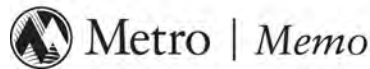
 **Metro** | *Agenda*

Meeting: Metro Technical Advisory Committee
Date: Wednesday, March 21, 2012
Time: 10 a.m. – 12 p.m.
Place: Metro Regional Center, council chamber

Time	Agenda Item	Action Requested	Presenter(s)	Materials
10 a.m.	CALL TO ORDER / ANNOUNCEMENTS	Information	John Williams, Chair	none
10:10 a.m.	Proposed Regional Transportation Function Plan amendments <i>Objective: Discuss proposed amendments to the Regional Transportation Function Plan and schedule for legislative process</i>	Information/ Discussion	John Mermin	In packet
10:30 a.m.	Climate Smart Communities Scenarios <i>Objective: Provide a project update and receive input on the Phase 2 work plan</i>	Information/ Discussion	Kim Ellis	In packet
11:30 a.m.	ADJOURN			

MTAC meets on the 1st & 3rd Wednesday of the month. **The next meeting is scheduled for April 4, 2012.**

For agenda and schedule information, call Alexandra Roberts Eldridge at 503-797-1839, email: Alexandra.Eldridge@oregonmetro.gov. To check on closure or cancellations during inclement weather, please call 503-797-1700#.



Date: March 14, 2012
To: MTAC & Interested Parties
From: John Mermin, Senior Transportation Planner
Subject: Regional Transportation Functional Plan amendments

Purpose

MTAC discussion of proposed amendments to the Regional Transportation Functional Plan and schedule for legislative process.

Background

On December 16, 2010 the Metro Council adopted Ordinance 10-1244B which amended several Urban Growth Management Functional Plan titles, including streamlining the local compliance procedures described in Title 8. The Council adopted the Regional Transportation Functional Plan six months earlier (June 10, 2010) and did not include these streamlined procedures. Staff has acknowledged the need to make these procedures consistent.

Additionally, staff realized that making these changes would provide an opportunity to address another “housekeeping” amendment to the RTFP to address the issue of exemptions. The State Transportation Planning Rule (TPR) includes a provision for exemption from its requirements, but Metro had not previously addressed exemption from regional transportation requirements.

Recommended amendments to the RTFP

Extensions & Exceptions - Metro staff recommends amending the RTFP procedures for extending compliance deadlines (3.08.620) and granting exceptions to specific requirements (3.08.630) to match the procedures within the UGMFP (3.07.830 and 3.07.840). The changes would make requests from local governments for extensions or exceptions administrative functions of Metro’s Chief Operating Officer (COO), but still allow for an appeal to the Metro Council.

Exemptions - Staff recommends amending the RTFP to add a section (3.08.640) providing for exemption from all RTFP requirements. A jurisdiction would be eligible for an exemption if:

- its existing transportation system is generally adequate to meet its needs,
- little population or employment growth is expected, and
- exempting them would not make it more difficult to accommodate regional or state needs, or to meet regional performance targets.

Staff recommends exemption for three jurisdictions - Johnson City, Maywood Park, and Rivergrove.

Schedule of deadlines - Metro staff recommends moving the schedule for RTFP compliance (Table 3.08-4) from the RTFP into the RTP Appendix (Exhibit A to Ordinance No. 10-1241). This change will ensure that Metro code need not be amended in the future if the COO grants an extension to a compliance deadline.

Next Steps

Metro proposes to take the recommended changes described above through the legislative process necessary to amend Metro code.

Proposed schedule for legislative process

MARCH 14, 2012
MEMO TO MTAC
REGIONAL TRANSPORTATION FUNCTIONAL PLAN AMENDMENTS

March 20 Metro Council Work Session – Information / discussion
March 21 – May 9 Public Comment Period / Notice to DLCD
March 21 MTAC – Information / discussion
March 30 TPAC - Comments from chair, with memo in packet
April 11 MPAC – Information / discussion
April 12 JPACT - Comments from chair, with memo in packet
April 18 (or May 2) MTAC - Recommendation to MPAC
April 27 TPAC - Recommendation to JPACT
May 9 MPAC - Recommendation to Metro Council
May 10 JPACT - Action
May 10 Metro Council - First reading
May 17 Metro Council - Second reading, public hearing, Council consideration and vote

For more information on the proposed RTFP changes or legislative process, please contact *John Mermin, 503-797-1747*

www.oregonmetro.gov

2011 Compliance Report

Metro Code Chapter 3.07 Urban Growth
Management Functional Plan

and

Metro Code Chapter 3.08 Regional
Transportation Functional Plan

March 2012



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About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

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Suzanne Flynn

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EXECUTIVE SUMMARY

This 2011 Compliance Report summarizes the status of compliance for each city and county in the region with the Metro Code requirements included in the Urban Growth Management Functional Plan. The purpose of this requirement is to implement regional goals to make this region a greater place to live, work and play. For the first time, this compliance report also addresses compliance with the Metro Code requirements included in the Regional Transportation Functional Plan.

In 2011, most local governments that had outstanding compliance issues requested and were granted extensions of their compliance deadlines for Urban Growth Management Functional Plan requirements. Two local governments, the City of Fairview and the City of Troutdale, requested extensions which were granted to December 31, 2011. However, neither city met the compliance deadline.

Six jurisdictions requested deadlines of December 31, 2011 for requirements of the Regional Transportation Functional Plan. Two of these jurisdictions have completed Transportation System Plan updates and are currently in compliance and four are still in the process of completing Transportation System Plan updates.

Staff is recommending that that the Regional Transportation Functional Plan procedures for extending compliance deadlines and granting exceptions be changed to match the procedures in the Urban Growth Management Functional Plan. Staff also recommends adding a section to allow an exemption from transportation requirements in certain circumstances.

2011 COMPLIANCE REPORT

Metro Code Chapter 3.07 Urban Growth Management Functional Plan and Metro Code Chapter 3.08 Regional Transportation Functional Plan

March 2012

Introduction

Metro Code 3.07.870 requires the Chief Operating Officer to submit annually to the Metro Council the status of compliance by cities and counties with the requirements of the Metro Code Chapter 3.07 (Urban Growth Management Functional Plan). In an effort to better integrate land use and transportation requirements, this compliance report includes information on local government compliance with the Regional Transportation Functional Plan (Metro Code Chapter 3.08) as well as the Urban Growth Management Functional Plan (UGMFP).

On December 16, 2010 the Metro Council adopted Ordinance 10-1244B which amended several Urban Growth Management Functional Plan titles. The Oregon Land Conservation and Development Commission are expected to consider acknowledgement of the components of the ordinance including changes to the UGMFP in Spring 2012. Until the Commission acknowledges the changes to the UGMFP, the titles in effect on December 15, 2010 remain in effect. Once the Commission acknowledges the UGMFP changes, Metro is required to provide each local government the date in which they must come into compliance.

Overview

In 2011, 12 local governments requested extensions of their compliance deadlines for specific compliance requirements for the Urban Growth Management Functional Plan. Under Metro Code, the Chief Operating Officer (COO) may grant an extension request if a local government meets one of two criteria: 1) the city or county is making progress towards compliance; or 2) there is good cause for failure to meet the deadline for compliance. All extension requests were found to meet one of the criteria and were granted by the COO. The COO decision was appealed to the Council in two cases and, after a public hearing, the Council denied the appeals and the extension were upheld.

