffic signals and ITS improvements on the state highway system. The OHP mobility targets are meant to be used as a guide to compare the relative benefits of potential operational solutions rather than as a firm target to be met. The main goal of operational projects is to improve system performance - which may include mobility, safety or other factors - from current or projected conditions.

Action 1F.9

Enhance coordination and consistency between planning and project design decisions whenever possible. Ensure that project development processes and design decisions take into account statewide mobility and economic objectives, including design standards, while balancing community mobility, livability and economic development objectives and expectations. Consider practical design principles that take a systematic approach to transportation solutions in planning and project development processes. Practical design principles strive to deliver the broadest benefits to the transportation system possible within expected resources.

Table 6: Volume to Capacity Ratio Targets for Peak Hour Operating Conditions

VOLUME TO CAPACITY RATIO TARGETS OUTSIDE METRO ^{A,B,C}							
Highway Category	Inside Urban Growth Boundary					Outside Urban Growth Boundary	
	STA ^D	MPO	Non-MPO Outside of STAs where non-freeway posted speed ≤ 35 mph, or a Designated UBA	Non-MPO outside of STAs where non-freeway speed > 35 mph, but <45 mph	Non-MPO where non-freeway speed limit ≥ 45 mph	Unincorporated Communities ^E	Rural Lands
Interstate Highways	N/A	0.85	N/A	N/A	0.80	0.80	0.75
Statewide Expressways	N/A	0.85	0.80	0.80	0.80	0.80	0.75
Freight Route on a Statewide Highway	0.90	0.85	0.85	0.80	0.80	0.80	0.75
Statewide (not a Freight Route)	0.95	0.90	0.90	0.85	0.80	0.80	0.80
Freight Route on a Regional or District Highway	0.95	0.90	0.90	0.85	0.85	0.80	0.80
Expressway on a Regional or District Highway	N/A	0.90	N/A	0.85	0.85	0.80	0.80
Regional Highways	1.0	0.95	0.90	0.85	0.85	0.85	0.80
District / Local Interest Roads	1.0	0.95	0.95	0.90	0.90	0.85	0.85

Notes for Table 6

^A For the purposes of this policy, the peak hour shall be the 30th highest annual hour. This approximates weekday peak hour traffic in larger urban areas. Alternatives to the 30th highest annual hour may be considered and established through alternative mobility target processes.

^B Highway design requirements are addressed in the Highway Design Manual (HDM).

^C See Action 1F.1 for additional technical details.

^D Interstates and Expressways shall not be identified as Special Transportation Areas.

^E For unincorporated communities inside MPO boundaries, MPO mobility targets shall apply.

Table 7: Volume to Capacity Ratio Targets within Portland Metropolitan Region

VOLUME TO CAPACITY RATIO TARGETS INSIDE METRO ^A		
Location	Target	
	1 st hour	2 nd hour
Central City Regional Centers Town Centers Main Streets Station Communities	1.1	.99
Corridors ^B Industrial Areas Intermodal Facilities Employment Areas Inner Neighborhoods Outer Neighborhoods	.99	.99
I-84 (from I-5 to I-205) ^C	1.1	.99
I-5 North ^C (from Marquam Bridge to Interstate Bridge)	1.1	.99
OR 99E ^C (from Lincoln Street to OR 224 Interchange)	1.1	.99
US 26 ^C (from I-405 to Sylvan Interchange)	1.1	.99
I-405 ^C (I-5 South to I-5 North)	1.1	.99
Other Principal Arterial Routes I-205 ^C I-84 (east of I-205) I-5 (Marquam Bridge to Wilsonville) ^C OR 217 ^C US 26 (west of Sylvan) US 30 OR 8 (Murray Blvd to Brookwood Avenue) ^C OR 224 ^C OR 47 OR 213 242 nd /US26 in Gresham	.99	.99
Areas of Special Concern^D Beaverton Regional Center Highway 99W (I-5 to Tualatin Road)	1.0 .95	D

Notes for Table 7: Maximum volume to capacity ratios for two hour peak operating conditions through a 20-year horizon for state highway sections within the Portland metropolitan area urban growth boundary.

^A See Action 1F.1 for additional technical details.

^B Corridors that are also state highways are 99W, Sandy Boulevard, Powell Boulevard, 82nd Avenue, North Portland Road, North Denver Street, Lombard Street, Hall Boulevard, Farmington Road, Canyon Road, Beaverton-Hillsdale Highway, Tualatin Valley Highway (from Hall Boulevard to Cedar Hills Boulevard and from Brookwood Street to E Street in Forest Grove), Scholls Ferry Road, 99E (from Milwaukie to Oregon City and Highway 43).

^C Thresholds shown are for interim purposes only; refinement plans for these corridors are required in Metro's Regional Transportation Plan and will include a recommended motor vehicle performance policy for each corridor.

^D Areas with this designation are planned for mixed use development, but are also characterized by physical, environmental or other constraints that limit the range of acceptable transportation solutions for addressing a level-of-service need, but where alternative routes for regional through traffic are provided. In these areas, substitute performance measures are allowed by OAR.660.012.0060(2)(d). Provisions for determining the alternative performance measures are included in Section 6.7.7 of the 2000 RTP. The OHP mobility target for state highways in these areas applies until the alternative performance targets are adopted in local plans and approved by the Oregon Transportation Commission.

Table 6: ~~Maximum~~ Volume to Capacity Ratios Targets for Peak Hour Operating Conditions

MAXIMUM VOLUME TO CAPACITY RATIOS <u>TARGETS</u> OUTSIDE METRO^{A,B,C,17}							
Highway Category	Inside Urban Growth Boundary					Outside Urban Growth Boundary	
	STA ^D	MPO	Non-MPO Outside of STAs where non-freeway posted speed \leq 35 mph, or a Designated UBA	Non-MPO outside of STAs where non-freeway speed $>$ 35 mph, <u>but $<$45 mph</u>	Non-MPO where non-freeway speed limit \geq 45 mph	Unincorporated Communities ^E	Rural Lands
Interstate Highways ^F	N/A	0.85 0.80	N/A	N/A	0.80 0.70	0.80 0.70	0.75 0.70
Statewide Expressways	N/A	0.85 0.80	0.80 0.70	0.80 0.70	0.80 0.70	0.80 0.70	0.75 0.70
Freight Route on a Statewide Highway	0.90 0.85	0.85 0.80	0.85 0.80	0.80 0.75	0.80 0.70	0.80 0.70	0.75 0.70
Statewide (not a Freight Route)	0.95 0.90	0.90 0.85	0.90 0.85	0.85 0.80	0.80 0.75	0.80 0.75	0.80 0.70
Freight Route on a Regional or District Highway	0.95 0.90	0.90 0.85	0.90 0.85	0.85 0.80	0.85 0.75	0.80 0.75	0.80 0.70
Expressway on a Regional or District Highway	N/A	0.90 0.85	N/A	0.85 0.80	0.85 0.75	0.80 0.75	0.80 0.70
Regional Highways	1.0 0.95	0.95 0.85	0.90 0.85	0.85 0.80	0.85 0.75	0.85 0.75	0.80 0.70
District / Local Interest Roads	1.0 0.95	0.95 0.90	0.95 0.90	0.90 0.85	0.90 0.80	0.85 0.80	0.85 0.75

Notes for Table 6

^A OHP Amendment 00-04 established alternative mobility standards for Portland Metro and the Rogue Valley MPO (RVMP). For Metro, see Table 7, below. For RVMP see note B, below and the OHP amendment establishing the RVMP alternative standards located on the web at:

<http://www.oregon.gov/ODOT/TD/TP/docs/orhwyplan/registry/0004.pdf>. Where there is a conflict between the Table 6 standards and the established alternative mobility standards, the more tolerant standard (higher v/c ratio) applies.

