

Metro | Agenda

Meeting: Joint Policy Advisory Committee on Transportation (JPACT)
Date: Thursday, April 12, 2012
Time: 7:30 to 9 a.m.
Place: Metro Regional Center, Council Chamber

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|---------|-----|--|---------------------------------|
| 7:30 AM | 1. | CALL TO ORDER, DECLARATION OF A QUORUM & INTRODUCTIONS | Carlotta Collette, Chair |
| 7:32 AM | 2. | CITIZEN COMMUNICATIONS ON JPACT ITEMS | Carlotta Collette, Chair |
| 7:35 AM | 3. | UPDATES FROM THE CHAIR & COMMITTEE MEMBERS <ul style="list-style-type: none">• Report Back on Annual JPACT Washington, DC Trip* • Public Review and Comment Period Begins Proposed Revisions to the Oregon Highway Plan - Freight Issues and Policies* • Comment Letter on Draft Oregon Highway Plan (OHP) and Oregon Transportation Plan (OTP) Tolling and Congestion Pricing Amendments* • Update on Regional Transportation Functional Plan Amendments# • Comment Letter on 2015-18 State Transportation Improvement Plan (STIP) Eligibility Criteria & Prioritization Factors* • Metro Public Engagement Review Process Proposal | Patty Unfred |
| 7:50 AM | 4. | * CONSIDERATION OF THE JPACT MINUTES FOR MARCH 1, 2012 | |
| | 5. | <u>ACTION ITEMS</u> | |
| 7:55 AM | 5.1 | * Resolution No. 12-4335: Draft 2012-13 Unified Planning Work Program – <u>DISCUSSION AND ACTION REQUESTED</u> | Josh Naramore |
| | 6. | <u>INFORMATION/DISCUSSION ITEMS</u> | |
| 8:05 AM | 6.1 | * Climate Smart Communities Scenarios: Shaping Regional and Local Choices – <u>DISCUSSION AND SUPPORT TO MOVE FORWARD REQUESTED</u> | Kim Ellis |
| 9 AM | 7. | ADJOURN | Carlotta Collette, Chair |

* Material available electronically.

Material will be distributed at the meeting.

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.

2012 JPACT Work Program

4/5/12

<p><u>March 1, 2012 - Regular Meeting</u></p> <ul style="list-style-type: none">• 2012-15 MTIP/STIP Approval and Air Quality Conformity – Action• Briefing on RTO Strategic Plan – Information• TriMet budget update – Information/Discussion <p><u>March 5 to 8, 2012 - Annual Washington, DC Trip</u></p>	<p><u>April 12, 2012 - Regular Meeting</u></p> <ul style="list-style-type: none">• Comments from the Chair/Committee Members<ul style="list-style-type: none">○ Washington, DC Trip Update○ Review and comment on draft 2015-18 STIP Prioritization Criteria○ Update on Regional Transportation Functional Plan Amendments○ Comment Letter on 2015-18 State Transportation Improvement Plan (STIP) Eligibility Criteria & Prioritization Factors○ Public Review and Comment Period Begins Proposed Revisions to the OHP - Freight Issues and Policies○ Metro Public Engagement Review proposal○ Comment Letter on Draft Oregon Highway Plan (OHP) and Oregon Transportation Plan (OTP) Tolling and Congestion Pricing Amendments• FY2012-13 UPWP – Action• Climate Smart Communities Scenarios Phase 2 work plan – Discussion
<p><u>May 10, 2012 - Regular Meeting</u></p> <ul style="list-style-type: none">• RTO Strategic Plan – Action• Proposed amendments to the Regional Transportation Functional Plan – Action• Oregon Sustainable Transportation Initiative (OSTI) - Information<ul style="list-style-type: none">○ Statewide Transportation Strategy (STS)○ LCDC Rulemaking on selection of preferred scenario	<p><u>June 14, 2012 - Regular Meeting</u></p> <ul style="list-style-type: none">• Climate Smart Communities Scenarios Phase 2 – Discussion• East Metro Connections update – Information• OSTI draft Statewide Transportation Strategy (STS) – Discussion• Regional Safety Action Plan – Briefing and Direction on Developing Implementation Options
<p><u>July 12, 2012 - Regular Meeting</u></p> <ul style="list-style-type: none">• CII Leadership Council – Information	<p><u>August 9, 2012 - Regular Meeting</u></p>
<p><u>September 13, 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>October 11, 2012 - Regular Meeting</u></p> <ul style="list-style-type: none">• Oregon Sustainable Transportation Initiative (OSTI) - LCDC Rulemaking on selection of preferred scenario - Discussion

<u>November 8, 2012 - Regular Meeting</u> <ul style="list-style-type: none">• Climate Smart Communities Scenarios- Discussion	<u>December 13, 2012 - Regular Meeting</u> <ul style="list-style-type: none">• Climate Smart Communities Scenarios- Action
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Parking Lot: Regional Indicators briefing

Public Review and Comment Period Begins Proposed Revisions to the OHP - Freight Issues and Policies

A public review and comment period is underway for proposed revisions to the 1999 Oregon Highway Plan (OHP). The proposed revisions relate to freight issues and policies and will:

- Make the OHP consistent with the OFP
- Add an OHP Freight Route to the State Highway Freight System
- Add language about ORS 366.215 (No Reduction of Freight Capacity)

OFP

The Oregon Freight Plan (OFP) was adopted by the Oregon Transportation Commission (OTC) in 2011. The OFP is a multimodal topic plan and includes freight related information that affects the Policy Element of the OHP. Revisions are needed to the Policy Element of the OHP to make it consistent with the newly adopted OFP.

OHP Freight Routes

The OHP Freight Routes (part of the Policy Element of the OHP) need to be revised to include a new state highway that was acquired by ODOT in 2007. The new highway is the westerly extension of OR140 from OR62 (North of Medford) to I-5 (Seven Oaks Interchange).

ORS 366.215

The Policy Section of the OHP needs to be revised to incorporate information about ORS 366.215. The statute was adopted during the 2003 Legislative session and states that the OTC may not permanently reduce the vehicle-carrying capacity of an identified freight route. More information about ORS 366.215 can be found at <http://www.oregon.gov/ODOT/TD/TP/ORS366.215.shtml>

Public Review and Comment Period

A 45-day public review and comment period on proposed revisions to the Oregon Highway Plan (OHP) will begin at the March 21, 2012 OTC meeting. Outreach and consultation will include the Area Commissions on Transportation, Metropolitan Planning Organizations and other interested stakeholders. ODOT will incorporate feedback during the public review period and the OTC will adopt the amendments to the OHP at their May 16 meeting.

Links to Proposed Revisions

The proposed revisions to the Policy Element of the OHP and the OHP Freight Route Map can be seen at <http://www.oregon.gov/ODOT/TD/TP/OHP.shtml>. They are located under the heading, "Current OHP Projects".

If you or any stakeholders need additional information please contact Robin Marshburn if you have any questions at 503-986-3696. Email address: robin.l.marshburn@odot.state.or.us

Kelsey Newell

Subject: Tolling Policies (Draft)

**For the latest draft of the 2012 tolling and congestion pricing OHP/OTP amendments visit: <http://www.oregon.gov/ODOT/TD/TP/Tolling.shtml>
Link to document available at the bottom of the webpage.**

From: RAMIREZ Lucia L [<mailto:Lucia.L.RAMIREZ@odot.state.or.us>]

Sent: Monday, March 05, 2012 9:53 AM

To: ASHFORD Scott; Andy Cotugno; CRALL Matthew; DICKEY Stephen; DITZLER Phillip; DODDS Marie; DUNCAN Angus; GROVE Monte; HAGERBAUMER Chris; HANUS Ann; HAVIG Erik M; HONEYMAN Craig; KELLER Penny; Tom Kloster; LAHSENE Susie; LEI Wayne; Ted Leybold; LUNDQUIST Lynn; MCARTHUR Michael; MCCAULEY Mike; MONTERO Mike; PORTER John; QUILTY Michael; RUSSELL Bob; SANDHU Satvinder; SCHLACK Art; SCHLUETER Jonathan; VANHUFFEL Gary; WEMPLE Beth

Cc: MAESTRE Robert A; BOHARD Jerri L

Subject: FW: Tolling Policies (Draft)

The Oregon Department of Transportation (ODOT) and the Oregon Transportation Commission (OTC) have been studying how and when tolling and pricing of transportation facilities around the country and the world have been implemented. The Oregon Legislature also recently looked at a possible congestion pricing pilot program in the Portland Metropolitan area. This study is culminating in proposed tolling and pricing amendments to the Oregon Highway Plan (OHP) and Oregon Transportation Plan (OTP).