By statute cities and counties have two years following the date of acknowledgement of Metro's Regional Transportation Plan (November 24, 2011) to bring their Transportation System Plans (TSPs) into compliance with any new or changed regional requirements. However, Metro exercised its authority under the state's Transportation Planning Rule to extend city and county deadlines beyond the two-year statutory deadline. Metro consulted with each city and county to determine a reasonable timeline for this work and adopted a schedule that is part of the Regional Transportation Plan Ordinance No. 10-1241B. The deadlines were phased (2011, 2012, 2013) to take advantage of funding opportunities and the availability of local and Metro staff resources.

Urban Growth Management Functional Plan Compliance Status

Two jurisdictions, the cities of Fairview and Troutdale, are out of compliance with Title 13 Nature in Neighborhoods requirements. The Metro Council has directed staff to schedule a public hearing on the City of Troutdale's non-compliance. *[Note: As of February 2012, the City of Fairview has submitted Title 13 material and Metro staff is reviewing it to determine if it complies with Title 13 requirements]*. Appendix A summarizes the compliance status for all local governments with the requirements of the Urban Growth Management Functional Plan as of the end of 2011.

Appendix B shows the status of Title 11 new urban area planning for areas added to the Urban Growth Boundary since 1998. Appendix C summarizes the compliance dates for each UGMFP title.

Regional Transportation Functional Plan Compliance Status

Six jurisdictions requested deadlines of 2011. As described below and in Appendix D two of these jurisdictions have completed TSP updates and are currently in compliance with the Regional Transportation Functional Plan (RTFP), and four have not yet completed TSP updates.

Beaverton: The City of Beaverton adopted its TSP in September 2010 and is in compliance with all Regional Transportation Functional Plan requirements in effect on December 31, 2011.

Tigard: The City of Tigard adopted its TSP in November 2010 and is in compliance with all Regional Transportation Functional Plan requirements in effect on December 31, 2011.

Damascus: The City of Damascus is not in compliance with the Regional Transportation Functional Plan.

The City of Damascus started the development of its TSP in June 2009, but the project was put on hold due to significant revisions to the City's draft comprehensive plan map. The development of the TSP is scheduled to resume in March 2012. The City Council reaffirmed the appointments to the Transportation Steering Committee and Transportation Topic Specific Team in 2011. An 18-month work plan is in place to complete the TSP. The estimated completion date of the TSP is August 2013. The TSP is scheduled to be adopted by the Damascus City Council with the completed Comprehensive Plan and submitted to DLCD in Fall 2014.

Multnomah County: Multnomah County is not in compliance with the Regional Transportation Functional Plan. The County's TSP, including the unincorporated urban pockets, will be completed in partnership with the City of Portland, whose deadline is December 31, 2013. The County would like to amend its compliance deadline to December 31, 2013 to match up with the City of Portland.

The County's urban roads are also addressed in TSP updates for cities of Fairview, Troutdale and Wood Village, and the City of Gresham for the Pleasant Valley and Springwater Corridor Plan Areas. The cities' TSPs will reflect the outcome of the East Metro

Connections Plan, anticipated in Summer 2012. The County coordinates with the cities on their TSPs as part of compliance with the RTP. The County will also amend its Comprehensive Framework Plan Transportation Elements as part of RTP compliance.

Troutdale: Troutdale is not in compliance with the Regional Transportation Functional Plan. An update to Troutdale's TSP is a required task under the city's approved Periodic Review work program. The City was recently informed that its periodic review assistance grant application has been approved. This grant will enable the City to hire a transportation planning consultant to complete the TSP update. Compliance with the RTFP will be one of the tasks for the TSP update. The City is waiting to receive the grant agreement from the State in order to commence work on the TSP update. Its intention is to complete the TSP update by July 1, 2013; however, given the uncertainty of when the grant agreement will be executed with the state and work actually commences, it is more reasonable to assume the work will be completed by December 31, 2013.

Wood Village: The City of Wood Village planned to complete its TSP in 2011 until the East Metro Connections Plan (EMCP) was chosen to be completed as Metro's next Corridor study. During scope development and early stages of the EMCP, it was a concern that beginning the TSP process could result in a plan that would be prematurely outdated by the adoption of the EMCP. As the EMCP scope took shape it became apparent that portions of the Wood Village TSP could be accomplished concurrent with the EMCP. It was then that Wood Village began its TSP update and with a proper process in mind its completion is planned for Spring 2012. The City would like to amend its deadline to December 31, 2012.

The remaining jurisdictions in the region have deadlines of either 12/31/12 or 12/31/13 by which they anticipate completing TSP updates to come into compliance with the RTFP (see Appendix D).

Metro staff recommends exemption from RTFP requirements for three jurisdictions (Johnson City, Maywood Park, and Rivergrove). The transportation system in these cities is generally adequate to meet their needs, little population or employment growth is expected and exempting them would not make it more difficult to accommodate regional or state transportation needs or to meet regional performance targets.

Recommendations

In 2010, Council amended the Urban Growth Management Functional Plan to simplify and streamline the compliance process. Metro staff recommends amending the Regional Transportation Functional Plan procedures for extending compliance deadlines (3.08.620) and granting exceptions to specific requirements (3.08.630) to match the procedures within the UGMFP (3.07.830 and 3.07.840). The changes would allow Metro's COO to grant extensions and exceptions, rather than requiring a public hearing and decision by the Metro Council. Under the new process, a hearing before the Council would only be held if a person or jurisdiction appeals the COO order.

Metro staff recommends amending the RTFP to add a section (3.08.640) providing for exemption from all RTFP requirements. A jurisdiction would be eligible for an exemption if:

- Its existing transportation system is generally adequate to meet its needs;
- Little population or employment growth is expected, and;
- Exempting them would not make it more difficult to accommodate regional or state transportation needs or to meet regional performance targets.

Staff recommends exemption for three jurisdictions (Johnson City, Maywood Park, and Rivergrove).

Metro staff also recommends moving the schedule of deadlines for RTFP compliance (table 3.08-4) from the RTFP into the RTP Appendix (Exhibit A to Ordinance No. 10-1241). This change will ensure that Metro Code need not be amended in the future if the COO grants an extension to a compliance deadline. Staff recommends establishing new deadlines in Table 3.08-4 for four jurisdictions (Damascus, Troutdale, Wood Village, and Multnomah County). The rationale for these extensions is provided earlier in this report.

Options Available

Metro Code (3.07.850) provides that the Metro Council may initiate enforcement if a city or county has failed to meet a deadline for compliance with a functional plan requirement.

APPENDIX A

Summary of Compliance Status as of December 31, 2011 (Functional Plan in effect as of 12/15/2010)

	Title 1 Housing Capacity	Title 2 ¹ Parking Management	Title 3 Water Quality & Flood Management	Title 4 Industrial and other Employment Land	Title 6 ² Centers, Corridors, Station Communities & Main Streets	Title 7 Housing Choice	Title 11 Planning for New Urban Areas <small>(see Appendix B for detailed information)</small>	Title 13 Nature in Neighborhoods
Beaverton	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance
Cornelius	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance
Damascus	Extended to 12/31/2013	See footnote	Extended to 12/31/2013	Extended to 12/31/2013	See footnote	Extended to 12/31/2013	Extended to 12/31/2013	Extended to 12/31/2013
Durham	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Fairview	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	Out of compliance
Forest Grove	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance
Gladstone	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Gresham	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance
Happy Valley	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance
Hillsboro	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Areas 69 & 71 extended to 12/31/2012	In compliance
Johnson City	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
King City	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance
Lake Oswego	In compliance	See footnote	In compliance	Pending final city action	See footnote	In compliance	Not applicable	In compliance
Maywood Park	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Milwaukie	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Oregon City	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Extended to 6/30/2014 for Beavercreek Rd and South End	In compliance
Portland	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	Extended to 6/30/2012
Rivergrove	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Sherwood	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	In compliance	In compliance

¹ While Title 2 was removed from the Urban Growth Management Functional Plan through Ordinance 10-1244B, the requirements of Title 2 were added to the Regional Transportation Functional Plan (Metro Code 3.08) in the same ordinance. Compliance with parking requirements should be addressed in each local government's Transportation System Plan.