^B The maximum volume to capacity ratio at the Northbound and Southbound off-ramps of the South Medford Interchange is $>$ 1.0 for four hours daily until the new South Medford Interchange is constructed. The maximum v/c ratio at Highway 99 at Stewart Avenue is $>$ 1.0 for two hours daily. When the new interchange is completed, the mobility standards for the ramps will be those in Table 6.

^{CA} For the purposes of this policy, the peak hour shall be the 30th highest annual hour. This approximates weekday peak hour traffic in larger urban areas. Alternatives to the 30th highest annual hour may be considered and established through alternative mobility target processes.

^B Highway design requirements are addressed in the Highway Design Manual (HDM).

¹⁷ Table 6 was replaced in August 2005, part of OHP Amendment 05-16.

^C See Action 1F.1 for additional technical details.

^D Interstates and Expressways shall not be identified as Special Transportation Areas.

^E For unincorporated communities inside MPO boundaries, MPO mobility targets shall apply.

^E ~~National Highway System (NHS) highway design requirements are addressed in the Highway Design Manual (HDM).~~

Table 7: ~~Maximum~~ Volume to Capacity Ratios ~~Targets~~ within Portland Metropolitan Region

MAXIMUM VOLUME TO CAPACITY RATIOS TARGETS INSIDE METRO^A		
Location	Standard Target	
	1st hour	2nd hour
Central City Regional Centers Town Centers Main Streets Station Communities	1.1	.99
Corridors ^B Industrial Areas Intermodal Facilities Employment Areas Inner Neighborhoods Outer Neighborhoods	.99	.99
I-84 Banfield Freeway (from I-5 to I-205) ^C	1.1	.99
I-5 North ^C (from Marquam Bridge to Interstate Bridge)	1.1	.99
Highway OR 99E ^C (from Lincoln Street to OR Highway 224 Interchange)	1.1	.99
US 26 Sunset Highway ^C (from I-405 to Sylvan Interchange)	1.1	.99
I-405 Stadium Freeway ^C (from I-5 South to I-5 North)	1.1	.99
Other Principal Arterial Routes	.99	.99
I-205 ^C I-82-84 (east of I-205) I-5 (Marquam Bridge to Wilsonville) ^C OR Highway 217 ^C US 26 (west of Sylvan) US Highway 30 OR 8 Tualatin Valley Highway (Murray Cedar Hills Blvd to Brookwood Avenue) ^C OR Highway 224 ^C OR Highway 47 OR Highway 213 242 nd /US26 in Gresham		
Areas of Special Concern^D		
Beaverton Regional Center	1.0	D
Highway 99W (I-5 to Tualatin Road)	.95	

Notes for Table 7: Maximum volume to capacity ratios for two hour peak operating conditions through a 20-year horizon for state highway sections within the Portland metropolitan area urban growth boundary.

^A The volume to capacity ratios in the table are for the highest two consecutive hours of weekday traffic volumes. This is calculated by dividing the traffic volume for the average weekly two hour PM peak by twice the hourly capacity.

^A See Action 1F.1 for additional technical details.

^B Corridors that are also state highways are 99W, Sandy Boulevard, Powell Boulevard, 82nd Avenue, North Portland Road, North Denver Street, Lombard Street, Hall Boulevard, Farmington Road, Canyon Road, Beaverton-Hillsdale Highway, Tualatin Valley Highway (from Hall Boulevard to Cedar Hills Boulevard and from Brookwood Street to E Street in Forest Grove), Scholls Ferry Road, 99E (from Milwaukie to Oregon City and Highway 43).

^C Thresholds shown are for interim purposes only; refinement plans for these corridors are required in Metro's Regional Transportation Plan and will include a recommended motor vehicle performance policy for each corridor.

^D Areas with this designation are planned for mixed use development, but are also characterized by physical, environmental or other constraints that limit the range of acceptable transportation solutions for addressing a level-of-service need, but where alternative routes for regional through traffic are provided. In these areas, substitute performance measures are allowed by OAR.660.012.0060(2)(d). Provisions for determining the alternative performance measures are included in Section 6.7.7 of the

2000 RTP. The OHP mobility ~~standard~~ target for state highways in these areas applies until the alternative performance targets ~~measures~~ are adopted in local plans and approved by the Oregon Transportation Commission.

OHP Goal 6: Tolling and Congestion Pricing

Overview

Oregon's citizens have become accustomed to funding roads through fuel taxes and vehicle fees. While citizens may not like paying fuel taxes and vehicle fees, they generally understand how these mechanisms work, and have built their traveling behavior on the basis of this system. The system also implies that roads are seen as a "public good"; that is, roads are accessible to any citizen at any time and the cost of developing, operating and maintaining the system is borne by the population as a whole.

In Oregon, tolls have been limited to a few Columbia River bridges. The rationale for tolling bridges has been that they are extraordinarily expensive, vehicles have limited alternatives and tolls can be collected at one location.

Around the world, including the United States, tolling is seeing a resurgence. There are two main drivers: 1) bridges and highways are increasingly expensive to build with limited public appetite for tax increases; and 2) modern electronic tolling technology allows creative new tolling applications that not only raise money, but potentially enhance transportation system performance. Commensurate with this renewed interest, the Oregon Department of Transportation (ODOT) has undertaken a variety of tolling and congestion pricing studies supportive of the policies and strategies below.

The rapid and continuing improvement in tolling and in-vehicle navigation technology also has resulted in making the consideration of tolling in many cases a much more complex undertaking. First, there are now a variety of different policy objectives beyond the traditional financing of construction of a new road or bridge. Tolling can now be used to relieve congestion, improve the environment or enhance economic development. In fact, the number of possible objectives can be quite large, and in some cases, but not all, can be mutually reinforcing. Second, the number of different ways tolls can be applied also has expanded considerably. In addition to the new road or bridge, individual lanes, new or existing, can be priced in various ways to encourage certain behavior. Time-of-day (congestion) pricing can be applied to certain portions of an urban area or to select parts of the highway system. Finally, it is not always possible to separate tolling applied to new capacity,

new facilities, and existing capacity. For instance, there may be situations where existing capacity will need to be tolled to help pay for new capacity in the same corridor, or situations where new facilities provide new capacity while also replacing existing capacity.

The large number of possible combinations of policy objectives and tolling applications raises the question of whether, or how well, particular applications can achieve particular objectives. The answer is that the effectiveness of applications to objectives varies considerably, requiring each combination to be considered in itself. Further, for every tolling application there will be winners and losers. The winners may consider the toll a bargain, or at least feel indifferent between paying the toll and saving time. Those made worse off, either directly or indirectly, are likely to view tolling as an expensive or less affordable alternative to new capacity funded through higher taxes or fees. Even those made better off, however, may question tolling as the most appropriate or legitimate solution.

