

 Metro | Agenda

Meeting: Transportation Policy Alternatives Committee (TPAC)
Date: Friday, April 27, 2012
Time: 9:30 a.m. to 12 p.m. (noon)
Place: Metro, Council Chambers

- | | | | |
|----------|-------|--|------------------------------|
| 9:30 AM | 1. | Call to Order and Declaration of a Quorum | Elissa Gertler, Chair |
| 9:35 AM | 2. | Comments from the Chair and Committee Members | Elissa Gertler, Chair |
| 9:40 AM | 3. | Citizen Communications to TPAC Agenda Items | |
| 9:45 AM | 4. ** | Consideration of the TPAC Minutes for March 30, 2012 | |
| | 5. | <u>ACTION ITEMS</u> | |
| 9:50 AM | 5.1 * | Ordinance No. 12-1278 , For the Purpose of Amending the Regional Transportation Functional Plan to Remove the Schedule for Updating City and County Transportation System Plans; to Add an Exemption Process; and to Revise Procedures for Extensions and Exceptions – <u>RECOMMENDATION TO JPACT REQUESTED</u> <ul style="list-style-type: none">• <i>Purpose</i>: Review and approve RTFP amendments.• <i>Outcome</i>: Recommendation to JPACT. | John Mermin |
| 10:05 AM | 5.2 * | Resolution No. 12-4345 , For the Purpose of Updating the Work Program for Corridor Refinement Planning and Designating the Powell-Division High Capacity Transit Corridor as the Next Regional Priority for Completion of Corridor Refinement and Commencement of Alternatives Analysis – <u>RECOMMENDATION TO JPACT REQUESTED</u> <ul style="list-style-type: none">• <i>Purpose</i>: Provide background on next corridor prioritization and request TPAC direction.• <i>Outcome</i>: Recommendation to JPACT. | Deb Redman |

Continued on back...

10:25 AM 5.3 * Regional Travel Options Strategic Plan – **Daniel Kaempff**
RECOMMENDATION TO JPACT REQUESTED

- Purpose: Review stakeholder comments and approve RTO Strategic Plan.

- Outcome: Recommendation to JPACT.

Note: The full 2012-2017 RTO Strategic Plan is available online at: <http://www.oregonmetro.gov/traveloptions>

6. **INFORMATION/DISCUSSION ITEMS**

10:55 AM 6.1 # Regional Safety Action Plan – Discussion of Findings **Joshua Naramore**
– INFORMATION/DISCUSSION **Anthony Butzek**

- Purpose: Present findings from Portland Metropolitan region safety data.

- Outcome: TPAC prepared for May discussion of Regional Safety Plan and recommendations.

Note: The draft State of Safety in the Region report is available online at:

<ftp://ftp.oregonmetro.gov/pub/tran/TSMO/Safety/>

11:35 AM 6.2 * Age-Friendly Portland: An Overview of Global and Local **Margaret B. Neal, PSU**
Efforts –INFORMATION **Alan DeLaTorre, PSU**

- Purpose: Presentation detailing Portland's involvement in the World Health Organization's *Global Age-Friendly Cities* project.

- Outcome: Inform TPAC of regional efforts for planning for an aging society (current advisory group, development of action plan & indicators).

12 PM 7. **ADJOURN** **Elissa Gertler, Chair**

* Material available electronically.

** Material will be distributed in advance of the meeting.

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.

Future TPAC discussion items:

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

2012 TPAC Work Program

4/20/12

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

Parking Lot:

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

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE)	ORDINANCE NO. 12-1278
REGIONAL TRANSPORTATION FUNCTIONAL)	
PLAN TO REMOVE THE SCHEDULE FOR)	
UPDATING CITY AND COUNTY)	
TRANSPORTATION SYSTEM PLANS; TO ADD)	Introduced by Chief Operating Officer Martha
AN EXEMPTION PROCESS; AND TO REVISE)	J. Bennett with the Concurrence of Council
PROCEDURES FOR EXTENSIONS AND)	President Tom Hughes
EXCEPTIONS)	

WHEREAS, the Metro Council adopted the 2035 Regional Transportation Plan (RTP) by Ordinance No. 10-1241B (For the Purpose of Amending the 2035 RTP (Federal Component) and the 2004 RTP to Comply with State Law; to add the Regional Transportation Systems Management and Operations Action Plan, the Regional Freight Plan and the High Capacity Transit System Plan; to amend the Regional Transportation Functional Plan (RTFP) and add it to the Metro Code; to amend the Regional Framework Plan; and to amend the Urban Growth Management Functional Plan) on June 10, 2010; and

WHEREAS, the RTFP contains a schedule for city and county updates to their transportation systems plans (TSPs) (Table 3.08-4); and

WHEREAS, a number of cities and counties have been unable to meet the schedule for updates due to budgetary and other limitations on their resources; and

WHEREAS, several cities seek exemptions from the requirements of the RTFP, which the RTFP does not authorize; and

WHEREAS, section 660-012-0055(6) of the Transportation Planning Rule (TPR) authorizes the director of the Department of Land Conservation and Development to grant small cities and counties exemptions from the TPR, but such exemptions are not fully effective without exemptions from associated requirements of the RTFP; and

WHEREAS, the RTFP provides procedures for extensions of time for compliance with, and exceptions from requirements of the RTFP, both of which, unlike similar procedures in the Urban Growth Management Functional Plan, require hearings before the Metro Council; and

WHEREAS, the Joint Policy Advisory Committee on Transportation and the Metro Policy Advisory Committee both considered the proposed amendments and recommended that the Metro Council adopt the amendments; and

WHEREAS, the Metro Council held a public hearing on the proposed amendments on May 17, 2012, on the proposed amendments; now, therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. The RTFP is hereby amended, as indicated in Exhibit A, attached and incorporated into this ordinance, to repeal the schedule for TSP updates in Table 3.08-4; to add a process for exemptions from the requirements of the RTFP; and to revise the procedures for

extensions of time and exceptions to allow the Chief Operating Officer to grant extensions and exceptions subject to appeal to the Metro Council.

- 2. The Findings of Fact and Conclusions of Law, attached and incorporated into this ordinance as Exhibit B, are adopted as the Council’s explanation how the amendments to the RTFP comply with the Regional Framework Plan and state law.

ADOPTED by the Metro Council this _____ day of ____, 2012.

Tom Hughes, Council President

Attest:

Approved as to Form:

Kelsey Newell, Regional Engagement Coordinator

Alison Kean Campbell, Metro Attorney

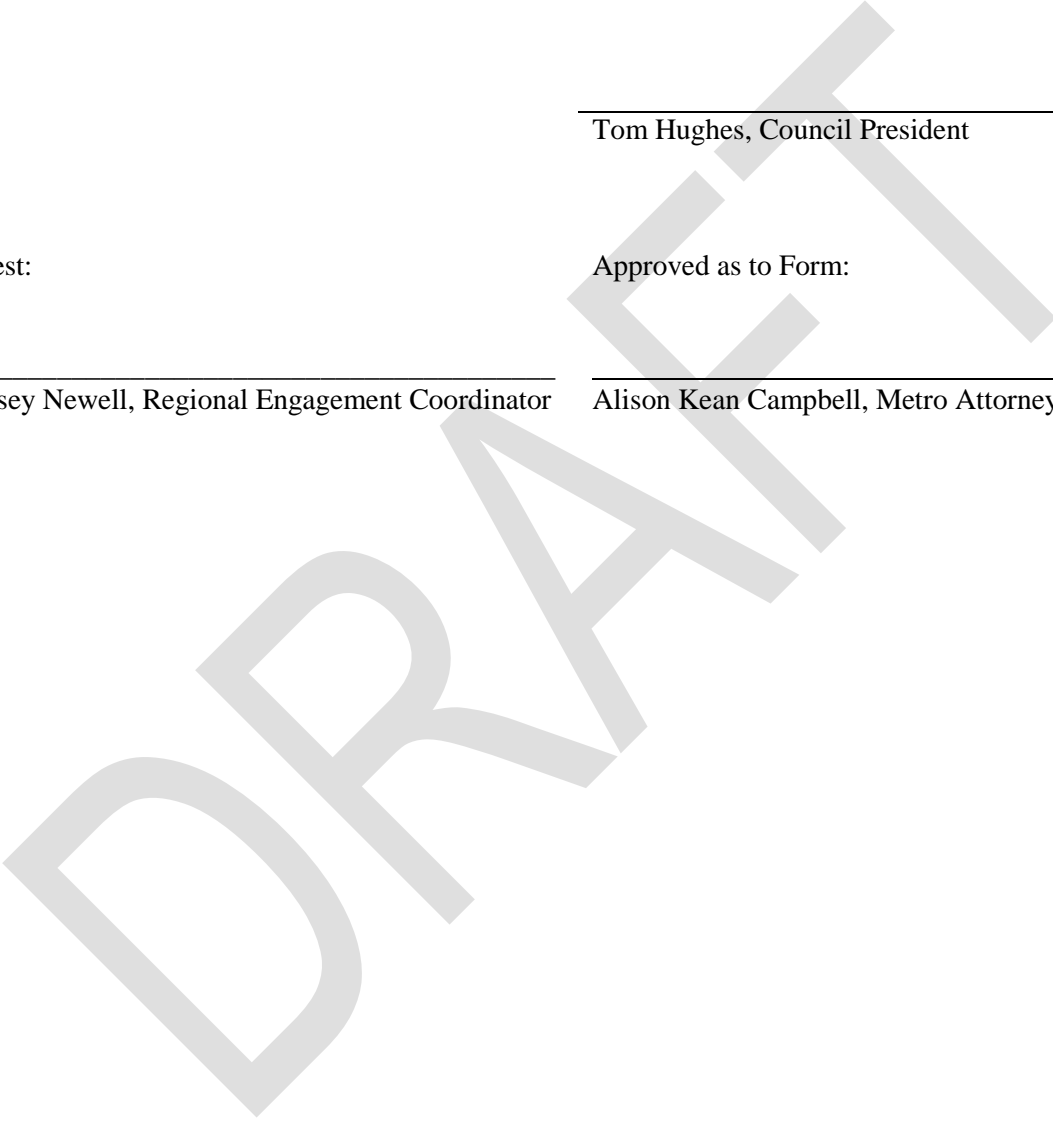


Exhibit A to Ordinance No. 12-1278

Amendments to Metro Code Chapter 3.08
Regional Transportation Functional Plan

3.08.620 Extension of Compliance Deadline

- A. A city or county may seek an extension of time for compliance with the RTFP by filing an application on a form provided by the COO. Upon receipt of an application, the ~~Council President shall set the matter for a public hearing before the Metro Council and shall notify the city or county, the Department of Land Conservation and Development (DLCD) and those persons who request notification of applications for extensions~~ COO shall notify the city or county, the Oregon Department of Transportation and those persons who request notification of applications for extensions. Any person may file a written comment in support of or opposition to the extension.
- B. ~~The Council shall hold a public hearing to consider the application. Any person may testify at the hearing. The Council~~ COO may grant an extension if ~~it finds that~~ the city or county is making progress toward compliance ~~with the RTFP; or There~~ there is good cause for failure to meet the compliance deadline. Within 30 days after the filing of a complete application for an Extension, the COO shall issue an order granting or denying the extension. The COO shall not grant more than two extensions of time. The COO shall send the order to the city or county and any person who filed a written comment.
- C. The ~~Council~~ COO may establish terms and conditions for an extension ~~in order~~ to ensure that compliance is achieved in a timely and orderly fashion and that land use decisions made by the city or county during the extension do not undermine the ability of the city or county to achieve the purposes of the RTFP requirement. A term or condition must relate to the requirement of the RTFP for which the Council grants the extension. The COO shall incorporate the terms and conditions into the order on the extension. ~~The Council shall not grant more than two extensions of time, nor grant an extension of time for more than one year.~~
- D. The city or county applicant or any person who filed written comment on the extension may appeal the COO's order to the Metro Council within 15 days after receipt of the order. If an appeal is filed, the Council shall hold a

Exhibit A to Ordinance No. 12-1278

hearing to consider the appeal. TheAfter the hearing, the Council shall issue an order with its conclusion and analysis and send a copy to the city or county, ~~the DLCD~~ and any person who participated in the proceeding. The city or county or a person who participated in the proceeding may seek review of the Council's order as a land use decision described in ORS 197.015(10)(a)(A).

3.08.630 Exception from Compliance

- A. A city or county may seek an exception from compliance with a requirement of the RTFP by filing an application on a form provided by the COO. Upon receipt of an application, the ~~Council President shall set the matter for a public hearing before the Metro Council and shall notify the DLCD and those persons who request notification of requests for exceptions~~COO shall notify the city or county, the Oregon Department of Transportation and those persons who request notification of requests for exceptions. Any person may file a written comment in support of or opposition to the exception.

~~Following the public hearing on the application, the Metro Council~~The COO may grant an exception if ~~it finds~~:

B.

1. It is not possible to achieve the requirement due to topographic or other physical constraints or an existing development pattern;
2. This exception and likely similar exceptions will not render the objective of the requirement unachievable region-wide;
3. The exception will not reduce the ability of another city or county to comply with the requirement; and
4. The city or county has adopted other measures more appropriate for the city or county to achieve the intended result of the requirement.

- B. Within 30 days after the filing of a complete application for an exception, the COO shall issue an order granting or denying the exception.

- C. The ~~Council~~COO may establish terms and conditions for the exception in order to ensure that it does not undermine the ability of the region to achieve the policies of the RTP.

Exhibit A to Ordinance No. 12-1278

A term or condition must relate to the requirement of the RTFP to which the Council grants the exception. The COO shall incorporate the terms and conditions into the order on the exception.

- D. The city or county applicant or a person who filed a written comment on the exception may appeal the COO's order to the Metro Council within 15 days after receipt of the order. If an appeal is filed, the Council shall hold a hearing to consider the appeal. TheAfter the hearing, the Council shall issue an order with its conclusion and analysis and send a copy to the city or county, the DLCD and those persons who have requested a copy of the order. The city or county or a person who participated in the proceeding may seek review of the Council's order as a land use decision described in ORS 197.015(10) (a) (A).

3.08.640 Exemptions

- A. A city or county may seek an exemption from the requirements of the RTFP. Upon receipt of a request, the COO shall notify the city or county, the Department of Land Conservation and Development, the Oregon Department of Transportation and those persons who request notification of applications for exemptions. Any person may file a written comment in support of or opposition to the exemption.
- B. The COO may grant an exemption from some or all requirements if:
1. The city or county's transportation system is generally adequate to meet transportation needs;
 2. Little population or employment growth is expected over the period of the exemption;
 3. The exemption would not make it more difficult to accommodate regional or state transportation needs;
and
 4. The exemption would not make it more difficult to achieve the performance objectives set forth in section 3.08.010A.
- C. Within 30 days after the filing the request for an exemption, the COO shall issue an order granting or denying the exemption.
- D. The COO shall prescribe the duration of the exemption and may establish other terms and conditions for the exemption

Exhibit A to Ordinance No. 12-1278

so long as the terms and conditions relate to the requirement of the RTFP to which the Council grants the exception. The COO shall incorporate the terms and conditions into the order on the exemption.