² Once acknowledged by LCDC, Title 6 will be an incentive approach and only those local governments wanting a regional investment (currently defined as a new high-capacity transit line) will need to comply. Metro is not intending to require local jurisdictions to comply with the previous version of Title 6 (pre-Ordinance No. 10-1244B).

	Title 1 Housing Capacity	Title 2 ¹ Parking Management	Title 3 Water Quality & Flood Management	Title 4 Industrial and other Employment Land	Title 6 ² Centers, Corridors, Station Communities & Main Streets	Title 7 Housing Choice	Title 11 Planning for New Urban Areas <small>(see Appendix B for detailed information)</small>	Title 13 Nature in Neighborhoods
Tigard	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Troutdale	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	Out of compliance
Tualatin	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Area 61 extended to 5/31/2012; Basalt Creek extended to 9/30/2016	In compliance
West Linn	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Wilsonville	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	East Wilsonville Extended to 12/31/2015; Basalt Creek extended to 9/30/2016	In compliance
Wood Village	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Clackamas County	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Not applicable	In compliance
Multnomah County	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	Area 93 extended to 6/2/2021	In compliance
Washington County	In compliance	See footnote	In compliance	In compliance	See footnote	In compliance	West Bull Mountain & and Cooper Mountain extended to 11/30/2012	In compliance

¹ While Title 2 was removed from the Urban Growth Management Functional Plan through Ordinance 10-1244B, the requirements of Title 2 were added to the Regional Transportation Functional Plan (Metro Code 3.08) in the same ordinance. Compliance with parking requirements should be addressed in each local government's Transportation System Plan.

² Once acknowledged by LCDC, Title 6 will be an incentive approach and only those local governments wanting a regional investment (currently defined as a new high-capacity transit line) will need to comply. Metro is not intending to require local jurisdictions to comply with the previous version of Title 6 (pre-Ordinance No. 10-1244B).

**APPENDIX B
TITLE 11 NEW AREA PLANNING COMPLIANCE
(as of December 31, 2011)**

Project	Lead Government(s)	Compliance	Status
1998 UGB Expansion			
Rock Creek Concept Plan	Happy Valley	yes	Concept plan and implementation measures completed; development on-going.
Pleasant Valley Concept Plan	Gresham and Portland	yes	Concept plan and implementation measures completed; city annexed 524 acres and development to begin in eastern section.
1999 UGB Expansion			
Witch Hazel Community Plan	Hillsboro	yes	Concept plan and implementation measures completed; development on-going.
2000 UGB Expansion			
Villebois Village	Wilsonville	yes	Concept plan and implementation measures completed; development on-going.
2002 UGB Expansion			
Springwater Community Plan	Gresham	yes	Concept plan and implementation measures completed for this mostly industrial area; waiting annexation & development.
Damascus/Boring Concept Plan	Happy Valley	yes	HV portion: Concept plan and implementation measures completed; waiting annexation and development.
	Damascus	DCLD extension to June 2014; FP extension to 12/31/13; CET extension to 7/31/14	Damascus portion: Comprehensive plan map approved, then overturned by vote; city working on next steps to comply with DLCD deadline of June 2014. NOTE: City has Functional Plan extension to 12/31/13 and CET extension to 7/31/14.
	Gresham	yes	Gresham portion, called Kelley Creek Headwaters Plan, was adopted by city in 2009.
Park Place Master Plan	Oregon City	yes	Concept plan and implementation measures completed; waiting annexation & development
Beavercreek Road	Oregon City	Extension to 6/30/14	Concept plan is completed and accepted by Metro; City has put on hold adoption of the final implementing ordinances pending LUBA appeal and work load.
South End Road	Oregon City	Extension to 6/30/14	City working on scope of work & intends to start in early 2012.
East Wilsonville (Frog Pond area)	Wilsonville	Extension to 12/31/15	City initially completed site analysis w/private builders in 2008; currently City is evaluating and budgeting for major sewer upgrade for eastern portion of City which must be completed before planning and development of site.
Coffee Creek 1 (NW Wilsonville)	Wilsonville	yes	Concept plan and implementation measures completed, including master plan for area adopted, for this industrial area; waiting development.
NW Tualatin Concept Plan (Cipole Rd & 99W)	Tualatin	yes	Concept plan and implementation measures completed for this small industrial area.
SW Tualatin Concept Plan	Tualatin	yes	Concept plan and implementation measures completed for this industrial area.
Brookman Concept Plan	Sherwood	yes	Concept Plan and implementation measures completed; waiting development

Project	Lead Government(s)	Compliance	Status
Study Area 59	Sherwood	yes	Concept plan and implementation measures completed; school constructed.
Study Area 61 (Cipole Rd)	Tualatin	Extension to 5/31/12	City is working with Wash County and Sherwood on going forward with planning.
99W Area (near Tualatin-Sherwood Rd)	Sherwood	yes	Concept plan and implementation measures completed.
King City	King City	yes	Concept plan and implementation measures completed; annexed to city with portion developed as park and rest in floodplain.
West Bull Mountain Concept Plan	Washington County	Extension to 11/30/12	Concept plan adopted; City of Tigard to take over planning for area.
Cooper Mountain area	Washington County	Extension to 11/30/12	Washington County in talks with Beaverton for City to plan this area.
Study Area 64 (14 acres north of Scholls Ferry Rd)	Beaverton	yes	Concept plan and implementation measures completed; annexed to City.
Study Area 69 & 71	Hillsboro	Extension to 12/31/12 or 1 yr after UGB inclusion, whichever earlier	Areas are included in South Hillsboro Area Plan. NOTE: Since the ordinance that brought the South Hillsboro area into the UGB was not effective or acknowledged before 2012, the 12/31/12 date is the deadline for compliance.
Study Area 77	Cornelius	yes	Concept plan and implementation measures completed; annexed to City.
Forest Grove Swap	Forest Grove	yes	Concept plan and implementation measures completed; annexed to City.
Shute Road Concept Plan	Hillsboro	yes	Concept plan and implementation measures completed; annexed to City and portion developed with Genentech.
North Bethany Subarea Plan	Washington County	yes	Concept plan and implementation measures completed with final code modifications to be completed in early 2012.
Bonny Slope West Concept Plan (Area 93)	Multnomah County	Extension to 6/2/21 or 2 yrs after agreement w/other govt, whichever earlier	Concept plan map developed though not yet adopted by Board of Commissioners; extension order issued by Metro based on difficulty of deciding on service provider(s).
2004/2005 UGB Expansion			
Damascus area	Damascus	See under 2002 above	Included with Damascus comp plan (see above)
Tonquin Employment Area	Sherwood	yes	Concept plan and implementation measures completed.
Basalt Creek/West RR Area Concept Plan	Tualatin and Wilsonville	Extension to 9/30/16	Cities scheduled to begin planning in early 2012.
N. Holladay Concept Plan	Cornelius	yes	Concept plan completed; implementation to be finalized after annexation to City.

Project	Lead Government(s)	Compliance	Status
Evergreen Concept Plan	Hillsboro	yes	Concept plan and implementation measures completed.
Helvetia Concept Plan	Hillsboro	yes	Concept plan and implementation measures completed.