The indeterminate outcome of any application coupled with Oregon's very limited experience with tolling, implies that any proposed use of tolling of the state highway system should be preceded by a thorough analysis of likely effects and public acceptance. Oregon Revised Statutes, Chapter 383 grants the Oregon Transportation Commission authority over toll rates, and ODOT authority over tolling on state highways. Additional interstate bridge authority is granted to ODOT by Chapter 381. Therefore, the Oregon Transportation Commission considers it necessary to provide policy guidance for developing, evaluating and implementing tollway projects in Oregon in a manner consistent with Oregon statutes as well as existing Commission policies and the *Oregon Transportation Plan*.

Policy 6.1 – New Toll Facilities

Background

Most new highway capacity in the United States is not financed with toll revenues. Many projects are ill suited to tolling due to low traffic volumes, traffic diversion impacts or inadequate revenue generation. As one example, Truck-only toll lanes (TOT lanes) have little utility in Oregon because the state already allows longer-combination vehicles; hence the ability to improve productivity is limited. In addition, limited urban right-of-way, high

construction costs, environmental concerns and insufficient demand appear to ensure limited utility for TOT lanes even in urban areas.

Other projects seem very well suited to toll financing, and nationally the number of toll roads has increased significantly in recent years. Each project will have its own unique circumstances.

ODOT has well-established procedures within the Statewide Transportation Improvement Program (STIP) process for developing and funding projects. The Oregon Transportation Commission has managed this process in a manner intended to provide public assurance that once a project is undertaken, it will move forward in an appropriate way. The fact traffic volumes dictate few, if any, projects can be funded solely with toll receipts introduces the issue of how ODOT should financially manage projects that have the potential to be partially funded with toll receipts.

Policy 6.1 – New Toll Facilities

It is the policy of the State of Oregon to consider the use of tolling for financing the construction of new roads, bridges or dedicated lanes only if expected toll receipts will pay for an acceptable portion of project costs.

Action 6.1.1

Tolling projects providing new capacity need to be in compliance with other State policies and regional and local plans.

Action 6.1.2

In order to reflect the potential negative effects of traffic diverting around tolled facilities, project proposers will perform a benefit-cost analysis in a manner prescribed by ODOT¹ on all proposed toll projects to demonstrate overall societal benefits.

¹ Currently see, *Benefit-Cost Assessment Guidance for Evaluating Proposed Highway Tolling and Pricing Options for Oregon* (March 2010) <http://www.oregon.gov/ODOT/TD/TP/docs/LRPU/Benefit.pdf>.

Action 6.1.3

ODOT will only consider those toll projects ranked “high” under tolling parameters considered by ODOT.²

Action 6.1.4

Toll projects requesting statewide funds to supplement toll receipts must prepare and submit to ODOT a formal financing plan that includes debt service, operational, maintenance, and preservation expenses.³

Action 6.1.5

Proposed “premium service” high occupancy/toll (HOT) lanes must be expressly compared to high occupancy vehicle (HOV) lane(s) and “multi-class,” general purpose alternatives to ensure the overall best use of the limited additional capacity.

Policy 6.2 – Pricing Existing Capacity

Background

Applying tolls to existing roadways is likely to be viewed differently by the public than using tolls to finance new capacity. Our current financing system essentially treats roadways as “public goods.” Congested roadways, however, do not meet the classic definition of public goods as one person’s use can preclude or significantly limit the use by others at the same time. In addition, under many circumstances it is possible to charge for the use of roadways. This reality, experienced in many urban areas, has driven the renewed interest in congestion pricing of existing roadways.

Several problems have been seen to impede the application of time-of-day tolls, despite the efficiency benefits cited in economic theory. One, the public seems to prefer the existing approach, with the notable exception of pricing existing HOV lanes which has seen considerable success in a number

² Currently see, Table 4 in *Tolling White Paper #2 – Geographic and Situational Limits* (2009).

<http://www.oregon.gov/ODOT/TD/TP/docs/LRPU/twp2.pdf>

³ This is a separate requirement from the Federal requirement to have an annual financial plan for projects of over \$100 million.

of locales. A few major cities (London, Singapore, Stockholm) have successfully priced access to their cores. Most cities, however, have not opted to do the same. The reasons for this are varied and not well covered by existing research. Therefore, consideration of road pricing in Oregon cities will warrant careful study of both the effects – positive and negative –, consistency with other statutes and policies, and public reaction.

Policy 6.2 – Pricing Existing Capacity

It is the policy of the State of Oregon to consider the use of tolls, including time-of-day pricing, on existing, non-tolled state highways consistent with other Oregon Transportation Commission policies, state law, and federal statutes and planning regulations.

Action 6.2.1

A project that tolls the existing capacity of a previously non-tolled state highway must be included in relevant local and regional land use and transportation plans.

Action 6.2.2

The proposer of any tolling or pricing project is required to have a clear statement of public policy objectives against which the effectiveness of the proposal can be measured.

Action 6.2.3

The proposer of any tolling or pricing project is required to compare the proposal to a null, non-tolled alternative to ensure the effects of introducing tolls can be clearly demonstrated.

Action 6.2.4

The economic, social and environmental effects of any proposed tolling or pricing project will be analyzed by ODOT according to analytical procedures adopted by ODOT.⁴

⁴ Currently see, *Economic Assessment of Tolling Schemes for Congestion Reduction (March 2010)* <http://www.oregon.gov/ODOT/TD/TP/docs/LRPU/Economic.pdf> and *Benefit-Cost Assessment Guidance*

Action 6.2.5

The equity of any tolling or pricing proposal, particularly upon the transportation disadvantaged, will be examined by ODOT and will comply with federal statutes, rules and guidance.

Policy 6.3 – Consistent and Supportive Policy Objectives

Background

Roadway tolls may be levied for a variety of public policy objectives. The relative importance or degree of public acceptance of these objectives may vary in different locales and parts of the state. Similarly, a pricing program for a given purpose in one locale inadvertently may have undue negative effects on other parts of the state.

In addition, some potential policy objectives require tolls so high that facility throughput is reduced. This may be inconsistent with state statute.

It is unclear which policy objectives will be deemed the most important in future tolling or pricing proposals. It is clear, however, that attention may have to be given to the need for a degree of statewide consistency in policy objectives advanced through pricing proposals, as per Goal 7 of the Oregon Transportation Plan.

Policy 6.3 – Consistent and Supportive Policy Objectives

It is the policy of the State of Oregon to ensure motorists and its citizens have clear, consistent and coordinated objectives for any future highway tolling or pricing proposals, reflective of primary public concerns with the performance of the state highway system.

Action 6.3.1

Project proposers will review and document that their roadway tolling or pricing proposals are consistent with other tolling and congestion pricing policies, state and federal statutes and policies, and other tollway projects within the state.

Action 6.3.2

ODOT will analyze the likely transportation, economic, social, energy and environmental effects of any tolling or pricing project on parts of the state outside of the project area.