ODOT is inviting comments on the draft tolling and pricing policies which are attached to this email. Our timeline leading to the OTC public hearing in May and possible OTC adoption in June is attached.

Please let me know if your organization would like to schedule a presentation on these draft policies in-person or through a phone link before May 1. The presentation takes about 30 minutes and most groups take 15-30 minutes to ask questions.

Comments from your members or the organizations they represent are welcome before May 18. Comments can be sent to me at the email address below.

The majority of ODOT's work on tolling and pricing over the last 4-5 years can be found summarized at this web site: http://www.oregon.gov/ODOT/TD/TP/Tolling_Background.shtml

Robert Maestre,
Transportation Programs Manager
503-986-4165
robert.a.maestre@odot.state.or.us

TIMELINE FOR DRAFT OHP/OTP TOLLING and CONGESTION PRICING AMENDMENTS

February 15, 2012	Notify ACTs and other parties of public outreach and schedule Tolling presentations until May 1
February – May	Public Outreach
April 1	Begin 45 day public comment period
May 1	Tolling presentation schedule ends
May 16	OTC public hearing in McMinnville
May 18	45 day public comment period ends
June 21	OTC action/adoption of Tolling Amendments in Coos Bay



Feb. 10, 2012

Mr. Jason Tell, Manager
ODOT, Region 1
123 NW Flanders
Portland, OR 97209-4037

Dear Jason:

Thank you for the opportunity to review and comment on the draft Oregon Highway Plan Tolling and Congestion Pricing policies. We understand that the draft is the culmination of a significant body of research on alternative applications of congestion pricing or tolling and the best practices for evaluation of the tool for potential implementation. It provides a useful guide for factors and considerations that should be weighed in deciding whether to implement a proposal.

However, the foundation for the policy is that there is a resurgence of interest in tolling due to the high cost of expansion projects and in congestion pricing due to the changes in technology that enable a broad variety of approaches. It further provides in the introduction a description of the wide variety of applications and policy objectives that might be addressed through pricing or tolling and introduces the need for a thorough analysis of likely effects and public acceptance of the proposal.

In order for this policy to be effective and useful it should be developed to provide direction on the policy intent being pursued through pricing or tolling and have as its foundation the policy principles that are intended to be accomplished. As presently written, the draft defines a number of factors to be considered in a thorough evaluation but provides no guidance on the intended policy objectives.

The Oregon Highway Plan and the Oregon Sustainable Transportation Initiative recognize the potential role of pricing as a tool for managing the operation of the transportation system and provide an appropriate starting point for the policy making needed to be developed. We recognize the importance of these policies and believe that the draft policy provides a good framework for the evaluation issues to be considered. We support moving forward a revised draft policy (after addressing our comments) for consideration by the Oregon Transportation Commission (OTC) as soon as possible. Since the application of these tools are almost exclusively going to be located in the Portland region, it is also important that the Joint Policy Advisory Committee on Transportation be closely involved in the policy making process. We also urge the Oregon Department of Transportation to undertake a comprehensive revision of the Oregon Highway Plan soon in order to more fully address and integrate tolling, green house gas and other policy initiatives.

As the policy becomes more fully developed, attached are detailed section-by-section comments to take into consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "Carlotta Collette". The signature is written in a cursive style with a light blue background behind it.

Carlotta Collette, Chair
Joint Policy Advisory Committee on Transportation (JPACT)
Councilor, District 2

Encl: 1

Cc: Metro Council

ODOT Goal 6: Tolling and Congestion Pricing Policy
Detailed Section-by-Section Comments

1. Pages 1 and 2 should provide more of a framework for the policy rationale for where and why you may want to implement tolling or congestion pricing. Most of the specifics of the policy document are in the context of tolling being a major departure from the status quo and likely to be controversial. With this in mind, the policy direction calls for a significant evaluation process to ensure a thorough and publicly transparent process. In addition to establishing the expectation that issues that may be controversial should be fully evaluated, there should be a stronger introduction to the good policy reasons that tolling or congestion pricing maybe appropriate. Possible policy rationales to include are:
 - a. Tolling – Tolling may be appropriate if the proposed highway modernization project (such as a freeway or bridge expansion) is substantially more expensive than the broad-based user fees could support (i.e. statewide gas taxes, vehicle registration fees and truck weight-mile taxes).
 - b. Congestion Pricing – Congestion pricing may be appropriate if the level of congestion is such that the facility cannot operate in an uncongested manner without the price signals during the congested period.
 - c. Tolling and/or congestion pricing may be appropriate if it serves to strengthen the “user pays” philosophy of the road financing system by assigning the extra cost of very expensive expansion projects or the cost of the extra lanes in a congested corridor directly to the user of the facility.

Inclusion in the policy document of Table 4 (page 22 and 23) of “Tolling White Paper #2 – Geographic and Situational Limits (2009)” (attached) could provide the framework for defining applications of tolling or pricing that may be appropriate to pursue.
2. Tolling creates both private and public benefits. The policy should explicitly recognize this, should distinguish the two and should prioritize the public benefit.
3. Policy Action 6.1.3 states: “ODOT will only consider those toll projects ranked “high” under tolling parameters considered by ODOT.”² The policy should list these parameters rather than reference another document. Furthermore, proposals that are rated “medium to high” should be considered not just those rated as “high”. As reflected in the referenced document, those that are rated high are clear candidates for tolling or pricing. Those that are rated medium would be a closer judgment call that would be revealed through the detailed evaluation that is called for and in light of the particular outcomes being sought.
4. Add a policy for new capacity projects to contrast the use of toll revenues to the application of conventional funding mechanisms. For example, will toll revenues be limited to use on the facility being tolled? Or, will toll revenues be limited to facilities that benefit the operation of the facility being tolled? Or, will toll revenues be limited to facilities within the broader corridor or region? In contrast, conventional funding sources are not restricted to be used exclusively in the area where the revenues are generated. A comparison of tolled vs. conventional funding mechanisms should be disclosed to better understand who benefits vs. who pays for each funding approach.

5. Policy Action 6.2.2 states: “The proposer of any tolling or pricing project is required to have a clear statement of public policy objectives against which the effectiveness of the proposal can be measured.” The policy should be further expanded to call for a clear delineation of whether the policy intent is as a revenue-raising mechanism or a demand management mechanism or both. Policy Action 6.2.3 states: “The proposer of any tolling or pricing project is required to compare the proposal to a null, non-tolled alternative to ensure the effects of introducing tolls can be clearly demonstrated.” The policy should be further expanded to call for consideration of other non-tolled, build alternatives to ensure that the consequences of introducing tolls can be contrasted with addressing the purpose and need through actions that do not entail tolls.
6. Policy 6.3 “Background” states: Roadway tolls may be levied for a variety of public policy objectives. The relative importance or degree of public acceptance of these objectives may vary in different locales and parts of the state. Similarly, a pricing program for a given purpose in one locale inadvertently may have undue negative effects on other parts of the state. “Region or” should be added in front of “state” as the effects are more likely to be regional rather than statewide.
7. Policy Action 6.3.2 states: “ODOT will analyze the likely transportation, economic, social, energy and environmental effects of any tolling or pricing project on parts of the state outside of the project area.” Add “region and” prior to state.
8. Policy Action 6.3.3 calls for the following: “ODOT will analyze the expected change, if implemented, in vehicle throughput due to any tolling or pricing proposal to ensure consistency with ORS 366.215.” ODOT staff has indicated the ORS 366.215 (regarding preservation of capacity on freight routes) may not apply. If it does apply, the policy should list these parameters rather than reference the statute.
9. Policy Action 6.3.4 states: “ODOT region staff and local government agencies shall work together to evaluate public understanding of and support for the principle likely objectives for road tolling and pricing applications.” The policy should be further expanded by indicating the need to evaluate public understanding of the proposal as contrasted with other alternatives to address the purpose and need including other economic, social and environmental consequences and alternate funding responsibility.