- E. The city or county applicant or any person who filed written comment on the exemption may appeal the COO's order to the Metro Council within 15 days after receipt of the order. If an appeal is filed, the Council shall hold a hearing to consider the appeal. After the hearing, the Council shall issue an order with its conclusion and analysis and send a copy to the city or county and any person who participated in the proceeding. The city or county or a person who participated in the proceeding may seek review of the Council's order as a land use decision described in ORS 197.015(10) (a) (A).

Exhibit B to Ordinance No. 12-1278

Findings of Fact and Conclusions of Law

[PLACEHOLDER]

DRAFT

STAFF REPORT

IN CONSIDERATION OF ORDINANCE NO. 12-1278, FOR THE PURPOSE OF AMENDING THE REGIONAL TRANSPORTATION FUNCTIONAL PLAN TO REMOVE THE SCHEDULE FOR UPDATING CITY AND COUNTY TRANSPORTATION SYSTEM PLANS; TO ADD AN EXEMPTION PROCESS; AND TO REVISE PROCEDURES FOR EXTENSIONS AND EXCEPTIONS

Date: April 9, 2012

Prepared by: John Mermin, 503-797-1747

BACKGROUND

The Regional Transportation Functional Plan (RTFP) is part of Metro Code (Chapter 3.08) and implements the policies contained in the Regional Transportation Plan. Cities and Counties local transportation system plans and implementing ordinances must be consistent with the Regional Transportation Functional Plan.

The Metro Council approved the 2035 Regional Transportation Plan and Regional Transportation Functional plan on June 10, 2010. Metro consulted with each city and county to determine a timeline for this local work and adopted a schedule that is part of the RTP Ordinance (No.10-1241B). Since that time four jurisdictions were unable to meet 2011 deadlines due to resource constraints and other limitations. Metro staff expects several local jurisdictions to be unable to meet the existing schedule for 2012.

On December 16, 2010 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. Formerly the process for receiving extensions and exceptions was time consuming for the Council and local governments since it required a public hearing and decision by the Metro Council. Ordinance 10-1244B amended the procedure to make the granting of extensions & exceptions administrative decisions of Metro's Chief Operating Officer, with possible appeal to the Metro Council.

Since the adoption of the RTFP, the City of Rivergrove contacted Metro staff inquiring about exemption from its requirements. The Regional Transportation Functional Plan does not address the issue of exemptions. Metro staff believes there are other communities in the region that would be interested in an exemption process. 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.

Staff Recommendation

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 or some 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 believes that four jurisdictions, Johnson City, Maywood Park, Durham and Rivergrove, may meet these criteria and may wish to apply for exemption from RTFP requirements. To receive an exemption a jurisdiction would need to send a formal request to Metro's COO.

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) 2013. This change will ensure that Metro code need not be amended in the future when the COO grants extensions to compliance deadlines.

ANALYSIS/INFORMATION

1. Known Opposition

None known at this time.

2. Legal Antecedents

- Metro Ordinance No.10-1241B, which included adoption of the Regional Transportation Plan and Regional Transportation Functional Plan
- Metro Ordinance No.10-1244, which included updates to the Urban Growth Management Functional Plan to streamline the compliance process to make the granting of extensions and exceptions an administrative decision of Metro's Chief Operating Officer

3. Anticipated Effects

Adoption of the legislative would amend Title 6 of the Regional Transportation Functional Plan (Compliance Procedures).

4. Budget Impacts

None

RECOMMENDED ACTION

Metro Staff recommends that the Council adopt Ordinance No.12-1278

BEFORE THE METRO COUNCIL

IN CONSIDERATION OF RESOLUTION NO. 12-) RESOLUTION NO. 12-4345
4345 FOR THE PURPOSE OF UPDATING THE)
WORK PROGRAM FOR CORRIDOR) Introduced by Shirley Craddick
REFINEMENT PLANNING AND
DESIGNATING THE POWELL-DIVISION HIGH
CAPACITY TRANSIT CORRIDOR AS THE
NEXT REGIONAL PRIORITY FOR
COMPLETION OF CORRIDOR REFINEMENT
AND COMMENCEMENT OF ALTERNATIVES
ANALYSIS

WHEREAS, the State of Oregon Transportation Planning Rule (TPR) section 660-012-0020 requires that transportation system plans (TSPs) establish a coordinated network of planned transportation facilities adequate to serve regional transportation needs; and

WHEREAS, the state component of the 2035 Regional Transportation Plan (RTP) is intended to serve as the regional transportation system plan under statewide planning Goal 12 and the State Transportation Planning Rule, and must be consistent with those laws; and

WHEREAS, Metro, as the metropolitan planning agency, has identified areas where refinement planning is necessary to develop needed transportation projects and programs not included in the regional TSP; and

WHEREAS, the Metro Council, the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), the Metro Technical Advisory Committee (MTAC), and the Transportation Policy Alternatives Committee (TPAC) assisted in the development of refinement plan prioritization factors in fall 2009; and

WHEREAS, Resolution 10-4119, adopted by the Metro Council on February 25, 2010, directed staff to work with affected local jurisdictions to conduct the first two corridor refinement plans (known as the East Metro Connections Plan and the Southwest Corridor Plan) based on an approved prioritization framework; and

WHEREAS, the Regional High Capacity Transit (HCT) System Plan summary report (June 2010), a component of the RTP, identified a new HCT corridor (#10) in the vicinity of Powell Boulevard from the Portland central city to Gresham (the "Powell-Division HCT Corridor") as the second highest of the three near-term regional priority corridors; and

WHEREAS, the highest ranked HCT corridor is already in the alternatives analysis phase, as part of the Southwest Corridor refinement planning process; and

WHEREAS, preparatory work in or near the Powell-Division HCT Corridor, including the Phase I Powell-Foster Corridor Refinement Plan, the Inner Powell Streetscape Plan, the East Metro Connections Plan (currently finalizing its recommendations), the East Portland Action Plan (EPAP) and the recently completed Outer Powell Boulevard Conceptual Design Plan, identified the major safety, roadway, and related bicycle and pedestrian improvements needed in the Powell-Division HCT Corridor; and

WHEREAS, the EPAP was developed by the community of East Portland, generally east of I-205, and identified actions and strategies aimed at improving transit service throughout East Portland, including expanding transit service and connections between East Portland neighborhoods and Columbia Corridor employment areas; and

WHEREAS, the East Portland in Motion project represents a five-year implementation strategy for the EPAP, focused on active transportation and access to transit; and

WHEREAS, the Outer Powell Boulevard Conceptual Design Plan acknowledges the need for a near term analysis of improved transit service including HCT and the effect that HCT would have on vehicular capacity in the corridor; and

WHEREAS, the Outer Powell Boulevard Conceptual Design Plan did not seek to determine the impacts of HCT on Powell Boulevard or the function, mode or general location of HCT in this corridor; and

WHEREAS, the East Metro Connections Plan has identified transit opportunities and potential performance benefits associated with high capacity transit within the eastern segment of the previously identified Powell-Division HCT Corridor; and

WHEREAS, Resolution 10-4119 called for regular review of the proposed sequencing of corridor refinement plan preparation, to ensure that regional priorities continue to be reflected in refinement plan efforts, and directed staff to coordinate corridor refinement planning work with HCT planning efforts; and

WHEREAS, the phasing graphic included as Exhibit C in Resolution No. 10-4119 recognized the likelihood of initiation of an alternatives analysis for the HCT corridor in the vicinity of Powell Blvd to occur in 2012-13; and

WHEREAS, necessary multimodal transportation planning has been completed to identify needs and opportunities for high capacity transit at a system planning level in the Powell-Division HCT Corridor; and

WHEREAS, needs within the Powell-Division HCT Corridor include affordable, equitable transit access and improved service to stimulate community and economic development and serve locally desired land uses; and

WHEREAS, there is now both demonstrated interest in and local and regional support for determining the best community investment strategy and specific projects for the Powell-Division HCT Corridor to address identified needs and fulfill local and regional aspirations; and

WHEREAS, on April 19, 2012, the Metro Council approved Resolution 12-4335, adopting the Fiscal Year 2012-13 Unified Planning Work Program (UPWP), which identifies the Powell-Division HCT Corridor as appropriate for the next corridor refinement plan; and

WHEREAS, on **May 10, 2012**, the Joint Policy Advisory Committee on Transportation (JPACT) recommended approval of this resolution to update refinement plan prioritization by the Metro Council and in the UPWP, now therefore

BE IT RESOLVED that the Metro Council:

1. Approves and adopts the revised sequencing and phasing for the next corridor refinement plan, the “Powell-Division High Capacity Transit Corridor Refinement Plan.”

2. Approves commencement of refinement planning efforts as follows, subject to all necessary further approvals, with work scheduled as resources permit, for this next corridor refinement plan, which will:

- a) Be consistent with the Mobility Corridor Strategies and the HCT System Expansion Policy Framework contained within the adopted 2035 RTP;
- b) Determine the geographic scope of the refinement plan;
- c) Identify unresolved issues and needed steps for the refinement plan;
- d) Identify scope elements and study methods for the corridor refinement process as well as a Transit Alternatives Analysis (AA) (see Exhibit A). The AA will further define the route, service, transit and associated pedestrian, bicycle and roadway improvements needed to provide high quality and high capacity bus service in this corridor. The outcome will be an application for Small or New Starts funding;
- e) Coordinate proposed planning activities with other project development activities and already defined RTP projects within the corridor; and
- f) Seek funding to complete required study components, the Alternatives Analysis and eventual implementation of a community investment strategy within the Powell-Division HCT Corridor.

3. Amends the FY 2012-13 UPWP to reflect that the Powell-Division HCT Corridor is the next regional corridor refinement plan priority.

ADOPTED by the Metro Council this [10th] day of [May] 2012.

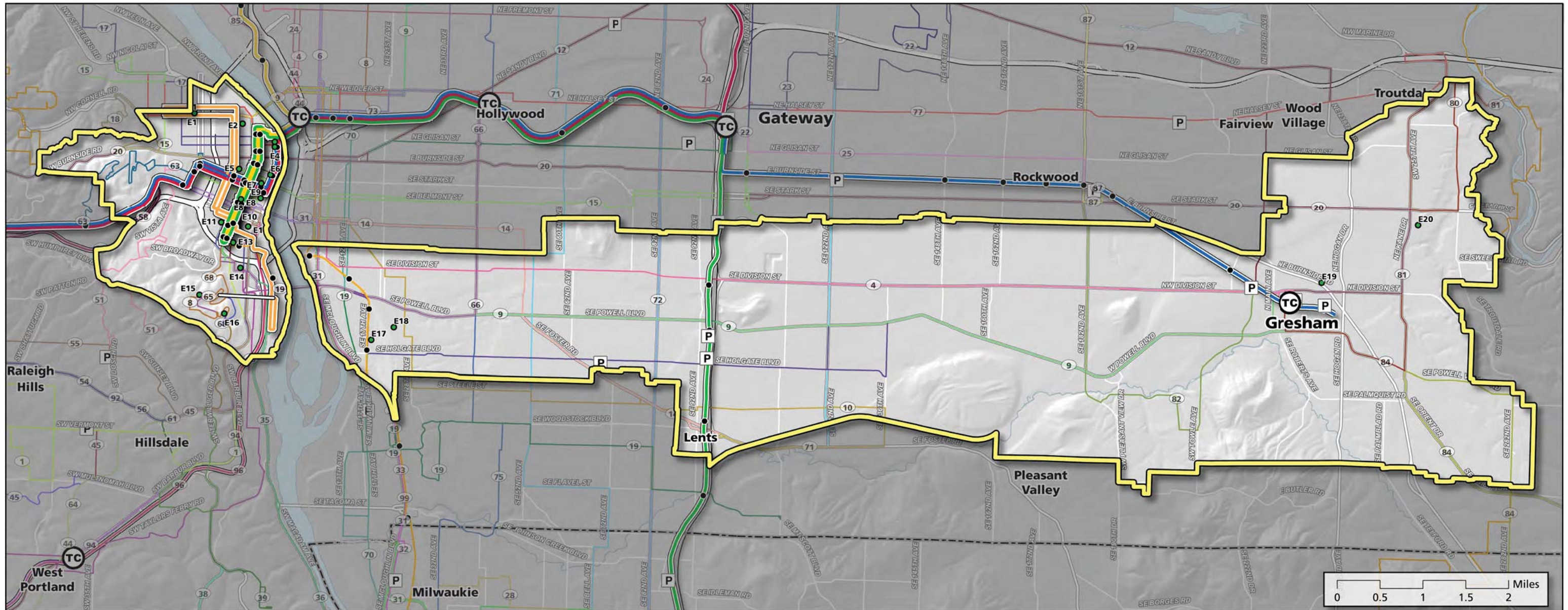
Tom Hughes, Council President

Approved as to Form:

Alison Kean Campbell , Metro Attorney

Exhibit A: Proposed Powell-Division Transit Alternative Analysis Study Area Map

Powell-Division Transit Alternatives Analysis



Colleges and Universities

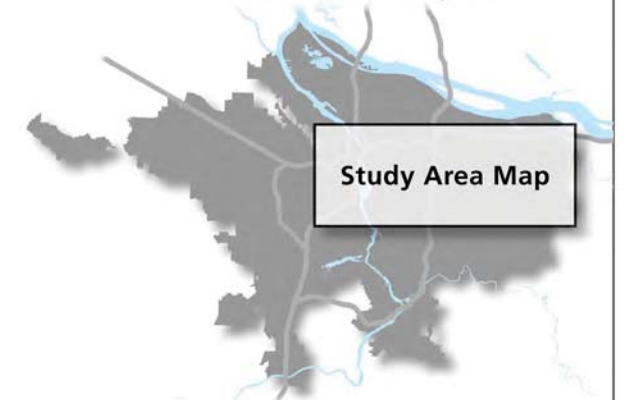
Skills Centers

High Schools

Large Employers

E1	LEGACY HEALTH SYSTEM	E11	PORTLAND STATE UNIVERSITY
E2	US POST OFFICE	E12	REGENCO GROUP
E3	PORT OF PORTLAND	E13	ISHIMOTO AMERICA INC
E4	KB PIPELINE CO	E14	ADP DEALER SVC
E5	PORTLAND STATE UNIV	E15	OREGON HEALTH & SCIENCE UNIV
E6	US ARMY CORPS OF ENGINEERS	E16	V A MEDICAL CTR-PORTLAND
E7	ODS CO	E17	TRIMET
E8	STANDARD INSURANCE CO	E18	FRED MEYER STORES INC
E9	PORTLAND GENERAL ELECTRIC CO	E19	ADVANCED BUSINESS TECHNOLOGIES
E10	WEYERHAEUSER CO	E20	MT HOOD COMMUNITY COLLEGE

Portland Metro Region



Study Area Map

STAFF REPORT (DRAFT)

IN CONSIDERATION OF RESOLUTION NO. 12-4345 FOR THE PURPOSE OF UPDATING THE WORK PROGRAM FOR CORRIDOR REFINEMENT PLANNING AND DESIGNATING THE POWELL-DIVISION HIGH CAPACITY TRANSIT CORRIDOR AS THE NEXT REGIONAL PRIORITY FOR COMPLETION OF CORRIDOR REFINEMENT AND COMMENCEMENT OF ALTERNATIVES ANALYSIS

Date: May 10, 2012

Prepared by: Deborah Redman
503-797-1641

BACKGROUND

1) Description of Proposed Powell-Division High Capacity Transit Corridor Refinement Plan

Building off the findings and local support generated through recent related planning work (described below), the Powell-Division High Capacity Transit Corridor Refinement Plan will coordinate land use and transportation planning efforts to develop an investment strategy that defines a high capacity transit project for a Small or New Starts application, develops supportive land use actions and identifies and prioritizes related projects to stimulate community and economic development. Transit in this corridor would connect several low income areas with major education and workforce training sites including Portland State University, Portland Community College and Mt. Hood Community College as well as with jobs in Portland and Gresham. It would leverage existing transit investments in the Willamette River Transit Bridge, and afford transit vehicles a time advantage in accessing downtown Portland from points east on the eventual alignment.

