

Metro | Agenda

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, March 30, 2012
Time: 9:30 a.m. to 12 p.m. (noon)
Place: Metro, Room 370A/B

- | | | | |
|----------|-----|--|------------------------------|
| 9:30 AM | 1. | Call to Order and Declaration of a Quorum | Elissa Gertler, Chair |
| 9:35 AM | 2. | Comments from the Chair and Committee Members | Elissa Gertler, Chair |
| | * | <ul style="list-style-type: none">Update on Regional Transportation Functional Plan Amendments | |
| 9:40 AM | 3. | Citizen Communications to TPAC on Non-Agenda Items | |
| 9:45 AM | 4. | * Consideration of the TPAC Minutes for Feb. 17, 2012 | |
| | 5. | <u>ACTION ITEMS</u> | |
| 9:50 AM | 5.1 | * Draft 2012-13 Unified Planning Work Program (UPWP) – <u>RECOMMENDATION TO JPACT REQUESTED</u> | Josh Naramore |
| | | <ul style="list-style-type: none"><i>Purpose:</i> Final review of the UPWP to consider comments incorporated from the federal consultations and previous TPAC meetings.<i>Outcome:</i> Recommendation to JPACT. | |
| | 6. | <u>INFORMATION/DISCUSSION ITEMS</u> | |
| 10:10 AM | 6.1 | * Climate Smart Communities Scenarios Phase 2 Work Plan – <u>INFORMATION/DISCUSSION</u> | Kim Ellis |
| | | <ul style="list-style-type: none"><i>Purpose:</i> Provide a project status report and review proposed approach for Phase 2.<i>Outcome:</i> TPAC input on proposed approach and support for moving forward. | |
| 11:30 AM | 7. | <u>ADJOURN</u> | Elissa Gertler, Chair |

* Material available electronically.

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.

Future TPAC discussion items:

- MOVES update
- High Speed Rail
- Context sensitive design and least cost planning
- A briefing on the Metro Auditor's *Tracking Transportation Project Outcomes* report
- Congestion Pricing Pilot Study

2012 TPAC Work Program

3/23/12

<p><u>March 30, 2012 – Regular Meeting</u></p> <ul style="list-style-type: none">• FY2012-12 UPWP Action – Recommendation to JPACT• Climate Smart Communities Scenarios Phase 2 Work Plan – Discussion	<p><u>April 27, 2012 – Regular Meeting</u></p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios – Discussion• Oregon Sustainable Transportation Initiative (OSTI) - Information<ul style="list-style-type: none">○ Statewide Transportation Strategy (STS)○ LCDC Rulemaking on selection of preferred scenario• Regional Safety Action Plan – Discussion of Findings• Proposed amendments to the Regional Transportation Functional Plan – Recommendation to JPACT• Presentation on Age-Friendly-Communities and Transportation –Information• RTO Strategic Plan – Recommendation to JPACT
<p><u>May 25, 2012 – Regular Meeting</u></p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios – Discussion• East Metro Connections update – Information• Regional Safety Action Plan – Discussion of Recommendations and Framing of Implementation	<p><u>June 29, 2012 – Regular Meeting</u></p>
<p><u>July 27, 2012 – Regular Meeting</u></p>	<p><u>August 31, 2012 – Regular Meeting</u></p> <ul style="list-style-type: none">• Oregon Sustainable Transportation Initiative (OSTI) - LCDC Rulemaking on selection of preferred scenario – Informational• Climate Smart Communities Scenarios – Discussion
<p><u>September 28, 2012 – Regular Meeting</u></p> <ul style="list-style-type: none">• Oregon Sustainable Transportation Initiative (OSTI) - LCDC Rulemaking on selection of preferred scenario - Discussion	<p><u>October 26, 2012 – Regular Meeting</u></p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios – Discussion
<p><u>November 30, 2012 – Regular Meeting</u> Climate Smart Communities Scenarios – Discussion</p>	

Parking Lot:

- MOVES update
- High Speed Rail
- Context sensitive design and least cost planning
- A briefing on the Metro Auditor’s *Tracking Transportation Project Outcomes* report
- Congestion Pricing Pilot Study



Date: March 22, 2012
To: TPAC & Interested Parties
From: John Mermin, Senior Transportation Planner
Subject: Regional Transportation Functional Plan amendments

Purpose

TPAC 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 22, 2012
MEMO TO TPAC
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 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*



TRANSPORTATION POLICY ALTERNATIVES COMMITTEE
February 17, 2012
Metro Regional Center, Council Chamber

MEMBERS PRESENT

Chris Beanes
Karen Buehrig
Carla Danley
David Eatwell
Carol Gossett
Heidi Guenin
Katherine Kelly
Nancy Kraushaar
Alan Lehto
Margaret Middleton
Satvinder Sandhu
Karen Schilling
Paul Smith
Charlie Stephens
Rian Windsheimer

AFFILIATION

Community Representative
Clackamas County
Community Representative
Community Representative
Community Representative
Community Representative
City of Gresham, Representing Cities of Multnomah Co.
City of Oregon City, Representing Cities of Clackamas Co.
TriMet
City of Beaverton, Representing Cities of Washington Co.
Federal Highway Administration
Multnomah County
City of Portland
Community Representative
Oregon Department of Transportation

MEMBERS EXCUSED

Brent Curtis
Elissa Gertler, Chair
John Hoefs
Scott King
Dean Lookingbill
Dave Nordberg
Sharon Zimmerman

AFFILIATION

Washington County
Metro
C-TRAN
Port of Portland
Southwest Washington Regional Transportation Committee
Oregon Department of Environmental Quality
Washington State Department of Transportation

ALTERNATES PRESENT

Andy Back
Phil Healy
Tom Kloster, Chair

AFFILIATION

Washington County
Port of Portland
Metro

STAFF: Matt Bihn, Anthony Butzek, Daniel Kaempff, Ted Leybold, Lake McTighe, John Mermin, Josh Naramore, Kelsey Newell, Pam Peck, Dylan Rivera, Marc Week Caleb Winter..

1. CALL TO ORDER AND DECLARATION OF A QUORUM

Chair Tom Kloster declared a quorum and called the meeting to order at 9:35 a.m.

2. COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS

Chair Kloster announced that Ms. Kim Ellis of Metro will present to the Metro Policy Advisory Committee (MPAC) and TPAC in mid March 2012 on the Climate Smart Communities (CSC) Phase 2 local engagement plan.

Mr. Joshua Naramore of Metro provided an update on the FY 2012-13 Unified Planning Work Program which he will provide a formal update in March 2012. The committee discussed the Division/Powel Corridor specifically how it will be adopted into the Regional Transportation Plan, and the benefit of using Bus Rapid Transit in the corridor.

Mr. Ted Leybold of Metro stated that there will be a stakeholder meeting state wide concerning Oregon Department of Transportation (ODOT) projects. A public comment period will commence on April 13th. The committee agreed that members should send into ODOT directly and that TPAC nor JPACT should formally draft a comment letter.

Mr. Alan Lehto of TriMet updated the committee on TriMet's proposed plan to address the organizations' budget deficit. TriMet has been holding open houses to discuss the plan and will hold a public comment period in March 2012. TriMet proposes to increase and simplify of rates, decrease frequency and routes and increase internal efficiencies. The committee expressed concern for how the proposed changes will affect transit dependant riders and how reductions will affect green house gasses reduction goals.

Ms. Nancy Kraushaar of Oregon City reminded the committee of the 4-day closure on Highway 214 and Washington Street. The road will close March 22nd to March 27th for a rapid bridge replacement. The City and the County are initiating a major public outreach and expect a lot of media coverage. Ms. Kraushaar emphasized the need to inform agencies and local leaders and to encourage the public to use alternative routes during the closure.

3. CITIZEN COMMUNICATIONS TO TPAC ON NON-AGENDA ITEMS

There was none.

4. CONSIDERATION OF THE TPAC MINUTES FOR JANUARY 6, 2012

MOTION: Mr. Satvinder Sandhu moved, Mr. Charlie Stephens seconded, to approve the Transportation Policy Alternatives Committee (TPAC) minutes for January 27, 2012.

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

5. ACTION ITEMS

5.1 2012-15 Metropolitan Transportation Improvement Program (MTIP)

Mr. Leybold introduced Draft Resolution No. 12-4332 which, if approved by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council, would adopt the 2012-15 Metropolitan Transportation Improvement Program (MTIP). The 2012-15 MTIP is a report that summarizes all programming of federal transportation funding in the metropolitan region for the federal fiscal years 2012 to 2015 and demonstrates that the use of these funds will comply with all relevant federal laws and administrative rules. The MTIP and the State Transportation Improvement Program (STIP) are required to be coordinated and approved in the same time period every two years.

Approval of the resolution would:

1. Approve the scheduling of previously allocated federal funding to projects by project phase and fiscal year;
2. Define administrative authority to add or remove projects from the MTIP, and;
3. Affirm the region meets federal planning and programming rules and submission of Documentation to the Governor of Oregon, the Federal Highway Administration and the Federal Transit Administration.

The committee discussed the following items:

- The name of the Powell/Division corridor and the perception that it would run on a specific street.
- A correction to the MTIP on TriMet Regional Travel Options (RTO) allocations.
- The funding figure for FY 2012 at \$84 million for Trimet Portland to Milwaukie light rail. Trimet stated that The FTA had not formally committed to \$85 million but Trimet staff anticipate the release of the figure in march.
- The timing and process for STIP funds related to the MTIP timeline.
- The committee discussed elements of administrative amendments such as amendment size and air quality impacts. FHWA expressed support for resolutions ability to reduce the amount of amendment votes.

MOTION: Mr. Andy Back moved, Mr. Paul Smith seconded, to recommend that JPACT approve Draft Resolution No. 12-4332.