**APPENDIX C:
COMPLIANCE DATES FOR THE
URBAN GROWTH MANAGEMENT FUNCTIONAL PLAN**

Functional Plan Requirement	When Local Decisions Must Comply		
	Plan/Code Amendment 3.07.810(C) ¹	Land Use Decision 3.07.810(D) ²	Adoption 3.07.810(B) ³
Title 1: Adopt minimum dwelling unit density (3.07.120.B)	12/16/2010		2 years after acknowledgment by LCDC
Title 1: Allow accessory dwelling unit in SFD zones (3.07.120.G) <i>(provision included in previous version of Metro Code as 3.07.140.C)</i>	12/8/2000		12/8/2002
Title 3: Adopt model ordinance or equivalent and map or equivalent (3.07.330.A)	12/8/2000		12/8/2002
Title 3: Floodplain management performance standards (3.07.340.A)	12/8/2000	12/8/2001	12/8/2002
Title 3: Water quality performance standards (3.07.340.B)	12/8/2000	12/8/2001	12/8/2002

¹ A city or county that amends its plan to deal with the subject of a Functional Plan requirement any time after the effective date of the requirement (the date noted) must ensure that the amendment complies with the Functional Plan

² A city or county that has not yet amended its plan to comply with a Functional Plan requirement must, following one year after acknowledgement of the requirement (the date noted), apply the requirement directly to land use decisions

³ Cities and counties must amend their plans to comply with a new Functional Plan requirement within two years after acknowledgement of the requirement (the date noted)

Functional Plan Requirement	When Local Decisions Must Comply		
	Plan/Code Amendment 3.07.810(C) ¹	Land Use Decision 3.07.810(D) ²	Adoption 3.07.810(B) ³
Title 3: Erosion control performance standards (3.07.340.C)	12/8/2000	12/8/2001	12/8/2002
Title 4: Limit uses in Regionally Significant Industrial Areas (3.07.420)	7/22/2005	7/22/2006	7/22/2007
Title 4: Prohibit schools, places of assembly larger than 20,000 square feet, or parks intended to serve people other than those working or residing in the area in Regional Significant Industrial Areas (3.07.420D)	12/16/2010	1 year after acknowledgment by LCDC	2 years after acknowledgment by LCDC
Title 4: Limit uses in Industrial Areas (3.07.430)	7/22/2005	7/22/2006	7/22/2007
Title 4: Limit uses in Employment Areas (3.07.440)	7/22/2005	7/22/2006	7/22/2007
Title 6: (Title 6 applies only to those local governments seeking a regional investment or seeking eligibility for lower mobility standards and trip generation rates)			
Title 7: Adopt strategies and measures to increase housing opportunities (3.07.730)			6/30/2004
Title 8: Compliance Procedures (45-day notice to Metro for amendments to a comprehensive plan or land use regulation) (3.07.820)	2/14/2003		

Functional Plan Requirement	When Local Decisions Must Comply		
	Plan/Code Amendment 3.07.810(C) ¹	Land Use Decision 3.07.810(D) ²	Adoption 3.07.810(B) ³
Title 11: Develop a concept plan for urban reserve prior to its addition to the UGB (3.07.1110)			2 years after acknowledgement by LCDC
Title 11: Prepare a comprehensive plan and zoning provisions for territory added to the UGB (3.07.1120)	12/8/2000	12/8/2001	2 years after the effective date of the ordinance adding land to the UGB unless the ordinance provides a later date
Title 11: Interim protection for areas added to the UGB (3.07.1130) <i>(provision included in previous version of Metro Code as 3.07.1110)</i>	12/8/2000	12/8/2001	12/8/2002
Title 12: Provide access to parks by walking, bicycling, and transit (3.07.1240.B)			7/7/2005
Title 13: Adopt local maps of Habitat Conservation Areas consistent with Metro-identified HCAs (3.07.1330.B)	12/28/2005	1/5/2008	1/5/2009
Title 13: Develop a two-step review process (Clear & Objective and Discretionary) for development proposals in protected HCAs (3.07.1330.C & D)	12/28/2005	1/5/2008	1/5/2009
Title 13: Adopt provisions to remove barriers to, and encourage the use of, habitat-friendly development practices (3.07.1330.E)	12/28/2005	1/5/2008	1/5/2009

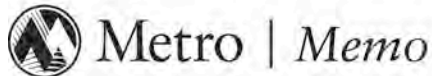
APPENDIX D

Summary of Compliance Status

(Regional Transportation Functional Plan in effect as of 6/10/2010)

	Title 1 Transportation System Design	Title 2 Development and Update of Transportation System Plans	Title 3 Transportation Project Development	Title 4 Regional Parking Management	Title 5 Amendment of Comprehensive Plans
Beaverton	In compliance	In compliance	In compliance	In compliance	In compliance
Cornelius	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Damascus	Not in compliance	Not in compliance	Not in compliance	Not in compliance	Not in compliance
Durham	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Fairview	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Forest Grove	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Gladstone	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Gresham	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Happy Valley	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Hillsboro	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Johnson City	Recommending exemption	Recommending exemption	Recommending exemption	Recommending exemption	Recommending exemption
King City	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Lake Oswego	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Maywood Park	Recommending exemption	Recommending exemption	Recommending exemption	Recommending exemption	Recommending exemption
Milwaukie	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Oregon City	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Portland	12/31/13	12/31/13	12/31/13	12/31/13	12/31/13
Rivergrove	Recommending exemption	Recommending exemption	Recommending exemption	Recommending exemption	Recommending exemption
Sherwood	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Tigard	In compliance	In compliance	In compliance	In compliance	In compliance
Troutdale	Not in compliance	Not in compliance	Not in compliance	Not in compliance	Not in compliance
Tualatin	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
West Linn	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Wilsonville	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Wood Village	Not in compliance	Not in compliance	Not in compliance	Not in compliance	Not in compliance
Clackamas County	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12
Multnomah County	Not in compliance	Not in compliance	Not in compliance	Not in compliance	Not in compliance
Washington County	12/31/12	12/31/12	12/31/12	12/31/12	12/31/12

Date shown in table is the deadline for compliance with the Regional Transportation Functional Plan (RTFP). Note - a city or county that has not yet amended its plan to comply with the RTFP must, following one year after RTFP acknowledgement, apply the RTFP directly to land use decisions.



Date: March 14, 2012
To: Metro Technical Advisory Committee and interested parties
From: Kim Ellis, Principal Transportation Planner
Re: Climate Smart Communities Scenarios: Draft Phase 2 Work Plan & Engagement Approach

Action requested

MTAC input on draft Phase 2 work plan and engagement strategy and recommendations for discussion items to be presented for consideration by the Metro Policy Advisory Committee on April 11. At that meeting MPAC will be asked to support the work plan (and any needed refinements) so that staff may fully proceed with the Phase 2 activities.

Technical work group members are also asked to share their perspectives on the draft work plan.

Project overview

The Climate Smart Communities Scenarios project is a multi-year, collaborative effort between Metro, local governments and other regional partners. The project is as much about jobs, livable neighborhoods and public health as it is about clean air. It is focused on working together to find the right combination of land use and transportation actions (e.g., policies and investments) that will keep communities vibrant and prosperous. While the project responds directly to state and regional goals to reduce greenhouse gas emissions from cars and small trucks, the project provides an opportunity for Metro, local governments and others to work together to advance the ambitions of each community and implement the Community Investment Strategy adopted by the Metro Council in 2010.