The Powell-Division Corridor Transit Refinement Plan will include:

- Local land use planning work that will help define the transit route, stop locations and connections and identify land use actions and investments to support livable communities. Outcomes of these efforts will be implemented by local jurisdictions.
- Transit Alternatives Analysis (AA). The AA will further define the route, service type, transit and associated pedestrian, bicycle and roadway improvements needed to provide high quality and high capacity bus service in this corridor. The outcome will be an application for Small Starts/New Starts funding.
- Identification of key community investments (regional, local, public and private) that will create synergy with proposed transit investments and support community economic development and livability.

2) Objectives of Proposed Powell-Division High Capacity Transit Corridor Refinement Plan

- Develop transit solution that efficiently serves high demand corridor in the near term while recognizing physical constraints in the corridor as well as the limited local capital and operational funding for near term implementation.
- Develop a Powell-Division Corridor community investment strategy that identifies and prioritizes needed projects to serve locally desired land uses and stimulate community and economic development centered on high capacity transit service.

- Establish agreements on local, regional and state actions to support implementation of the community investment strategy.
- Develop multi-modal solutions that distribute both benefits and burdens of growth, support active lifestyles and enhance the natural environment.
- Actively engage public in developing the criteria to prioritize transportation investments and land use changes.
- Conduct a transit Alternatives Analysis to determine the best alignment, associated service changes and capital improvements of a high capacity transit route.
- Incorporate refined transportation planning into RTP.

3) **Previous Corridor Refinement Work Program Prioritization**

a) **Background**

The 2000 Regional Transportation Plan (RTP) identified a significant transportation need in 18 corridors but specified that additional work was needed before a specific project could be implemented. In FY 2000-01, the Corridor Initiatives Program prioritized completion of the corridor plans and refinements. Per that recommendation, Metro initiated and led corridor studies including the Powell/Foster and Highway 217 corridors. The phase I Powell/Foster plan was completed and the findings were adopted by JPACT and the Metro Council in FY 2003/04.

In winter 2005, Metro again consulted with regional jurisdictions to identify the next priority corridor(s) for commencement of planning work. Based on the consultation, in winter 2005/06, JPACT and Metro Council approved a corridor planning work plan update, which called for initiation of five new corridor plans in the next five years. In winter 2007/08, Metro commenced work on one of the corridor planning efforts identified in that work program, the Regional High Capacity Transit System Plan.

As part of the Regional Transportation Plan update, in 2009, Metro worked with technical committees and local jurisdictions to identify and prioritize remaining corridor needs. Five corridors were found to need refinements and a phased approach was established to accomplish all remaining refinement plans by 2020. Mobility Corridor #15 (East Multnomah County connecting I-84 and US 26) and Mobility Corridors #2 and # 20 (in the vicinity of I-5/Barbur Blvd, from Portland Central City southward to approximately the “Tigard Triangle”) were designated as the next priorities based on technical factors, as well as local urgency and readiness (Resolution 10-4119, approved by Metro Council on February 25, 2010). The East Metro Connections and Southwest Corridor Plans commenced shortly thereafter and will be completed in June and December 2012 respectively.

4) **2010 Metro Council Prioritization as directed by Resolution No. 10-4119**

- a) Resolution No. 10-4119 listed six remaining multimodal mobility corridors needing refinement planning, along with one HCT Corridor (“Powell Vicinity”), the latter which is the subject of this staff report and related resolution.
- b) Two plans are underway, per that prioritization: East Metro Connections Plan and Southwest Corridor Plan.
- c) The assumption at the time this previous corridor refinement prioritization was completed (i.e., February 2010) was that “Vicinity of Powell Corridor” transit needs and opportunities would in part be studied as a First Tier HCT corridor within the framework of an Oregon Transportation and Growth Management Program-funded study that came to be called the Outer Powell

Boulevard Conceptual Design Plan. A draft of the final report of that Plan was released in December, 2011, and is discussed briefly below.

d) Resolution No. 10-4119 also anticipated regular review of the proposed, to ensure that regional priorities continue to be reflected in refinement plan efforts and directed staff to coordinate corridor refinement planning work with HCT planning efforts. It also anticipated the initiation of an alternatives analysis for the HCT corridor in the vicinity of Powell Blvd to occur in 2012, as shown in the Exhibit C to the resolution (Attachment 1 to this staff report.) The order presented in the phasing and sequencing shown in Attachment 1 considered not only the accepted technical rankings, but also took into account then-current levels of local support, as listed below:

- Technical rankings
- Demonstrated local support
- Respective levels of effort of the five corridors
- Ability of local jurisdictions to take more responsibility for one or more pieces of work that are likely to be required in a given corridor
- Ability to logically segment work (e.g., to postpone corridor refinement planning)
- Potential for project development to proceed on a separate track
- Ramp-up time needed for more complex corridors (to be included in a preparatory phase described below)—allowing staggered plan initiation points
- A proposed scenario for linking High Capacity Transit (HCT) system expansion process and priorities to the corridor refinement planning process, where appropriate

e) High Capacity Transit (HCT) Corridors

In July 2009, the Metro Council adopted the Regional High Capacity Transit (HCT) System Plan. The HCT plan identifies and prioritizes corridors for implementation based on a set of evaluation criteria consistent with the goals of the RTP and the region's 2040 growth concept. The HCT plan was adopted by the region as part of the Regional Transportation Plan in June 2010. In July 2011, the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council adopted the High Capacity Transit System Plan Expansion Policy guidelines to further describe the process for moving projects forward.

Both the HCT plan and the system expansion policy identify the Portland Central City to Gresham (in general, Powell-Division Corridor) as a Near-Term regional priority corridor. The rigorous HCT process included the application of 25 evaluation criteria approved by the Metro Council and Joint Policy Advisory Committee on Transportation. System Expansion policy targets were applied to both the SW and Powell-Division corridors. While on many measures such as transit supportive land use and community support, regional network connectivity and integrated transportation system development the corridors scored equally. In terms of Housing needs supportiveness, Powell actually measured higher. In the areas of financial capacity and partnership, political leadership and ridership (particularly in projected increase) the SW corridor scored higher.

The SW corridor is currently in an AA process. Given the strong land use needs and opportunities, community support, current ridership, and housing needs, the Powell-Division corridor should move forward at this time.

In addition to a decade of corridor refinement plan prioritization and regional-scale planning work, there has been significant and relevant preparatory studies in or near the Powell-Division HCT Corridor, including the Phase I Powell/Foster Corridor Refinement Plan, the Inner Powell Streetscape Plan, the East Metro Connections Plan (currently finalizing its recommendations), the East Portland Action Plan and the recently completed Outer Powell Boulevard Conceptual Design Plan. These studies and planning work, summarized below, identify the major safety, roadway, and related bicycle and pedestrian improvements in this corridor, and have identifies needs and opportunities for high capacity transit at a system planning level.

5) Previous Multimodal and Corridor Refinement Planning Work

a) East Metro Connections Plan

The East Metro Connections Plan (EMCP) has identified transit opportunities and potential performance benefits associated with high capacity transit within the eastern segment of the previously identified Powell-Division HCT Corridor. The EMCP Enhanced Transit Scenario is a modeled collection of transit improvements identified through the EMCP planning process for potential further study. The modeling effort forecasts the effects of these improvements in the year 2035, as compared to the Regional Transportation Plan (RTP) Financially Constrained (FC) network. The 2035 RTP FC includes all transit assumed to be in place in the region by the year 2035, and as such includes improvements over existing transit.

The 2035 RTP Financially Constrained transit network includes the following improvements compared to current day service:

- Interlining of lines 82 and 87. Combining these two lines eliminates the need to transfer at Rockwood for trips traveling between north and south on 181st Avenue.
- Improved frequency to service on 181st Avenue to provide frequent service between Sandy Boulevard and Powell Boulevard. Line 82 is maintained as a separate, additional line to the 82/87 interline, operating only between Sandy Boulevard and Powell Boulevard.
- Improved frequency of line 20 to provide frequent service on Stark Street.
- Improved frequency of line 77 to provide frequent service on Halsey Street.
- Improved frequency of line 9 to provide frequent service on Powell Boulevard.

The 2035 EMCP Enhanced Transit Scenario network includes the following improvements to the RTP Financially Constrained network:

- Addition of Bus Rapid Transit (BRT) in the Powell-Division corridor, extending from Portland Central City to Mt. Hood Community College via Gresham Transit Center. The Powell Corridor HCT is designated as a “Near Term Regional Priority Corridor” in the Metro High Capacity Transit System Plan and in the High Capacity Transit System Expansion Policy; the extension to Mt. Hood Community College is not part of the identified corridor but has been included in this study. The BRT would run on Powell Boulevard west of I-205, and on Division Street east of I-205. Frequency of line 4-Division local service would be reduced to hourly service in the plan area where the route is duplicated by BRT.

- Shortening of line 20, moving the terminus to Mt Hood Community College instead of Gresham Transit Center. The removed routing is duplicated by the extension of the proposed BRT from Gresham Transit Center to Mt. Hood Community College.
- Improved frequency of line 12 to provide frequent service on Sandy Boulevard / Halsey Street / 223rd Avenue between Parkrose and Gresham Transit Center.
- Routing change of 12-Sandy from Halsey Street to Arata Road between NE 223rd Ave and NE 238th Drive to provide accessibility to more households.
- Improved frequency of lines 80 and 81 from hourly service to twice-hourly service.
- Routing change of portions of line 80 off of Kane Drive and onto 242nd Avenue between Powell Boulevard and Stark Street. This provides new service to 242nd Avenue.
- Routing change of portions of line 84 off of US 26 and onto Hogan Road and Palmquist Road, resulting in new service in those currently unserved areas.
- Addition of new hourly service between Gresham Transit Center and Damascus, traveling on Roberts Road and Hogan Road in the Plan Area.

The analysis compares forecasts for the 2035 EMCP Enhanced Transit Scenario to the 2035 Regional Transportation Plan (RTP) Financially Constrained network. The RTP Financially Constrained network includes all transit assumed to be in place in the region by the year 2035, and as such includes improvements over existing transit.

The Enhanced Transit Scenario features a combination of new service, frequency improvements, and routing changes compared to the RTP Financially Constrained network. The scenario examines introduction of a BRT extending from downtown Portland to Mt. Hood Community College, travelling on Division Street within the Plan Area. Frequency decreases to the 4-Division and shortening of the 20-Burnside/Stark would occur to accommodate the BRT service. For north-south routes, frequencies of line 12-Sandy, line 80-Kane/Troutdale, and line 81-Kane/257th would be improved, and line 80 would be shifted from Kane Drive to 242nd Avenue. Finally, routing of the 84-Kelso/Boring would be adjusted, and a new route would be introduced to serve between Gresham Regional Center and Damascus.

The analysis examines individual transit lines in terms of changes in boardings and productivity, and assesses the geographic locations within the Plan Area in terms of changes in ridership caused by the transit modifications.

Transit Line Findings

- The introduction of the BRT would result in increased boardings and productivity in both the Plan Area and the region. Including the effects to lines with service adjustments in conjunction with the BRT, and productivity effects to lines competing with BRT, average weekday boardings would increase by over 1,400 in the Plan area and by over 9,700 in the region, and boardings per transit revenue hour would increase by 33 in the Plan Area and by 101 in the region.
- Frequency improvements to line 12-Sandy would result in 1,100 additional boardings in the corridor, and over 3,000 additional boardings in the region, with minimal change to boardings per revenue hour.
- Frequency improvements to lines 80-Kane/Troutdale and 81-Kane/257th, along with a routing change to line 80, would result in an increase in boardings but a decrease in productivity. Together, average weekday boardings would increase by 660, and boardings per revenue hour would decrease by 55.

- Lines 82-Eastman/182nd and 87-Airport Way/181st are assumed to be interlined in the RTP Financially Constrained network, with improved frequencies between Sandy Boulevard and Powell Boulevard, eliminating the need to transfer for trips between north and south in the Plan Area. This improvement over current conditions is carried into the Enhanced Transit Scenario; since coding is identical between the two networks the effects cannot be assessed in this analysis. Similarly, frequency improvements to lines 9-Powell, 20-Burnside/Stark, and 77-Halsey are assumed in both networks.

Although the EMCP Steering Committee will develop more detailed recommendations this spring, high capacity transit within the Powell-Division corridor has strong regional and jurisdictional support. The proposed Powell-Division High Capacity Transit Corridor Refinement Plan will advance the transit-related recommendations toward implementation by analyzing feasible transit alternatives that will recommend a best mode, service type and alignment.

b) Outer Powell Boulevard Conceptual Design Plan ((December 2011)

“The Outer Powell Boulevard Conceptual Design Plan acknowledges the status of a new high capacity transit (HCT) corridor in the vicinity of Powell Blvd connecting downtown Portland to Gresham as one of the three near-term regional priority corridors. There is a need for a refinement plan on this near-term regional priority corridor to analyze the potential opportunities for improved transit service and to resolve concerns over the effect HCT would have on vehicular mobility and freight on Powell Boulevard if high capacity transit were to be located there. The Outer Powell Boulevard Conceptual Design Plan will not seek to determine the impacts of HCT on Powell Boulevard or the function, mode or general location of HCT in this corridor. Any HCT on Powell should attempt to stay within the 104 feet of right-of-way as would be required for a five-lane enhanced roadway section.”

c) East Portland Action Plan (EPAP) (2009)

The East Portland Action Plan (EPAP) was developed by the community of East Portland, generally east of I-205. It identified actions and strategies aimed at improving transit service throughout East Portland; including expanding transit service and connections between East Portland neighborhoods and Columbia Corridor employment areas. The East Portland in Motion (EPIM) represents a five-year implementation strategy for EPAP, focused on active transportation and access to transit and presents an opportunity for close coordination between the Powell-Division HCT Corridor refinement work, and projects or needs identified in the EPIM.