Table 4: Potential Toll Application Rating System Using Performance Measures

Measure/ Application	New Alignment or Greenfield Toll Road	HOV-to-HOT Lane Conversion	New or Replacement Major Bridges	Tolling Existing Facilities
Daily Volumes	<20,000 = Low 20,000 – 60,000 = Medium >60,000 = High	Based on volume-to-capacity ratio or ability to maintain a minimum guaranteed speed.	<20,000 = Low 20,000 – 60,000 = Medium >60,000 = High	<20,000 = Low 20,000 – 60,000 = Medium >60,000 = High
Travel Time Savings (compared to existing corridor or no-build alternative)	Little or no improvement = Low Measurable = Medium Substantial = High	Measured along HOT facility: Little or no improvement or negative impact on HOV speeds = Low Measurable improvement with no negative impact on HOV speeds = Medium Substantial improvement, zero negative impact on HOV speeds = High	Little or no improvement = Low Measurable = Medium Substantial = High	Little or no improvement = Low Measurable = Medium Substantial = High
Traffic Management – congestion levels on adjacent or parallel facilities potentially relieved by tolling application (based on modeling or other travel demand estimation)	Little or no relief = Low Moderate reduction of traffic delays on parallel facilities = Medium High level of reduction of traffic delays on parallel facilities, or existing “free” facility has multiple hours per day where volumes exceed capacity = High	Little or no relief = Low Moderate reduction of traffic delays on parallel facilities = Medium High level of reduction of traffic delays on parallel facilities, or existing “free” facility has multiple hours per day where volumes exceed capacity = High	Little or no relief = Low Moderate reduction of traffic delays on parallel facilities = Medium High level of reduction of traffic delays on parallel facilities, or existing “free” facility has multiple hours per day where volumes exceed capacity = High	Little or no relief = Low Moderate reduction of traffic delays on parallel facilities = Medium High level of reduction of traffic delays on parallel facilities, or existing “free” facility has multiple hours per day where volumes exceed capacity = High
Existence of Proximate or Competing Free Facilities	Close (within a mile) = Low In vicinity but not close = Medium Remote (more than 3 miles away) = High	General purpose lanes are within the same facility. If they are heavily congested, they won’t compete very well with HOT lane.	Close (within a mile) = Low In vicinity but not close = Medium Remote (more than 3 miles away) = High	Close (within a mile) = Low In vicinity but not close = Medium Remote (more than 3 miles away) = High

Measure/ Application	New Alignment or Greenfield Toll Road	HOV-to-HOT Lane Conversion	New or Replacement Major Bridges	Tolling Existing Facilities
Multimodal	No toll exemption for buses, or no transit service gained as part of project = Low Some toll exemption for buses, some transit services gained as part of project = Medium Transit has toll exemption, excess toll revenue can fund high level of peak transit service = High	Unlikely to fund new transit service or facilities. FHWA will require no negative impact on HOV/bus speeds.	No toll exemption for buses, or no transit service gained as part of project = Low Some toll exemption for buses, some transit services gained as part of project = Medium Transit has toll exemption, excess toll revenue can fund high level of peak transit service = High	No toll exemption for buses, or no transit service gained as part of project = Low Some toll exemption for buses, some transit services gained as part of project = Medium Transit has toll exemption, excess toll revenue can fund high level of peak transit service = High
Revenue Return	Low traffic volumes, low proposed toll = Low Medium traffic volumes, low or medium proposed toll, or high traffic volumes, low proposed toll = Medium High traffic volumes, medium or high proposed toll = High	National experience on corridors that carry 150,000 or more vehicles a day is that revenue will cover operating and maintenance costs, or perhaps a little more, which goes into transit operations. Oregon has no corridors carrying 150,000 or more vehicles per day, but I-5 in Portland is projected to carry that level or higher levels well before 2040.	Low traffic volumes, low proposed toll = Low Medium traffic volumes, low or medium proposed toll, or high traffic volumes, low proposed toll = Medium High traffic volumes, medium or high proposed toll = High	Low traffic volumes, low proposed toll = Low Medium traffic volumes, low or medium proposed toll, or high traffic volumes, low proposed toll = Medium High traffic volumes, medium or high proposed toll = High
Diversion to Free Facilities (based on modeling)	Could be an issue especially if the toll authority has no-compete clause in the tolling agreement. High level of shift, perhaps enough to result in volumes exceeding capacity on adjacent facility = Low Some shift but not enough to cause substantial congestion on parallel routes = Medium Little or no shift onto parallel routes = High	Less likely to occur since HOT lanes are attempting to use up excess HOV capacity.	High level of shift, perhaps enough to result in volumes exceeding capacity on adjacent facility = Low Some shift but not enough to cause substantial congestion on parallel routes = Medium Little or no shift onto parallel routes = High	High level of shift, perhaps enough to result in volumes exceeding capacity on adjacent facility = Low Some shift but not enough to cause substantial congestion on parallel routes = Medium Little or no shift onto parallel routes = High
Access Management	Frequent local access, or > 3 driveways/mile = Low Infrequent or controlled access, 1-	Must be limited access facilities. Access as measured by ability to enter/exit HOT lane:	Typically should be limited access over the river.	Frequent local access, or > 3 driveways/mile = Low Infrequent or controlled access, 1-2

Measure/ Application	New Alignment or Greenfield Toll Road	HOV-to-HOT Lane Conversion	New or Replacement Major Bridges	Tolling Existing Facilities
	2 driveways per mile = Medium Limited access, no driveways = High	Continuous access = Low Buffer separation, access every 1-2 miles = Medium Buffer or barrier separation, access > 2 miles apart = High		driveways per mile = Medium Limited access, no driveways = High
Oregon Planning Rule Implications	Potentially difficult to justify in urban areas if new roadway capacity increases reliance on single-occupant vehicles; need to demonstrate compliance with goals for reducing vehicle miles traveled per capita in Section 12 of the Statewide Planning Goals contained in the Oregon Administrative Rules (OAR 660-012-0000).	May be justifiable if it can be demonstrated that there is no net negative impact on HOVs.	Probably neutral – a new bridge will require inclusion in a transportation system plan, which will trigger Oregon Planning Rule review.	Probably neutral.

Rating system is as follows:

Low = Low potential for reasonable tolling application under this criterion.

Medium = Medium potential; shows promise, but borderline under this criterion.

High = High potential for reasonable tolling application; shows merit under this criterion.



Date: April 3, 2012
To: JPACT & Interested Parties
From: John Mermin, Senior Transportation Planner
Subject: Regional Transportation Functional Plan amendments

Purpose

Inform JPACT of proposed amendments to the Regional Transportation Functional Plan in preparation for JPACT action at its May 10 meeting.

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

APRIL 3, 2012
MEMO TO MPAC
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 27 TPAC - Recommendation to JPACT
May 2 MTAC - Recommendation to MPAC
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*

 Metro | Memo

Date: April 4, 2012
To: Joint Policy Advisory Committee on Transportation members
From: Patty Unfred, Metro Communications manager
Subject: New review process for Metro public engagement

Metro's Office of Citizen Involvement is pleased to introduce a new public engagement review process to ensure that Metro's public involvement is effective, reaches diverse audiences and use emerging best practices.

The process has been in development since the Metro Committee for Citizen Involvement (MCCI) was suspended in 2010 due to declining participation that limited its effectiveness. Since that time, Metro staff has engaged community stakeholders, including local government public involvement staff, former MCCI members, and the International Association of Public Participation Cascade Chapter, to create a multi-track public engagement review process. The new process includes a semi-annual meeting of professional public involvement peers, an annual stakeholder summit and the establishment of a new standing public committee, the Public Engagement Review Committee (PERC). We are also introducing an annual public survey and subsequent annual report to evaluate Metro's public involvement efforts.

We are seeking review of the proposal and suggestions on how to best implement the process. The attached proposal, which describes the new process, will be presented as follows:

- Metro Policy Advisory Committee (MPAC) on April 11 – feedback requested, no formal recommendation
- Joint Policy Advisory Committee on Transportation (JPACT) on April 12 – comments from the Chair, not a formal presentation or action
- Metro Council on May 10 and 17 – ordinance for adoption

We look forward to hearing your comments, suggestions or concerns, especially in terms of how we can best implement this process to ensure effective public engagement. Feel free to contact me at patty.unfred@oregonmetro.gov or 503-797-1685.