Action 6.3.3

ODOT will analyze the expected change, if implemented, in vehicle throughput due to any tolling or pricing proposal to ensure consistency with ORS 366.215.

Action 6.3.4

ODOT region staff and local government agencies shall work together to evaluate public understanding of and support for the principle likely objectives for road tolling and pricing applications.

Policy 6.4 – Toll Revenues

Background

The appropriate use of toll generated revenues may be dependent upon a number of factors. These include: a) the type of tolling application under consideration; b) the objective(s) for the application; c) the geographic scope of the application; d) the relative importance of the “user pays” principle; e) public attitudes on transportation system needs; and f) how best to off-set any negative effects of levying tolls. The most appropriate use of toll revenues for any given application may be constrained by federal and state statutes or procedures.

Policy 6.4 – Toll Revenues

The effectiveness, equity and overall utility of tolling projects can be affected by how net toll receipts are used. Multiple approaches to using revenue may need to be considered. It is the policy of the State of Oregon to treat the use of toll-generated revenue as an important evaluative component of any tolling proposal.

Action 6.4.1

For any proposed tolling or pricing project on a state highway, the project proposer will consider a range of potential uses for toll generated revenue, conditional upon the policy objective for the application, and ODOT will incorporate the resultant investments into the economic, social, energy and environmental analysis undertaken for the proposed project.

Action 6.4.2

ODOT region staff and local government agencies shall work together to assess public attitudes toward proposed toll revenue usage for any tolling or pricing project on a state highway as a means of meeting public needs.

Policy 6.5 — Tolling Technology and Systems

Background

The trend in the United States is for state-owned tolling systems to offer electronic toll collection in addition to toll booth cash collection. In contrast, modern toll facilities in other parts of the world now operate as all-electronic systems with no cash payment option at entry to the facilities. Potential toll payers without transponders or bank accounts, or who seek privacy, have options for electronic payment derived from cash payment at another location. Typically, a motorist can obtain a day pass at roadside kiosks or retail stores.

Most state-owned toll facilities in the United States that allow electronic toll collections operate as closed proprietary systems that are not interoperable with each other. As a result, state-owned toll facilities become bound to one provider and limited to the capabilities of that provider. Motorists using toll facilities in multiple states may have more than one transponder for

compliance. An alternative is to develop an integrated system based on common standards and an operating sub-system accessible by the marketplace where components performing the same function can be readily substituted or provided by multiple providers.

Policy 6.5 — Tolling Technology and Systems

When tolling state highways, it is the policy of the state of Oregon to implement tolling systems that:

- (1) Enable cash-based motorists ready access to all-electronic toll facilities while eliminating the need for cash payment at the point of entry;
- (2) Deploy technology that facilitates interoperability with tolling systems of neighboring states and allows evolution of fully functional, non-proprietary tolling systems.

Action 6.5.1

For any proposed tolling or pricing project on a state highway, ODOT shall develop tolling systems that rely on all-electronic collection mechanisms, and enable at least one manner of toll collection that allows a readily accessible electronic payment method for cash customers.

Action 6.5.2

For any proposed tolling or pricing project on a state highway, ODOT will develop applicable tolling technologies and systems that are based on common standards and an operating sub-system accessible by the marketplace where components performing the same function can be readily substituted or provided by multiple providers.

We would add the phrase from the draft tolling policies into OTP Goal 2, Capacity and Operational Efficiency, as a new strategy:

"Consider the use of toll revenue, including time-of-day pricing revenue, from existing state highways in a manner consistent with other Oregon Transportation Commission policies, state law, and federal statutes and planning regulations."

We would add this phrase from the draft tolling policies into OTP Goal 6, Funding Structure, as a new strategy:

"Consider the use of tolling for financing the construction of new roads, bridges or dedicated lanes only if expected toll receipts will pay for an acceptable portion of project costs."

Transit depends on safe and convenient pedestrian access

Every transit rider is a pedestrian. Whether walking or using a mobility device, all TriMet customers depend on being able to get to and from a stop safely and comfortably. Providing safe, convenient and attractive sidewalks, pedestrian crossings and transit stops is imperative to ensuring riders have a positive experience. As a result, TriMet and its regional partners are working collaboratively as part of the Pedestrian Network Analysis Project to develop an objective, data-driven system for prioritizing places around the region where pedestrian infrastructure investments will provide safer and more comfortable access to transit. This effort is designed to:



Wide sidewalks facilitate a safer pedestrian environment by creating a buffer from auto traffic and enhancing sightlines.

- **Prioritize safety:** Arterials are the most suitable type of roadway for transit service and often the only choice. There are usually many destinations along arterials and the roads are designed to handle large vehicles, like buses. However, from a pedestrian perspective arterials can be difficult to cross and uncomfortable, or even dangerous to walk along. This is particularly true when there are missing sidewalks, unprotected crossings, or very little buffer provided between fast moving traffic and pedestrians. This study first and foremost examines how to improve pedestrian safety.
- **Cost-effectively provide service:** It costs an average of \$29 per ride to provide LIFT paratransit service to people who are unable

to use more cost effective bus or rail service due to a lack of pedestrian access. Investments in sidewalks, protected crossings, traffic-calming and streetscaping are long-term fiscally prudent investments that help people maintain their independence by being able to access fixed route transit even as their mobility lessens over the years.

- **Foster environmental stewardship:** Improving access to transit enables people to meet more of their needs without driving and helps the region reduce its greenhouse gas emissions.
- **Create great places: People like to walk.** Creating engaging, easy, desirable places where people want to walk helps communities stay vibrant and attract private investment.



This Line 52-Farmington/185th bus stop is in project focus area No. 1. It lacks sidewalks, a buffer from 40 mph traffic and a direct protected crossing.

Benefits of a more pedestrian accessible transit system

An accessible transit system has many benefits:

- **Keeping people healthy:** The U.S. Centers for Disease Control and Prevention recommends adults get 30 minutes of moderate-intensity activity five days a week, such as walking. The median amount of time public transit users walk is 19 minutes.
- **Saving families money:** Transportation costs are often the second biggest expense in a family's budget. According to the American Automobile Association (AAA), the average annual cost of owning a car in 2010 was \$9,520. By comparison, a TriMet annual Adult All-Zone Pass costs \$968, just over 10 percent of the cost of owning a car.
- **Maintaining independence:** Public transportation provides travel options to people who do not want to, cannot afford to, or are unable to drive, like the very young and very old.