The goal of the Scenarios Project is to work with local governments and other regional partners to build consensus, ownership and support for state, local and regional investments and actions needed to achieve the 2040 vision and local ambitions for growth and development, and to meet our climate goals.

Phase 2 – Initial Steps Forward and Challenges

Moving forward, the region's decision-makers will use the Phase 1 information and additional information developed during Phase 2 to direct staff to create and evaluate three alternative scenarios.

Since January, Metro staff and Councilors have begun briefing local elected officials and other stakeholders on the Scenarios Project and Phase 1 Findings. This has included briefings to the East Multnomah County Transportation Committee, the Washington County Coordinating Committee, the Hillsboro Chamber of Commerce Policy Committee and the following city councils: Durham, Lake Oswego, Tigard, Tualatin, Sherwood, and Wilsonville. Other City Council briefings throughout the region have been or will be scheduled for March and April.

The briefings provide an opportunity for project partners to ask questions, share concerns and provide suggestions for how we can best work together to support their community ambitions and ensure that those ambitions are reflected in the region's strategy.

A number of challenges have been identified through these briefings and previous discussions with Metro's advisory committees and local governments as the Phase 1 Findings were finalized:

- **The project must find a balance between advancing local community ambitions and needs and defining a successful regional strategy.** The project dynamics are still unfolding; political, communications and technical work must be coordinated and balanced. It is critical for the Scenarios Project to continue building on existing efforts and community ambitions and to make that connection clear. To be successful, the process and, ultimately, the preferred scenario must recognize that each community is unique, provide individual and local choice, and work as part of an integrated regional strategy.
- **The project's complexity remains a hurdle to achieving understanding and building support.** The complexity of the subject matter and the fact that the scenario planning, visualization and other communication tools are still under development make communication of project direction, relevance to local communities and potential outcomes difficult. Some fear or do not see the broader outcomes the project is trying to achieve even though most strategies being considered are actions and investments that have already been identified as desirable by local communities in their plans.
- **The project's ambition and optimism may be overly dampened by current economic conditions.** The fiscal realities of TriMet service cuts, local government budgets and a faltering economy are affecting the project dynamics and highlight the need to develop a preferred scenario that is results-oriented and ambitious, yet implementable and realistic.
- **Diverse stakeholders that include business and community leaders will be important contributors to the regional conversation and shaping the policy options that are tested in 2013.** Everyone has a stake in the outcome, and the future project phases will provide meaningful opportunities for business and community leaders to help shape the scenarios that will be developed and evaluated in 2013, and ultimately the preferred scenario that is considered by MPAC, JPACT and the Metro Council in 2014. Given limited local and project resources, the process must also complement and leverage existing outreach efforts, not duplicate them.
- **Much work remains to build trust, partnerships, consensus and support. It will take time and resources, but they are keys to success.** Climate change is a polarizing issue, and many are not motivated to act by state requirements or climate change. To date, there hasn't been a locally-driven mandate for this project to be successful. There are many supporters who see this process as a means of achieving their communities' ambitions. Local elected officials and staff and other stakeholders are engaged, but more champions and partners will be needed.

Draft Phase 2 Work Plan Approach and Input Requested

The early stakeholder discussions and the challenges presented have informed the draft work plan and engagement strategy presented in the attached draft materials. The materials also reflect comments and suggestions provided by the Metro Council on February 28 and project's technical work group on March 12.

The Track 1 and Track 2 summaries seek to provide the reader with an overview of the tasks, desired outcomes, activities and deliverables needed to answer the questions that will be important for MPAC, JPACT and the Metro Council to answer in directing staff to develop and evaluate three policy scenarios for testing next year.

- **Track 1 (Refine Scenario Building Blocks to Define Policy Options)** is focused on leading to development of three scenario options that will be evaluated in 2013. This track will focus on understanding the most effective strategies from Phase 1 as well the policies and strategies that are needed to achieve community and regional ambitions. The Envision Tomorrow scenario planning tool will be used to develop community investment case studies.
- **Track 2 (Develop Outcomes-Based Evaluation Methods and Report Card)** is focused on working with topic experts to develop the methods and measures to be used to evaluate the Phase 1 scenarios (as part of the district and regional analysis) and the three scenarios to be tested in 2013. This track will also result in the creation of a report card to convey the results of the analysis to policymakers and other stakeholders.

The project team is trying to determine how much and what type of information is needed to frame potential scenario options for regional discussion and policymaking. The project team must balance those options with the project timeline, budget and the desire of many policymakers to begin exploring potential policy options and their implications for their communities and the region. A goal of Phase 2 is to provide a sufficient level of information to understand the choices and tradeoffs presented by the Phase 1 scenarios and build consensus and support for three scenario options to undergo a more in-depth analysis in 2013.

With this in mind, please review the Track 1 and Track 2 summaries for next week's meeting and come prepared to share your thoughts on the overall approach and engagement strategy.

Below are some questions to consider for our discussion at the meeting. Please feel free to raise others.

1. Does the overall approach and schedule make sense? What refinements or modifications do you suggest?
2. On the technical side:
 - a. Will the activities posed in each track provide decision-makers and other stakeholders with the information needed to support the regional discussions? Does it provide the right level of additional information? What refinements or modifications do you suggest?
 - b. How can we ensure the sensitivity testing and community and regional investment case studies provide the information needed to explore refinements to the Phase 1 community design, pricing, marketing, roads fleet and technology ambitions? What additional information may be needed?
 - c. How soon should alternative scenario "straw proposals" be developed? Who should develop them? What new information is needed to inform their development? Do you have ideas for what these straw proposals might be?
3. On the engagement side:
 - a. What planning and engagement activities are you considering that would be appropriate to leverage or piggyback on (e.g., Southwest Corridor, East Metro Connections Plan, Portland

- Plan)? What suggestions do you have for how can we better leverage or piggyback on these efforts?
- b. What capacity might you or your agency have to provide more direct assistance in the engagement activities that are proposed?

Thank you for your help on finalizing the Phase 2 work plan. TPAC is scheduled to review it on March 30. Staff will then bring a modified draft to MPAC and JPACT for discussion and endorsement on April 11 and 12, respectively.

Climate Smart Communities Scenarios – Phase 2

Track 1: Refine Scenario Building Blocks to Develop Policy Options

Draft

March 14, 2012

Purpose

This summary provides an overview of the Track 1 work plan for the second phase of the Climate Smart Communities Scenarios Project. This work plan seeks to identify the desired outcomes, research questions, activities and deliverables needed to assist MPAC, JPACT and the Metro Council in directing staff to develop and evaluate three policy scenarios for testing in 2013. These policy scenarios will be developed with the aim of supporting jobs, protecting neighborhoods and ensuring clean air while reducing greenhouse gas emissions.

Overview

This track will refine the Phase 1 scenario building blocks to develop potential policy options for how and where to apply the policies that are needed to achieve community and regional ambitions for growth and development and meet climate goals.

Staff will work with the technical work group to further evaluate the Phase 1 scenarios to identify the most effective land use and transportation strategies and report on their potential benefits and impacts at a regional and household level. This research will be complemented by the project's Strategy Toolbox (developed in Phase 1) and ODOT's on-line Greenhouse Gas Toolkit Database. The Strategy Toolbox and ODOT database summarize the effectiveness and applicability of various strategies based on existing research. They also provide estimates of cost-effectiveness, when known, and the time required for implementation (e.g., near-, medium- and long-term).