Thank you.



Metro Public Engagement Review – April 2012

Introduction and overview

Active public engagement is essential to Metro's role as regional convener and makes Metro a more responsive and collaborative agency. Efficient public engagement at the project level requires review at the agency level. In response to evolving communications and public engagement practices, Metro staff has developed a multi-track public engagement review process. This review process engages the public, community organizations, and local government public involvement staff to actively monitor and contribute to Metro's public engagement efforts. The review process is in addition to the public involvement outreach done regularly at the project and program levels.

Mission

Metro's public engagement review process provides:

1. Constructive feedback on Metro's public engagement practices.
2. More focused and effective public engagement process.
3. Access to local expert knowledge and best practices.

Purpose

The public engagement review process guides Metro staff in the development and implementation of successful public engagement outreach with residents of the region.

Objectives and outcomes

Build public trust: through transparent and open policy development and planning processes. Respect and consider all citizen input.

Build consensus: by convening diverse regional stakeholders and residents in order to identify and realize mutual interests and beneficial outcomes.

Promote equity: by recognizing the rich diversity of the region and ensuring that benefits and burdens of growth and change are distributed equitably.

Understand local aspirations: by engaging local experts and community members in order to access local knowledge and aspirations.

Achieve efficiency: by organizing public engagement activities to make the best use of public participants' time, effort, and interests.

Improve best practices: by coordinating with other public involvement experts and community members.

Tools and tactics

Metro will convene a standing Public Engagement Review Committee, a stakeholder summit, and Public Engagement Peer Group to monitor Metro’s public engagement efforts. The public engagement review process will also include an annual Opt In public engagement review survey and the production of an annual public engagement report. Tools and tactics are outlined below.

Public Engagement Review Committee (PERC)

Chapter V, Section 27 of the Metro Charter requires that a standing "citizens' committee" be established and maintained by the Metro Office of Citizen Involvement. The Public Engagement Review Committee (PERC) meets this requirement. The PERC will convene twice each year, in May or June and again in November.

Duties of the PERC include:

- Assist in developing the stakeholder summit agenda
- Assist with outreach to stakeholder summit participants
- Assist in facilitating the stakeholder summit
- Review the annual public engagement report
- Provide input on content of the annual Opt In public engagement review survey

The Committee will be made up of public involvement staff persons from Clackamas, Multnomah, and Washington county governments; staff persons from community organizations; and at-large representatives of the region as follows:

Clackamas County.....	1
Multnomah County.....	1
Washington County.....	1
Community Organizations.....	3
At-Large Representatives.....	3
<hr/>	
	9 total members

PERC members will be appointed by the Metro Council President and confirmed by the Metro Council, following a selection process outlined below, as applicable:

- Representatives (and alternates if desired) of the counties shall be nominated by the presiding executive of the county. Alternatively, a county may nominate an employee of a city within the county, with the consent of the city’s administrator.
- Community organization representatives (and their alternates, if desired) will be nominated by their organizations and apply to be appointed through a public application process.
- The at-large representatives of the region will apply for appointment through a public application process.

Criteria for the selection of community organization representatives include:

- Representative: Broadly representative of geographic areas and interests related to land use and land-use decisions and of demographics of the region.
- Experience: Demonstrated skills, knowledge or experience valuable to fulfill Metro's public engagement mandate.

Criteria for the selection of at-large members include:

- Community Service: Demonstrated commitment to community involvement.
- Experience: Demonstrated skills, knowledge or experience valuable to fulfill Metro's public engagement mandate.
- Representative: Broadly representative of geographic areas and interests related to land use and land-use decisions and of demographics of the region.

Stakeholder Summit

Metro will convene an annual summit of community stakeholders representing diverse aspects of the region, members of Metro citizen advisory committees and oversight committees on ongoing projects. Meetings will be advertised and open to the general public.

The function of the stakeholder summit is to:

- Evaluate Metro public engagement practices from the previous year
- Share local community information
- Give advice on priorities and engagement strategies for upcoming Metro policy initiatives

Public Engagement Peer Group

Metro will convene two meetings annually of public engagement staff and professionals from across the Portland metropolitan region.

The function of the public engagement peer group is to:

- Share and learn about best practices and new tools, including international, national and local examples and case studies
- Share information, upcoming policy discussions and events to facilitate collaboration and leverage individual jurisdiction outreach efforts
- Provide input on public engagement process for individual projects
- Document best practices for public engagement
- Review and update public engagement principles and planning guide

Public engagement review annual schedule

Winter

Public engagement peer group meeting #1

Spring

Public Engagement Review Committee meeting #1

- Assist with pre-planning stakeholder summit

Public engagement peer group meeting #2

- Assist with pre-planning stakeholder summit

Early fall

Stakeholder summit

Annual Opt In public engagement review survey

Late fall

Annual public engagement report released

Public engagement review committee meeting #2

- Review annual public engagement report

Measurement and evaluation

The success of Metro's public engagement program is defined by consistently effective and efficient communication between Metro and the public. Metro staff will use the following tools to evaluate the success of Metro's public engagement processes:

- An annual Opt In public engagement review survey will measure public perception of Metro's public engagement processes
- Stakeholder summit and public engagement peer group participant interviews, questionnaires, and/or collected comments
- The public engagement report will summarize project evaluations, including:
 - Objectives
 - Context
 - Levels of involvement
 - Methods and techniques used
 - Who was involved
 - Inputs (costs)
 - Outputs (products and activities)
 - Outcomes (benefits/impacts)



JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION

March 1, 2012

Metro Regional Center, Council Chamber

MEMBERS PRESENT

Rex Burkholder
Carlotta Collette, Chair
Shirley Craddick
Nina DeConcini
Craig Dirksen
Donna Jordan
Deborah Kafoury
Ann Lininger
Don Wagner
Bill Wyatt

AFFILIATION

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

MEMBERS EXCUSED

Sam Adams
Shane Bemis
Jack Burkman
Neil McFarlane
Jason Tell
Roy Rogers
Steve Stuart

AFFILIATION

City of Portland
City of Gresham, representing Cities of Multnomah Co.
City of Vancouver
TriMet
Oregon Department of Transportation, Region 1
Washington County
Clark County

ALTERNATES PRESENT

Olivia Clark
Dean Lookingbill
Lisa Barton Mullins
Rian Windsheimer

AFFILIATION.

TriMet
City of Vancouver
City of Fairview, representing Cities of Multnomah Co.
Oregon Department of Transportation, Region 1

STAFF: Alison Kean Campbell, Katie Edlin, Kim Ellis, Tom Kloster, Dan Kaempff, Ted Leybold, Robin McArthur, John Mermin, Deena Platman, Dylan Rivera, Amy Rose, Josh Springer, Randy Tucker, Elissa Gertler, Kelsey Newell, Sheena VanLeuven, Marc Week, John Williams

1. CALL TO ORDER, DECLARATION OF A QUORUM AND INTRODUCTIONS

Chair Carlotta Collette declared a quorum and called the meeting to order at 7:33 a.m. Chair Collette formally introduced Ms. Alison Kean Campbell as Metro Attorney. Ms. Kean Campbell was selected to fill the vacant position by Mr. Dan Cooper, who is anticipated to retire in November 2012.

2. CITIZEN COMMUNICATIONS ON JPACT ITEMS

Councilor Jeff Gudman of the City of Lake Oswego City Council, on his own behalf, testified to the committee that although he opposed the Portland to Lake Oswego Streetcar project, he did not oppose

transit projects in general. He stated that while he believed the streetcar project did not make sense at that specific time, it did not mean he disagreed with other bus and light rail projects in the region.

3. COMMENTS FROM THE CHAIR & COMMITTEE MEMBERS

Chair Collette shared the Climate Smart Communities Phase 1 findings report with the committee. Metro councilors are in the process of presenting the report and project summary to city councils and county coordinating committees around the region. Chair Collette welcomed the committee members' attendance at the scheduled meetings. The Metro Council discussed Phase 2 of the project at a work session on Tuesday, February 28th. The Metro Council would like local goals and aspirations to be at the center of this process.