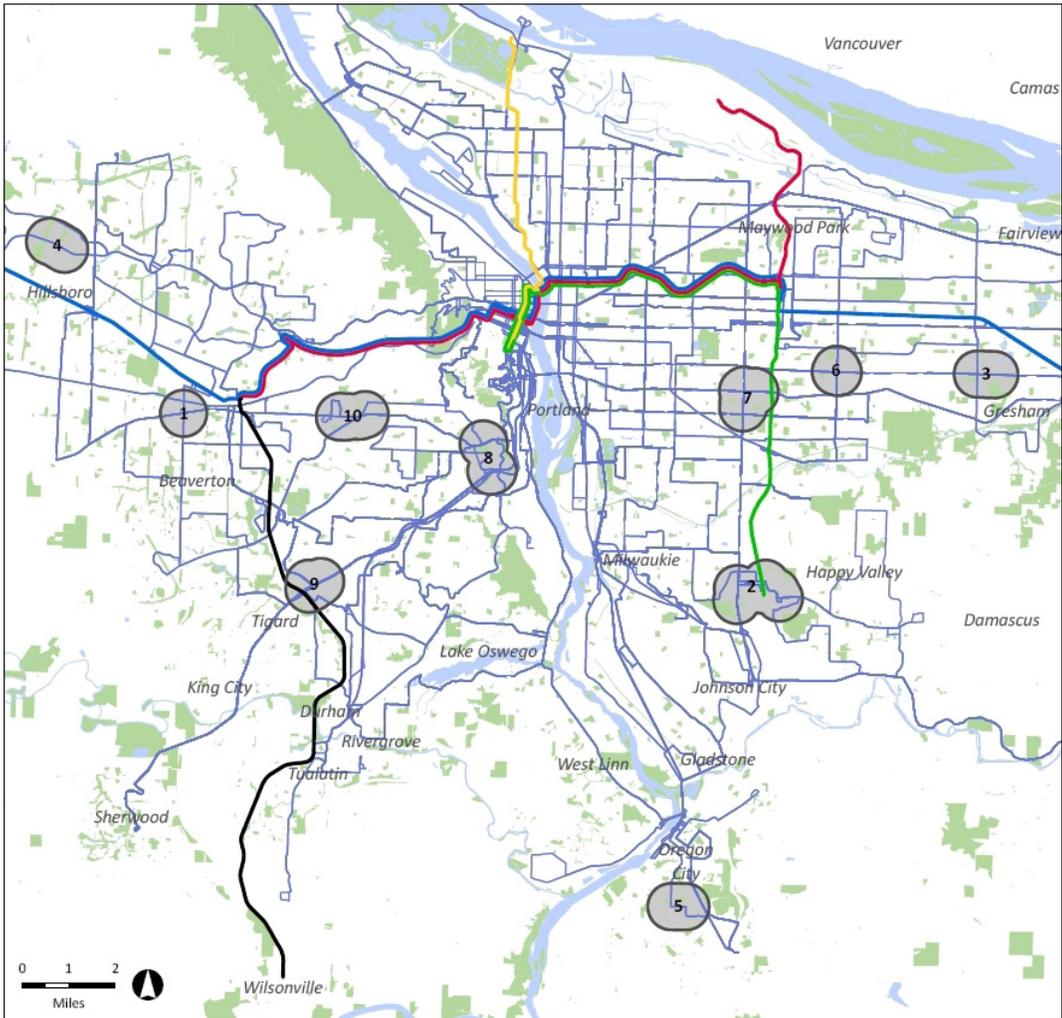
The Pedestrian Network Analysis Project

The Pedestrian Network Analysis Project identifies key locations within the Portland region where pedestrian investments will provide improved access to transit stops and have the strongest potential to improve pedestrian safety, both actual and perceived, and increase the number of people walking and using transit.

TriMet has more than 7,000 stops. Using Geographic Information Systems (GIS) data TriMet and its jurisdictional partners located areas near transit stops that exhibited the highest amount of opportunity and need. Sixty-six clusters of stops, encompassing roughly 600 stops were identified as high need/high opportunity areas. From these clusters, TriMet and its partners chose 10 key focus areas to place attention first*:

1	City of Beaverton	SW Farmington Rd. & Murray Blvd.
2	Clackamas County	Clackamas Town Center
3	City of Gresham	SE Division St & 182nd Ave.
4	City of Hillsboro	Cornell Rd. – Tanasbourne Area
5	City of Oregon City	Warner Milne Rd. – Red Soils Campus
6	City of Portland	SE Division & 122nd Ave.
7	City of Portland	SE Powell & 82nd Ave.
8	City of Portland	SW Bertha Blvd – Hillsdale Area
9	City of Tigard	Tigard WES Station
10	Washington County	Beaverton-Hillsdale Hwy & Scholls Ferry Rd.

*Numbers indicate location on map, and do not indicate project prioritization.



Pedestrian Access Network Project focus areas. Numbers correspond to the table on previous page.

Next steps

TriMet staff will walk each area, document existing conditions, and assess pedestrian needs near transit stops. The Pedestrian Network Analysis Project is expected to be complete by July 1, 2011.

After July, TriMet will continue to work with its partners to move pedestrian investments forward in the 10 focus areas and to generally promote ways communities can help make areas near transit stops safer, more convenient and more pleasant to walk.



Before and after photos show the bus stop and pedestrian improvements that were made outside a major grocery store on Highway 8 in Hillsboro.

More information

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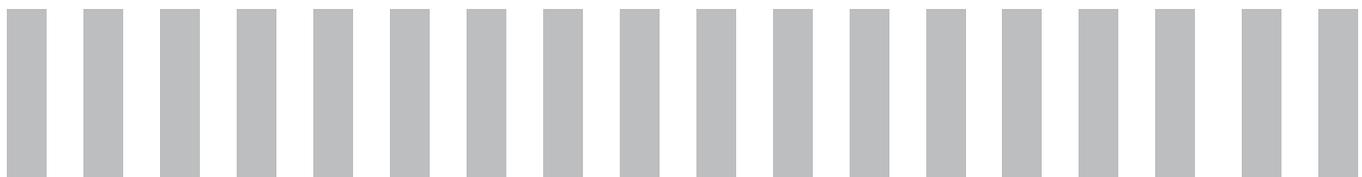
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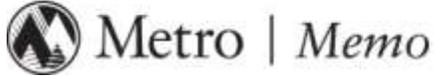
Pedestrian Network Analysis



*A safer, easier, more comfortable
walk to transit*



Materials following this page were distributed at the meeting.



Date: October 10, 2011
To: JPACT and Interested Parties
From: Andy Cotugno
Ted Leybold
Subject: TIGER III Evaluation

Introduction

The Federal Highway Administration is soliciting applications for a third round of TIGER funding through a competitive evaluation and allocation process. Five agencies in the Metro region intend to submit applications.

Metro, with input from citizen members of TPAC, has reviewed drafts of the five applications and provided an evaluation relative to the federal criteria. The TIGER III criteria focus on six primary and two secondary categories for evaluating the project applications. This evaluation was shared and modified with the input of TPAC citizen members. The result of this evaluation is attached, labeled as Exhibit A.

Findings

The analysis results showed that each of the project applications scored well in at least one of the primary categories and therefore are qualified for the program. However, some of the projects more completely addressed many of the criteria and thus are likely to compete better at the national level against projects from other regions.

Review and input from regional and state transportation agencies could be helpful in strengthening the applications relative to the federal criteria. Metro staff is available to coordinate with other regional and state agencies to help local agencies with their applications.

Next Steps

Options for JPACT action include:

1. Project endorsements: JPACT may wish to provide endorsement of one or more projects as the MPO policy board.
2. Consider early identification of future grant opportunities in order to identify competitive projects for those opportunities.