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

5.2 Air Quality Conformity 2012-15 Metropolitan Transportation Improvement Program (MTIP)

Mr. Matt Bihn of Metro introduced Draft Resolution No. 12-433, which if approved by JPACT and the Metro Council, would approve the Air Quality Conformity Determination for the FY 2012-15 MTIP. Federal regulations require that an air quality conformity determination be completed for any updated MTIP. The air quality conformity determination must demonstrate compliance with all federal and state determined air pollutants for the area so that the region, the Oregon Department of Transportation and local jurisdictions can continue to be eligible to receive federal funds for transportation projects within the region.

MOTION: Mr. Smith moved, Mr. Charlie Stephens seconded, to recommend that JPACT approve Draft Resolution No. 12-4330.

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

6. INFORMATION/DISCUSSION ITEMS

6.1 Regional Active Transportation Plan

Ms. Lake McTighe of Metro presented an overview of the Regional Active Transportation Plan project. The need for a Regional Active Transportation Plan (ATP) was identified as a follow-up activity in the 2035 Regional Transportation Plan (RTP). The project objective is to identify priorities and strategies for completing a regional principal active transportation network, which will be identified by the project. The project officially started on Jan. 4, 2012, will last 18 months, and must be completed by June 30, 2013, to

fulfill the requirements of the Transportation Growth Management (TGM) grant which is funding part of the project. Active transportation is transportation powered by human energy, such as riding a bike, walking and public transportation. Ms. McTighe overviewed the benefits and strategies for a working active transportation plan. Themes that were identified were why timing is important and local goals and regional outcome. Phase I commences from January 2012 to June 2012, Phase II from August 2012 to January 2013 and Phase III from February 2013 to June 2013.

The committee discussed the following items:

- Developing local active transportation in a regional context.
- Collaboration between other entities like the Environmental Protection Agency, Housing and Urban Development and freight stakeholders.
- Include public health professionals in the conservation especially for public outreach and
- Options to address potentially less expensive alternatives for active transportation infrastructure. Some committee members suggested developing a tool kit for the 2035 RTP.
- Strategies for public outreach and explaining why something like a walking trip is a regional issue.
- The health cost benefits of the ATP and providing that to the public.
- Potential funding sources for financing and revenue and the need to look beyond federal funding.
- Active transportation outside of the Metro boundary. A public involvement strategy will be released soon but the focus will be on urban areas and areas under Metro's jurisdiction.
- Members discussed the role of regional and local governments in active transportation.
- Members recommended including a transit advocate, a member from the Multnomah County Bicycle and Pedestrian Citizen Advisory Committee and a medical professional to the executive council on active transportation.

6.2 2012-17 Regional Travel Options Strategic Plan

Mr. Daniel Kaempff of Metro introduced the FY 2012-17 Regional Travel Options Strategic Plan. The purpose of this strategic plan is to define a mission, a set of goals and objectives, and a 5-year plan to support a regional travel options program. Metro's Regional Travel Options (RTO) program supports Metro's mission of creating a great place by increasing the awareness of non-single occupancy vehicle travel options such as biking, walking, taking transit, and ridesharing. Staff will convene a TPAC working group to develop project criteria. The RTO strategic plan is supported by four efforts, stakeholder interviews, landscape scan, RTO think tank and biennial performance evaluation. The work group recommendations will come before TPAC at a later date. A 30-day public comment period will commence on Tuesday, February 28th. TPAC is anticipated to make a recommendation to JPACT at their March meeting. Pending TPAC's recommendation, JPACT and the Metro Council are anticipated to consider and vote on the plan in April.

The committee discussed the following items:

- Scaling back and streamlining Metro's administrative roll to increase funds and flexibility for grants.
- Creation of a working group to evaluate grants proposals and the possibility of a TPAC Subcommittee, MTIP or the RTO subgroup to fulfill that role.

- Reducing Metros administrative costs beyond 35%. 35% was the largest reduction that could be made.
- The importance Transportation Management Association's (TMA). Members expressed general concern how the competitive grant process could affect TMAs, however there is need to create accountability.

6.3 Regional Safety Plan Update

Mr. Naramore presented a preview of the Regional Safety Plan. In 2008, as part of the quadrennial federal certification review, Metro received a recommendation from the Federal Highway Administration (FHWA) to better incorporate safety into the MPO planning process. In response, Metro established a Regional Safety Workgroup. From the onset, workgroup participants highlighted the importance for creating a data driven approach to incorporate safety data into regional land use and transportation decisions. The workgroup developed a list of core activities to help Metro focus its safety efforts. Staff will be bringing a draft Regional Safety Plan to TPAC in April and May to share findings and discuss implantation before going to JPACT in June.

7. ADJOURN

Chair Gertler adjourned the meeting at 11:57 p.m.

Respectfully submitted,



Marcus Week
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR FEBRUARY 17, 2012

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

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
3	Memo	02/17/12	Comments on FY 12-13 UPWP	021712t-01
3	Handout	02/12	TriMet Challenges & Choices Feb	021712t -02
3	Handout	2/12	TriMet Bus Service Reduction	021712t -03
3	Handout	2/12	HWY 214 Closure	021712t -04
5.1	Resolution	2/12	Resolution No. 12-4332	021712t -05
5.2	Resolution	2/12	Resolution No. 12-4332	021712t-06

6.1	PPT	2/17/12	The Regional Active Transportation Plan	021712t -07
------------	-----	---------	---	-------------

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF CERTIFYING THAT) RESOLUTION NO. 12-4335
THE PORTLAND METROPOLITAN AREA IS IN)
COMPLIANCE WITH THE FEDERAL) Introduced by Chief Operating Officer Martha
TRANSPORTATION PLANNING) Bennett with the concurrence of Council
REQUIREMENTS AND ADOPTING THE) President Tom Hughes
FISCAL YEAR 2012-13 UNIFIED PLANNING
WORK PROGRAM

WHEREAS, the Unified Planning Work Program (UPWP) as shown in Exhibit A attached hereto, describes all Federally-funded transportation planning activities for the Portland-Vancouver metropolitan area to be conducted in FY 2012-13; and

WHEREAS, the FY 2012-13 UPWP indicates Federal funding sources for transportation planning activities carried out by Metro, Southwest Washington Regional Transportation Council, Clackamas County and its cities, Multnomah County and its cities, Washington County and its cities, TriMet, and the Oregon Department of Transportation; and

WHEREAS, approval of the FY 2012-13 UPWP is required to receive Federal transportation planning funds; and

WHEREAS, the federal self-certification findings in Exhibit B demonstrate Metro's compliance with Federal planning regulations as required to receive Federal transportation planning funds; and

WHEREAS, the FY 2012-13 UPWP is consistent with the proposed Metro Budget submitted to the Metro Council; now therefore

BE IT RESOLVED by the Metro Council:

1. That the FY 2012-13 UPWP attached hereto as Exhibit A is hereby adopted.
2. That the FY 2012-13 UPWP is consistent with the continuing, cooperative, and comprehensive planning process and is given positive Intergovernmental Project Review action.
3. That Metro's Chief Operating Officer is authorized to apply for, accept, and execute grants and agreements specified in the UPWP.
4. That staff shall update the UPWP budget figures, as necessary, to reflect the final Metro budget.
5. That staff shall submit the final UPWP and self-certification findings to the Federal Highway Administration and Federal Transit Administration.

ADOPTED by the Metro Council this _____ day of April 2012.

Tom Hughes, Council President

Approved as to Form:

Alison Kean-Campbell, Metro Attorney

CLICK HERE FOR FULL REPORT ^{Exhibit A}

FY 2012-13

Unified Planning Work Program

Transportation Planning in the
Portland/Vancouver Metropolitan Area

March 22, 2012

Metro Self-Certification

1. Metropolitan Planning Organization Designation

Metro is the Metropolitan Planning Organization (MPO) designated by the Governor for the urbanized areas of Clackamas, Multnomah and Washington Counties, and operates in accordance with 23 U.S.C. 134 and 49 U.S.C. 5303.

Metro is a regional government with six directly elected district councilors and a regionally elected Council President. Local elected officials of general purpose governments are directly involved in the transportation planning/decision process through the Joint Policy Advisory Committee on Transportation (JPACT). JPACT provides the “forum for cooperative decision-making by principal elected officials of general purpose governments” as required by USDOT and takes action on the Regional Transportation Plan (RTP), the Metropolitan Transportation Improvement Program (MTIP) and the Unified Planning Work Program (UPWP). The Metro Policy Advisory Committee (MPAC) deals with non-transportation-related matters and with the adoption and amendment to the Regional Transportation Plan (RTP). Specific roles and responsibilities of the committees are described on page 2.

2. Geographic Scope

Transportation planning in the Metro region includes the entire area within the Federal-Aid Urban Boundary (FAUB). Metro updated the FAUB and Federal functional classification in January 2005 as recommended in Metro’s 2004 Federal Review. Additionally, as part of the 2035 RTP adopted in June 2010, the Metropolitan planning area boundaries were expanded to reflect the urbanized area defined by the 2000 Census to address a corrective action from the 2008 federal certification review.

3. Agreements

- a. A Memorandum of Agreement between Metro and the Southwest Washington Regional Transportation Council (RTC) delineates areas of responsibility and coordination. Executed in April 2009, the Agreement will be updated in April 2012.
- b. In accordance with 23 CFR 450.314, an intergovernmental agreement (IGA) between TriMet, Oregon Department of Transportation (ODOT), and Metro was executed in July 2008, to be updated in June 2018.
- c. Yearly agreements are executed between Metro and ODOT defining the terms and use of FHWA planning funds.
- d. Bi-State Coordination Committee Charter – Metro and eleven state and local agencies adopted resolutions approving a Bi-State Coordination Committee Charter in 2004. Some were adopted in late 2003 and the balance in 2004, which triggered the transition from the Bi-State Transportation Committee to the Bi-State Coordination Committee.
- e. A Memorandum of Understanding between Metro and the Department of Environmental Quality (DEQ) describing each agency’s responsibilities and roles for air quality planning. Executed in August 2010, it will not need to be updated until August 2013.
- f. A Memorandum of Understanding between Metro and South Metro Area Regional Transit (SMART) outlining roles and responsibilities for implementing the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) was updated in 2011 and is effective July 1, 2011, and will be updated in June 2014.