6) Powell-Division HCT Corridor is ripe for transit-focused refinement planning

Based upon previous work, past prioritization and findings of related plans (described above), the time is right for re-sequencing the refinement planning work within the Metro region. Recently identified needs within the Powell-Division HCT Corridor include affordable, equitable transit access and improved service to stimulate community and economic development and serve locally desired land uses. There is now both demonstrated interest in and local and regional support for determining the best community investment strategy and specific projects for the Powell-Division HCT Corridor to address identified needs and fulfill local and regional aspirations.

The East Metro Connections Plan has conducted preliminary analysis of a transit scenario in East Multnomah County that includes a bus rapid transit (BRT) route from central Portland to Mt. Hood

Community College. This would be one scenario analyzed as part of the proposed refinement plan and associated Alternatives Analysis. . In addition, there is a time-critical opportunity to secure necessary funding to conduct an alternatives analysis that could lead to New/Small Starts funding for implementation.

7) Regional and jurisdictional support for Powell-Division HCT

Supporting project partners include TriMet, cities of Portland and Gresham, Multnomah County, and the Oregon Department of Transportation. In addition, the Unified Planning Work Program (UPWP) which, describes all Federally-funded transportation planning activities for the Portland-Vancouver metropolitan area to be conducted in FY 2012-13 identifies an expectation of work to finalize scope, schedule and budget and execute funding agreements and commence analysis for proposed next corridor transit implementation project on Division/Powell. Approval of Resolution 12-4345 would confirm that direction, and amend the UPWP accordingly.

8) Remaining corridor refinement plan candidates are not ready

Other multimodal corridor plans (I-5 South, TV Highway, I-205, and I-405 Loop) remain lower priorities, for the same reasons they were previously scheduled for refinement planning in later years

DRAFT

Table 1: Review and Update of 2010 Corridor Plan Work Program

Mobility Corridor	Status of Modal Planning (Corridor Level)				Key changes from 2010
	Roadway	Transit	Bicycle	Pedestrian	
#15 (East Metro)	Complete	Need specific alignment and design	Complete	Complete	<ul style="list-style-type: none"> East Metro Connections Plan will be complete June 2012; HCT service along identified near-term regional HCT corridor in vicinity of Division/Powell evaluated and performs well. Further refinement needed to define and implement HCT.
#2 & 20 (Southwest)	In process	In process	In process	In process	<ul style="list-style-type: none"> Southwest Corridor Plan is underway
#3 (I-5 South)	Future	Future	Future	Future	<ul style="list-style-type: none"> Still dependent upon agreement between local jurisdictions, and, to some extent, upon findings from Southwest Corridor
#24 (Beaverton-Forest Grove, via TV Highway)	In process	In process	In process	In process	<ul style="list-style-type: none"> Planning in this corridor is being conducted through ODOT TGM grant
#7, #8, #9 (Clark County to I-5 via I-205)	Future	Future	Future	Future	<ul style="list-style-type: none"> No change;
Corridor in Vicinity of Powell Blvd. (Includes #4, 5, 6 & 15)	Complete 3-lane alternative for Outer Powell segment (to 2025); projects identified in EMCP	Future Need & benefits, performance identified by EMCP; further evaluation of specific HCT mode, alignment and design needed	Complete	Complete	<ul style="list-style-type: none"> Time-critical opportunity to secure New/Small Starts funding . This corridor is ready for study: EMCP and Outer Powell Blvd. Conceptual Design Plan treat different segments of corridor and require integration. Both plans point to need for refinement plan for this near-term regional HCT priority corridor. Transit-focused refinement plan will determine precise mode, function, alignment of transit in this corridor; refinement of multimodal connections identified in recent plans also to be considered Opportunity to leverage time transit trip time advantages from Willamette River Transit Bridge into downtown Portland. Key equity benefits to serve disadvantaged populations in a corridor with important educational and employment centers.
#4 (I-405 Loop)	Future	Future	Future	Future	<ul style="list-style-type: none"> No change, although ODOT has continued to develop practical solutions, absent large funding pot for more complex and costly systemic fixes

ANALYSIS/INFORMATION

1. **Known Opposition** – None. However there is concern that affected jurisdictions, including the City of Portland, may not be able to support a planning effort with sufficient technical and policy staff engagement and oversight, due to budget shortfalls.

2. **Legal Antecedents** –

Resolution No. 01-3089, *For the Purpose of Endorsing the Findings and recommendations of the Corridor Initiatives Project*, (July 26, 2001)

Resolution No. 05-3616A, *For the Purpose of Updating the Work Program for Corridor Refinement Planning through 2020* (October 27, 2005)

Resolution No. 09-4099, *For the Purpose of Accepting the Draft 2035 Regional Transportation Plan, With the Following Elements, For Final Review and Analysis For Air Quality Conformance: the Transportation Systems Management and Operations Action Plan; the Regional Freight Plan; the High Capacity Transit System Plan; and the Regional Transportation Functional Plan* (December 17, 2009)

Resolution No. 10-4119, *For the Purpose of Approving Corridor Refinement Plan Prioritization through the Next Regional Transportation Plan Cycle (2010-2013) and initiate corridor refinement plan work in Mobility Corridor #15 (the segment in the East Metro area from I-84 southward to US 26 and the Springwater area) and Mobility Corridors #2 and # 20 (in the vicinity of I-5/Barbur Blvd, from Portland Central City southward to approximately the “Tigard Triangle”)* (February 25, 2010).

Resolution No. 12-4335, *For the Purpose of Certifying that the Portland Metropolitan Area is in Compliance with the Federal Transportation Planning Requirements and Adopting the Fiscal Year 2012-13 Unified Planning Work Program*. (April 19, 2012)

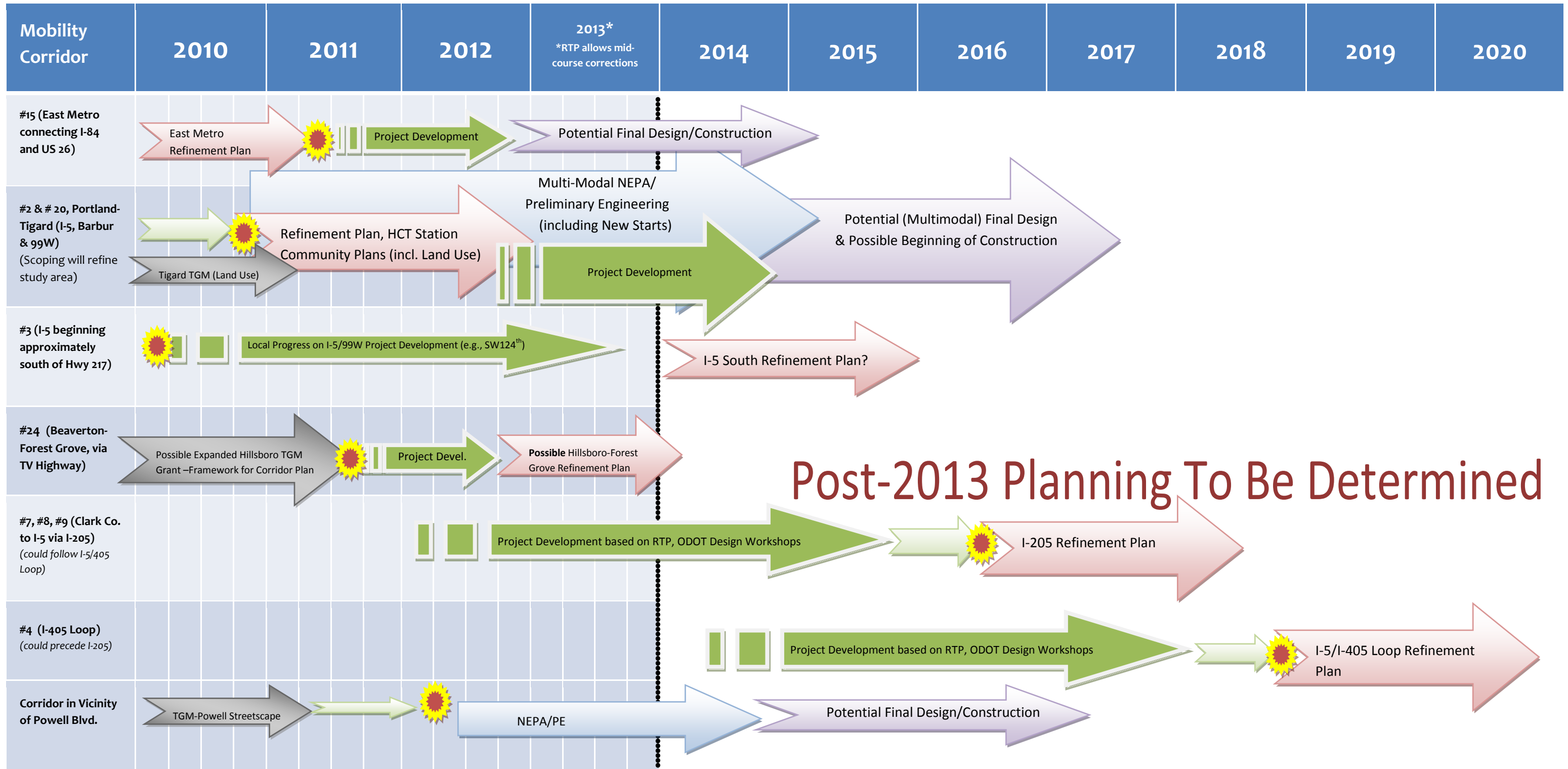
3. **Anticipated Effects** Adoption of this resolution identifies new corridor planning priorities for the 2010-2013 and 2013-2016 planning period and would enable the prioritized corridors to receive funding and staff resources needed to complete the required corridor refinement planning work by updating the work program for corridor refinement planning through 2016, and provide general guidance through 2020.
4. **Budget Impacts** Cost of performing the identified corridor refinement plan is to be determined, based upon scope.

RECOMMENDED ACTION

Approve this resolution.

ATTACHMENTS: Attachment 1 (2010 Corridor Refinement Plan Sequencing, Exhibit C from Resolution No. 10-4119)

Corridor Refinement Plan Sequencing, including Top Near-Term High-Capacity Transit Plans, through 2020 (2/8/10)



Post-2013 Planning To Be Determined

Critical Plan Elements or Goals:

- #15: Refine problem statement; identify urgent actions and solutions leading to system project development. **Moderate Effort from Metro Staff**
- #2 & #20: Phase A: Scoping and chartering to support long-term commitments. **Moderate Effort**; Phase B: **Portland Central City to Tigard Triangle: I-5, Barbur & 99W Refinement Plan, HCT Station Communities Plan, Major Effort**; Phase C: Multimodal NEPA, PE. **Major Effort**
- #24: Phase A: Beaverton-Hillsboro (TV Highway) TGM grant, plus possible expansion. **Moderate Effort**; Phase B could require refinement planning from Hillsboro to Forest Grove. **Moderate Effort**
- #3: I-5/South to Boone Bridge Refinement Plan (unresolved elements). (Potentially) **Major Effort**
- #7, 8, 9: Multimodal refinement plan. Could be phased. **Major Effort**
- #4: I-405 Loop multimodal refinement plan. Could be phased. **Major Effort**
- Powell Vicinity:** (High Capacity Transit Corridor, Alternatives Analysis, NEPA, PE). **Moderate Effort**

Starburst denotes **KEY points of required stakeholder agreement.**

Color Key: (Arrow thickness indicates relative level of effort across the region. Local agency efforts would differ.)

Planning Tasks:

- Preparatory Scoping/Chartering
- Corridor Refinement Plan
- Other Planning Work (e.g., TGM, Land Use Planning)

Project Development Tasks:

- Near-Term Road/Bike/Ped Project Development
- NEPA/Preliminary Engineering (All Modes)
- Final Design/Construction (All Modes)



Date: April 20, 2012
To: Transportation Policy Alternatives Committee and Interested Parties
Cc:
From: Dan Kaempff, Principal Transportation Planner
Re: **2012-2017 RTO Strategic Plan Adoption**

Background

The Draft 2012-2017 RTO Strategic Plan lays out a framework for building on past successes through a realignment of the program with regional desired outcomes and Regional Transportation Plan triple-bottom line objectives (Equity, Economy and Environment). Specific recommendations include a refined set of goals and objectives, clarification and consolidation of roles and responsibilities, broadened measurement and evaluation criteria, and consolidation of three separate grant programs into one.

The consolidation of the grant programs has been the primary topic of discussion throughout the Strategic Plan adoption process. The primary point of concern has been regarding the recommended elimination of the dedicated grant program for Transportation Management Associations (TMA). The consultant's recommendation to eliminate this dedicated grant program was based on improving program performance. Program evaluation findings showed that TMAs performed no better or worse than other RTO program investments, despite the TMAs having a dedicated source of funding.

Concerns were raised at TPAC and JPACT that removing dedicated funds for TMAs would potentially damage those organizations' ability to deliver results, or in some cases, threaten their existence.

Metro staff has expressed concern that continuing to provide dedicated funding for a particular type of organization, as opposed to directing funding to projects that consistently perform well, would hamper the ability of the RTO program as a whole to achieve desired regional outcomes.

In response, Metro staff gathered input from regional stakeholders through meetings as well as a public comment period (see summary at the end of this memo). What we heard was that a.) in areas where TMAs existed, they were seen as strong and valuable partners of local government in helping to address transportation and economic issues, and b.) there were also needs in those areas without TMAs or where other RTO strategies were warranted.

To address these concerns, staff have developed the following recommendations.

Establish sub-regional funding targets

To ensure that balance is achieved between regional equity and performance goals, staff is recommending that a portion of the grant funding total be targeted for prioritized projects, and be divided into amounts by sub-region. Identified sub-regions are:

- City of Portland
- Clackamas County
- East Multnomah County (balance of the county not including Portland)
- Washington County

This would enable each sub-region to have a degree of base level program funding to ensure that current successful programs can continue (provided other grant criteria and performance standards are met), but still allow for a robust open competitive grant process and the ability to fund region-wide and other highly-rated projects.

Further work to fully develop this concept remains to be done, particularly in how the program can ensure sub-regional priorities will address program performance objectives. Staff will develop recommendations to inform the work of the TPAC work group that will be charged with developing the RTO grant program criteria.

Local project prioritization

Among these four sub-regions, there is a diversity of existing programs, local needs and decision-making processes between partners. The need to allow flexibility in how local project priorities are established is critical.