Chair Collette announced that the draft 2015-18 the Statewide Transportation Improvement Program (STIP) eligibility and prioritization criteria are available for comment from Metropolitan Planning Organization (MPO) and Area Commission on Transportation (ACT) stakeholders. The draft criteria are available on the Oregon Department of Transportation (ODOT) web site. The Transportation Policy Alternatives Committee (TPAC) recommended that Metro staff draft a comment letter from Metro but to not seek formal MPO endorsement of the letter. Agencies are encouraged to provide their own comments to the STIP Stakeholder committee; directions for doing so are on the ODOT web site. Metro's draft letter will be made available to Metro area agencies for input prior to the April 13th comment deadline.

4. CONSIDERATION OF THE JPACT MINUTES FOR FEB. 1, 2012

MOTION: Ms. Olivia Clark moved, Ms. Nina DeConcini seconded, to approve the JPACT minutes for February 9, 2012.

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

5. TRIMET'S "CHALLENGES AND CHOICES" PROPOSAL

Ms. Clark of TriMet updated the committee on TriMet's recent proposal to address with the transit agencies 17 million dollar budget deficit. TriMet started the budgeting process three months early and have been holding open houses to receive public feedback. The proposed changes include, fair increases, eliminating zone pricing, surgical changes to services and internal efficiencies. The changes were designed impart to simplify the system for when TriMet moves to electronic ticketing. Economic equality of riders was a main consideration when developing fee changes and eliminating fares.

The committee discussed the following items:

- The importance of having a robust transportation system, the consideration of potential long-term negative impact, and the need to strengthen investments as the economy recovers.
- Some committee members were concerned with the lack of available ridership information. Multnomah County's member, Commissioner Deborah Kafoury, offered county assistance with the data collection process.
- The need to reinforce the importance of a federal authorization bill that emphasizes more transit investments.

6. 2012-15 METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM (MTIP) AND AIR QUALITY CONFORMITY DETERMINATION

Ms. Amy Rose of Metro introduced two pieces of legislation. Resolution No. 12-4332, for the purpose of approving the 2012-2015 Metropolitan Transportation Improvement Program for the Portland metropolitan area. Resolution No. 12-4332, if approved, would; allow for the scheduling of previously allocated federal funding, define which decisions to add or remove from the MTIP that require JPACT approval or can be handled administratively, demonstrate that the region is meeting federal planning and programming regulations and would enable submission of the MTIP to the Governor and the US Department of Transportation (DOT) for review and approval

Resolution No. 12-4333 for the purpose of approving the air quality conformity determination for the 2012-15 MTIP. Resolution 12-4333 is the companion piece to the MTIP legislation and is a federally required step in documenting that the region can meet air quality standards. Approval of the resolution would enable the submission of the conformity determination to the US DOT for review and approval and thus affirm that the MTIP meets air quality standards.

The committee discussed the following items:

- The potential for TriMet's service cuts that could affect project's air quality conformity. Metro staff stated that any current cuts made by TriMet would be incorporated into the next MTIP modeling scheduled in 2 years.
- Ms. DeConcini flagged that the national ozone standard is currently under consideration and may be tightened. Any changes to the ozone standards would have to be updated in future next MTIP.

MOTION: Councilor Burkholder moved, Councilor Donna Jordan seconded, to approve Resolution No. 12-4332 and Resolution No.12-4333.

ACTION TAKEN: With all in favor the motion passed.

7. 2012-17 REGIONAL TRAVEL OPTIONS STRATEGIC PLAN

Mr. Daniel Kaempff of Metro presented Metro's 2012-17 Regional Travel Options (RTO) Strategic Plan. The RTO program is intended to increase the awareness of non-single occupancy vehicle (SOV) travel options such as biking, walking, taking transit, and ridesharing. 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. To accomplish this, the RTO program provides strategic investments in a range of programs, including: individualized marketing, employer and commuter travel options, Transportation Management Associations (TMAs), and traveler information tools and services. Mr. Ross Peterson of Nelson/Nygaard Consulting added details on the evaluation process used to create the RTO plan, outlined the new mission statement, and summarized key issues, opportunities and recommendations

The following items were discussed by the committee:

- The future of TMA funding, and how to balance stable funding of the TMA with accountability
- RTO programs that resonate in Portland might not resonate in the suburbs; members noted that $\frac{3}{4}$ of the region's population lives in the suburbs.
- The difference between new residents choosing into a non-SOV lifestyle and converting current residents from SOV to non-SOV.

- The success of the Smart Program in Clackamas County and how it is applicable regionally.

8. TIGER IV AND JPACT REGIONAL FUNDING SUBCOMMITTEE UPDATE

Chair Collette provided an update on the Transportation Investment Generating Economic Recovery (TIGER) IV grant applications. At the JPACT regional funding subcommittee on Wednesday, February 29th, 2012, subcommittee members recommended that JPACT to approve a letter to Secretary of Transportation Ray LaHood supporting local jurisdictions in the metro area submission of four TIGER grants applications based on a technical rating according derived from a federal scoring standards. Metro staff rated the Sunrise Project in Clackamas County, with the highest score while the other three, the I-84/Troutdale Reynolds Industrial Park Access, the Close the Loop Streetcar, the US 26/Brookwood-Helvetia Interchange Modernization Project, would still move forward with committee support.

The following items were discussed by the committee:

- Identify job creation figures in the application with short and long term aspects.
- The application should show how each project has unique quality which may match future federal priorities.
- The committee should consider putting the Environmental Protection Agency (EPA) in the first section.
- The committee noted how close each projects rated during staff evaluation.
- The committee noted that Representative Earl Blumenauer recommended that only one project move forward.

MOTION: Commissioner Ann Lininger moved, Councilor Jordan seconded, to approve the letter of support be sent to Secretary Ray LaHood, for the regions four TIGER IV applications with the previous comments.

ACTION TAKEN: With all in favor, 1 abstain (N. DeConcini), the motion passed.

9. ADJOURN

Chair Collette adjourned the meeting at 8:45 a.m.

Respectfully submitted,



Marc Week
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR MARCH 1, 2012

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

ITEM	Document type	Doc Date	Document Description	Document No.
3	Brochure	02/12	CRC Phase 1 Findings	030112j-01
3	Handout	02/12	CRC Phase 1 Findings	030112j-02
5	Handout	2/12	TriMet Challenges and Choices	030112j -03
5	Handout	02/09/12	TriMet Service Reduction	030112j -04
6	Resolution	03/01/12	Resolution No. 12-4332	030112j -05
7	PPT	2/12	Regional Travel Options	030112j -06
8	Letter	2/9/12	TIGER IV Submissions	030112j -07



Date: April 5, 2012
To: JPACT and interested parties
From: Josh Naramore, Associate Transportation Planner
Re: FY 2012-13 Unified Planning Work Program

Background

The Unified Planning Work Program (UPWP) is developed annually by Metro as the Metropolitan Planning Organization for the Portland Metropolitan Area. It is a federally-required document that serves as a guide for transportation planning activities to be conducted over the course of each fiscal year, beginning on July 1st. Included in the UPWP are detailed descriptions of the transportation planning tasks, listings of various activities, and a summary of the amount and source of state and federal funds to be used for planning activities. The UPWP is developed by Metro with input from local governments, TriMet, ODOT, FHWA and FTA. Additionally, Metro must annually undergo a process known as self-certification to demonstrate that the Portland Metropolitan region's planning process is being conducted in accordance with all applicable federal transportation planning requirements. Self-certification is conducted in conjunction with annual adoption of the UPWP.

Calendar of Events

The process of developing the fiscal year (FY) 2012-13 UPWP started in January 2012. The FY 2012-13 UPWP document covers planning activities that will take place beginning on July 1, 2012 and runs through June 30, 2013. The UPWP is adopted by JPACT and the Metro Council in April of every year. Adoption allows us to begin spending federal dollars by July 1 of the new fiscal year. Below is a timeline for the UPWP adoption and self-certification process:

January 27, 2012	TPAC review and comments on draft FY 2012-13 UPWP.
February 3, 2012	FY 2012-13 UPWP draft submitted for federal and state review.
February 6, 2012	Deadline for comments from TPAC and interested parties on the draft FY 2012-13 UPWP.
February 17, 2012	Metro staff will distribute a summary of all comments on the draft FY 2012-13 UPWP for TPAC review.
February 22, 2012	Review draft FY 2012-13 UPWP with federal and state partners at 9am at MRC.
March 30, 2012	TPAC final review and recommendation of FY 2012-13 UPWP and MPO self-certification to JPACT for adoption.
April 12, 2012	JPACT review and adoption of FY 2012-13 UPWP and MPO self-certification
April 19, 2012	Metro Council review and adoption FY 2012-13 UPWP and MPO self-certification

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](#)

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>
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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.