4. Responsibilities, Cooperation and Coordination

Metro uses a decision-making structure that provides state, regional, and local governments the opportunity to participate in the transportation and land use decisions of the organization. The two key committees are JPACT and MPAC. These committees receive recommendations from the

Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC).

JPACT

This committee is comprised of three Metro Councilors; seven locally elected officials representing cities and counties, and appointed officials from ODOT, TriMet, the Port of Portland, and DEQ. The State of Washington is also represented with three seats that are traditionally filled by two locally elected officials and an appointed official from the Washington Department of Transportation (WSDOT). All transportation-related actions (including Federal MPO actions) are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration. Final approval of each item, therefore, requires the concurrence of both bodies. As recommended by Metro's 2004 Federal Review, JPACT has designated a Finance Subcommittee to explore transportation funding and finance issues in detail, and make recommendations to the full committee. In FY 2007-08, JPACT completed the bylaw review recommended in Metro's 2004 Federal Review and clarified representation of South Metro Area Regional Transit representation on the committee.

Bi-State Coordination Committee

Based on a recommendation from the I-5 Transportation & Trade Partnership Strategic Plan, the Bi-State Transportation Committee became the Bi-State Coordination Committee in early 2004. The Bi-State Coordination Committee was chartered through resolutions approved by Metro, Multnomah County, the cities of Portland and Gresham, TriMet, ODOT, the Port of Portland, RTC, Clark County, C-Tran, WSDOT and the Port of Vancouver. The Committee is charged with reviewing all issues of bi-state significance for transportation and land use. A 2003 Memorandum of Understanding (MOU) states that JPACT and the RTC Board "shall take no action on an issue of bi-state significance without first referring the issue to the Bi-State Coordination Committee for their consideration and recommendation."

MPAC

This committee was established by the Metro Charter to provide a vehicle for local government involvement in Metro's planning activities. It includes eleven local elected officials, three appointed officials representing special districts, TriMet, a representative of school districts, three citizens, two non-voting Metro Councilors, two Clark County, Washington representatives and a non-voting appointed official from the State of Oregon. Under the Metro Charter, this committee has responsibility for recommending to the Metro Council adoption of or amendment to any element of the Charter-required RTP.

The Regional Framework Plan was adopted on December 11, 1997 and updated December 2005 and most recently in December 2010 and addresses the following topics:

- Transportation
- Land use (including the Metro Urban Growth Boundary (UGB))
- Nature in Neighborhoods
- Water supply and watershed management
- Natural hazards
- Coordination with Clark County, Washington
- Management and implementation

As part of the 2035 RTP adoptions there were specific changes made to the Regional Transportation Functional Plan. In accordance with this requirement, the transportation component of the Regional Framework Plan developed to meet Federal transportation planning regulations, the Oregon Transportation Planning Rule and Metro Charter requirements that require a recommendation from both MPAC and JPACT. This ensures integration of transportation with land use and environmental concerns.

5. Metropolitan Transportation Planning Products

a. Unified Planning Work Program

JPACT, the Metro Council, and the Southwest Washington RTC adopt the UPWP annually. It fully describes work projects planned for the Transportation Department during the fiscal year and is the basis for grant and funding applications. The UPWP also includes federally funded major projects being planned by member jurisdictions. These projects will be administered by Metro through intergovernmental agreements with ODOT and the sponsoring jurisdiction. As required by Metro's 2004 Federal Review, Congestion Management Process (CMP) and RTP update tasks were expanded in the UPWP narratives. The CMP was adopted as part of the 2035 RTP and can be found in Appendix 4.4. Also, Metro identified environmental justice tasks in the UPWP in the Environmental Justice and Title VI narrative and individual program narratives; elderly and disabled planning tasks have been identified in the Regional Transportation Plan program narrative.

b. Regional Transportation Plan

JPACT and the Metro Council approved the 2035 RTP in June 2010. The 2035 RTP includes a new policy for the purpose of transportation planning and project funding to address SAFETEA-LU provisions and key issues facing the region. The 2035 RTP establishes a new outcomes-based framework and new policies and tools to guide future planning and investment decisions. The plan includes a broad set of ambitious performance targets that are tied to the outcomes that the RTP is trying achieve. The targets and other performance measures included in the plan continue the region's shift away from reliance upon level-of-service as the primary measure for determining transportation needs and success of the plan's strategies. To successfully implement this new approach and make progress toward the six desired outcomes identified through the *Making the Greatest Place* effort, new actions, tools and collaboration are needed.

Finally, the 2035 RTP has three new system component plans: a Regional Transportation System Management and Operations Plan, a Regional Freight Plan and a Regional High Capacity Transit System Plan. These plans more fully articulate the integrated multi-modal regional transportation system and prioritize investments to improve the operations and efficiency of the existing transportation, improve freight reliability and strategically expand the HCT system to support 2040 Growth Concept implementation and meet other goals of the RTP. In addition, the Regional Transportation Functional Plan (RTFP) component of the RTP directs how local governments will implement the RTP.

As required by Metro's 2008 Federal Review, the 2035 update included documentation of the process for both full and administrative RTP amendments. A Regional Safety Workgroup was also formed in October 2009 to better address safety as part of Metro's planning process. Currently, the Safety Workgroup is working on a safety plan that is expected to be completed by December 2011. The safety work is included in the Transportation System Management and Operations (TSMO): Regional Mobility Narrative.

Additionally, a new map was added to Chapter 1 of the RTP that identifies the MPO Planning Boundary and the Air Quality Maintenance Area Boundary. This boundary defines the area that the RTP applies to for Federal planning purposes. The boundary includes the area inside Metro's jurisdictional boundary, the 2008 UGB and the 2000 census defined urbanized area boundary for the Portland metropolitan region. FHWA and FTA approved the 2035 RTP and the associated air quality conformity determination on February 29, 2008 and again in September 2010. Documentation of compliance with specific Federal planning requirements is summarized in subsequent sections of this document.

Work will begin in fiscal year 2012-13 to start the 2014 RTP update.

c. Metropolitan Transportation Improvement Program

The MTIP update was adopted in March 2012 and incorporated into the 2012-15 State Transportation Improvement Program (STIP). The update included the allocation of \$71 million of Surface Transportation Program (STP) and Congestion Mitigation/Air Quality Program

(CMAQ) funding, programming of projects for the ODOT Modernization, Bridge, Safety, Preservation, Operations, OTIA III, Enhancements, and Immediate Opportunity Fund projects and programming of transit funding. The first year of programming is considered the priority project funding for the region. Should any of these projects be delayed, projects of equivalent dollar value may be advanced from the second, third or fourth years of the program without processing formal Transportation Improvement Program (TIP) amendments. As recommended in Metro's 2004 Federal Review, the MTIP webpage was linked to ODOT's STIP page.

6. Planning Factors

Currently, Metro's planning process addresses the SAFETEA-LU planning factors in all projects and policies. Table 1 below describes the relationship of the planning factors to Metro's activities and Table 2 outlines Metro's response to how the factors have been incorporated into the planning process. The SAFETEA-LU planning factors are:

1. Support the economic vitality of the metropolitan area, especially by enabling global competitiveness, productivity and efficiency;
2. Increase the safety of the transportation system for motorized and non-motorized users;
3. Increase the security of the transportation system for motorized and non-motorized users;
4. Increase the accessibility and mobility options available to people and for freight;
5. Protect and enhance the environment, promote energy conservation and improve quality of life;
6. Enhance the integration and connectivity of the transportation system, across and between modes, for people and freight;
7. Promote efficient management and operations; and
8. Emphasize the preservation of the existing transportation system.

As noted in Tables 1 and 2, Metro has reviewed and updated both the RTP and MTIP, and revised both documents to be compliant with SAFETEA-LU planning requirements.

Table 1: SAFETEA-LU Planning Factors

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
1. Support Economic Vitality	<ul style="list-style-type: none"> • RTP policies linked to land use strategies that promote economic development. • Industrial areas and intermodal facilities identified in policies as "primary" areas of focus for planned improvements. • Comprehensive, multimodal freight improvements that link intermodal facilities to industry are detailed for the plan period. • Highway Level of Service (LOS) policy tailored to protect key freight corridors. • RTP recognizes need for freight linkages to destinations beyond the region by all modes. 	<ul style="list-style-type: none"> • All projects subject to consistency with RTP policies on economic development and promotion of "primary" land use element of 2040 development such as centers, industrial areas and intermodal facilities. • Special category for freight improvements calls out the unique importance for these projects. • All freight projects subject to funding criteria that promote industrial jobs and businesses in the "traded sector." 	<ul style="list-style-type: none"> • HCT plans designed to support continued development of regional centers and central city by increasing transit accessibility to these locations. • HCT improvements in major commute corridors lessen need for major capacity improvements in these locations, allowing for freight improvements in other corridors.

Table 1: SAFETEA-LU Planning Factors

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
2. Increase Safety	<ul style="list-style-type: none"> • The RTP policies call out safety as a primary focus for improvements to the system. • Safety is identified as one of three implementation priorities for all modal systems (along with preservation of the system and implementation of the region's 2040-growth management strategy). • Work is currently underway by the Regional Safety Workgroup to develop a safety plan for the Portland Metropolitan region. The work will be completed in June 2012. Implementation will continue into 2012-13. • The RTP includes a number of investments and actions aimed at further improving safety in the region, including: <ul style="list-style-type: none"> ◦ Investments targeted to address known safety deficiencies and high-crash locations. ◦ Completing gaps in regional bicycle and pedestrian systems. ◦ Retrofits of existing streets in downtowns and along main streets to include on-street parking, street trees marked street crossings and other designs to slow traffic speeds to follow posted speed limits. ◦ Intersection changes and ITS strategies, including signal timing and real-time traveler information on road conditions and hazards. ◦ Expanding safety education, awareness and multi-modal data collection efforts at all levels of government. ◦ Expand safety data collection efforts and create a better system for centralized crash data for all modes of travel. 	<ul style="list-style-type: none"> • All projects ranked according to specific safety criteria. • Road modernization and reconstruction projects are scored according to relative accident incidence. • All projects must be consistent with regional street design guidelines that provide safe designs for all modes of travel. 	<ul style="list-style-type: none"> • Station area planning for proposed HCT improvements is primarily driven by pedestrian access and safety considerations.