Recognizing that, Metro staff is recommending that the grant selection process contain the provision for each of the four sub-regions to indicate up to two top prioritized projects from the list of projects submitted from their area. This prioritization would be included as a component of the criteria, thus giving these prioritized projects additional weight and helping to ensure their funding, provided they are coordinated with RTO program goals and objectives, and meaningfully address other aspects of grant criteria. Prioritized projects would be accepted from county coordinating committees, cities (working jointly or singularly), or other RTO partners.

In order to carry out the goals and objectives of the 2012-2017 Strategic Plan, projects that are a continuation of existing successful initiatives, such as TMAs or local jurisdiction's outreach programs, and show a high degree of in-kind or fiscal support from local partners would be ranked higher than new projects or projects with lower levels of local support.

Local prioritization of projects would enable each sub-region to support local TMAs or other RTO activities that best address the needs and opportunities in their particular area. It helps to ensure that funding is distributed in a manner that carries out the RTO program mission by addressing regional equity and a balanced service delivery model.

Increase flexibility in valuing program investments

Feedback received through the Strategic Plan process indicated that the current program did not provide partners with enough flexibility in the types of project outcomes they could achieve, measure, and assign value to. Grant recipients, TMAs in particular, were generally required to meet a "one size fits all" standard of showing how their project resulted in VMT reductions.

The consultant recommendation is that evaluation criteria be broadened to recognize the varying degree of local conditions (i.e. level of transit service, paid parking, bicycle and pedestrian infrastructure, etc.) may make it more difficult for some areas of the region to achieve similar levels of VMT reduction as others. This in turn will enable projects which focus primarily on raising awareness to receive funding, along with those that have the ability to measure and report reductions in VMT.

Improve support of local program development

All of the above recommendations should serve to support strategies that meet the needs of the identified sub-regional partners. To further improve regional program performance, staff is recommending that local jurisdiction partners contribute a portion of local funds or provide meaningful in-kind contributions to their TMAs or other prioritized projects.

Local investments will help accomplish regional and local goals in the following ways:

- Provide resources for sub-regional and local RTO planning and program implementation
- Provide a higher level of stable funding for TMAs
- Provide stability through local coordination
- More closely align TMA work with TSP goals and other planning initiatives
- Build credibility with businesses for the work of the TMAs
- Grow business partnerships, focusing additional resources on local priorities
- Leverage regional investments to achieve locally desired outcomes
- Development or amendment of local codes to encourage business participation in TMAs (e.g. City of Beaverton permitting reduced parking requirements for businesses with TMA membership)

Conclusion and next steps

These recommendations provide a means of stable support for TMAs or other local RTO program priorities. At the same time, they achieve desired improvements in program performance, better alignment with local priorities, and maintain regional program coordination to achieve strategic plan goals and objectives.

Assuming regional consensus on these recommendations, staff will continue to work with stakeholders to further develop these concepts into grant criteria and funding targets.

Public Comments on the updated Regional Travel Options (RTO) Strategic Plan

The public participation process for updating the 2012-2017 RTO Strategic Plan allowed stakeholders and the general public to provide feedback and information on key elements of the updated plan, and meet regional and federal requirements for public participation in transportation planning and decision-making.

The comment period focused primarily on the proposed goals, objectives, policies and the overall direction of the updated RTO Strategic Plan. Comments received during the comment period will be presented to the Metro Council and JPACT for discussion before the 2012-2017 RTO Strategic Plan is considered for approval. All transportation-related 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.

The public comment period on the updated 2012-2017 Regional Travel Options (RTO) Strategic Plan began Tuesday, February 21 and ended at 5 p.m., Wednesday, March 21. The draft version of the updated RTO Strategic Plan was available for download on Metro's website for the full duration of the comment period. Paper copies of the draft Strategic Plan were also available upon request. Metro asked for comments to be submitted by mail or email. In addition to providing information about the updated Draft Strategic Plan and the comment period on Metro's website, RTO staff posted a newsfeed on the Metro web page and sent emails through the Commuter Dispatch, the RTO Marketing Outreach Working Group, the RTO Subcommittee and the interested parties list.

A total of two comments were received by email during the one month public comment period—one from Heidi Guenin, Transportation Policy Coordinator from Upstream Public health and one from Pam Wilson, Marketing Manager at TriMet. Both comments supported the overall direction of the Draft RTO Strategic Plan and the proposed adoption of new performance targets aligned with a triple-bottom-line approach to performance evaluation.

The consolidation of the grant programs has been the primary topic of discussion throughout the Strategic Plan adoption process. The primary point of concern was focused on the consultant's recommended elimination of the dedicated grant program for Transportation Management Associations (TMA) to improve program performance. To address these concerns, Metro staff gathered input from regional stakeholders and County Coordinating Committees and is looking for options to provide a means of stable support for TMAs.

From: Heidi [\[mailto:heidi@upstreampublichealth.org\]](mailto:heidi@upstreampublichealth.org)
Sent: Tuesday, March 13, 2012 11:39 AM
To: daniel.kaempff@oregonmetro.gov
Cc: Pamela Blackhorse
Subject: A few questions and comments about the RTO draft plan

Hello Daniel,

I'm not sure if you're the right person to chat with about the draft plan, so please point me in the right direction if not. I'm one of the citizen members of TPAC, but I had to leave during this discussion at the February meeting.

In general, the proposed changes are heading in the right direction. Expanding performance metrics to include triple bottom line measures is an important step in connecting the RTO funds to the many goals that Metro has for the region. I'm also excited about RTO engaging more ethnically and culturally specific non-profits that are already delivering programs designed to get their clients/constituents to better understand their transportation options.

Without a deep understanding of the existing structure for TMAs, though, I do wonder how the new metrics will limit the ability of TMAs to continue to do the very important work that they do, especially in the more suburban areas of the Metro region. Is there a solution that can successfully support both TMAs and the inclusion of diverse community programs?

I also wonder how these proposed changes might benefit Safe Routes to Schools programs and infrastructure, which is what I'm hoping you can give me some more information about, Daniel. Would SR2S qualify for funds? With SR2S funding at the federal level disappearing, and with a good chance that SR2S funding will ultimately be devolved to the MPOs, how is Metro thinking about regional decision-making and funding around Safe Routes?

Thank you!



Heidi Guenin Transportation Policy Coordinator at Upstream Public Health
heidi@upstreampublichealth.org | office 503-284-6390 | mobile 503-841-7936

From: Wilson, Pam [<mailto:WilsonP@trimet.org>]
Sent: Wednesday, March 21, 2012 4:03 PM
To: Daniel Kaempff
Cc: Pamela Blackhorse; Britton, Adriana
Subject: TriMet feedback on RTO Plan

Hi, Dan,
Hope all is great with you. Here is our feedback.
Pam

TriMet Feedback for the Five-Year Strategic Plan for the Metro Regional Travel Options Program

TriMet supports Metro's efforts in assessing the results and goals of the RTO program. The RTO program is a cost-effective program that improves the efficiency of the region's transportation infrastructure. TriMet endorses the direction of the RTO Five-year Strategic Plan to better align the program's mission with the regional vision and place greater emphasis on performance measures. During these times of reduced and competing resources, it is critical funds are used as efficiently as possible, with emphasis on return on investment

The evaluation process was comprehensive but as supplied in earlier feedback, there are several items remaining that need clarification and correction. Some of the questions on the table we presume will be clarified in the final evaluation.

TriMet's Employer Outreach program serves employers of all sizes across the region. As a participant of the RTO program, TriMet's Employer Outreach program contributed the following results as highlighted in the RTO evaluation:

- TriMet's Employer Outreach program achieved the highest vehicle miles reduced, estimated between 42,982,007 and 64,473,011.
- During the evaluation period (January 2009-June 2011), the non-SOV mode split for worksites participating in the TriMet Employer Outreach Program increased considerably from 27.1% in 2009 to 38.5% in 2011.
- The non-SOV mode split for employers working with the TriMet Employer Outreach program increased from 34.6% in 2008 to 38.5% in 2011.
- TriMet's Employer Outreach program is among the most cost-effective programs with an estimated cost per VMR of \$0.01 - \$0.02.
- The 2011 RTO awareness survey and focus groups reported 59% of residents have heard of TriMet Trip Planner, and 43% have used the Trip Planner.

TriMet's draft work plan for 2013 submitted in December 2011 incorporated early direction from the draft RTO plan and TriMet is prepared to coordinate efforts to meet the goals of the final RTO plan.

Following is our initial feedback for consideration in finalizing the plan.

Mission – we support linking mission to Metro's Making a Great Place and goals. The aspirational mission connects the "big picture" and clearly defines the overall benefit of the RTO program as it relates to the region's livability goals. Aligning the RTO goals with the Regional Transportation Plan objectives will better position RTO as an effective regional program.

Coordination of Roles

- TriMet is uniquely qualified and positioned to market and manage TDM programs in the region as it provides practical and effective employer-focused programming throughout the metro area and at the local level. TriMet offers TMAs and local partners technical assistance about using TriMet, ECO surveys, materials plus regional services such as the Emergency Ride Home program, transit pass program support, and promotion of events in TriMet's employer newsletter.
- The TriMet Employer Outreach staff coordinates with TMAs and RTO partners to deliver the TDM services that will address a local employer's situation. Employers expect to have a relationship with TriMet and TriMet relies on maintaining contact with the employers in the region. Our staff's in-depth knowledge of transportation resources is of great benefit when enrolling local and regional employers in transportation programs.
- The evaluation identified that some employers used services from a TMA, Metro and/or TriMet. However, the evaluation did not go further to identify the specific services provided by each partner. We are optimistic that concerns about the potential for overlapping roles can be addressed with clearly defined project plans and targeted goals among the partners, such as TMAs, as well as improved communication and coordination.

Formalization of formula funding for the TriMet employer outreach program

- With current staffing last year, TriMet made 5,465 contacts with 1,659 employers and colleges across the Metro region. TriMet's employer outreach staff works with employers and colleges of all sizes. TriMet offers experienced staff dedicated to focus on three distinct geographic areas to offer solutions tailored to the employer's situation. TriMet staff currently assists employers with transportation programs and education about using all non-SOV commute options such as transit, carpooling, vanpooling, biking, walking, compressed workweeks, telecommuting and incentives. We leverage ongoing as well as new relationships to meet our goals.
- It would be helpful to further clarify how the formula funding will be formalized. Specific, measurable performance outcomes are essential. We presume that by formalizing the funding, the program could still maintain flexibility to adjust our services as needed to serve the region. For example, we are serving a section of Clackamas County previously served by the North Clackamas TMA. Formula funding and being a regional service provider allows us the capacity to do so.
- The Nelson Nygaard report recommended that TriMet offer individualized marketing programs. We are open to a discussion about individualized marketing projects. TriMet could offer individualized marketing with an increase in staffing and grant funding. However, individual marketing may be a better fit for a TMA with grant funding.

Consolidation of TMA, small grant and individualized marketing grant pool

- The consolidation of the above projects could allow flexibility of operating a TMA as a nimble performance-based catalyst for meeting the very real travel option needs in a local community or geographic area. Once a project is complete or the goal is accomplished, the TMA could then shift to another community need. While grant criteria is still being developed, it is our understanding the guidelines could be designed to improve grant opportunities for TMAs. This would be an effective way to provide some funding assurance and assist with transition; and is an action we would support.

Performance metrics and changing singular focus on VMR results

- We support the proposed move toward triple-bottom line metrics that can be applied to RTO program projects and tasks. In recent subcommittee discussions last summer about measuring results, TriMet requested whether Metro could supply a set of results related to projects and tasks that could be applied across the RTO programs.
- We recommend continuing use of VMR as one measurement plus support dividing it into maintenance VMR and new VMR in addition to expanding measurements to include desired outcomes such as economic benefits and healthy communities. As we seek to change behaviors and mode splits, other indicators, such as awareness and satisfaction, are useful in determining results and performance. The CMAQ guidelines indicate VMR as a performance measure for programs but the guidelines also provide flexibility for tailoring CMAQ programs to local requirements. The mode split data that TriMet currently captures in our ECO surveys could be supplied to Metro.
- TriMet's draft plan for 2013 includes a set of quantifiable performance measures for our outreach activities in addition to ECO surveys. TriMet captures our outreach activities in a customized database and we supply this information each quarter to Metro and we are prepared to make adjustments and changes based on the goals and priorities in the final RTO plan.

Outreach to employers in transit-underserved areas

- By way of example, in the current year, we will be working with partners to target employers located in the underserved areas such as in industrial area previously served by the former North Clackamas TMA. Like we do with all employers, we will be promoting all modes of transportation to meet their needs.
- Our staff promotes multiple transportation choices to fit the needs of the worksite or college campus. We are currently promoting Drive Less Connect tool among employers and colleges. Plus, staff has been using TriMet's multi-modal Regional Trip Planner tools in our employer outreach since the beta was released in October. We'll continue these efforts and we have included proposed performance goals in our draft plan for 2013.

Administration of the vanpool and Drive Less Connect programs

- As you know, TriMet has researched these options but decided not to take on the administration of these programs. We consider ourselves part of the marketing team to enroll Drive Less Connect, along with other travel options, to employers and colleges.

The RTO program is critical to the livability of this region. TriMet welcomes the opportunity to continue working with our partners to produce a performance-based strategic plan that aligns with our region's goals and mission.

March 21, 2012

[www.metro-region.org/ traveloptions](http://www.metro-region.org/traveloptions)



March 2012

2012-2017 Strategic Plan

REGIONAL TRAVEL OPTIONS



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Metro | *Making a great place*

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

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

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APPENDIX

Appendix A – Summary of Key Findings from Strategic Planning Process

Appendix B – Strategic Plan Methodology

CHAPTER 1 – INTRODUCTION

Metro’s Regional Travel Options (RTO) program supports Metro’s mission of creating a great place by increasing the awareness of non-single occupancy vehicle (SOV) travel options such as



RTO Investments contribute to making a great place

biking, walking, taking transit, and ridesharing. The RTO program is an important, low-cost component of the region’s aggressive goal to reach a non-SOV mode-share of 50 percent or more by 2035. In fiscal year 2009-2010, the RTO program accounted for only half of one percent of the region’s transportation budget, yet it funded over 20 regional partners and helped to reduce between 77 and 123 million vehicle miles traveled.¹ At its core, the program is designed to help make the best use of the region’s existing transportation infrastructure and service investments.

To accomplish this, the RTO program provides strategic investments in a range of programs, including individualized marketing, employer commuter travel options, grants to partners, and traveler information tools and services. These investments contribute to the economic, environmental, and socio-economic health and prosperity of the region in the following ways:

- **Economic:** The RTO program helps to reduce traffic congestion by encouraging non-SOV modes. Decreased traffic congestion ensures the efficient movement of freight and goods. Moreover, RTO investments help to utilize the existing transportation system, instead of investing money into new and costly infrastructure improvements. Cost-effective travel options, such as biking and walking, put money back in people’s pockets, which can then be spent in the local economy. This green dividend has been attributed to saving Metro area residents as much as \$2.6 billion per year.²
- **Environment:** Biking, walking, taking transit, ridesharing, and telecommuting help to reduce the number of single occupancy vehicles on the road. As such, the RTO program reduces greenhouse gas emissions, reduces water pollution from auto travel, and improves air quality.
- **Equity & Health:** The RTO program works to provide affordable transportation options for all residents. Households in the Metro region generally spend between 15% and 28% of their household income on transportation costs.³ Moreover, transportation options improve community health by improving air quality and encouraging people to participate in active transportation options.