Metro | Memo

Date: April 2, 2012
To: Joint Policy Advisory Committee on Transportation and interested parties
From: Kim Ellis, Principal Transportation Planner
Re: Climate Smart Communities Scenarios Phase 2: Shaping Regional and Local Choices

Action requested

JPACT supports the Phase 2 approach as proposed so that staff may fully proceed with the Phase 2 activities.

Below are questions to consider for discussion at the meeting.

1. Do you support the overall approach for Phase 2?
2. Will the activities proposed provide you with the information you need to direct staff on development of scenario options? If not, what additional information do you need?
3. What are your community's ambitions and how can this project help your community be successful?

With MPAC and JPACT support of the Phase 2 approach, staff will fully proceed with Phase 2 and prepare a summary of 2012 policy meeting discussions.

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

A summary of activities that have been underway since January, when JPACT last considered the Scenarios Project, is provided for context.

- **Phase 1 Findings accepted and submitted to State.** At the recommendation of MPAC and JPACT, the Metro Council formally accepted the Phase 1 Findings report and Strategy Toolbox in January. Staff submitted both reports to the Oregon Department of Transportation (ODOT) and the Department of Land Conservation and Development (DLCD) in January for inclusion in their joint progress report to the 2012 Legislature.
- **Local elected official and stakeholder briefings held and will continue.** Since January, Metro Councilors and project staff have briefed local elected officials and other stakeholders on the 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 April and May. 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 list of the briefings will be provided at the April 12 meeting.
- **Project challenges identified.** Five key 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:
 1. **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.
 2. **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.
 3. **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.
 4. **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.

5. **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.
- **Phase 2 approach and work plan developed, reflecting input received to date.** The early stakeholder discussions and the challenges presented have informed the Phase 2 work plan and engagement approach attached to this memo. The materials also reflect comments and suggestions provided by the Metro Council on February 28, the project's technical work group on March 12, MTAC on March 21 and TPAC on March 30. MPAC is scheduled to discuss the Phase 2 approach on April 11. Comments and suggestions from the MPAC discussion will be brought forward to JPACT the following morning.

Phase 2 – Approach and work plan activities

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 options to undergo a more in-depth analysis in 2013. The project team has focused on determining how much and what type of information is needed to frame potential scenario options for regional discussion and policymaking. The project team has balanced 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. The Policy Track and Technical Track summaries provide an overview of the tasks, activities and information needed to support MPAC, JPACT and the Metro Council in directing staff to develop and evaluate three policy scenarios for testing next year.

Policy Track (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. This work will be conducted in coordination with local governments and the Southwest Corridor Plan, which has already defined focus areas for that effort. The **Envision Tomorrow** scenario planning tool will be used to develop **5 community focus area case studies** to show examples of the types of strategies that are needed to achieve existing community ambitions, and to identify implementation opportunities and barriers that exist within the case study areas. Staff is pursuing funding and other approaches for interested local governments to further explore their

community ambitions using the Envision Tomorrow tool. Portland, Gresham, Beaverton and Hillsboro have expressed interest in participating with Metro staff in Envision Tomorrow training, for example. In addition, the Southwest Corridor Plan effort is also looking to the use Envision Tomorrow for the focus area workshops the project will convene later this year.

This track will also develop **state and regional policy options** presented by changes to pricing, transit, roads, marketing, fleet and technology for further discussion by MPAC and JPACT in June. The policy options will provide information to support refining the Phase 1 scenario assumptions. Metro staff will work with the technical work group, MTAC and TPAC to develop **scenario options** using the **Phase 1 results, strategy toolbox**, focus areas, regional and state policy options and local case studies, following further direction by MPAC, JPACT and the Metro Council. Local government, business and community leaders will review the range of scenario options relative to economic opportunities, changing demographics and market trends, access to opportunity, the availability of affordable housing and transportation options, environmental protection and the potential for job creation and active living. This review will be conducted as part of the Fall 2012 engagement activities.

Technical Track (Create Score Card for Scenarios) is focused on working with the technical work group, TPAC, MTAC and topic experts (e.g., business, public health, freight, social equity and environment) 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 **Scenarios 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 as they relate to all six of the region's desired outcomes. This work will build on the evaluation framework endorsed by MPAC, JPACT and the Metro Council in June 2010 as well as the evaluation methods work being completed through the Statewide Transportation Strategy. Stakeholder workshops will be convened to specifically address the public health/environment, economy and equity elements of the score card. Preliminary criteria and pilot methods will be used in Policy Track 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 defining two to three scenario concepts for achieving community and regional ambitions, implementing the 2040 Growth Concept and meeting our climate goals.

/attachment

- 2012 Policy and Technical Tracks Overview (April 4, 2012)

Additional materials to be provided at the meeting:

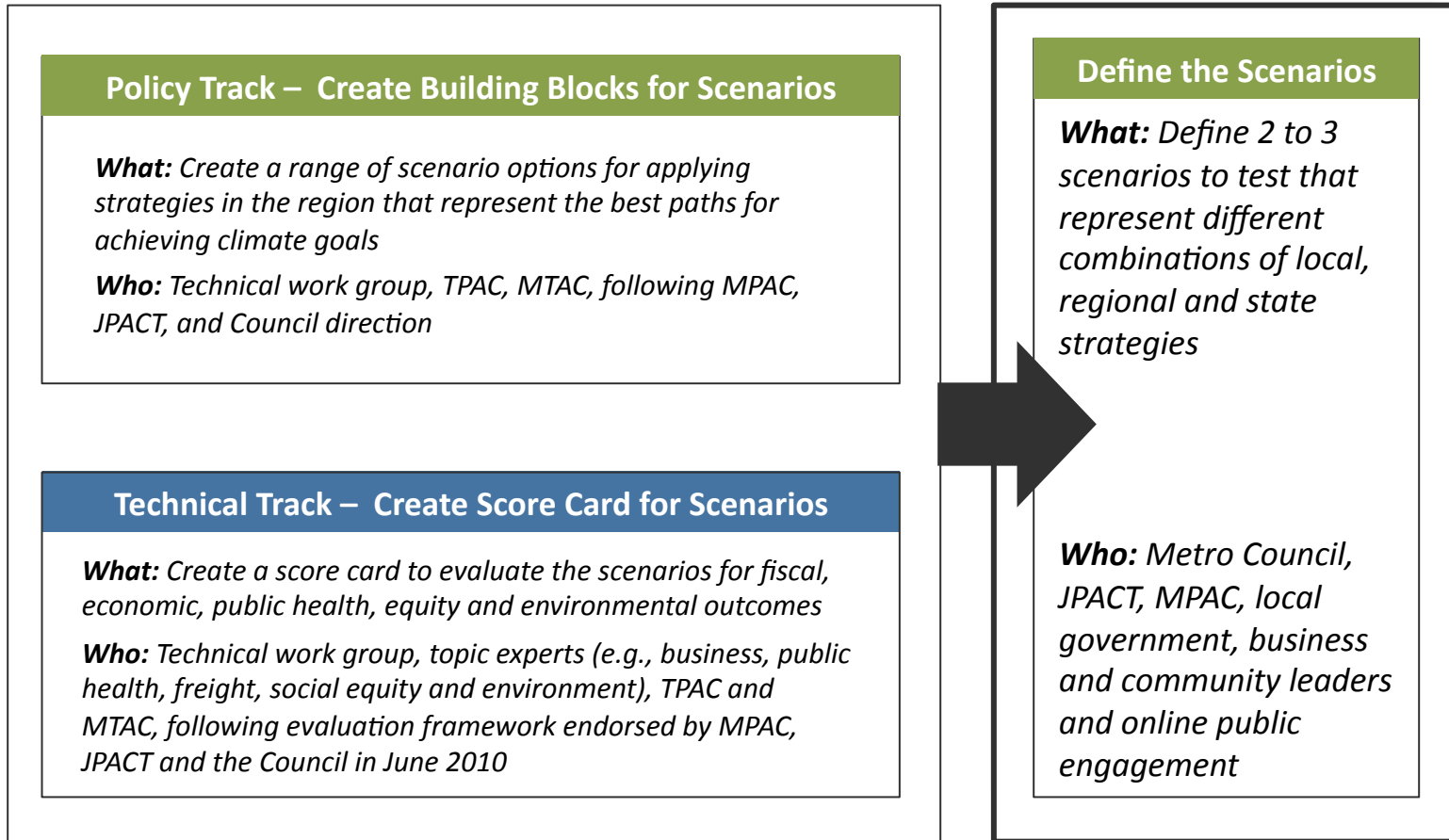
- 2011-14 Project Timeline
- 2012 Project Engagement Calendar