Table 1: SAFETEA-LU Planning Factors

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
3. Increase Security	<ul style="list-style-type: none"> • System security was incorporated into the 2035 RTP. • Security and emergency management activities are summarized in Section 1.6 of the 2035 RTP (Pages 1-38 – 1-40). • Policy framework in Section 2.3 of the 2035 RTP includes, “Goal 5: Enhance Safety and Security,” and specific security objectives and potential actions to increase security of the transportation system for all users. • Includes investments that increase system monitoring for operations, management and security of the regional mobility corridor system. • Actions direct Metro to work with local, state and regional agencies to identify critical infrastructure in the region, assess security vulnerabilities and develop coordinated emergency response and evacuation plans. • Actions direct transportation providers to monitor the regional transportation and minimize security risks at airports, transit facilities, marine terminals and other critical infrastructure. 		<ul style="list-style-type: none"> • System security has been a routine element of the HCT program, and does not represent a substantial change to current practice.

Table 1: SAFETEA-LU Planning Factors

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
4. Increase Accessibility	<ul style="list-style-type: none"> • The RTP policies are organized on the principle of providing accessibility to centers and employment areas with a balanced, multi-modal transportation system. • The policies also identify the need for freight mobility in key freight corridors and to provide freight access to industrial areas and intermodal facilities. • The plan emphasizes accessibility and reliability of the system, particularly for commuting and freight, and includes a new, more customized approach to managing and evaluating performance of mobility corridors. This new approach builds on using new, cost-effective technologies to improve safety, optimize the existing system, and ensure freight transporters and commuters have a broad range of travel options in each corridor. 	<ul style="list-style-type: none"> • Measurable increases in accessibility to priority land use elements of the 2040-growth concept is a criterion for all projects. • The MTIP program places a heavy emphasis on non-auto modes in an effort to improve multi-modal accessibility in the region. 	<ul style="list-style-type: none"> • The planned HCT improvements in the region will provide increased accessibility to the most congested corridors and centers. • Planned HCT improvements provide mobility options to persons traditionally underserved by the transportation system.

Table 1: SAFETEA-LU Planning Factors (continued)

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
<p>5. Protect Environment and Quality of Life</p>	<ul style="list-style-type: none"> • The RTP is constructed as a transportation strategy for implementing the region's 2040-growth concept. The growth concept is a long-term vision for retaining the region's livability through managed growth. • The RTP system has been "sized" to minimize the impact on the built and natural environment. • The region has developed an environmental street design guidebook to facilitate environmentally sound transportation improvements in sensitive areas, and to coordinate transportation project development with regional strategies to protect endangered species. • The RTP conforms to the Clean Air Act. • Many new transit, bicycle, pedestrian and Transportation Demand Management (TDM) projects have been added to the plan to provide a more balanced multi-modal system that maintains livability. • RTP transit, bicycle, pedestrian and TDM projects will complement the compact urban form envisioned in the 2040 growth concept by promoting an energy-efficient transportation system. • Metro coordinates its system level planning with resource agencies to identify and resolve key issues. • The region's parking policies (Title 4 of the Regional Transportation Functional Plan) are also designed to encourage the use of alternative modes, and reduce reliance on the automobile, thus promoting energy conservation and reducing air quality impacts. 	<ul style="list-style-type: none"> • The MTIP conforms to the Clean Air Act and continues to comply with the air quality maintenance plan in accordance with sections 174 and 176 (c) and (d) of the Clean Air Act, as amended (42 U.S.C. 7504, 7605 (c) and (d)) and 40 CFR part 93. • The MTIP focuses on allocating funds for clean air (CMAQ), livability (Transportation Enhancement) and multi- and alternative modes (STIP). • Bridge projects in lieu of culverts have been funded through the MTIP to enhance endangered salmon and steelhead passage. • "Green Street" demonstration projects funded to employ new practices for mitigating the effects of storm water runoff. 	<ul style="list-style-type: none"> • HCT improvements provide emission-free transportation alternatives to the automobile in some of the region's most congested corridors and centers. • HCT transportation alternatives enhance quality of life for residents by providing an alternative to auto travel in congested corridors and centers.

Table 1: SAFETEA-LU Planning Factors (continued)

Factor	System Planning (RTP)	Funding Strategy (MTIP)	High Capacity Transit (HCT)
6. System Integration/ Connectivity	<ul style="list-style-type: none"> • The RTP includes a functional classification system for all modes that establishes an integrated modal hierarchy. • The RTP policies and Functional Plan include a street design element that integrates transportation modes in relation to land use for regional facilities. • The RTP policies and Functional Plan include connectivity provisions that will increase local and major street connectivity. • The RTP freight policies and projects address the intermodal connectivity needs at major freight terminals in the region. • The intermodal management system identifies key intermodal links in the region. 	<ul style="list-style-type: none"> • Projects funded through the MTIP must be consistent with regional street design guidelines. • Freight improvements are evaluated according to potential conflicts with other modes. 	<ul style="list-style-type: none"> • Planned HCT improvements are closely integrated with other modes, including pedestrian and bicycle access plans for station areas and park-and-ride and passenger drop-off facilities at major stations.
7. Efficient Management & Operations	<ul style="list-style-type: none"> • The policy component of the 2035 RTP includes specific provisions for efficient system management and operation (2035 RTP Goal 4), with an emphasis on TSM, ATMS and the use of non-auto modal targets (Table 2.5) to optimize the existing and planned transportation system. • The 2035 RTP included adoption of the Regional Transportation System Management and Operations (TSMO) Plan. The TSMO Plan includes project and corridor prioritization. • Proposed RTP projects include many system management improvements along regional corridors. • The plan also calls for consideration of value pricing in the region to better manage capacity and peak use of the throughway system. However, more work is needed to gain public acceptance of this tool. 	<ul style="list-style-type: none"> • Projects are scored according to relative cost effectiveness (measured as a factor of total project cost compared to measurable project benefits). • TDM projects are solicited in a special category to promote improvements or programs that reduce single occupancy vehicle (SOV) pressure on congested corridors. • TSM/ITS projects are funded through the MTIP. 	<ul style="list-style-type: none"> • Proposed HCT improvements include redesigned feeder bus systems that take advantage of new HCT capacity and reduce the number of redundant transit lines.

7. **Public Involvement**

Metro maintains a proactive public involvement process that provides complete information, timely public notice, and full public access to key decisions. Metro supports early and continuing involvement of the public in developing its policies, plans and programs. Public Involvement Plans are designed to both support the technical scope and objectives of Metro studies and programs while simultaneously providing for innovative, effective and inclusive opportunities for engagement. Every effort is made to employ broad and diverse methods, tools and activities to reach potentially impacted communities and other neighborhoods and to encourage the participation of low-income and minority citizens and organizations.

All Metro UPWP studies and projects that have a public involvement component require a Public Involvement Plan (PIP) that meets or exceeds adopted public involvement procedures. Metro consults with the Metro Committee for Citizen Involvement (MCCI) in the development of individual PIPs. Included in individualized PIPs are strategies and methods to best involve a diverse citizenry. Some of these may include special public opinion survey mechanisms, translation of materials for non-English speaking members of the community, citizen working committees or advisory committee structures, special task forces, web instruments and a broad array of public information materials. Hearings, workshops, open houses, charrettes and other activities are also held as needed.

The work program and PIP for the 2035 RTP update was developed with input from Metro's Advisory Committees, including Metro's Committee for Citizen Involvement. The 2035 RTP update included workshops, informal and formal input opportunities as well as a 30-day+ comment period for the community, affected public agencies, representatives of transportation agency employees, freight shippers, providers of freight transportation services, private providers of transportation, representatives of users of public transit, and other interested persons. Public involvement opportunities and key decision points were published in the *Oregonian* and other community newspapers, posted on Metro's web site, e-mailed via the Planning Department E-News to more than 4,500 individuals, and advertised through Metro's transportation hotline. All plan documents were simultaneously published (and regularly updated) on the Metro web site, including draft plan amendments, the update schedule, other explanatory materials and summaries of public comments received. Appendix 4.3 of the 2035 RTP describes the public engagement process in more detail.

The MTIP relies on early program kick-off notification, inviting input on the development of criteria, project solicitation, project ranking and the recommended program. Workshops, informal and formal opportunities for input as well as a 30-day+ comment period are repetitive aspects of the MTIP process. By assessing census information, block analysis is conducted on areas surrounding each project being considered for funding to ensure that environmental justice principles are met and to identify where additional outreach might be beneficial.

TPAC includes six citizen positions that are geographically and interest area diverse and filled through an open, advertised application and interview process. TPAC makes recommendations to JPACT and the Metro Council. Metro Council adopted an update to Metro's Transportation Public Involvement Policy in October 2009.

Title VI – In April 2007, Metro completed and submitted its Title VI Plan to the FTA. This plan is now being implemented through updates to Metro's RTP and MTIP, and through corridor planning activities in the region. It includes both a non-discrimination policy and complaint procedure. On Aug. 30, 2011, Metro submitted a Title VI Compliance Report to ODOT, covering a 15 month period from April 1, 2010, through June 30, 2011. With approval from ODOT's office of civil rights granted on June 6, 2011, Metro is transitioning to a July 1 to June 30 reporting period, with Title VI Compliance Reports due to ODOT on Aug. 30 after the end of each annual reporting period. The next annual report will be due Aug. 30, 2013, covering July 1, 2012 to June 30, 2013. As of March 2012, Metro was revising its Limited English Proficiency Plan as part of an update to its Title VI Program for FTA.