Staff will also work with local government staff to develop community investment case studies to show how policies and individual strategies might be tailored in a community to help advance that community's economic development ambitions. The Envision Tomorrow scenario planning tool and place types toolbox will be central to the creation of these case studies. Regional investment case studies will also be developed to highlight the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology.

The work will be coordinated with the Statewide Transportation Strategy, Southwest Corridor Plan, East Metro Connections Plan and Active Transportation Plan and build on existing plans and policies identified through the Community Investment Strategy in 2009. Opportunities to integrate new ambitions identified since 2010 through the Southwest Corridor Plan, East Metro Connections Plan, Portland Plan and other local planning efforts will be identified.

Information from this track will be presented to the Metro Council and Metro's

Track 1 Partnering and engagement

January through November 2012

The **technical work group** will continue to be convened in 2012.

Periodic **newsfeed updates** and background **briefings** to print and broadcast media.

Speakers and other events may be identified pending available resources.

May - June 2012

Metro sponsors **Envision Tomorrow training** for interested local governments to begin building Metro and local government capacity. Participating local governments will be asked to contribute resources to help support this activity.

Local government meetings to develop community investment case studies. In the Southwest Corridor this will be coordinated with project partners meetings and at a workshop on the focus areas.

Summer 2012

Local government workshop will be held with local elected officials to provide input on draft focus areas and policy options relative to implementation challenges and opportunities.

Business and developer workshop will be held in partnership with leaders from business, real estate and development organizations to provide input on the draft focus areas

technical and policy advisory committees as research is completed and new information and findings are developed.

Desired outcomes

- The Scenarios Project strengthens partnerships and builds understanding of which land use and transportation strategies are most effective at reducing greenhouse gas emissions and the policies that are needed to achieve community ambitions.
- Diverse stakeholders, including the region's elected officials and business and community leaders, have a meaningful opportunity to shape the scenario policy options to be tested in 2013.
- Feedback from a diverse set of stakeholders will inform MPAC, JPACT and the Metro Council in directing staff to develop and test three policy scenarios in 2013

Research questions

- What are the most effective land use and transportation strategies and how might they be applied in the region to advance local community and economic development ambitions?
- What are the tradeoffs between scenario options relative to their potential benefits and the cost, complexity and difficulty of implementing different strategies?
- How might different strategies be phased in the short-term, medium-term and long-term?
- Which three scenario policy options does the region want to consider for further evaluation and refinement in 2013?

Activities

1. **Conduct a regional and district level evaluation of the Phase 1 scenarios** to understand the range of variation in performance across the region. The preliminary research conducted in Phase 1 focused exclusively on regional greenhouse emissions reductions. Additional research is needed to support refining the scope and range of options identified in Phase 1. This research will be conducted in consultation with the project's technical work group, and will provide more information to frame the potential benefits, costs and savings of different scenarios at a regional and household level. A summary of key findings and recommendations will be written to inform development of potential scenario options and the outcomes-based evaluation methods in Track 2.
2. **Conduct sensitivity testing of individual community design, pricing and technology strategies from Phase 1** to identify the most effective land use and transportation strategies. Phase 1 focused on the overall effectiveness of different levels of implementation for each policy area. The analysis did not address the extent to which each of the individual strategies within each policy area is contributing to the emissions reductions, and

and policy options relative to economic opportunities, market trends and the potential for job creation.

Environment and public health workshop will be held in partnership with community organizations to provide input on the draft focus areas and policy options relative to environmental protection and the potential for clean air and active living.

Equity and environmental justice workshop will be held to review draft focus areas and policy options relative to demographics, access to opportunity and the availability of affordable housing and transportation options.

September 2012

On-line engagement to gather input on scenario options and outcomes to be evaluated.

September through November 2012

Regional discussion to build consensus on three scenarios to test and outcomes to be measured. MPAC, JPACT, Council work session(s) or regional summit.

therefore did not facilitate an understanding of the primary drivers within each policy area. To address this information gap and support refining the scope and range of options to be considered in Phase 2 and 3, this activity will complete a sensitivity analysis to isolate individual strategies within the community design, pricing and technology policy areas and estimate their relative effectiveness at reducing greenhouse gas emissions, compared to all other strategies within the policy area. Only community design, pricing and technology policy areas are proposed to be subject to the sensitivity analysis given the relatively lower greenhouse emissions reduction potential of the other policy areas.

This research will be complemented by the Strategy Toolbox developed in Phase 1 and ODOT's on-line searchable Greenhouse Gas Toolkit Database. The Strategy Toolbox and ODOT's database summarize the effectiveness and applicability of various actions and programs based on existing research. The database also estimates cost-effectiveness, when known, and the time required for implementation (e.g., near-, medium- and long-term). A summary of key findings and recommendations will be written to inform development of potential scenario options considering potential effectiveness, synergies, cost and timeframe for implementation.

3. **Develop "straw" scenario policy options** to kick-off a regional discussion on a narrowed range of options for meeting the region's climate goals. The proposals will be tied to lessons learned from sensitivity testing of the Phase 1 scenarios and will continue to be refined as other Track 1 activities are completed. District and regional level performance of the "straw" scenario options may be evaluated.
4. **Compile 2010 existing conditions and 2035 Reference Case regional snapshot** to frame existing conditions and inform future potential policy options. The materials and information compiled will summarize existing and future socio-demographic, land use and transportation characteristics and assumed growth and development for different parts of the region based on adopted plans and policies. The analysis will also consider access to opportunity and the availability of housing options in an effort to identify pathways that result in increased social and economic health for all communities. Existing planning work and data will be used when possible, including the Southwest Corridor Plan, East Metro Connections Plan, Portland Plan and Active Transportation Plan existing conditions assessments. This activity is intended to provide a snapshot. Phase 3 of the Scenarios Project will develop more in-depth analysis as part of the scenarios evaluation, and the Regional Transportation Plan update that will begin in 2013.
5. **Define and categorize 2040 focus areas** in the region based on zoning, the development intensity of residential, jobs and services, block size, network connectivity, and other urban characteristics that predict market readiness, redevelopment and economic development opportunities and the pedestrian, bicycle and transit friendliness of an area. The analysis will incorporate RLIS and Envision Tomorrow data and build on the locally-adopted 2040 Growth Concept design type boundaries and focus areas identified in the Southwest Corridor study and other planning efforts

underway in the region (e.g., Portland Plan, East Metro Connections Plan).

The focus areas are the places where additional land use and transportation strategies may be applied in the scenarios to be evaluated in 2013. They will typically be 2040 Design Types located in existing downtowns, corridors, main streets and employment areas designated on the 2040 Growth Concept map – those areas that are currently zoned, or that are being contemplated to be zoned, medium- or high-density residential, commercial or industrial. The focus areas will be classified based on their readiness for development.

This approach reinforces the importance of leveraging land use and transportation policies and investments to get the most out of each action and spur additional investment. This approach also allows for protection of existing neighborhoods from inappropriate development. The technical work group, TPAC and MTAC and local government staff will review and refine focus areas.

6. **Compile place types toolbox and worksheet** that document and describe the range of place types for use in Envision Tomorrow, and the land use and transportation characteristics assumed in each place type. Characteristics include anticipated primary and secondary land uses, frequency of transit service, streetscape design, bicycle and pedestrian facilities, job and housing units per acre, and parking.

A common palette of 16 different place types will be used to generalize the various development categories that appear in the region. Normalizing terms and concepts used to describe development in the region improves communication and the project's ability to describe, measure, and evaluate the built environment within a scenario planning process. The worksheet provides a tool for linking the land use and transportation characteristics of each place type to specific land use and transportation strategies that are needed to realize the ambitions reflected in individual place type.