¹ These figures reflect a conservative estimate based on reported figures and include a 40 – 60 percent discount from actual numbers reported from the various sources. Because ECO data includes employers’ VMR over multiple years between their baseline and follow-up surveys, these figures also reflect so-called “maintenance” VMR, or VMR reduced as part of prior investments.

² Cortright, J. (2007, June 28). Portland’s Green Dividend. Chicago, Illinois: CEOs for Cities.

³ Center for Neighborhood Technology. (2011). “Housing + Transportation Affordability Index” Portland-Vancouver WA. Web. Accessed November 15, 2011

CHAPTER 2 – GUIDING PRINCIPLES & POLICY FRAMEWORK

The RTO Strategic Plan defines a mission, a set of goals and objectives, and a five-year plan to support a regional travel options program that helps to achieve regional air quality, transportation, and livability goals.

STRATEGIC PLAN GUIDING PRINCIPLES

The Strategic Plan process was guided by the following principles that were identified during the Strategic Plan development process.

- Enable local partners to reach out to employers and residents to help make non-SOV travel choices.
- Link the RTO program to other Metro programs to proactively integrate transportation demand management into regional planning and growth management processes.
- Provide regional policy support and program development that supports efficient use of the existing transportation system.
- Establish a sustainable and diverse funding stream by linking the RTO program to other Metro transportation investments.
- Streamline Metro RTO services to limit duplication of roles and foster collaboration and the sharing of best practices among regional partners.
- Position the Metro RTO program to leverage community partners—such as health care providers, local jurisdictions, non-profit organizations, and others—to proactively build a regional travel options program that serves the diverse needs of the region.
- Develop a streamlined evaluation process that links to Metro’s overarching economic, environmental, and community building goals and reduces the administrative burden on Metro RTO staff and its grantees.

A summary of key questions, issues, opportunities, and recommendations addressed in this Plan can be found in Appendix A.

RTO PROGRAM MISSION AND GOALS

The 2012-2017 RTO Strategic Plan is guided by a mission statement that emphasizes the economic, social, and environmental benefits of the RTO program. The emphasis on these strengths of the RTO program enables it to more effectively support and leverage other Metro programs.

This mission is supported by the following goals and objectives.

RTO Mission

The mission of the RTO program is to make the Portland Metro Region a great place by working with local and regional partners to promote travel options that support economically vibrant communities, increase active transportation, and are environmentally sustainable.

RTO Goals & Objectives

Goal 1: Align the RTO program with regional economic development, growth management, and livability objectives

- Objective 1.1 – Link RTO efforts to goals outlined in the Metro Regional Transportation System Plan (RTP).
- Objective 1.2 – Support projects that provide information and services to geographically and socio-economically diverse populations.
- Objective 1.3 – Work with other Metro programs and regional partners to make travel options an integral element of every transportation project.
- Objective 1.4 – Measure and evaluate the RTO program to report progress and aid policy decision- making, and to maintain or improve performance.
- Objective 1.5 – Address transportation needs in areas underserved by transit, bicycle, or pedestrian investments.

Goal 2: Be a leader in developing local, regional, state, and national policies that promote walking, biking, transit, and high-occupancy vehicle travel

- Objective 2.1 – Support local jurisdictions in developing and implementing policies that support the RTO mission.
- Objective 2.2 – Support multimodal programs that meet the business and residential needs in urban centers, corridors, and suburban areas.
- Objective 2.3 – Work with local jurisdictions, businesses, and partners to build local political and staff support for transportation demand management.

Goal 3: Support local partners to engage with employers and commuters to increase the use of travel options for commute trips

- Objective 3.1 – Support local partners to market and provide multimodal travel options services to employers and commuters.
- Objective 3.2 – Provide information and technical services to local and regional partners to make the business case for employers to support travel options.
- Objective 3.3 – Support partners who have established working relationships with employers in promoting economic development with travel options tools and programs.

Goal 4: Develop tools to support the use of travel options to reduce drive-alone trips

- Objective 4.1 – Continue a regional collaborative marketing campaign to increase awareness of travel options and assure meaningful integration with local marketing outreach campaigns and efforts.
- Objective 4.2 – Develop and deliver enhanced and accessible traveler information tools.
- Objective 4.3 – Provide technical services to local partners to help implement and support the RTO mission.

CHAPTER 3 – RTO PROGRAM STRUCTURE

The Metro RTO Program is funded by the Federal Congestion Mitigation and Air Quality (CMAQ) program. Established as part of the Clean Air Act of 1990, the CMAQ program provides funding to states to help achieve the National Ambient Air Quality Standards (NAAQs).

The Metro RTO Program relies heavily on local partners to deliver travel options services across the region. Partners include non-profit organizations, Transportation Management Associations (TMAs), municipalities and counties, area transit agencies including TriMet and Wilsonville SMART, and state and federal agencies.

This chapter defines the roles and functions of partners who deliver RTO services and presents the funding framework that is used to guide RTO investments of CMAQ funds for the 2012-2017 strategic plan.

PARTNER ROLES

Regional transportation demand management programs are supported by a broad range of functions; they require policy input, planning and program development, technical services, marketing, outreach, and evaluation. Defining and optimizing the roles and responsibilities in the Metro region is a key component of this Strategic Plan. This section outlines the roles and responsibilities of Metro RTO staff, transit agencies, and local partners in administering and delivering regional travel options services.

Metro

Metro is the lead agency responsible for administering RTO funds and evaluating the RTO program in the Portland Metropolitan region. As the program administrator, Metro RTO staff provide wholesale-level support to help its partners across the region deliver travel options at the local level. These efforts include:

- Playing a lead role in developing and shaping policy that supports RTO efforts.
- Ensuring that travel options services are distributed equitably throughout the region by providing direct outreach to local political leaders and local staff to build support and capacity for implementation of RTO programs at the local level.
- Creating a forum for local organizations and jurisdictions to share best practices and collaborate on implementation.
- Providing needed assistance on a fee-for-service basis, such as website development, GIS mapping tools, and other technical services, to jurisdictions and organizations with limited staffing abilities.
- Working with the Oregon Department of Transportation on delivering the collaborative Drive Less Save More state marketing campaign.
- Evaluating the program on a biennial basis to ensure it is meeting regional economic, environmental, and social equity goals.

Transit Agencies

TriMet and Wilsonville SMART receive funding to support employer outreach programs. These functions are closely coordinated with the employer outreach offerings of other local partners to reduce overlap and leverage the collective efforts of RTO partners in the region.

Local Partners

Local partners play a crucial role in delivering quality RTO programs in the region. These partners include local jurisdictions and counties, Transportation Management Associations, and non-profit organizations, among others. Over the years, local partners have been influential in developing innovative programs and projects to increase the awareness of travel options and have contributed to a shift in travel behavior. Local jurisdiction support is critical to implement policies and programs on the ground. TMAs are instrumental in building important relationships with the business community, and employees and non-profits have developed innovative programs to reach all segments of the population.

FUNDING MODEL

To support the roles identified above, CMAQ funding for RTO-sponsored activities is distributed using a performance-based funding model with three primary channels. Metro receives approximately 30 percent of overall funding for its role in administration, oversight, and wholesale-level support. Transit Agencies receive approximately 20 percent for their role in providing the base employer outreach program. Approximately 50 percent of available funding is directed toward local partners through Metro's RTO competitive grant program.

Funding decisions are made pursuant to the RTO strategic plan mission and goals. The overall performance objective of the RTO program is to contribute to achieving the regional goal of 50 Percent Non-SOV mode split by 2035 by driving down the regional SOV rate. This is accomplished by making investments in strategic programs that result in mode-shift in the region. Recognizing there are multiple motivations for RTO partners to make these investments, the RTO performance framework utilizes a triple-bottom-line method to recognize returns. Under this model, applicants are able to pursue projects that contribute to economic development, environmental enhancement, social equity, or any combination of these important outcomes.

The process for applying for RTO funding is consolidated as part of an expanded competitive grant program that encompasses funding for TMAs, individualized marketing, and small grants. In the past, TMAs have had dedicated funding. While TMAs are still a valued asset to the RTO program, the new funding model combines TMA funding into the competitive grant funding pot. The new competitive grant program reflects the finding from the most recent biennial evaluation that TMAs have had mixed successes. While some TMA's have exceeded expectations, others have struggled. The new funding model will direct limited resources to a wider range of entities to help ensure that greater performance can be achieved across the region.

While funding priorities and funding levels may change from year to year, the process for applying for funds are governed by this Strategic Plan's goals and objectives and the funding framework

identified herein. To ensure programs are high-performing, the competitive grant process requires grant applicants to deliver a problem statement, a viable long-term business model, and demonstrated local support. The criteria for ranking grants are drawn from the goals and objectives of this strategic plan, and published separately each grant cycle.

The 2012-2017 funding model benefits the RTO program in the following ways:

- Proven local support—both monetary and political—helps align RTO efforts with local transportation system plans.
- A problem or opportunity statement required by the grantees helps the RTO program align its efforts and funding with programs that directly relate to RTO goals and regional infrastructure investments.
- Shifting commuter services to TriMet and other partners allows Metro staff to spend more time to build local capacity for travel options, develop policies that support biking, walking, and taking transit, and provide technical services to the region.

Summary of Changes from Previous Strategic Plans

The 2012-2017 funding model restructures the RTO program in the following ways:

- Clarification and reassignment of roles for Metro, Transit Agencies, and the RTO subcommittee.
- Formalization of formula funding for Transit Agencies' employer outreach programs.
- Consolidation of TMA, small grant, and individualized marketing grants under a single competitive grant process.
- Reallocation of funds to reflect changes in roles and an increase in the proportion of funds directed toward grants.
- Updates to Metro's Public Private Partnership policy to eliminate dedicated funding for TMAs.



CHAPTER 4 – STRATEGIC PLAN IMPLEMENTATION

Chapters 1 – 4 outline the broad policy objectives of the RTO strategic plan for the 2012 – 2017 operating period. Implementation of these objectives will require additional work on behalf of staff, partners, and local leaders to implement the new vision. It is agreed that the RTO program will continue to pursue the region’s ambitious goals for improving the use of travel options. It is also clear that this cannot be done without changes to the RTO program structure. The proposed funding model will enable the region to continue making advances in reaching regional performance targets for use of travel options. The following information provides a roadmap of the decisions and changes that will need to occur to accomplish this.

ONE-YEAR TRANSITION PERIOD

It’s recognized that the recommended changes will require local partners to make adjustments to their programs in order to implement the new Strategic Plan. New or changed elements of the Strategic Plan will be phased in over the course of fiscal year 2012-2013 in order to make the transition to the new plan as seamless as possible for partners and to ensure time for a comprehensive process to further develop and implement program changes. Next steps include:

- Upon adoption of the Strategic Plan, a work group comprised of TPAC members and other stakeholders will be formed. This group will be tasked primarily with making policy recommendations and funding decisions. In addition, their input will be required during discussions regarding measurement and performance methodology.
- The work group’s initial task will be the development of grant program and project selection criteria in preparation for the 2013-2015 grant solicitation process.
- Fiscal year 2012-2013 will be the final year of the current TMA-specific funding policy before transitioning to the new competitive grant program.
- To continue the coordination and policy advisory roles played by the former RTO Subcommittee, the purpose of the existing RTO Marketing and Outreach Working Group will continue to evolve and be refined during fiscal year 2012-2013.

UPDATES TO PUBLIC PRIVATE PARTNERSHIP MODEL

A significant change in the 2012-2017 Strategic Plan is the elimination of TMA-specific funding. TMAs are still eligible for funding, but this funding is now channeled through the new consolidated competitive grant program. While the role of TMAs does not change, the Funding Plan necessitates changes in the way TMAs position themselves. The elimination of Metro’s role in employer outreach while also increasing and formalizing coordination of other funded partners’ roles in employer outreach helps TMAs better define their role vis-à-vis the private sector.

VMR METHODOLOGY

In the past, the RTO program has been guided heavily by one metric or outcome: vehicle miles reduced (VMR). Although this goal is important, stakeholder interviews revealed a need for the RTO program to focus more on other outcomes, such as quality of life, economic development, convenient and competitive travel choices, the health benefits of active transportation, and social and regional equity. Reduced vehicle miles traveled is a good



quantitative measure for many of these outcomes, but there is a need to define why vehicle miles reduced is a benefit to the community from an environmental, equity, and economic standpoint. Further, many RTO-funded activities are designed as elements of a broad set of factors that will help change travel behaviors that may not happen immediately. Therefore, it is not always appropriate to measure the VMR results of individual programs. During the transition period, Metro RTO staff will need to implement the new evaluation framework focusing on SOV mode-shift by updating grant criteria, and incorporating new performance measures into future work plans.

PERFORMANCE MEASURES

Performance measures are a key component of any strategic plan to track progress towards shared goals, identify opportunities for improvement, and streamline performance evaluation across all programs.

Building on Metro's new triple-bottom-line framework for evaluating performance as part of the 2035 Regional Transportation Plan, the RTO program can articulate its performance in terms of economic, social, and environmental benefits. As described above, the previous process of relying on VMR as the primary indicator is problematic—both because it is difficult to measure accurately and because it does not speak to the community benefits of reducing vehicle miles traveled.

Non-SOV mode-shift is the principal performance measure of the RTO program. This performance measure is framed with a direct linkage to the RTP, and includes a targeted contribution specifically for the RTO program.

Non-SOV mode-split is the RTO Program's primary performance measure.

The RTO Program will help the region achieve its goal of a 50% non-SOV mode split by 2035 by achieving a 0.1 % increase per year attributable to the RTO program between 2012-2017.

Figure 1 below provides examples for how non-SOV mode split can be converted into meaningful metrics for communicating benefits in terms of the triple-bottom-line framework.

Figure 1 Example methods for converting non-SOV trips into triple-bottom-line measures

Conversion for reporting on Triple-Bottom-Line performance	
Economic Benefits	<ul style="list-style-type: none"> • Convert non-SOV trips into household cost savings and dollars returned to local economy. • Convert non-SOV trips into number of parking spaces reduced and multiply by the average cost of parking to demonstrate direct economic savings.
Social Benefits	<ul style="list-style-type: none"> • Use Active Transportation proportion of non-SOV trips to measure improvements in health. • Convert non-SOV trips into household transportation cost savings; in cases where the cost savings benefits are localized and housing costs are known, household cost savings could be converted into combined cost of housing and transportation.
Environmental Benefits	<ul style="list-style-type: none"> • Convert non-SOV trips into VMR and multiply by standard emission rates per VMR to calculate emission savings for specific pollutants.