Environmental Justice – The intent of environmental justice (EJ) practices is to ensure the needs of minority and disadvantaged populations are considered and the relative benefits/impacts of individual projects on local communities are thoroughly assessed and vetted. Metro continues to expand and explore environmental justice efforts that provide early access to and consideration of

planning and project development activities. Metro's EJ program is organized to communicate and seek input on project proposals and to carry those efforts into the analysis, community review and decision-making processes. In addition, Metro established an agency diversity action team. The team is responsible for identifying opportunities to collaboratively develop and implement sustainable diversity initiatives across and throughout the agency. Metro's diversity efforts are most evident in three areas: Contracts and Purchasing, Community Outreach, and Recruitment and Retention. Additionally, as part of Metro's Regional Flexible Fund Allocation (RFFA), a process Metro conducts every two years to distribute federal funding to regional programs and local projects, equity analysis and outreach was conducted. Over the years, Metro has worked to integrate equity considerations to a greater degree every cycle, with the 2014-15 allocation process being the strongest effort so far in ensuring that underserved populations are not only considered in the decision-making process, but that projects are developed around better meeting the needs of communities that have been traditionally underserved.

Efforts to develop an "equity lens" through which decisions are made in the region are ongoing, as are the challenges of applying this lens to everyday planning activities and analysis. This cycle of RFFA attempted to address equity by increasing our knowledge about underserved community transportation needs and access and where concentrations of communities in need are located. Local project applicants were provided this information to propose projects in areas that face the greatest transportation barriers in meeting daily needs of residents with the desired outcome of additional investment in areas of most need. Metro's increased focus on equity in this RFFA cycle reflects national and regional shifts in regulations and policies that emphasize the importance of increasing equity in our practices to better meet the needs of communities in the region and respond to shifting demographics.

In order to reach out to additional stakeholders in the 2014-15 process, Metro staff initiated the development of an Environmental Justice (EJ) and underserved communities working group. This group was key in providing information about the transportation needs of EJ and underserved communities. The group was formed by developing a list of contacts representing non-profits, government agencies, advocacy groups and others working with these communities of concern to invite to participate in the working group.

For the first time in the program's history, a joint task force was charged with developing the criteria for project scoping and prioritization. Metro staff invited community members and professionals involved with active transportation and freight related systems to attend five meetings. In addition, two individuals participating on the EJ/underserved working group served on the task force and reported on the findings of the working group. Their participation and perspective was influential in integrating equity into the highest level criteria and thus shaping where the projects are located and how they address the needs of underserved communities.

A more detailed description of the equity analysis methodology and outreach process is available on Metro's website.

8. Disadvantaged Business Enterprise

A revised Disadvantaged Business Enterprise (DBE) program was adopted by the Metro Council in June 1997 (Ordinance No. 97-692A).

Metro's DBE program was reviewed and submitted to FTA in August 1999. Metro currently piggybacks on ODOT's DBE program.

9. Americans with Disabilities Act

The Americans with Disabilities Act (ADA) Joint Complementary Paratransit Plan was adopted by the TriMet Board in December 1991 and was certified as compatible with the RTP by Metro Council in January 1992. The plan was phased in over five years and TriMet has been in compliance since January 1997. Metro approved the 1997 plan as in conformance with the RTP. FTA audited and approved the plan in summer 1999. The Special Transportation Funding Advisory Committee,

staffed by TriMet, coordinated with Metro as the MPO in updating the Coordinated Human Services Transportation Plan adopted in June 2009
(http://trimet.org/pdfs/publications/Coordinated_Human_Services_Transportation_Plan.pdf)

10. Affirmative Action

In accordance with 49 U.S.C. 5331, 42 U.S.C. 6101, Section 324 of title 23 U.S.C. and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and 49 CFR part 27, Metro states as its policy a commitment to provide equal employment opportunities without regard to race, color, religion, national origin, sex, age, disability, sexual orientation, or marital or familial status, except where a bona fide occupational qualification exists. Compliance with this policy is administered by Metro's Human Resources Department.

11. Construction Contracts

Provisions of 23 CFR part 230 do not apply to Metro as Metro does not administer Federal and Federal-aid highway construction contracts.

12. Lobbying

Annually Metro certifies compliance with 49 CFR 20 through the FTA TEAM system.

Table 2: Metro’s Response to SAFTEEA-LU Provisions

SAFTETEA-LU Provision for all MPOs	Metro Response
<p><i>Consult/Coordinate with planning officials responsible for planned growth, economic development, environmental protection, airport operations, and freight movement.</i></p>	<p>Metro’s transportation planning and land-use planning functions are within the same department and coordinate internally.</p> <ul style="list-style-type: none"> • Metro facilitates this consultation, coordination and decision-making through four advisory committee bodies –the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC). Metro consults MPAC on land-use activities. • Metro is a member of Regional Partners for Economic Development and endorsed the Consolidated Economic Development Strategy (CEDS). • Metro has implemented a fish and wildlife habit protection program through regulations, property acquisition, education and incentives. • Metro has a standing committee to coordinate with public agencies with environmental protection responsibility. • The Port of Portland manages the airport and marine terminal, and is represented on both TPAC and JPACT. • Metro also coordinated with freight, rail, airport operations and business interests through the Regional Freight and Goods Movement Task Force and Regional Freight and Goods Movement Technical Advisory Committee in developing a Regional Freight Plan. The Regional Freight Plan was adopted as part of the 2035 RTP in June 2010.
<p><i>Promote consistency between transportation improvements and State and local planned growth and economic development.</i></p>	<p>Metro transportation and land-use planning is subject to approval by the Oregon Department of Land Conservation and Development.</p>
<p><i>Give safety and security due emphasis as separate planning factors.</i></p>	<p>Metro addressed security and safety as individual factors in the update to the RTP in 2010.</p> <ul style="list-style-type: none"> • Separate background research papers were developed during Phase 2 of the update to document current safety issues and planning efforts, and current security planning efforts in the region. This research is included Appendix 7.0 was considered during the formulation of the 2035 RTP goals, objectives, projects and potential actions included in Chapter 2 and investment priorities in Chapter 3 of the 2035 RTP. <p>Additionally, Metro staffs the Regional Emergency Management Group (REMG), which has expanded its scope to include anti-terrorism preparedness, TriMet’s responsibility for transit security plans, ODOT’s responsibility for coordination of state security plans, Port of Portland’s responsibility for air, marine and other Port facilities security plans and implementation of system management strategies to improve security of the transportation system (e.g., security cameras on MAX and at transit stations). The group brings together local emergency managers to plan responses to security concerns and natural hazards.</p>

	<p>Metro has convened a Regional Safety Workgroup to better address safety in the MPO planning process. The Safety Workgroup is developing a safety plan for the Portland Metropolitan region that will be completed in June 2012. Implementation will begin in fiscal year 2012-13.</p>
--	--

Table 2: Metro’s Response to SAFETEA-LU Provisions (continued)

SAFETEA-LU Provision for all MPOs	Metro Response
<p><i>Discuss in the transportation plan potential environmental mitigation activities to be developed in consultation with Federal, State, and tribal wildlife, land management, and regulatory agencies.</i></p>	<p>SAFETEA-LU provisions for additional consultation with state and Federal resource agencies, and tribal groups that were not already part of Metro’s existing committee structure were met through a consultation meeting held on October 16, 2007 with the Collaborative Environmental Transportation Agreement for Streamlining (CETAS) work group, consisting of the Oregon Department of Transportation and ten state and Federal transportation, natural resource, cultural resource and land-use planning agencies. A background research paper was also developed during Phase 2 of the update to document current environmental trends, issues and current mitigation strategies in the region. This research was considered during the formulation of the 2035 RTP goals, objectives, projects and potential actions included in Chapter 2 and investment priorities in Chapter 3 of the 2035 RTP. In addition, staff conducted an analysis of the potential environmental effects of transportation investments. The background research report and environmental considerations analysis is included in Appendix 7.0.</p>
<p><i>Consult with State and local agencies responsible for land use management, natural resources, environmental protection, conservation, and historic preservation in development of the transportation plan.</i></p>	<p>SAFETEA-LU provisions for additional consultation with state and Federal resource agencies, and tribal groups that were not already part of Metro’s existing committee structure were met through a consultation meeting held on October 16, 2007 with the Collaborative Environmental Transportation Agreement for Streamlining (CETAS) work group, consisting of the Oregon Department of Transportation and ten state and Federal transportation, natural resource, historic, cultural resource and land-use planning agencies.</p> <p>A background research paper was also developed during Phase 2 of the update to document current environmental trends, issues and mitigation strategies in the region. This research was considered during the formulation of the 2035 RTP goals, objectives, projects and potential actions included in Chapter 2 and investment priorities in Chapter 3 of the 2035 RTP. In addition, staff conducted an analysis of the potential environmental effects of transportation investments – this analysis included a comparison of the RTP investments with available State Conservation maps and inventories of historic resources. The background research report and environmental considerations analysis is included in Appendix 7.0.</p>

Table 2: Metro’s Response to SAFTEEA-LU Provisions (continued)

SAFTETEA-LU Provision for all MPOs	Metro Response
<p><i>Include operation and management strategies to address congestion, safety, and mobility in the transportation plan.</i></p>	<ul style="list-style-type: none"> • System management policies in the RTP (2035 RTP Section 3.4.4) and resulting projects and programs are intended to maximize the use of existing facilities to address congestion, safety and mobility. • The Transportation System Management and Operations (TSMO) Plan was adopted as part of the 2035 RTP in June 2010. The TSMO Plan guides the region’s continued investment in operation, management and data collection to invest efficiently in transportation. • The regional CMP also requires local jurisdictions to explore system management solutions before adding roadway capacity to the regional system. The key framework for the CMP was the Mobility Corridors identified as part of the 2035 RTP development. Chapter 4 of the 2035 RTP lays out specific strategies for each mobility corridor for addressing the goals and policies of the RTP. The CMP can be found in Appendix 4.4 of the 2035 RTP. • The plan also calls for consideration of value pricing in the region to better manage capacity and peak use of the throughway system. • RTP projects in Chapter 3 include many system management improvements along regional mobility corridors and the supporting arterial system. • Metro has established a Regional Transportation Options Committee as a subcommittee of TPAC to address demand management. The TransPort Committee is a subcommittee of TPAC to address ITS and operations. • Metro has convened a Regional Safety Workgroup to better address safety in the MPO planning process. The Safety Workgroup is developing a safety plan for the Portland Metropolitan region that will be completed in June 2012. Implementation will begin in fiscal year 2012-13.