The project will use the place types toolbox and worksheet in combination with the focus areas and Envision Tomorrow scenario planning tool to create community investment case studies. The case studies will highlight community ambitions and the strategies needed to achieve those ambitions. The Southwest Corridor Plan will also use the place types toolbox and worksheet in combination with Envision Tomorrow to describe an integrated land use and transportation investment strategy for each of the project's focus areas; each strategy will be developed in collaboration with local partners and be consistent with local planning efforts.

7. **Partner with local government staff to develop community investment case studies** to highlight both the location and range of place types represented in current community plans and policies, and the strategies needed to achieve community ambitions. Opportunities to convene two or more jurisdictions together will be sought to discuss connecting focus areas, shared ambitions and investment needs. *Participants will include: Metro staff, community planning director, community development director, work*

group member, and senior staff. Participants may engage their respective City Councils, Planning Commissions, County Boards, as needed, for additional input. The Southwest Corridor project will develop an integrated investment strategy for each of the project’s focus areas that will inform the community investment case studies for this part of the region.

Potential community investment case study research questions

- How might strategies be tailored to advance local community and economic development ambitions?
 - What opportunities and assets already exist in your community?
 - What redevelopment opportunities exist to advance your community’s ambitions?
 - Where is development happening now?
 - Is there land available for development?
 - What barriers exist to achieving your ambitions?
 - What investment needs will be essential to achieving your ambitions?
- How might your community ambitions and investments contribute to meeting the region’s climate goals?

8. **Work with the technical work group to develop regional case studies** to frame the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology.

Potential regional investment case study research questions

- What role might these policies play in helping to advance local community and economic development ambitions?
- What opportunities already exist in the region that could advance implementation of these policies?
- What barriers exist to implementing these policies and how might those be overcome?
- How might these policies contribute to meeting the region’s climate goals?

9. **Convene stakeholder workshops** to gather input on the draft focus areas and policy options, relative to economic opportunities, changing demographics and market trends, access to opportunity, the availability of affordable housing and transportation options, environmental protection and the potential for job creation and active living. Metro will co-sponsor the **business, freight and developer workshop** in partnership with the *Urban Land Institute, the Port of Portland, the Portland Business Alliance, Columbia Corridor Association, Westside Economic Alliance, East Metro Economic Alliance (suggested, but not confirmed)* and other interested groups. Metro will co-sponsor the **environment and public health workshop** with *1000 Friends of Oregon, the Oregon Public Health Authority, Northwest Health Foundation (suggested, but not confirmed)* and other interested groups. Metro will co-sponsor the **equity and environmental justice workshop** with leaders from *Coalition for a Livable Future, Centro Cultural, OPAL, IRCO (suggested, but not confirmed)* and other community

groups.

10. **Prepare recommendations on the most effective strategies and focus areas to be carried forward and the scenario policy options** to be tested in 2013.

Deliverables

- Report documenting Phase 1 scenarios district and regional performance and sensitivity testing
- “Straw” scenario policy options
- Place Types Toolbox and worksheet
- Focus Areas Map(s)
- 2010 Existing Conditions and 2035 Reference Case maps and summary materials
- Community investment case studies showcasing existing community efforts and ambitions, and highlighting demographics, existing assets, barriers and investment needs
- Regional investment case studies highlighting the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology
- Report summarizing feedback from workshops
- Report on draft scenario options

Related Projects/Programs

- Southwest Corridor Plan (2012-13)
- East Metro Connections Plan (EMCP) (2012)
- Regional Active Transportation Plan (2012-13)
- Industrial Land Readiness/Inventory (2012)
- Metro Parking Management Study (*pending TGM funding*)
- Regional Travel Options Strategic Plan update and work plan
- Transit Oriented Development Strategic Plan and work plan
- Transportation System and Management Operations Plan implementation
- Regional opportunity mapping (2012)
- Community Investment Initiative (2011-13)
- Oregon Sustainable Transportation Initiative (2011-14)
- Local comprehensive plan and transportation system plan updates related to periodic review and other locally-led studies (2011-14)
- Tualatin Valley Highway Corridor Refinement Plan (2012)
- Aloha-Reedville Study and Community Livability Plan (2013)
- McLoughlin Area Plan (2011)
- TriMet Strategic Plan
- Others as they are identified

Schedule

March – August 2012

Climate Smart Communities Scenarios – Phase 2

Track 2: Develop Outcomes-Based Evaluation Methods and Report Card

Draft

March 14, 2012

Purpose

This summary provides an overview of the Track 2 work plan for the second phase of the Climate Smart Communities Scenarios Project. This work plan seeks to identify the desired outcomes, research questions, activities and deliverables needed to assist MPAC, JPACT and the Metro Council in directing staff to develop and evaluate three policy scenarios for testing in 2013. These policy scenarios will be developed with the aim of supporting jobs, protecting neighborhoods and ensuring clean air while reducing greenhouse gas emissions.

Overview

This track will work with local partners and stakeholders to develop methods to analyze costs and savings (individual/public/private) and other economic, public health, equity and environmental outcomes. This work will build on tools and methods developed as part of the Oregon Sustainable Transportation Initiative and development of the Statewide Transportation Strategy. The project's technical work group will advise Metro staff on methods for evaluating scenarios.

Desired outcomes

- The project seeks to confirm specific economic, social and environmental outcomes that decision-makers want measured.
- Diverse stakeholders will have a meaningful opportunity to shape the outcomes to be evaluated in 2013.
- Feedback from a diverse set of stakeholders will inform MPAC, JPACT and the Metro Council in directing staff to develop and test three policy scenarios and specific outcomes to be measured in 2013.

Research questions

- How might different strategies affect the economy, social equity, community, and the environment (e.g., pathways mapping)?
- What information would be most useful to decision-makers?

Activities

1. **Partnering meeting with the equity and environmental justice**

Track 2 Partnering and engagement

January through November 2012

The **technical work group** will continue to be convened in 2012.

Periodic **newsfeed updates** and background **briefings** to print and broadcast media.

January through April 2012

Policymaker and stakeholder

briefings will continue from January through April 2012 to inform them about the Phase 1 Findings.

March through July 2012

Staff-level partnering meetings to develop evaluation methods that can be piloted on the Phase 1 scenarios and then applied during the scenarios evaluation in 2013.

September 2012

On-line engagement to gather input on scenario options and outcomes to be evaluated.

September through November 2012

Regional discussion to build consensus on three scenarios to test and outcomes to be measured. MPAC, JPACT, Council work session(s) and/or summit.

stakeholders to develop a regional equity analysis method that can be applied during the scenarios evaluation in 2013. The method will consider demographics, access to opportunity and the availability of housing and transportation options in an effort to identify pathways that result in increased social and economic health for all communities.

2. **Partnering meeting with ODOT, the Port of Portland and other stakeholders to develop an economic analysis method** that can be applied during the scenarios evaluation in 2013. The method will focus on the cost and financial feasibility of implementation, economic development opportunities, region-wide job creation, and other benefit and impacts.
3. **Partnering meeting led by the Oregon Health Authority to develop a health impact assessment method** that can be piloted on the Phase 1 scenarios and then applied during the scenarios evaluation in 2013. This work is funded through a OHA received grant funding to convene public health experts, land use, planning and transportation experts, and community health, environmental and community development advocates to determine the scope of the assessment. In the assessment, OHA will describe the direction and magnitude of health impacts from the strategies that have been prioritized by the advisory work group. OHA may use the following analytic methods, depending on the scope and resources and what will best answer the research questions: literature review, meta-analysis, stakeholder interviews, risk analysis, and health effects modeling.
4. **Preparing recommendations on the political, economic, social, and environmental outcomes to be evaluated** in the scenarios that are tested in 2013.