TIGER III Grant Application Proposals

Project	Applicant	Cost	Request	Threshold Requirements	Primary Selection Criteria						Secondary Selection Criteria		Primary Total	Secondary Total	Grand Total	
					Long Term Outcomes						Job Creation/	Innovation				Partnership
					Good Repair	Economic Competitiveness	Livability	Environmental Sustainability	Safety	Economic Stimulus						
Sellwood Bridge Replacement	Multnomah County	\$268,800,000	\$22,700,000	High	3	0.5	3	2	1.5	3	2	2	13	4	17	
Troutdale Reynolds Industrial Park Road Improvements	Port of Portland	\$35,167,416	\$10,967,893	Medium	2	3	1	1.5	1	1.5	2	2	10	4	14	
Highway 212 to Lawnfield, Phase 3 Connector and Sunrise Corridor Multiuse Paths	Clackamas County	\$210,500,000	\$10,500,000	High	1.5	3	1	1	0.5	1.5	1.5	0.5	8.5	2	10.5	
Oleson Road Realignment	Washington County	\$31,200,000	\$24,960,000	Medium	0.5	0.5	1	1.5	2.5	1	1	1	7	2	9	
US 26 Helvetia/Brookwood Interchange	Hillsboro	\$72,350,000	\$15,000,000	Medium	0	3	0.5	0.5	1.5	0.5	1	1	6	2	8	
Criteria:				<p>1. Project is eligible for federal funding.</p> <p>2. Receipt (or reasonably anticipated receipt) of all environmental approvals necessary for the project to proceed to construction on the timeline specified.</p> <p>3. Project included in state, metropolitan and local planning docs.</p> <p>4. Project expects to be ready to obligate all TIGER funds no later than June 30, 2013.</p> <p>5. Local matching funds to support 20 percent or more of the costs for the project are identified and committed.</p>	<p>Improve condition of existing facilities/system</p> <p>1. consistent w/ maint plans.</p> <p>2. poor maint condition threaten efficiency, mobility or economic development?</p> <p>3. approp capitalized and use of asset mgmt?</p> <p>4. long term O&M sustainably funded?</p>	<p>Contribute to long-term productivity of US economy.</p> <p>1. long term improvement to good & worker access</p> <p>2. increase efficiency through integration/use of all existing trans infrastructure</p>	<p>Further Partnership for Sustainable Communities principles, particularly:</p> <p>1. reduce ave. cost of user mobility</p> <p>2. improve existing trans choices (by enhancing modal connectivity, increase number of accomodated modes and/or reduce congestion) on existing facilities</p> <p>3. improve accessibility of disadvantaged pops.</p> <p>4. coordinated trans and land use planning - contribute significantly to broader travel mobility.</p>	<p>Promote environmentally sustainable trans system.</p> <p>1. Improve engergy efficiency (including scale of use of new facilities/TSMO reducing auto trips)</p> <p>2. environmental benefits or avoidance of adverse impacts</p>	<p>Improve Safety.</p> <p>1. Ability to reduce number, rate and consequences of crashes, injuries and fatalities</p>	<p>Creation or preservation of jobs.</p> <p>1. # and type of jobs created or preserved (emphasize efforts to support opportunities for low-income & disadvantaged pops)</p> <p>2. Project readiness (NEPA approvals, legislative approvals, in required planning documents, technical feasibility, financial feasibility)</p>	<p>1. Use of innovative technology.</p> <p>2. Use of innovative finance, contracting, project delivery, congestion management, safety management, asset management, O&M.</p>	<p>1. Jurisdiction & Stakeholder collaboration (involvement of non-Federal entities and non-Federal funds, use of TIGER to complete a finance package)</p> <p>2. Disciplinary Integration (support by non-transportation public agencies: e.g. public housing, economic development, historic pres., energy, etc.)</p>				
Description of how points are awarded:				<p>All project eligible and in relevant plans. Rating relative to: 1. Risk relative to becoming fully permitted through NEPA and local processes. 2. Funding sources are identified and committed.</p>	<p>Relative score based on maintenance (not capacity) condition of existing facilities and potential impact to economy and trans system if current facility conditions allowed to continue.</p>	<p>Score based on potential contribution to US economy and efficiency of complete trans system.</p>	<p>Judgement on scope of project importance (gap vs. degree of deficiency correction) and quality of non-auto facility provided (density of crossings, separation from autos, etc.) and land use context for facilities reflected in score. Scale of improved accessibility and service to underserved pops also reflected in score. All projects are coordinated with land use plans & basic public involvement per Oregon Comp Plan processes - only extraordinary efforts noted/scored.</p>	<p>Judgement on relative use and benefits of sustainable trans system investments is used. Projects that decrease trips by SOV's given priority.</p>	<p>Points awarded for design elements likely to address high/severe crash location issues without creating new safety issues and for providing adequate facilities for most vulnerable system users.</p>	<p>Relative points for direct construction related jobs. Higher score for NEPA approval, less points relative to degree of risk for potential delays to NEPA approvals.</p>	<p>Points awarded based on judgement of relative use of innovative techniques.</p>	<p>Judgement on scale of partnership effort utilized in score.</p> <p>Points awarded for TIGER completing a significant and committed finance package.</p>				
Summary of elements leading to the score applied to each project as provided in project application:																
Sellwood Bridge Replacement				NEPA ROD and committed funding (JTA, County VRF, local pass through of state gas tax).	Bridge replacement on structurally deficient, weight limited bridge w/ 30,000 vehicle trips.	Increase in trans system efficiency by re-opening bridge to truck/bus commute traffic.	Add bike & pedestrian on only river crossing along 8 miles of Willamette River, connecting to two regional trails and main street (large base of potential users), allows restoration of bus transit service and prepares for potential streetcar.	Reduced out of direction travel for freight and transit, increased use by ped/bike will reduce engergy use. New stormwater management.	Replacing occluded 4-foot sidewalk with complete bike lanes and sidewalks, and improving vehicle sight distance & turning radii deficiencies. No current crash data provided.	1,700 direct job years. Maintaining access during construction to support local businesses. NEPA ROD completed.	First use of Construction Manager / General Contractor project delivery. Developing Sustainability Plan that supports the County's and the City of Portland's Climate Action Plan. Award winning collaborative decision making process in planning phase.	Citizen Advisory and Public Stakeholder groups guiding project development. City, County, Region and State have provided resources to project on joint City-County-State facility. Innovative & extensive public outreach utilized. Completes large, leveraged finance package.				
Troutdale Reynolds Industrial Park Road Improvements				Pursuing CE, funding committed (JTA, local).	Bridge repair and verticle clearance to prevent future damage.Graham Rd reconstruction to support development and savings on lifecycle costs.	Supports development in an export corridor of national significance (could use more info on specific benefits expected with 235 acre development and netting out transfer of benefits from other US locations from new benefits). Increase system efficiency by reducing out-of-direction travel.	New 40-mile Loop and Graham Rd. ped/bike facilities provide worker access to industrial development.	Facilities support a brownfield redevelopment. Supporting development located near ocean ports and inland waterways, international air cargo (PDX), two Class 1 railroads, and two interstate highways in energy efficient location.	New ped/bike facilities on Graham Rd & 40-mile Loop trail increases safety for these modes. Reduced truck miles through congested facility reduces exposure.	382 direct job years. Pursuing CE - per environmental and permit coordination work completed to date.	Completed IAMP. Utilizing ITS elements (advance signal control, variable message signs) Green Road elements on Graham Rd.	Port of Portland, City of Troutdale and ODOT partnering on project. Project part of larger collaboration with many agencies and non-profits on development of the Industrial Park and Sandy River Connections project. Completes finance package.				
Highway 212 to Lawnfield, Phase 3 Connector and Sunrise Corridor Multiuse Paths				NEPA ROD, JTA funding committed.	Re-establishes truck access from Clack Industrial area to I-205 after Sunrise constructed by addressing substandard widths, radii and slopes on Lawnfield Rd.	Supports development of RSIA with 5,900 current jobs (forecasted to double by 2025) and several international manufactures.	6,000 feet of new multi-use path will provide new commuter options to and through area.	Reduction in energy use from new path users and feight efficient signal timing.	Would allow safer operation of truck traffic and provide sidewalks on Lawnfield. Paths would provide safe options for bike/ped through area.	105 direct job years (job years do not credit whole Sunrise project as project can stand alone). NEPA ROD completed.	Truck sensors tied to signal system. Implementing practical design approach utilizing life-cycle cost analysis.	County and ODOT working with local impacted constituents. Completes large finance package.				
Oleson Road Realignment				Pursuing CE, local funding being sought.	Flood control - need more info on how often. Replacing 80 pci surface - no info on how this threatens future conditions relative to regular maint.	Increase in trans system efficiency by increasing system reliability with reduced accidents, reoccurring congestion and risk of flooding.	Provides new bike lanes and provides or widens sidewalks.	Addition of bike lanes & improved sidewalks reduce energy use. Improvements to wetlands, stormwater mgmt & Fanno Creek environment.	Safety project to address high vehicle crash location. Reduces conflicts with better intersection spacing, access mgmt., improved predictability and sight distance. New bike lanes provides seperation from conflicts. Needs to provide ped crossing features as TriMet focus area.	138 direct job years. Identified by FHWA as CE - close-out documentation being prepared.	ITS elements to be included such as adaptive signal timing system hardware. Implementing techniques for longer lasting asphalt.	Development work partnership of local, regional and federal funds for integrated state/local facility. Primary project finance.				
US 26 Helvetia/Brookwood Interchange				Pursuing CE, JTA funding committed.	N/A - poor maintenance condition not an issue.	Supports development of RSIA, forecasted to accomodate 20,000 jobs and \$1.2 B private capital investment.	Adds bicycle and sidewalk facilities through interchange. Reduces congestion.	Reduction in energy use of new bike/ped facilities and reduced ideling due to congestion.	Would address documented safety issues associated with congested conditions.	98 direct job years (488/5 - method not annualizaed into job years). Pursuing CE, schedule anticipates NEPA ROD in Spring 2013.	Completed IAMP. Considering ODOT Solar Highway project installation as gateway treatment.	Hillsboro, Washington County, ODOT and Hillsboro Chamber of Commerce leading development of project. Primary source of project finance.				