EVALUATION

Evaluation is an important component of the RTO program to ensure grant funding is being spent effectively and measures are in place to track performance towards regional mode share goals. As described above, although VMR is one indicator to show the achievement of RTO efforts, it is not an easy metric to track, nor is it necessarily an accurately calculated performance measure. The RTO evaluation process now aligns program investment decisions with the new performance measures identified above. However, the majority of individual recipients will not be required to track or estimate their specific outcomes (i.e., direct contributions to the key performance measures), but instead, demonstrate how their funded activities are tied to the performance measures. This can be accomplished by requiring recipients to identify this relationship as part of their application and report on precursors that are known to contribute to the advancement of the performance measure.

As part of the recommended funding model, recipients will select from a menu of indicators that they will track pursuant to the performance measures their project is designed to achieve. At the most basic level, these precursor indicators include direct program outputs such as number of advertisements, number of maps produced, number of meetings attended, and so forth. Requiring a slightly higher level of evaluation, intermediary precursors include, awareness, participation, and satisfaction. At the highest level of evaluation is direct measurement of the desired outcome. The expected level of reporting is based on how much funding is sought, with an increasing level of reporting for higher levels of funding (see Figure 2).

Figure 2 Recommended Reporting Requirements

Funding Level	Reporting Requirements	Notes
Low	Outputs	Recipients of small grants will not be required to report on outcomes.
Medium	Outputs, Awareness, and Participation	Recipients of medium-sized grants will be expected to conduct more rigorous evaluation, stopping short of estimating outcomes.
High	Outputs, Awareness, Participation, Satisfaction, and Outcomes (where appropriate)	Recipients of large grants will be required to conduct even more rigorous evaluation including, when appropriate, estimates of direct and indirect impacts on the relevant performance measures.

SELECTION CRITERIA

The current selection criteria used for Metro’s small grant program will serve as a starting point for defining selection criteria for the consolidated grant program. The primary modification that will be made relates to Criterion #6. Criterion #6 should be eliminated (because of the previously identified issues associated with the previous return on investment framework) and replaced with a series of criterion that reflect the performance measures identified in this strategic plan.

ELIGIBILITY

Suggested eligibility for competitive grants is determined as follows:

- Does the proposed investment contribute to increasing use of non-SOV modes? This is established through a written project narrative that provides a logical explanation demonstrating how the funded efforts will contribute to reducing non-SOV modes, identifying specific performance targets for each investment.
- Does the applicant demonstrate interest and willingness? This is established through a written project narrative that identifies the specific opportunity or problem to which the applicant is responding.
- Does the applicant have local support? Minimum match requirements are used as base-level eligibility criteria. The minimum level is set at CMAQ thresholds. Higher local match levels are higher-risk efforts or rewarded through extra points in the scoring process.
- Does the applicant have the capacity to implement? This is determined based on the applicant's demonstration of a viable long-term business model.

CONTRACTED REPORTING REQUIREMENTS

The evaluation process revealed opportunities for the Metro RTO program to improve its contracting, reporting, and evaluation processes. In the past, the reporting, invoicing, and evaluation process lacked a clear linkage between RTO Program and Metro goals, contract requirements, invoice requirements, and evaluation requirements. The Metro RTO Program now relies on a standardized system for contracting, invoicing, and reporting that relates to the evaluation framework proposed by Portland State University researchers in prior evaluations (documentation of this is available as part of the prior 2008 – 2013 Strategic Plan). Furthermore, the Metro RTO program has adopted thresholds based on program type and funding level for which higher-level reporting and evaluation is required (described above).

The reporting and evaluation process reinforces the performance-based funding feedback loop by requiring that grant recipients report and meet the measures they commit to as part of their work plans. Figure 3 below illustrates how this feedback loop ties the evaluation framework back to the RTO goals.

Figure 3 Relationships among RTO Goals, Performance Measures, Reporting, and Evaluation



RTO SUBCOMMITTEE

The RTO Subcommittee will be restructured. The committee’s funding decision-making function is being divided from its collaborative functions and these functions are planned to be performed separately. This is so that funding decisions are not made by a committee that is comprised largely of direct grantees. During the one-year transition period, Metro will work toward reassigning the grant decision-making function of the RTO subcommittee to either a new committee comprised of non-grant recipients (such as higher-level decision makers similar to the group assembled for the Think Tank) or directly to TPAC. Yet, to preserve collaboration, the RTO program will continue convening and facilitating meetings of RTO grant recipients on a regular basis to coordinate programs and service delivery, facilitate information sharing, and disseminate best practices.

APPENDIX A: SUMMARY OF KEY QUESTIONS, ISSUES AND OPPORTUNITIES, AND RECOMMENDATIONS

	Key Questions	Issues & Opportunities	Recommendations
Mission, Goals & Objectives	<ul style="list-style-type: none"> What outcomes should the RTO program strive to achieve? How can the RTO program be more closely aligned with other Metro investments? 	<p>Issues</p> <ul style="list-style-type: none"> The RTO program helps make the Portland-Metro region a great place through contributions to quality of life, economic development, health, and social and regional equity. However, these contributions are not well-articulated in the regional transportation policy and planning discourse. The singular Vehicle Miles Reduced (VMR) performance target results in missed opportunities for the RTO program to demonstrate its contributions to other important outcomes. <p>Opportunities</p> <ul style="list-style-type: none"> Link RTO program to other Metro programs by articulating goals that reflect and build on goals defined in the RTP. RTO Program evaluation framework is well-advanced and can help RTO play a leadership role in performance-based planning. 	<ul style="list-style-type: none"> Adopt a new mission statement that reflects RTO's contribution to making the region a great place. Adopt new performance targets aligned with a triple-bottom-line approach to performance evaluation. Integrate triple-bottom-line performance measures into the existing evaluation methodology developed by Portland State University.
Evaluation	<ul style="list-style-type: none"> What performance measures should be used to track performance relative to new goals? How should the evaluation framework be modified to respond to the changing landscape and emerging opportunities? 	<p>Issues</p> <ul style="list-style-type: none"> Stakeholders expressed a concern that evaluation requirements are overly burdensome, consume a disproportionate share of project resources, and could be streamlined without sacrificing the objectives of the evaluation process. Singular VMR target and return on investment methodology skews performance measurement. <p>Opportunities</p> <ul style="list-style-type: none"> Good to Great: While some RTO-funded programs face specific challenges, many RTO investments have become national models for implementing innovative travel demand management practices. There is an opportunity to continue developing the evaluation process so that a good program becomes great. Become a leader at Metro by defining RTO's contribution to the regional goals and through adaptation of the existing evaluation framework to support a triple-bottom-line evaluation framework. 	<ul style="list-style-type: none"> Align level of evaluation and reporting effort with funding level and program type. Express RTO goals through evaluation criteria, RTO recipients' work plans, invoice and reporting requirements, and two-year evaluations.
Roles & Actors	<ul style="list-style-type: none"> What roles and functions should Metro and its partners play in delivering regional RTO programs? What functional changes are needed to respond to the changing landscape and new opportunities? 	<p>Issues</p> <ul style="list-style-type: none"> Overlapping roles dilute the effectiveness of individual actors. This is especially true for TMAs, who compete with TriMet and others to deliver employer-focused programming. Stakeholders—including funded partners and private sector representatives—feel that employer outreach should be done by Metro's partners. Metro should play a wholesale role in support of retail-level delivery at the local level. The effectiveness of the RTO Subcommittee is reduced because of its conflicting roles as both a funding decision-making entity and a collaborative forum. Regional collaboration is important in the delivery of services. <p>Opportunities</p> <ul style="list-style-type: none"> More clearly defined roles can improve the efficiency of the RTO program by reducing redundancy. Separating the RTO subcommittee into distinct parts has the potential to improve both the decision-making and collaborative processes. 	<ul style="list-style-type: none"> Focus Metro staff resources to: (1) support local jurisdictions, TMAs, and other organizations that promote travel options; (2) serve as a regional liaison to share best practices and develop regional policy that supports travel options; and (3) provide technical services to support local partners (mapping, website, surveys, etc.). Support TMAs, local jurisdictions, and TriMet in leading direct outreach at the local level Divide RTO subcommittee roles; funding decisions should be separated from RTO collaborative functions.
Prioritization of Funding	<ul style="list-style-type: none"> Given the issues and opportunities on the horizon, how should funding be prioritized during the next five-year planning period? What organizational, policy, and institutional framework is needed to deliver the desired outcomes? What specific changes need to be made to the existing policy for public private partnerships (TMAs)? 	<p>Issues</p> <ul style="list-style-type: none"> Reduced availability of funding brought on by on-going economic recession. The RTO program—like many other regional programs—faces the conflicting objective of providing for regional equity while also demonstrating performance. Not all TMAs have achieved private sector support as originally envisioned when the Public Private Partnership policy was enacted. TMA booster funding is serving more of a formula funding function than the intended performance-based function. <p>Opportunities</p> <ul style="list-style-type: none"> Provide a streamlined funding structure to ensure limited funding is dedicated to effective investments while building local capacity. Increase the proportion of funding available for grants by clarifying roles, reducing redundancy, and improving effectiveness. 	<ul style="list-style-type: none"> Combine TMA, individualized marketing, and RTO Grants Program funding; emphasize the need for local support, a problem statement, and a proven business model or complementary funding streams. Establish formula funding for employer outreach with specific performance requirements. Reduce Metro's total administrative budget for RTO and direct proportionally more funding toward grants. Eliminate TMA-specific funding and shift TMA program administration funding to support RTO grant recipients with technical services.

APPENDIX B: STRATEGIC PLAN METHODOLOGY

METHODOLOGY

The 2012-2017 Metro RTO strategic plan was developed through a multi-faceted outreach and analytical process supported by the following four efforts (also represented in Figure 1, below):

- Stakeholder Interviews: 17 interviews with over 50 participants were conducted to understand the strengths, weaknesses, and opportunities of the Metro RTO program. Participants included local city and county representatives, Metro staff, businesses, non-profit organizations, transit agencies, state representatives, universities, and current and past RTO grant recipients.
- Landscape Scan: A landscape scan was conducted to understand expected external changes to the Metro RTO program in the next five years, such as increasing energy prices, emerging social media and traveler information technologies, and an increased emphasis on the connection between transportation and health.
- RTO Think Tank: On October 6, 2011, regional policy makers and leaders in the community gathered to discuss key issues facing the RTO program to help guide the direction of the program in the next five years. Participants included city and county policy makers, health care representatives, Metro Councilors, and non-profit representatives.
- Biennial Performance Evaluation: A biennial performance evaluation was conducted to assess the performance of Metro RTO-funded programs.

Figure 1 Metro RTO Strategic Plan Process



Documentation of these materials can be obtained from Metro RTO staff by contacting the Metro Transportation Planning Division at 503-797-1735, or by email at trans@oregonmetro.gov.

Planning for Our Aging Society

by Alan DeLaTorre, Tomoko DeLaTorre, Margaret Neal, Paula Carder, Jenny Weinstein, Michael DeShane, and Keren Brown Wilson

No other force is likely to shape the future of national economic health, public finances, and policymaking as the irreversible rate at which the world's population is aging.

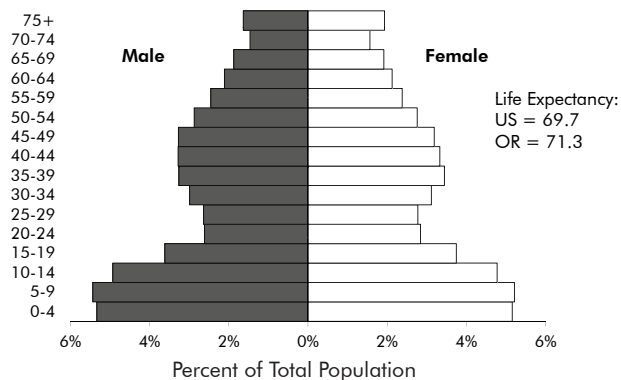
— Standard & Poor's, Global Aging 2010: An Irreversible Truth

In 2011, the oldest members of the Baby-Boom generation – those born in the U.S. between 1946 and 1964 – began turning 65. Boomers have been described as the “silver tsunami” and the “pig in a python” due to the disproportionate number of individuals born during this period.

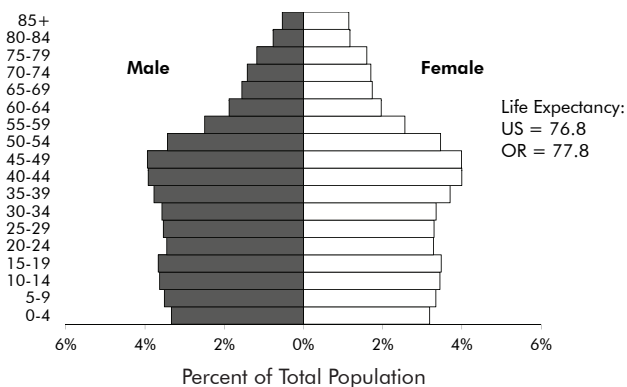
The population pyramids on this page reflect how the Boomers have affected and will impact the overall age structure in Oregon in the future. The graph on the top right shows how, in 1960 (15 years after the end of WWII and the approximate beginning of the “boom”), Boomers swelled the ranks of the youngest Oregonians. The middle graph (2000) shows how, 40 years later, the cohort has aged and created a bulge – the “pig” moving its way through the “python.” Looking ahead 40 more years, to 2040, we are able to see what demographers refer to as the “rectangularization” of the population pyramid, which has occurred primarily based on the fact that Oregon – as well as the U.S. as a whole and many other developed countries – has witnessed a shift from high birth and high mortality rates, to low birth (after 1964) and low mortality rates.

The fact that the U.S. is aging is not new; many headlines in 2011, while not heralding the coming of the Boomers, were related to the demographic phenomenon of population aging, including those concerning the government's failed efforts to find solutions to budget deficits, questions pertaining to the future solvency of Social Security, and the extended debate over our nation's health care system. The aging population presents both challenges and opportunities for our region, state, and country in the coming years. The challenge for leaders and policymakers now is to better understand the dynamics that we are facing and to develop appropriate policy responses.