DRAFT

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

April – September 2012

Sept. – Nov. 2012



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: Shape Choices

Policy Track – Create Building Blocks for Scenarios (April – September 2012)

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



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

Technical Track – Create Score Card for Scenarios (March – September 2012)

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

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	🔴	🟢	🟢

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2012 Partnering and Engagement Track
Climate Smart Communities Scenarios
Phase 2: Shape 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)

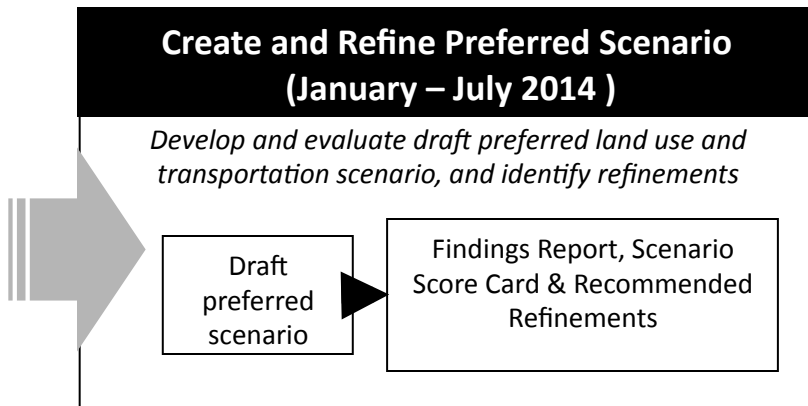
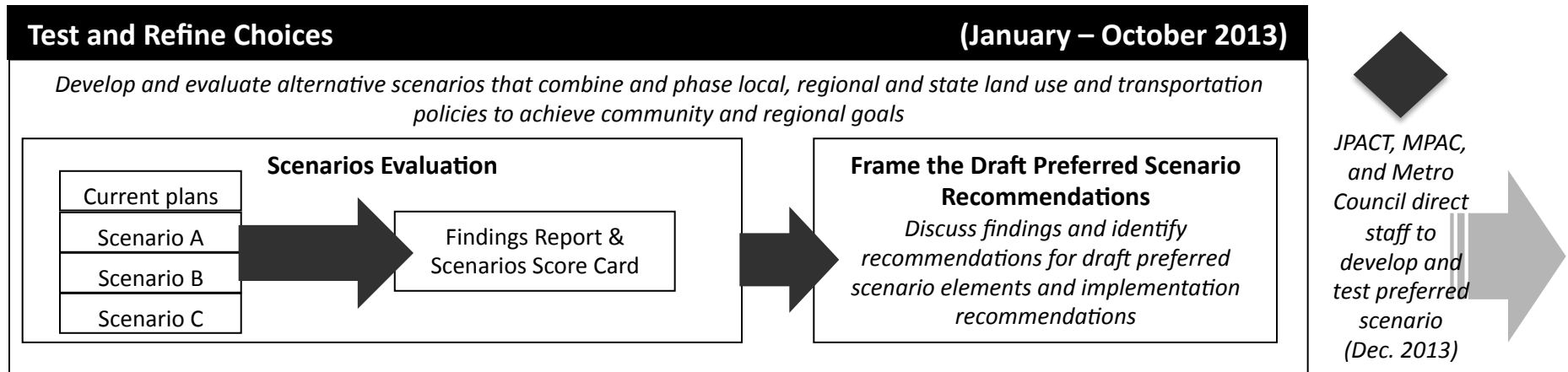
Newsfeed series: through the eyes of the technical work group

Periodic **newsfeed** updates

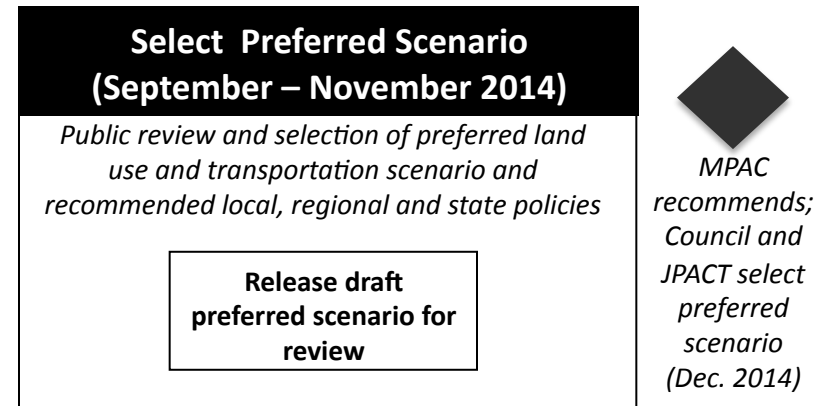
Periodic key **print and broadcast media briefings**

DRAFT

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



JPACT, MPAC, and Metro Council release final draft preferred scenario for public review (August 2014)



 Metro | *Memo*

Date: April 5, 2012
To: MPAC, JPACT and interested parties
From: Kim Ellis, Principal Transportation Planner
Re: Climate Smart Communities Scenarios Phase 2: Shaping Regional and Local Choices –
SUPPLEMENTAL MATERIALS

On April 11 and 12, MPAC and JPACT will be asked to support the approach for shaping regional and local choices during Phase 2 of the Climate Smart Communities Scenarios project. An overview of the Phase 2 approach has been included in your meeting packets, and will be the focus of the staff presentation.

More detailed draft work plans for the Policy Track and Technical Tracks are also provided for reference for interested members.

Please contact me with any questions you have at kim.ellis@oregonmetro.gov or 503.797.1617.

/attachments

- Policy Track: Create Building Blocks for Scenarios (April 5, 2012)
- Technical Track: Create Score Card for Scenarios (April 5, 2012)

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Climate Smart Communities Scenarios – Phase 2

Policy Track: Create Building Blocks for Scenarios

Draft

April 5, 2012

Purpose

This summary provides an overview of the 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 scenario options for testing in 2013. These 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 create a range of scenario 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 options will be developed using the Phase 1 scenarios, subsequent district and sensitivity analysis results, the Strategy Toolbox, Statewide Transportation Strategy, focus areas, locally- developed case studies, and state and regional policy options. MPAC, JPACT and the Metro Council will provide staff with direction on a framework to guide creation of the options.

Staff will work with the technical work group, TPAC and MTAC 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 will be central to the creation of these case studies. Staff is pursuing funding and other approaches for interested local governments to further explore their community ambitions using the Envision Tomorrow tool beyond the case studies. Portland, Gresham, Beaverton and Hillsboro have expressed interest in participating with Metro staff in Envision Tomorrow training, for example. In addition, the Southwest Corridor Plan effort is also looking to the use Envision Tomorrow for the focus area workshops the project will convene in 2012. State and regional policy options will also be developed to

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.

January through May 2012

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

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 - August 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

September through November 2012

MPAC, JPACT, Council work session(s) or regional summit to build consensus

complement the case studies to highlight the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology. The policy options will provide information to support refining the Phase 1 scenario assumptions.

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

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

and define two to three scenarios to test and outcomes to be measured.

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

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

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 the Technical Track.

- 2. Conduct sensitivity testing of individual community design, pricing and technology strategies from Phase 1** to identify the most effective land use and transportation strategies. Phase 1 focused on the overall effectiveness of different levels of implementation for each policy area. The analysis did not address the extent to which each of the individual strategies within each policy area is contributing to the emissions reductions, and 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. 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.
- 4. 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.

5. **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.

6. **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?

7. **Work with the technical work group, MTAC and TPAC to develop regional and state policy options** to frame the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology, following MPAC, JPACT and Metro Council direction.

Potential regional and state policy options 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?
 - Should the scenario options focus on policies that are largely within local and/or regional control?
8. **Create scenario policy options** to kick-off a regional discussion on a narrowed range of scenario 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 Policy Track activities are completed.