Deliverables

- Report summarizing input provided at stakeholder workshops and other engagement activities.
- Report documenting evaluation measures and methods recommended for the scenarios evaluation in 2013.

Related Projects/Programs

- Greater Portland Pulse (2012)
- Southwest Corridor Plan (2012-13)
- East Metro Connections Plan (EMCP) (2012)
- Regional Opportunity Mapping (2012)
- Oregon Sustainable Transportation Initiative (2011-14)
- Oregon Public Health Division Health Impact Assessment of the scenarios developed during Phase 1 of the Scenarios Project (2012)

Schedule

March – November 2012

DRAFT

Climate Smart Communities Scenarios Phase 2: Shaping the Direction

2012 Technical Work and Policy Development Roadmap

Jan Feb Mar April May June July Aug Sept Oct Nov Dec

Track 1

Refine Scenario Building Blocks to Define Policy Options

Develop potential options for how and where to apply strategies and sequencing options for strategies (near-, mid-, long-term)

- *Conduct sensitivity testing of individual community design, pricing and technology strategies to identify the most effective land use and transportation strategies from Phase 1.*
- *Conduct a district and regional level evaluation of the Phase 1 scenarios to understand the range of variation in performance across the region and their potential benefits and impacts.*
- *Define 2040 focus areas and compile Envision Tomorrow place types for scenario planning and community investment case studies.*
- *Develop “straw” scenarios options and case studies that highlight community ambitions and policy options for community design, pricing, marketing, road, fleet and technology.*

Discuss Scenario Options

Regional discussion to build consensus on alternative scenario options that combine and phase local, regional and state land use and transportation strategies to achieve community ambitions, implement 2040 Growth Concept and meet greenhouse gas emissions reduction target

**JPACT, MPAC,
and Metro
Council
direct staff to
develop and
test three
scenarios**

Track 2

Develop Outcomes-Based Evaluation Methods and Report Card

Develop methods to analyze costs and savings (individual/public/private), economic, public health, equity and environmental outcomes. Pilot methods will be used in Track 1 to evaluate the Phase 1 scenarios and frame policy options; the methods will continue to be refined in Phase 2.



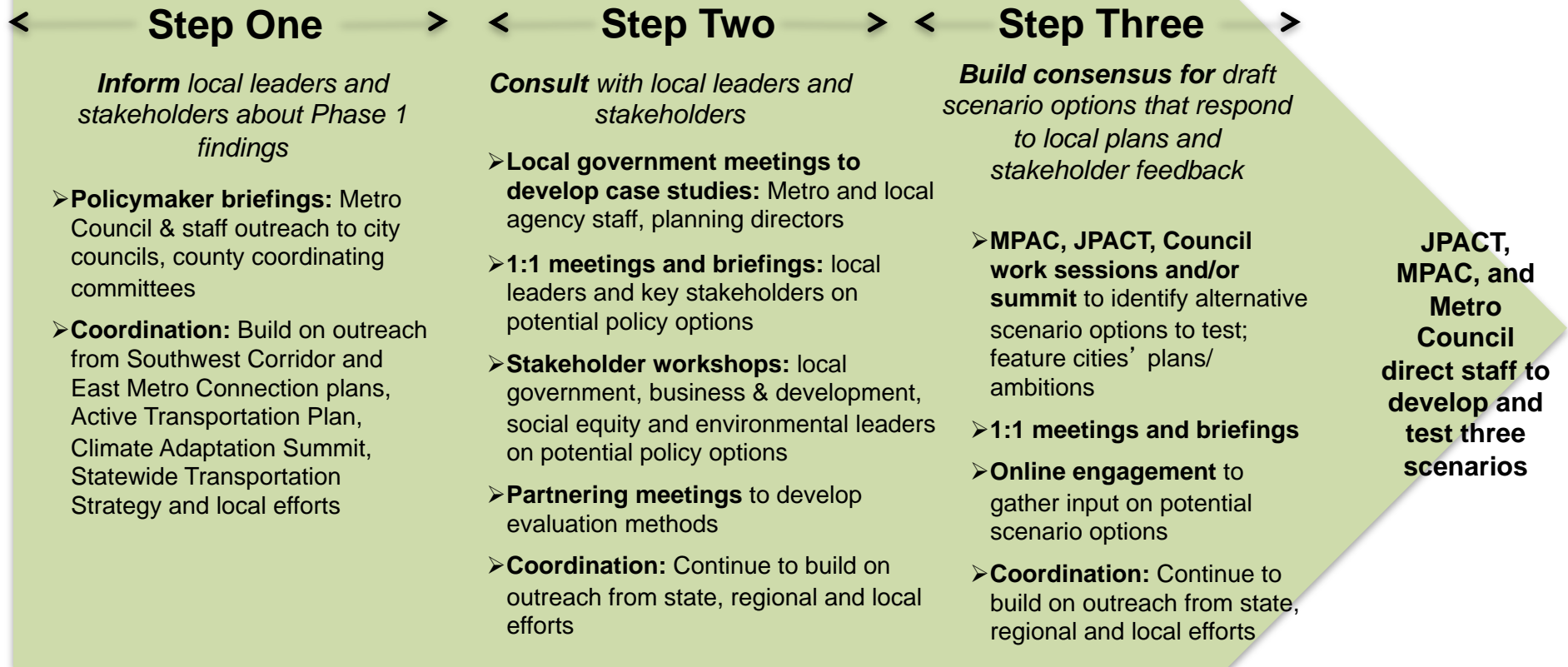
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March 14, 2012

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Climate Smart Communities Scenarios Phase 2: Shaping the Direction 2012 Partnering and Engagement Roadmap

Jan Feb Mar April May June July Aug Sept Oct Nov Dec



Newsfeed series: through the eyes of the technical work group

Periodic newsfeed updates

Ongoing: periodic background briefings to key print and broadcast media

DRAFT

Climate Smart Communities Scenarios

Phase 3: Building the Preferred Scenario and Implementation Strategy

2013-14 Technical Work and Policy Development Roadmap

Jan Feb Mar April May June July Aug Sept Oct Nov Dec

2013

Alternative Scenario Development, Analysis and Reporting

Develop and evaluate alternative scenarios that combine and phase local, regional and state land use and transportation strategies to achieve local aspirations, 2040 implementation, and region's desired outcomes and meet state GHG target

Alternatives Scenarios Evaluation

Current plans

Scenario A

Scenario B

Scenario C

Findings Report

Identify Draft Preferred Scenario
Recommendations

*Regional discussion on findings to inform
recommendations for draft preferred
scenario elements and evaluation process*

Council, MPAC &
JPACT direction
on draft
preferred
scenario to be
developed and
tested
(Nov.- Dec.
2013)

2014

Draft Preferred Land Use and Transportation Scenario Development, Evaluation and Refinement Process

Develop and evaluate draft preferred land use and transportation scenario, and identify refinements

Draft
preferred
scenario

Findings &
Rec' ds for
Refinements

Council, MPAC
& JPACT
release final
draft
preferred
scenario for
final public
review
(September
2013)

Preferred Land Use and Transportation Scenario Final Review and Selection Process

Final analysis, public review and selection of state, local and regional policies, investments, and short-term and long-term actions needed to implement and monitor as part of regional growth management decision

MPAC
recommends;
Council and
JPACT select
preferred
scenario
(Dec. 2014)



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March 14, 2012