Table 2: Metro's Response to SAFETEA-LU Provisions (continued)

SAFETEA-LU Provision for all MPOs	Metro Response
<p><i>Develop a participation plan in consultation with interested parties that provides reasonable opportunities for all parties to comment on transportation plan.</i></p>	<p>Metro has public involvement policy for regional transportation planning and funding activities to support and encourage board-based public participation in development and review of Metro's transportation plans. The Transportation Planning Public Involvement Policy was last updated in June 2009.</p> <p>The work program and public participation plan (PPP) for the 2035 RTP update was developed with input from Metro's Advisory Committees, including Metro's Committee for Citizen Involvement.</p> <p>Approval of the 2035 RTP, Ordinance No. 10-1241B, followed JPACT and Metro Council consideration of approximately 300 comments received during the public comment period. The comments were summarized into a comment log and Public Comment Summary Report. Refinements were recommended to respond to the comments received. The comment period for the Air Quality Conformity Determination provided an opportunity for public review and comment on the air quality conformity methodology and results.</p> <p><i>Appendix 4.3 in the 2035 RTP describes the public process in more detail.</i></p>
<p><i>Employ visualization techniques to describe plan and make information available (including transportation plans) to the public in electronically accessible format such as on the Web.</i></p>	<p>On a regular basis, Metro employs visualization techniques. Examples include:</p> <ul style="list-style-type: none"> • RTP document is available on Metro's website • RTP newsletters and maps • MTIP document is available on Metro's website • GIS maps to illustrate planning activities • Participation in FHWA GIS Web Training <p>Video simulation of light rail on the Portland Mall and I-205 Corridor.</p>
<p><i>Update the plan at least every 4 years in non-attainment and maintenance areas, 5 years in attainment areas.</i></p>	<p>2035 RTP update was completed on June 10, 2010.</p>
<p><i>Update the TIP at least every 4 years, include 4 years of projects and strategies in the TIP.</i></p>	<p>Initiated MTIP and STIP update for spring 2012.</p>
<p><i>SAFETEA-LU includes a new requirement for a "locally developed, coordinated public transit/human services transportation plan" to be eligible for formula funding under three FTA grant programs (5310,5316,5317) It is not clear yet who will be responsible for these plans.</i></p>	<p>Metro participates on the Special Transportation Fund Advisory Committee and Regional Transportation Coordinating Council of the Elderly and Disabled Transportation Plan. A coordinated human services and public transportation plan is under development by those committees and has been integrated into the 2010 RTP update.</p>

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 12-4335, FOR THE PURPOSE OF CERTIFYING THAT THE PORTLAND METROPOLITAN AREA IS IN COMPLIANCE WITH FEDERAL TRANSPORTATION PLANNING REQUIREMENTS AND ADOPTING THE FISCAL YEAR 2012-13 UNIFIED PLANNING WORK PROGRAM

Date: March 22, 2012

Prepared by: Josh Naramore
(503) 797-1825

BACKGROUND

Federal transportation agencies (Federal Transit Administration [FTA] and Federal Highway Administration [FHWA]) require a self-certification that Metro's planning process is in compliance with certain Federal requirements as a prerequisite to receiving Federal funds. The self-certification documents that we have met those requirements and is considered yearly at the time of Unified Planning Work Program (UPWP) approval. Required self-certification areas include:

- Metropolitan Planning Organization (MPO) designation
- Geographic scope
- Agreements
- Responsibilities, cooperation and coordination
- Metropolitan Transportation Planning products
- Planning factors
- Public Involvement
- Title VI
- Environmental Justice
- Disadvantaged Business Enterprise (DBE)
- Americans with Disabilities Act (ADA)
- Affirmative Action
- Construction Contracts
- Lobbying

Each of these areas is discussed in Exhibit A to Resolution No. 12-4335.

ANALYSIS/INFORMATION

1. **Known Opposition** – No known opposition
2. **Legal Antecedents** – this resolution certifies that the Portland metropolitan area is in compliance with Federal transportation planning requirements as defined in Title 23 of the Code of Federal Regulations, Parts 450 and 500, and title 49, of the Code of Federal Regulations, Part 613.
3. **Anticipated Effects** – Approval will mean that grants can be submitted and contracts executed so work can commence on July 1, 2012, in accordance with established Metro priorities.
4. **Budget Impacts** – Approval of this resolution is a companion to the UPWP. It is a prerequisite to receipt of Federal planning funds and is, therefore, critical to the Metro budget. The UPWP matches projects and studies reflected in the proposed Metro budget submitted by the Metro Chief Operating Officer to the Metro Council. The UPWP is subject to revision in the final adopted Metro budget.

RECOMMENDED ACTION

Approve Resolution No. 12-4335 certifying that the Portland metropolitan area is in compliance with Federal transportation planning requirements.



Date: March 22, 2012
To: Transportation Policy Alternatives Committee and interested parties
From: Kim Ellis, Principal Transportation Planner
Re: Climate Smart Communities Scenarios: Draft Phase 2 Work Plan & Engagement Approach

Action requested

TPAC input on draft Phase 2 work plan and engagement strategy and recommendations for discussion items to be presented for consideration by the Joint Policy Advisory Committee on Transportation on April 12. At that meeting JPACT 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 local ambitions for growth and development and the 2040 Growth Concept vision, and 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, Oregon City, Sherwood, Tigard, Tualatin 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, the project's technical work group on March 12 and MTAC on March 21.

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 two or three scenario concepts to undergo a more in-depth analysis in 2013.

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 (Create Building Blocks for Scenarios)** 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 technical work group will identify 2040-based focus areas that will be the places where additional land use and transportation strategies may be applied in the scenarios to be evaluated in 2013. The Envision Tomorrow scenario planning tool will be used to develop 5 community investment case studies to show examples of the types of strategies that are needed to achieve existing community ambitions, and to identify opportunities and barriers that exist within the case study areas. This track will also develop regional case studies to frame policy options presented by changes to pricing, transit, roads, marketing, fleet and technology. Metro staff will work with the technical work group, MTAC and TPAC to develop “straw man” scenario concepts using the Phase 1 results, strategy toolbox and local and regional case studies. Local government, business and community leaders will review the focus areas and “straw man” scenario concepts 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.
- **Track 2 (Create Score Card for Scenarios)** is focused on working with the technical work group, TPAC, MTAC and topic experts to develop the criteria and methods to be used to evaluate the three scenarios to be tested in 2013. This track will also result in the creation of a score card that will be used to convey the results of the analysis to policymakers and other stakeholders. The score card will report on fiscal, economic, public health, equity and environmental outcomes. Preliminary criteria and pilot methods will be used in Track 1 to report on the Phase 1 scenarios (as part of the district and regional analysis). The criteria and score card will continue to be refined throughout Phase 2.

Both tracks culminate in a fall regional discussion that is aimed at building consensus and framing two to three scenario concepts for achieving community and regional ambitions, implementing the 2040 Growth Concept and meeting our climate goals.

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. 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?
3. 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?
4. How soon should alternative scenario “straw man proposals” be developed? Do you have ideas for what these “straw man” proposals might be?
5. 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?

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

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 – Create Building Blocks for Scenarios

What: Build “straw man” scenario concepts using Phase 1 results, strategy toolbox and case studies

Who: Technical work group, TPAC, MTAC, and local government staff from case study communities

What: Engage stakeholders in “straw man” scenario concepts review

Who: Local government, business and community leaders

Track 2 – Create Score Card for Scenarios

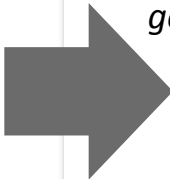
What: Create a score card to evaluate the scenarios for fiscal, economic, public health, equity and environmental outcomes

Who: Technical work group, topic experts, TPAC and MTAC

Frame the Scenarios

What: Frame 2 to 3 scenario concepts for achieving community ambitions, implementing the 2040 Growth Concept and meeting climate goals

Who: Metro Council, JPACT, MPAC, local government, business and community leaders and the public



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

DRAFT

**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

< Step One > < Step Two > < Step Three >

Inform local leaders and stakeholders about Phase 1 findings

- **Policymaker briefings:** Metro Council & staff outreach to city councils, county coordinating committees
- **Coordination:** Build on outreach from Southwest Corridor and East Metro Connection plans, Active Transportation Plan, Climate Adaptation Summit, Statewide Transportation Strategy and local efforts

Consult with local leaders and stakeholders

- **Local government meetings to develop case studies:** Metro and local agency staff, planning directors
- **1:1 meetings and briefings:** local leaders and key stakeholders on “straw man” scenario concepts
- **Stakeholder workshops:** local government, business & development, social equity and environmental leaders on “straw man” scenario concepts
- **Partnering meetings** to develop scenarios score card and evaluation criteria
- **Coordination:** Continue to build on outreach from state, regional and local efforts

Build consensus for draft scenario options

- **MPAC, JPACT, Council work sessions and/or summit** to frame 2 to 3 scenarios to test; feature cities ‘plans/ambitions
- **1:1 meetings and briefings**
- **Online engagement** to gather input on potential scenario concepts
- **Coordination:** Continue to build on outreach from state, regional and local efforts