Oregon

John A. Kitzhaber, MD, Governor

Department of Transportation
Office of the Director
1158 Chemeketa St. NE
Salem, OR 97301-2528

DATE: October 5, 2011

TO: Oregon Transportation Commission

FROM: Matthew L. Garrett
Director

SUBJECT: Agenda E – Support for TIGER III grant applications

Requested Action:

Approve a request for the Oregon Department of Transportation (ODOT) to serve as a partner/co-applicant on the Transportation Investment Generating Economic Recovery (TIGER) III grant applications, designate statewide priority projects for TIGER III funding, and delegate authority for ODOT staff to provide letters of support for meritorious TIGER III applications

Background:

In June the U.S. DOT announced the opportunity to apply for \$527 million in funding for surface transportation projects under the TIGER III program. Funding will be awarded on a competitive basis for projects that have a significant impact on the nation, a metropolitan area, or a region. In the first two rounds of TIGER funding, Oregon received a total of \$38.3 million. ODOT received \$2 million for an electric vehicle charging network, and the remainder went to three local government projects.

In response to this announcement, ODOT requested proposals for projects from its regions, divisions, and local governments. As it did in 2010 with the TIGER II program, the Oregon Transportation Commission (OTC) plans to provide support for both ODOT and local government applications in a number of ways in order to maximize Oregon's ability to compete for these funds:

- Applying for funding for ODOT projects;
- Offering letters of support for all meritorious projects submitted by local governments;
- Designating a small number of projects as statewide priorities regardless of mode or ownership;
- Approving ODOT serving as a partner for projects submitted by local governments that are on, adjacent to, or otherwise impact the state highway system or other areas of ODOT responsibility.

In September the OTC approved ODOT's request to apply for TIGER III funding for the Interstate 5 Woodburn Interchange and the Newberg-Dundee Bypass. ODOT now requests that the OTC approve ODOT's serving as a partner on a number of applications, designating statewide priorities, and delegating authority to ODOT staff to provide letters of support for meritorious applications.

Partnership with Local Governments

ODOT is limited to being the lead applicant on no more than three TIGER III applications, but ODOT can serve as a partner (essentially a co-applicant) on an unlimited number of projects. ODOT will serve as a partner on projects that are on, adjacent to, or otherwise impact the state highway system or other areas of ODOT responsibility. ODOT requests the OTC's approval to partner on the following applications submitted by local governments:

- Sellwood Bridge Replacement (Multnomah County)
- The Dalles Downtown/Riverfront Multimodal Connection (The Dalles)
- U.S. 20 Cascade Avenue Improvements (Sisters)
- Troutdale Reynolds Industrial Park Road Improvements (Port of Portland)
- Bike-Able Brookings (Brookings)
- Oregon 34 Park and Rides (Linn County)
- Oleson Road Realignment (Washington County)
- Oregon 212 to Lawnfield, Phase 3 Connector and Sunrise Corridor Multiuse Paths (Clackamas County)
- U.S. 26 Helvetia/Brookwood Interchange (Hillsboro)

All of these projects touch the state highway system, but the majority of work in each case will be on the local road system, so local governments are the most appropriate applicants.

Statewide Priority Projects

A four-person review team consisting of ODOT staff from Government Relations Section and the Active Transportation Section reviewed pre-application materials and scored projects against how well they met the explicit and implicit TIGER III criteria as well as the statewide importance of the projects. This review team incorporated input from staff in ODOT's modal divisions as well as input from Oregon Business Development Department on priorities for economic development.

Based on this review, ODOT recommends that the OTC designate the following projects as statewide priorities:

- Sellwood Bridge Replacement
- Troutdale Reynolds Industrial Park Road Improvements
- Interstate 5 Woodburn Interchange
- Newberg-Dundee Bypass
- U.S. 20 Cascade Avenue Improvements
- Lake County Railroad Rehabilitation

These projects represent strong candidates for TIGER III funding and are projects of statewide importance. This group includes a mix of urban and rural projects and also shows diversity among modes. Projects designated as statewide priorities will receive a special letter of support indicating this designation and can include this information in their applications. ODOT also plans to weigh in with U.S. DOT on the OTC's statewide priorities.