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
- Scenario policy options
- Place Types Toolbox and worksheet
- Focus Areas Map(s)
- 2010 Existing Conditions and 2035 Reference Case maps and summary materials
- Community case studies showcasing existing community efforts and ambitions, and highlighting demographics, existing assets, barriers and investment needs
- State and regional policy options highlighting the policy options presented by changes to pricing, transit, roads, marketing, fleet and technology

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

April – September 2012

Climate Smart Communities Scenarios – Phase 2

Technical Track: Create Score Card for Scenarios

Draft

April 5, 2012

Purpose

This summary provides an overview of the Technical 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 scenario options for testing in 2013. These 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 is focused on working with the technical work group, TPAC, MTAC and topic experts (e.g., business, public health, freight, social equity and environment) 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 Scenarios Score Card that will be used to convey the results of the analysis to policymakers and other stakeholders. The score card will report on costs, savings (individual/public/private) and other fiscal, economic, public health, equity and environmental outcomes as they relate to all six of the region's desired 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 scenario options 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?

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 May 2012

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

March through July 2012

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 through November 2012

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

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

Activities

1. **Workshop 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. **Workshop 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. **Workshop 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.
- Scenarios Score Card

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 – September 2012

DRAFT

Materials following this page were distributed at the meeting.



April 13, 2012

STIP Stakeholder Committee
c/o Ms. Lucia Ramirez
Oregon Department of Transportation

Dear STIP Stakeholder Committee and Staff:

Thank you for the opportunity to comment on the draft 2015-18 STIP project eligibility criteria and prioritization factors. This document successfully builds on previous STIP criteria to guide prioritization of projects consistent with Metro's desired outcomes of vibrant communities, economic prosperity, safe and reliable transportation, leadership on climate change, clean air and water, and equity.

Metro has reviewed the draft document and offers the following comments for your consideration.

1. The draft document provides helpful context of the relationship between state transportation policies and the STIP project prioritization process. This will be helpful for ODOT staff and community stakeholders to prioritize and define projects that reflect the spirit and intent of those policies.
2. Metro appreciates the new direction to project proposers to document how least cost planning tools and greenhouse gas emission reduction goals were used to select priority projects. We look forward to further development of STIP guidance as these activities continue to progress.
3. Finally, Metro appreciates the emphasis on early coordination with local stakeholders and with other ODOT project funding programs such as the Safety and Operations programs. As the Portland area MPO, we look forward to working with Region 1 staff on defining how to incorporate the region's local stakeholder input into the STIP prioritization process.

We have also included an attachment of suggested edits to the document to best implement the above issues and where helpful for clarification of intent. Thank you again for consideration of these comments.

Sincerely,

Robin McArthur, AICP
Planning & Development Director

Attachment 1

Suggested edits: Comment Draft of the 2015-18 STIP Project Eligibility Criteria and Prioritization Factors

P 17, lines 31-33: clarify the intent of this sentence regarding long-term perspective on minimizing risk.

P 21, Section 7.1: add the following phrase to the end of the first sentence “and to describe how the process was conducted consistent with the STIP Users Manual and this document.” This communicates that the documentation should describe how the recommended process was followed in addition to how the criteria was met.

P 22, line 19: add the following sentences to support staff’s ability to share initial or draft data and findings. “The development of data or information to be shared should be appropriate to the level of funding and the type of decision to be considered. Therefore, it is expected and acceptable to share data that will evolve and change throughout the prioritization process.”

P 23, line 31: To indicate that early coordination with management system data or program strategy is encouraged, delete ~~Projects considered~~ and add Priorities for other STIP programs . . .

P 41, line 20: add “and the relative completeness of seismic lifeline route improvements” for documentation to address new language in Section 5.2 regarding preservation of a continuous corridor for recovery.

2012 Scenarios Project At-a-Glance Engagement Calendar
Last update: April 11, 2012

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Policymaker briefings w/ local leaders, key stakeholders	◆◆	◆ ◆◆ ◆◆ ◆◆	◆◆ ◆	◆◆ ◆◆	◆◆◆	◆			◆		◆	◆
Local government meetings to develop case studies					◆◆ ◆◆	◆◆ ◆◆	◆					
Four Score Card workshops (Health, EJ, Environment, Business)			◆		◆	◆◆ ◆◆						
Local government workshops on community aspirations						◆	◆◆ ◆◆ ◆◆ ◆◆	◆◆ ◆◆				
Envision Tomorrow Training					◆							
Newsfeeds				◆	◆◆ ◆◆	◆◆ ◆◆	◆◆ ◆◆	◆◆ ◆◆ ◆◆	◆◆	◆◆ ◆◆	◆◆ ◆◆ ◆◆	◆◆ ◆◆
Online public engagement through Opt In										◆	◆	
MPAC/ JPACT/Council work sessions and/or summit										◆		
Presentation Opportunities				Active Transp. Summit		Assoc Oregon Counties			League Oregon Cities	OPI, CLF, APA	Assoc Oregon Counties	Or Biz Summit, OMPOC Summit

NOTE: Project will work closely with SW Corridor Plan to incorporate results from SW Corridor community workshops this summer

◆=completed event
 ◆=planned event

**Local government engagements on Climate Smart Communities Scenarios Project
(does not include county coordinating committees), as of April 11, 2012**

There are two types of engagements described here:

- **Brief overviews:** Brief overviews (usually 10 minutes or less) of the Climate Smart Communities project, and usually as part of a discussion of a broader range of Metro issues
- **Longer discussions:** More involved discussions (at least 30 minutes, and longer in some cases, usually in work sessions) of the project's findings and recommendations and how local communities' goals and aspirations for growth can be addressed through this effort

Brief overviews

- West Linn (Collette), Jan. 23
- Hillsboro (Harrington), Feb. 7
- Milwaukie (Collette), Feb. 7
- Gladstone (Collette), Feb. 14
- Beaverton (Harrington), Feb. 28
- Wilsonville (Hosticka), March 5
- Forest Grove (Harrington), March 26
- Cornelius (Harrington), April 2

Longer discussions

- Durham (Hosticka), Jan. 24
- Tualatin (Hosticka), Feb. 13
- Tigard (Hosticka), Feb. 14
- Sherwood (Hosticka), Feb. 21
- Lake Oswego (Collette), Feb. 28
- Oregon City (Collette), March 21
- Beaverton and Tigard joint session (Harrington and Hosticka), April 10
- Cornelius (Harrington), April 16
- Hillsboro (Harrington), May 1
- Washington County (Harrington, Hosticka, Hughes), June 12

www.oregonmetro.gov/climatescenarios



Climate Smart Communities Scenarios Phase 2 Approach

Shaping local and regional choices

**Joint Policy Advisory Committee on Transportation
April 12, 2012**

Kim Ellis, project manager

 **Metro** | *Making a great place*

1

Action Requested

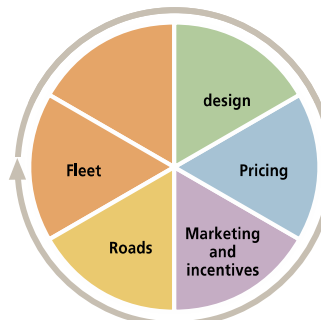
Support Phase 2 approach
to allow staff to fully proceed with
Phase 2

2



Phase 2 purpose

- Identify range of options for applying strategies
- Create a score card to evaluate options
- Define 2-3 scenario options to evaluate in detail



Policy areas tested in Phase 1

Shape local and regional choices, not to choose a preferred alternative



5

How we get there...

Policy Track – Create Building Blocks for Scenarios
April – September 2012

Building Blocks for Scenario Options



6

...How we get there

Technical Track – Create Score Card for Scenarios

March – September 2012

Refinement of 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 2011

Sample score card

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

Next steps

- | | |
|--------------------|--|
| Jan. - May | Share findings with local elected officials and stakeholders |
| April - May | Request JPACT, MPAC and Council support for Phase 2 activities |
| May | Develop more detailed schedule of policy discussions and engagement activities |
| June | MPAC, JPACT and Council kick-off policy options discussion |

Discussion



- What are your community's ambitions and how can this work help you be successful?
- Will this approach provide you with the information needed to direct staff on scenario options to test?
- What additional information do you need?
- Do you support the overall approach?