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

Newsfeed series: through the eyes of the technical work group

Periodic newsfeed updates

Ongoing: periodic background briefings to key print and broadcast media

□ **DRAFT**

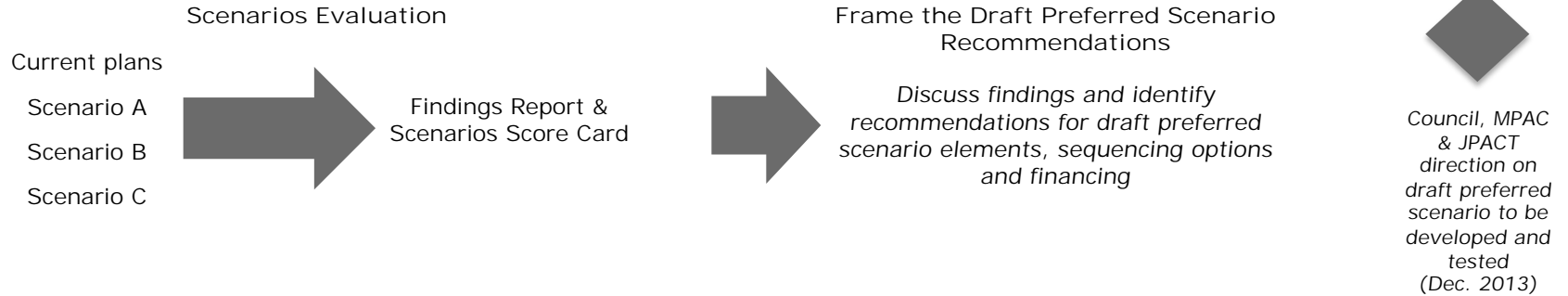
Climate Smart Communities Scenarios
Phase 3: Building and Selecting the Preferred Scenario
2013-14 Technical Work and Policy Development Roadmap

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

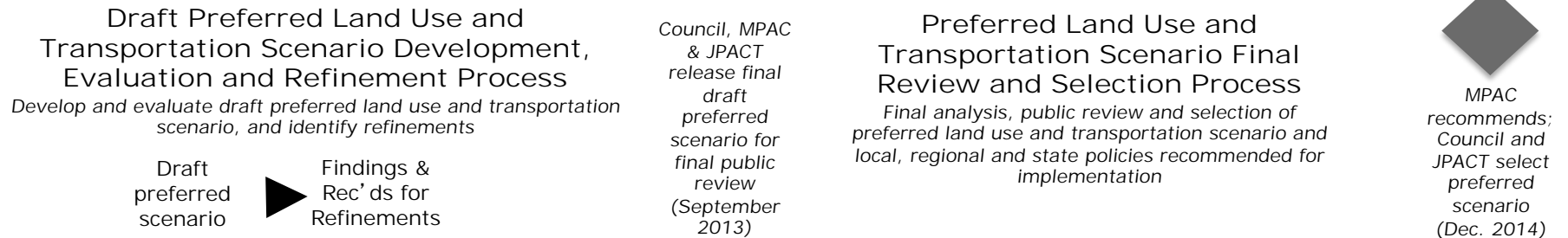
2013

Alternative Scenario Evaluation and Refinement

Develop and evaluate alternative scenarios that combine and phase local, regional and state land use and transportation strategies to achieve community ambitions, implement the 2040 Growth Concept and meet our climate goals



2014



March 22, 2012

Climate Smart Communities Scenarios – Phase 2

Track 1: Create Building Blocks for Scenarios

Draft

March 22, 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 achieving community ambitions, supporting jobs, protecting neighborhoods and ensuring clean air while reducing greenhouse gas emissions.

Overview

This track will build “straw man” scenario concepts 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. The concepts will be developed using the Phase 1 scenarios results, the strategy toolbox and local and regional case studies.

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 5 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

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 the “straw man” scenario concepts 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 “straw man”

identified.

Information from this track will be presented to the Metro Council and Metro's 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?
- Which three scenario concepts 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

scenario concepts 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 "straw man" scenario concepts relative to environmental protection and the potential for clean air and active living.

Equity and environmental justice workshop will be held in partnership with community organizations to review the "straw man" scenario concepts 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

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

within each policy area is contributing to the emissions reductions, and 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 man" scenario policy options** to kick-off a regional discussion on a narrowed range of options for meeting community and regional ambitions and 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.
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 five 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, MTAC and TPAC 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 local government and stakeholder workshops** to gather input on the "straw man" scenario concepts, 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 convene a **local elected officials workshop**. 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 man” scenario concepts
- 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: Create Score Card for Scenarios

Draft

March 22, 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 achieving community ambitions, 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 criteria and methods to analyze the scenarios for costs and savings (individual/public/private) and other fiscal, 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, MTAC and TPAC will advise Metro staff on the criteria and 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 stakeholders to develop a regional equity analysis method** that can be

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 criteria and a scenarios score card 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 outcomes to be evaluated.

September through November 2012

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

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)

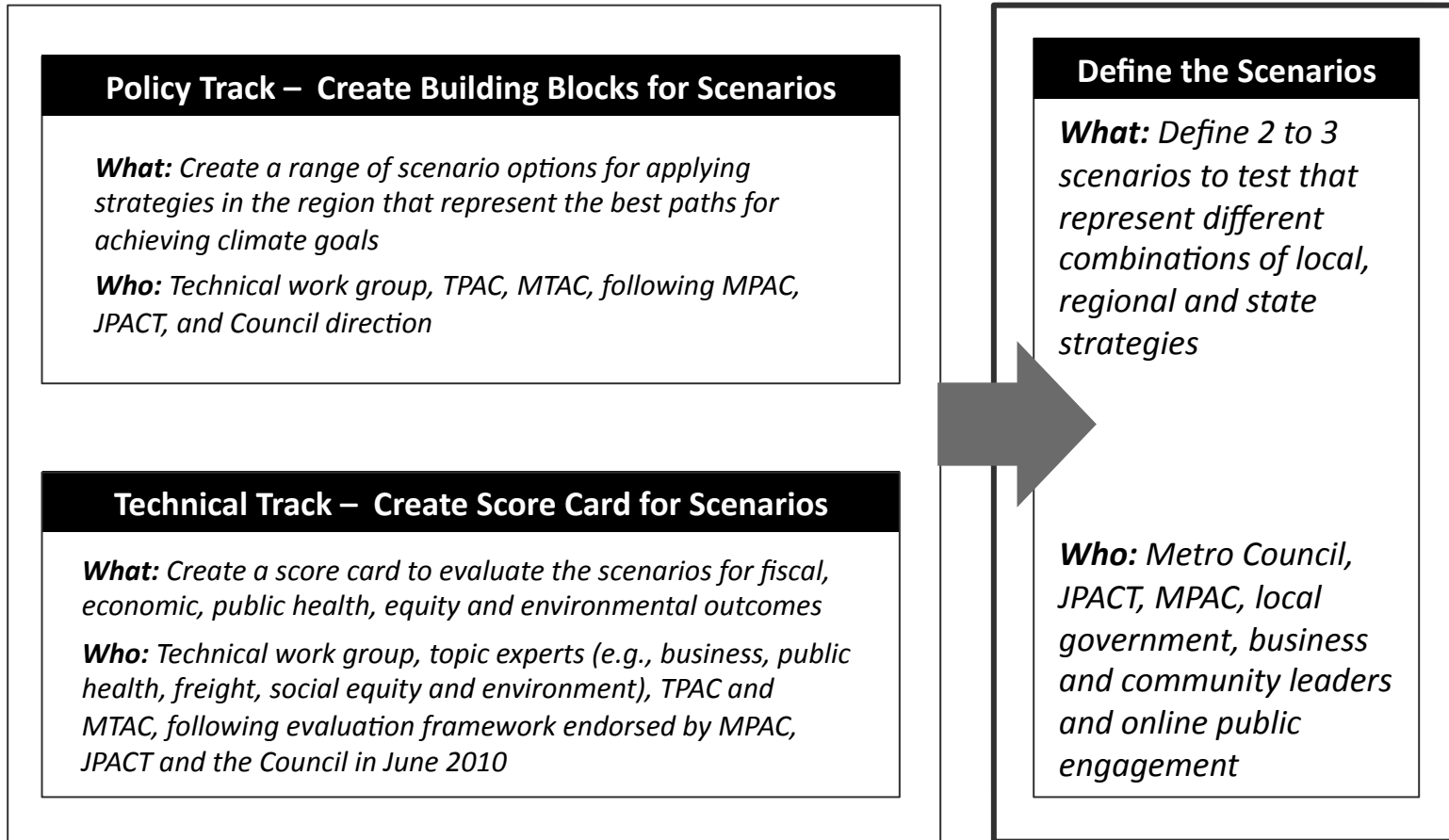
Schedule

March – November 2012

Materials following this page were distributed at the meeting.