Letters of Support

The team that reviewed TIGER pre-application materials judged all projects submitted by local governments to be meritorious. ODOT requests that the OTC delegate authority to staff to provide letters of support to all meritorious projects, including those for which ODOT has received a formal request and any others that might request a letter before the October 31 application deadline.

Copies (w/attachments) to:

<i>Jerri Bohard</i>	<i>Joan Plank</i>	<i>Patrick Cooney</i>	<i>Clyde Saiki</i>
<i>Robin Freeman</i>	<i>Travis Brouwer</i>	<i>Troy Costales</i>	<i>Michael Ward</i>
<i>Sheila Lyons</i>	<i>Betsy Imholt</i>	<i>Jason Tell</i>	<i>Sonny Chickering</i>
<i>Frank Reading</i>	<i>Bob Bryant</i>	<i>Monte Grove</i>	

TIGER III Applications in Oregon

Title	Description	Lead Applicant	Cost	Request	Urban/Rural	ODOT Lead	Support ODOT Proposes to Provide		Letter
							ODOT Partner	Statewide Priority	
I-5 Woodburn Interchange	Reconstruct congested interchange to expand capacity, build park and ride facility and improve bike/ped facilities	ODOT	\$71,000,000	\$5,000,000	Rural	✓	✓	✓	✓
Newberg-Dundee Transportation Improvement Project	Build alternative route to OR 99W to provide congestion relief in Newberg and Dundee	ODOT	\$272,000,000	\$15,000,000	Rural	✓	✓	✓	✓
Sellwood Bridge Replacement	Replace Sellwood Bridge, including enhanced bike/ped facilities and reconstruct interchange with OR43	Multnomah County	\$268,800,000	\$22,700,000	Urban		✓	✓	✓
US 20 Cascade Avenue Improvements	Reconstruct pavement, improve sidewalks and other bicycle/pedestrian facilities, improve intersections and install streetscaping	Sisters	\$5,977,000	\$1,457,000	Rural		✓	✓	✓
Troutdale Reynolds Industrial Park Road Improvements	Make improvements to local roads to facilitate access to TRIP and improve bike/ped facilities	Port of Portland	\$35,167,416	\$10,967,893	Urban		✓	✓	✓
Lake County Railroad Rehabilitation	Rehabilitate 55-mile long Lake county Railroad between Lakeview, OR and Alturas, CA.	Lake County	\$1,998,430	\$1,186,430	Rural		✓	✓	✓
The Dalles Downtown/Riverfront Multimodal Connection	Create bike/ped connection from downtown to the new commercial dock and riverfront trail under UPRR and I-84	The Dalles	\$14,155,000	\$9,655,000	Urban		✓	✓	✓
Bike-Able Brookings	Build network of bicycle facilities, including multi-use paths, bike lanes, sharrow markings	Brookings	\$7,900,000	\$6,434,395	Rural		✓	✓	✓
Highway 34 Park and Rides	Build park and ride facilities in Lebanon and near intersection of OR 34/Seven Mile Lane	Linn County	\$3,080,000	\$2,680,000	Rural		✓	✓	✓
Oleson Road Realignment	Realign Oleson Road 400 feet east of existing intersections with BH Highway and Scholls Ferry Road	Washington County	\$31,200,000	\$24,960,000	Urban		✓	✓	✓
Highway 212 to Lawnfield, Phase 3 Connector and Sunrise Corridor Multiuse Paths	Reconstruct Lawnfield Road to serve as access point for Clackamas Industrial Area, construct multiuse path along Sunrise Corridor	Clackamas county	\$210,500,000	\$10,500,000	Urban		✓	✓	✓
US 26 Helvetia/Brookwood Interchange	Reconstruct congested interchange to expand capacity and improving access to industrial land	Hillsboro	\$62,350,000	\$15,000,000	Urban		✓	✓	✓
East Devil's Lake Road Viaduct	Replace section of road that is siking into a marsh with 1500 foot long viaduct	Lincoln City	\$20,000,000	\$18,000,000	Rural		✓	✓	✓
Port of Garibaldi Commercial Ave Wharf Reconstruction	Reconstruct wharf to address falling/unsafe structural conditions and improve access	Port of Garibaldi	\$4,288,800	\$1,608,300	Rural		✓	✓	✓
Coos Bay Rail Line Swing-Span Rail Bridge Rehabilitation	Rehabilitate the swing-span railroad bridge on Coos Bay	Port of Coos Bay	\$12,000,000	\$10,200,000	Rural		✓	✓	✓
East Main Street Bypass/OC&E Pedestrian-Bike Flyover	Construct a new segment of East Main from Shasta Way to Crosby Ave, construct bike/ped bridge over UPRR tracks	Klamath Falls	\$20,945,100	\$20,945,100	Rural		✓	✓	✓
Empire Pedestrian and Bicycle Access Project	Widen Empire Boulevard to provide bike lanes, parking and sidewalks on both sides of the street	Coos Bay	\$5,016,005	\$3,804,000	Rural		✓	✓	✓
Pier 3 Ship & Barge Dock Redevelopment	Redevelop pier to increase capacity for cargo storage, handling and receiving for overseas shipping	Port of Astoria	\$9,000,000	\$4,500,000	Rural		✓	✓	✓

Proposed Amendments to the **Transportation Planning Rule & Oregon Highway Plan**



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Timeline

- ❖ Sept 2010 - LCDC hears TPR concerns
- ❖ Jan 2011 - OTC and LCDC appoint joint committee
- ❖ April 2011 - Joint subcommittee issues recommendations
- ❖ June 2011 - SB 795 requires TPR & OHP changes by Jan 1
- ❖ Summer 2011 - TPR Rules Advisory Committee and OHP Technical Advisory draft revisions for public review
- ❖ Fall 2011 – Parallel OTC and LCDC review



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Concerns

- ❖ Barrier to Economic Development
- ❖ Obstacle to mixed-use, compact development in urban areas
- ❖ Doesn't address non-auto modes



Proposed TPR Amendments

<i>Existing Provision</i>	<i>Proposed Change</i>
Zone changes triggering the Section 0060 concurrency provisions	Zone changes consistent with adopted plans exempted from 0060
Full mitigation could be required for compliance with Section 0060	Partial-mitigation allowed when adding industrial or non-retail jobs
Upzoning in 2040 centers severely limited by existing congestion	Process set forth for exempting centers from Section 0060 trigger



Oregon Highway Plan Revisions

<i>Existing Provisions</i>	<i>Proposed Change</i>
Mobility policy set forth as standards	Mobility policy set forth as "targets"
Single level-of-service congestion policy based on traditional volume-to-capacity ratio	New provisions allow alternative performance measures and corridor-based performance
Small increases in projected traffic triggers conflict with highway plan	Much more latitude for ODOT to evaluate impacts in proportion to existing conditions, defining "no further degradation"



Next Steps

Oregon Transportation Commission

Hearing on OHP Amendments

November 16 (Silverton)

Land Conservation & Development Commission

Hearing on TPR Amendments & Adoption

December 8-9 (The Dalles)