DRAFT

2012 Policy and Technical Tracks Overview
Climate Smart Communities Scenarios
Phase 2: Define Choices



JPACT, MPAC, and Metro Council direct staff to develop and test three scenarios (Dec. 2012)

DRAFT

2012 Policy Track Climate Smart Communities Scenarios Phase 2: Define Choices

Policy Track – Create Building Blocks for Scenarios (April – September)

What: Create a range of scenario options for applying strategies in the region that represent the best paths for achieving climate goals

Who: Technical work group, TPAC, MTAC, following MPAC, JPACT, and Council direction

How: Identify potential options for how and where to apply strategies using Phase 1 scenarios, sensitivity analysis and district results, Strategy Toolbox, Statewide Transportation Strategy, focus areas and 5 locally-developed case studies from the Portland area that illustrate on-the-ground examples of how local actions can achieve community ambitions and other desired outcomes

Building Blocks for Scenario Options



March 28, 2012

DRAFT

2012 Technical Track Climate Smart Communities Scenarios Phase 2: Define Choices

Technical Track – Create Score Card for Scenarios (March – September)

What: Create a score card to evaluate the scenarios for fiscal, economic, public health, equity and environmental outcomes

Who: Technical work group, topic experts (e.g., business, public health, freight, social equity and environment), TPAC and MTAC

How: Define criteria and methods for evaluating scenarios building on Phase 1 evaluation framework and Statewide Transportation Strategy criteria and methods

Technical Refinement of June 2010 Evaluation Framework

Building toward six desired outcomes

- Vibrant communities**
- Equity**
- Economic prosperity**
- Transportation choices**
- Clean air & water**
- Climate leadership**

Evaluation framework

- Equity**
 - Access to affordable housing and travel options
 - Access to opportunity
 - Public health
- Economy**
 - Access to industry and jobs
 - Freight travel time costs
 - Economic development opportunities
- Environment**
 - Greenhouse gas
 - Air quality
 - Access to parks and natural areas
- Costs and savings**
 - Implementation
 - Household and business

MPAC, JPACT and the Metro Council endorsed the evaluation framework in June 2010

Sample score card

Outcomes	Current plans and policies	Scenario 1	Scenario 2
Equity			
Economy			
Environment			
Fiscal			

DRAFT

2012 Partnering and Engagement Track
Climate Smart Communities Scenarios
Phase 2: Define Choices



Inform local leaders and stakeholders about Phase 1 findings

Policymaker briefings: Metro Council & staff outreach to city councils, county coordinating committees

Coordination: Build on outreach from Southwest Corridor and East Metro Connection plans, Active Transportation Plan, Climate Adaptation Summit, Statewide Transportation Strategy and local efforts

January – May 2012

Consult with local leaders and stakeholders on policy choices and criteria

Local government meetings to develop case studies: Metro and local agency staff, planning directors

1:1 meetings and briefings: local leaders and key stakeholders on project work completed to date and ideas for local, regional and state policy choices to be tested in 2013

Stakeholder workshops: local government, business & development, social equity and environmental leaders to develop scenarios score card and evaluation criteria

Coordination: Continue to build on outreach from state, regional and local efforts

March – August 2012

Build consensus for scenario options to test

MPAC, JPACT, Council work sessions and/or summit to define 2 to 3 scenarios to test; feature cities 'plans/ambitions/case studies

1:1 meetings and briefings: local leaders and key stakeholders on project work completed to date and ideas for local, regional and state policy choices to be tested in 2013

Online engagement to gather input on local, regional and state policy choices to be tested in 2013

Coordination: Continue to build on outreach from state, regional and local efforts

September – November 2012



JPACT, MPAC, and Metro Council direct staff to develop and test three scenarios (Dec. 2012)

Newsfeed series: through the eyes of the technical work group

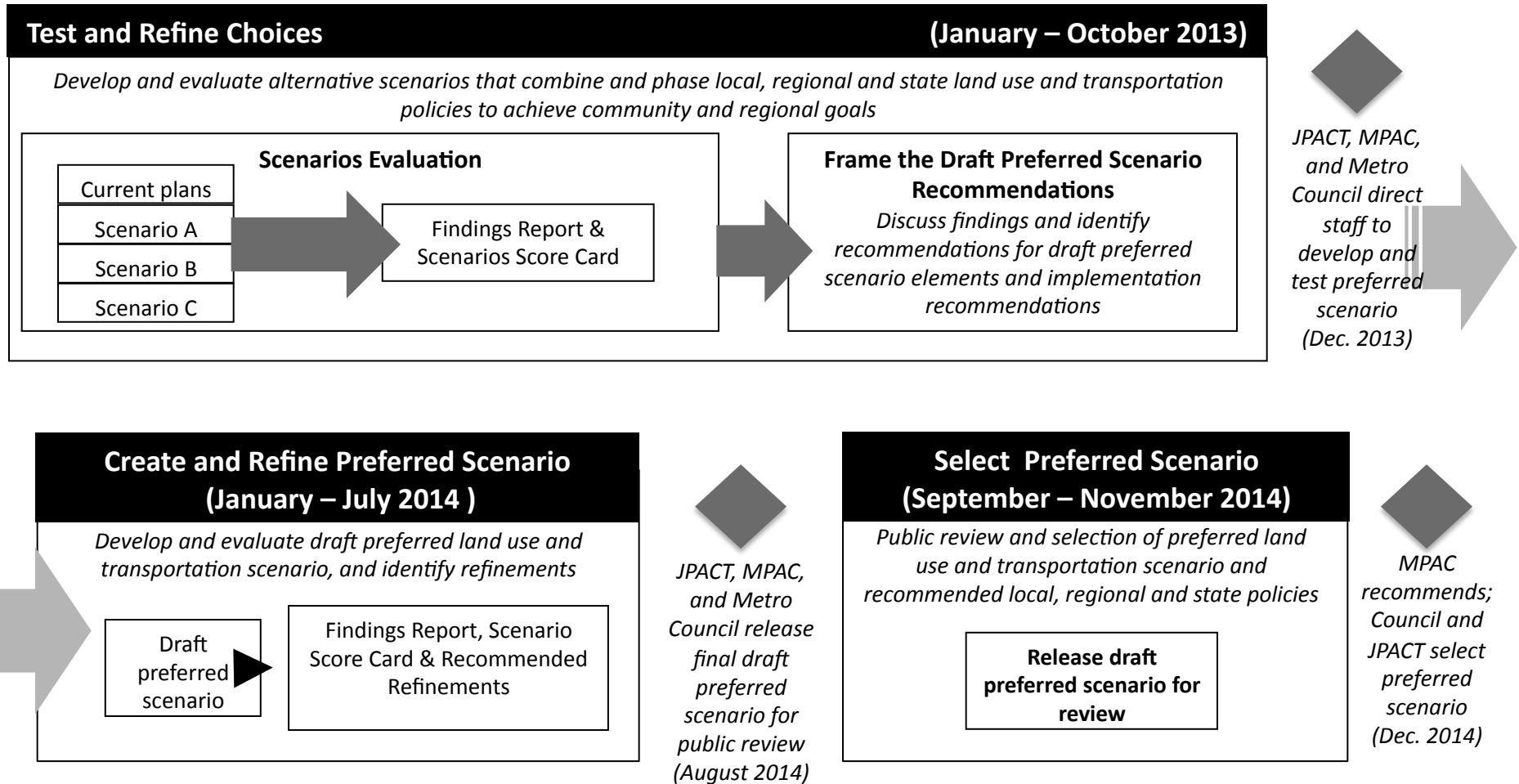
Periodic **newsfeed** updates

Periodic key **print and broadcast media briefings**

March 28, 2012

DRAFT

2013-14 Policy and Technical Tracks Climate Smart Communities Scenarios Phase 3: Test Choices and Create Preferred Scenario



March 28, 2012

Climate Smart Communities Scenarios – Phase 2

Policy Track-1: Create Building Blocks for Scenarios

Draft

March ~~2228~~, 2012

Purpose

This summary provides an overview of the ~~Track 1 work plan~~ Policy Track 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-scenario~~ options for testing in 2013. These ~~policy-scenario~~ options will be developed with the aim of achieving community ambitions, supporting jobs, protecting neighborhoods and ensuring clean air while reducing greenhouse gas emissions.

Overview

This track will build ~~“straw man”~~ scenario ~~concepts~~ 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. The ~~concepts~~ options will be developed using the Phase 1 scenarios results, the strategy toolbox and local and regional case studies.

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 5 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~~ policy options 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

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.

May - July ~~Summer~~ 2012

Policymaker and stakeholder briefings with local leaders and key stakeholders on project work completed to date and ideas for local, regional and state policy choices to be tested in 2013

The following workshops have been consolidated into the fall 2012 regional discussion.

Local government workshop will be held with local elected officials to provide input on the “straw man”

identified.

Information from this track will be presented to the Metro Council and Metro's 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?
- Which three scenario concepts 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

scenario concepts 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 "straw man" scenario concepts 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 "straw man" scenario concepts relative to environmental protection and the potential for clean air and active living.*

***Equity and environmental justice workshop** will be held in partnership with community organizations to review the "straw man" scenario concepts 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

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

within each policy area is contributing to the emissions reductions, and 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/Create “straw man” scenario policy options** to kick-off a regional discussion on a narrowed range of options for meeting community and regional ambitions and 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.
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 and other factors to be determined.

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 five 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. Case study locations are proposed to include an employment area, a regional center, a town center and a corridor. 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, MTAC and TPAC to develop regional and state case studies policy options** to frame the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology.

Potential regional investment case study and state policy options research questions

- What role might these policies play in helping to advance local community and economic development ambitions, in addition to meeting the region’s climate goals?
- 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?
- What policies and level of implementation should the region pursue?
- How might these policies contribute to meeting the region’s climate goals?

1. Convene local government and stakeholder workshops to gather input on the “straw man” scenario concepts, 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 convene a **local elected officials workshop**. 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.~~

10.9. 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 man” sScenario conceptspolicy 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~~policy options 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-April~~ - August 2012

DRAFT

Climate Smart Communities Scenarios – Phase 2

Technical Track-2: Create Score Card for Scenarios

Draft

March ~~22~~28, 2012

Purpose

This summary provides an overview of the Technical 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 achieving community ambitions, 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 criteria and methods to analyze the scenarios for costs and savings (individual/public/private) and other fiscal, economic, public health, equity and environmental outcomes. This work will build on the evaluation framework endorsed by MPAC, JPACT and the Metro Council in June 2010, and the 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, MTAC and TPAC will advise Metro staff on the criteria and 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?

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 **Score card workshops with community leaders and technical work group** to develop evaluation criteria and a scenarios score card 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 outcomes to be evaluated.

September through November 2012

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

Activities

1. **Partnering meetingWorkshop with the equity and environmental justice stakeholders to develop a regional equity analysis method** that can be applied during the scenarios evaluation in 2013. 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. 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 meetingWorkshop 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. 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. 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 meetingWorkshop 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. Metro will co-sponsor the environment and public health workshop with the Oregon Public Health Authority. 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

2011-14 Climate Smart Communities Scenarios Timeline

DRAFT
3/28/12

A collaborative approach to building livable, prosperous, equitable and climate smart communities