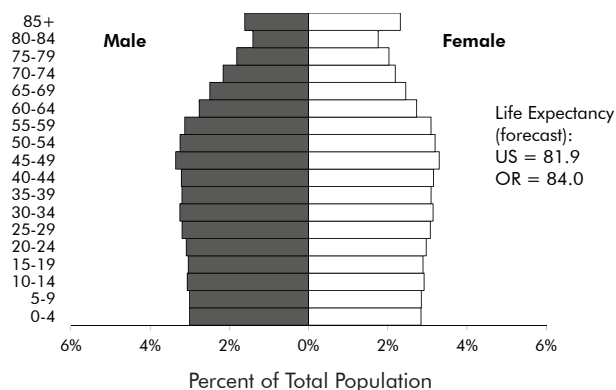
Oregon Population Distribution by Age and Sex, 1960



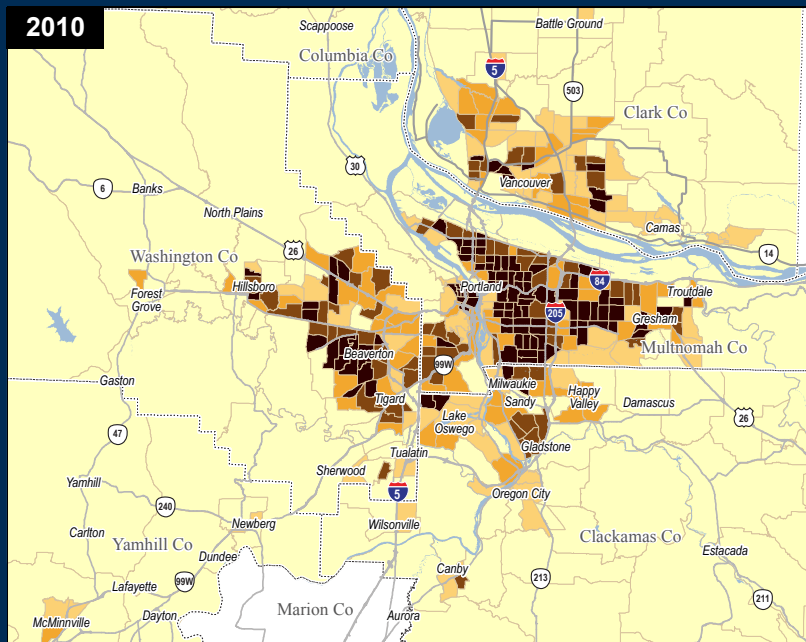
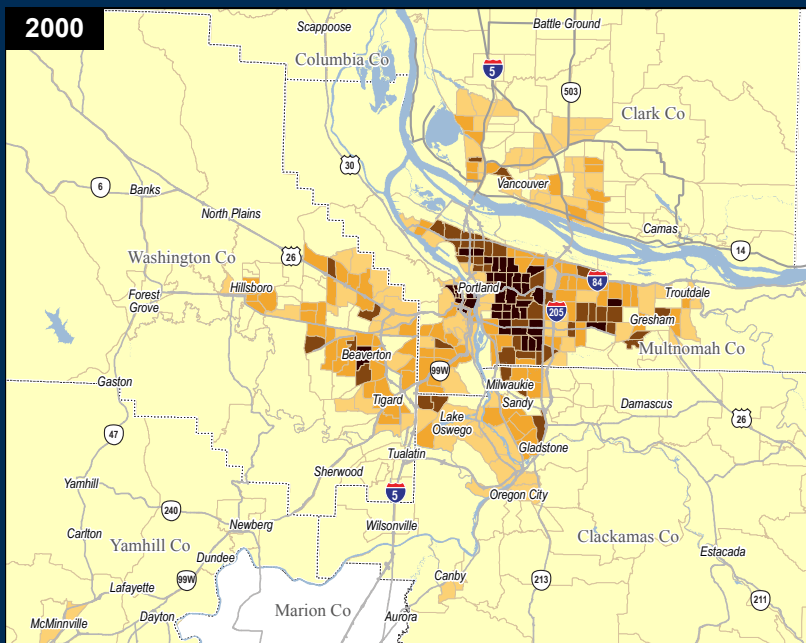
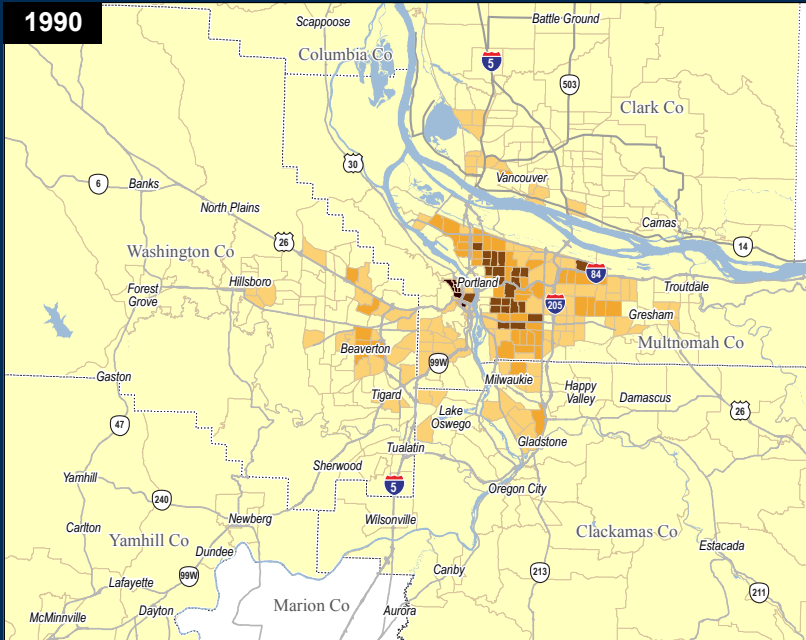
Oregon Population Distribution by Age and Sex, 2000



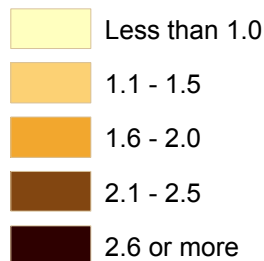
Oregon Population Distribution by Age and Sex, 2040



Persons Aged 45 to 65 per Acre by Census Tract



Persons Aged 45 to 65 per Acre by Census Tract



Source: U.S. Census

In 1990, the Boomer cohort had not yet turned 45. In 2000, approximately half of the cohort was in the 45-64 age range, and in 2010, the entire cohort was between 45 and 64 years of age. The density of those aged 45-64 in the Portland metropolitan region has grown each decade over the past 20 years; growth has occurred in urban cores and on the periphery of urban areas. As this cohort moves into the 65+ age category, systematic monitoring of population concentrations will allow for targeted planning and policy responses.

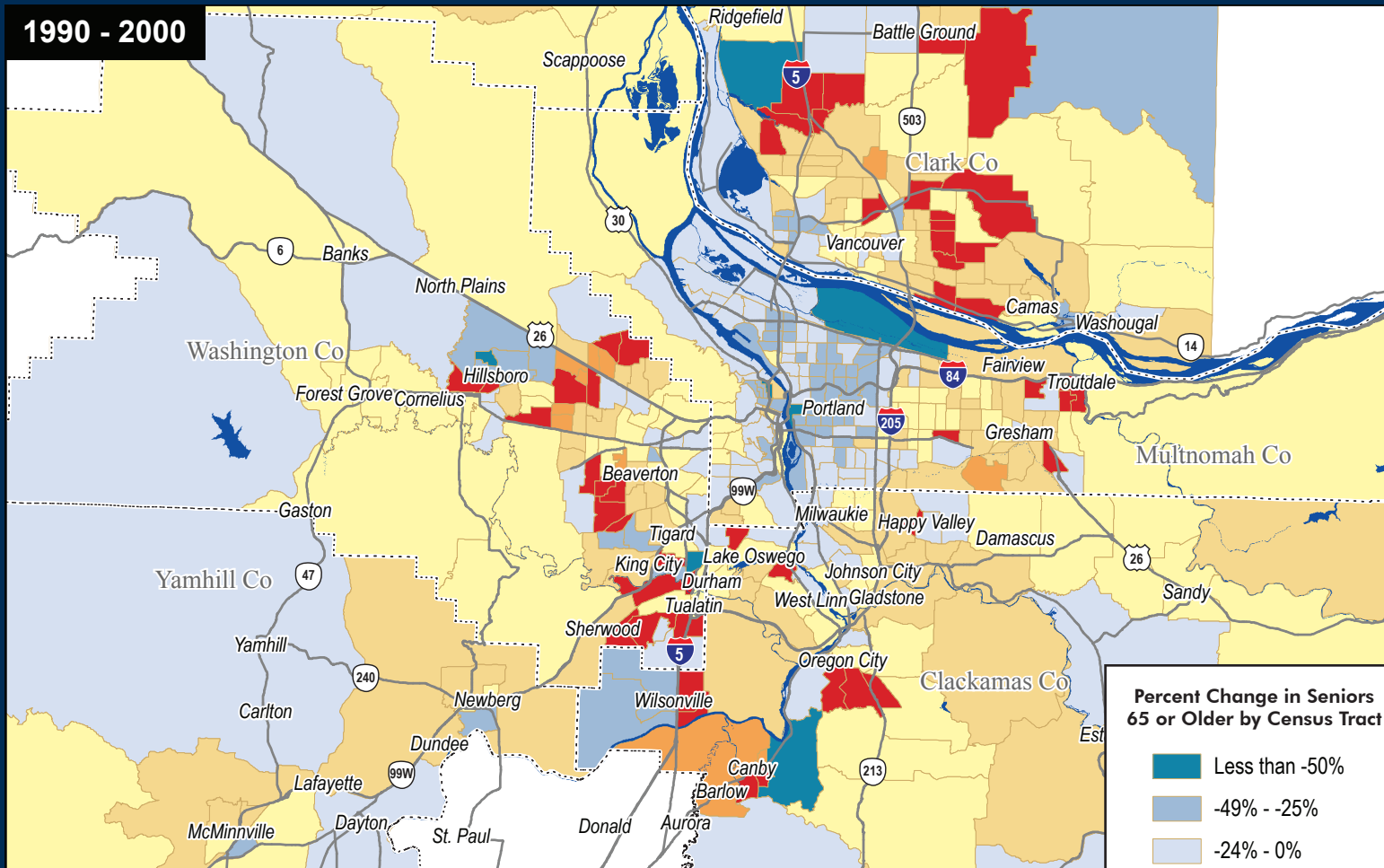
A snapshot of efforts in the region

The time to prepare for our aging population is now. Between 7,000 and 10,000 boomers will turn 65 each day for the next 18 years. Many will retire, although not as many as expected. Government programs will be strained. Employers will lose valuable skills and institutional knowledge. Individuals will look for meaningful ways in which to stay engaged. Although the local policy responses to population aging are still in the early stages, several efforts have been undertaken which are described below.

One organization that has been addressing these issues is Elders in Action, a non-profit group that strives to increase livability for those of all ages in the Tri-county region (Clackamas, Multnomah,

Percent Change in Seniors 65 or Older by Census Tract

1990 - 2000

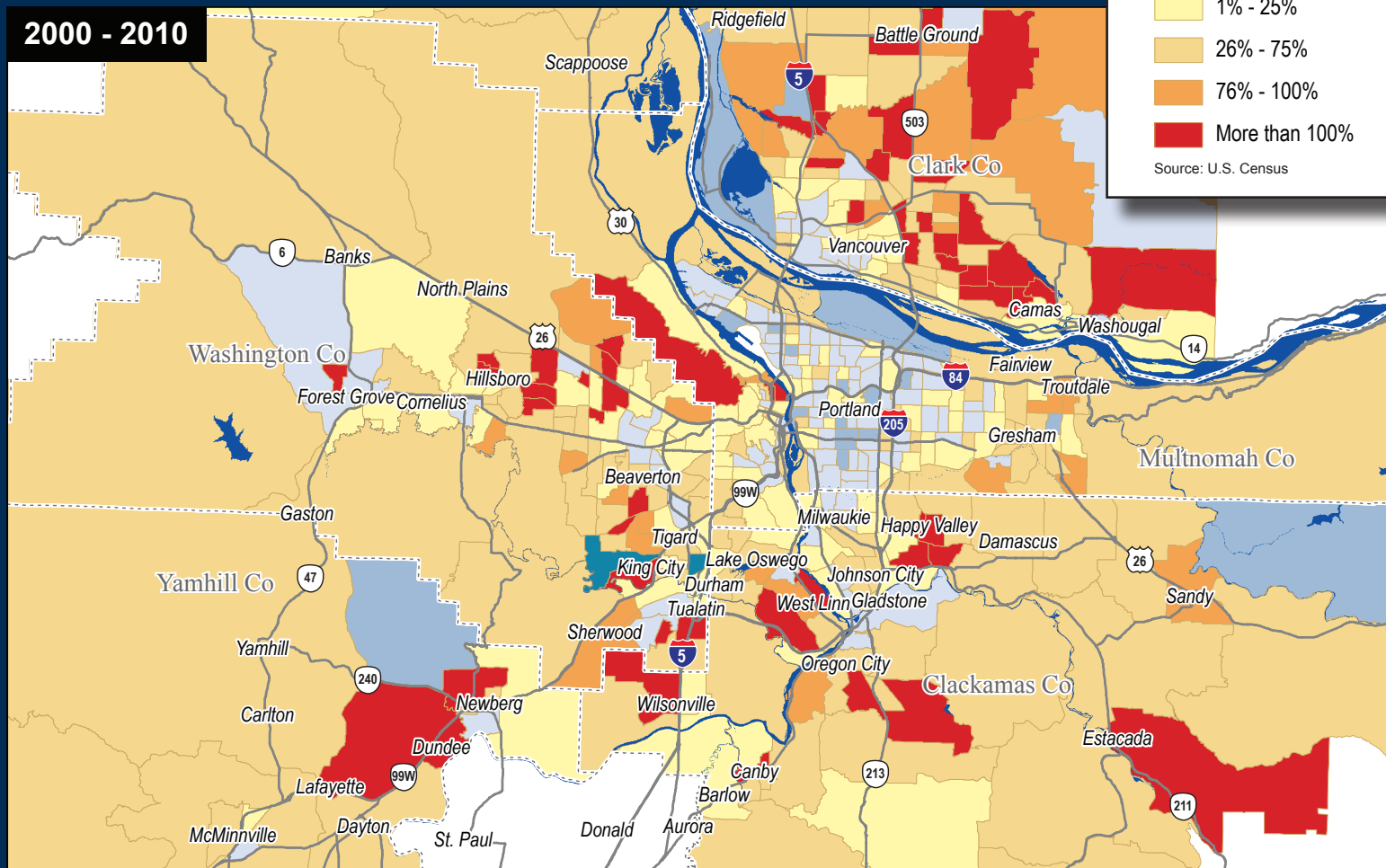


Percent Change in Seniors 65 or Older by Census Tract

- Less than -50%
- -49% - -25%
- -24% - 0%
- 1% - 25%
- 26% - 75%
- 76% - 100%
- More than 100%

Source: U.S. Census

2000 - 2010



The maps, at left, show the percentage changes that occurred by census tract in numbers of persons aged 65 and over from 1990-2000 and from 2000-2010. As part of PSU's 2006 report for Metro, *Age-Related Shifts in Housing and Transportation Demand*, the change between 1990 and 2000 map was produced. During the dissemination of findings, multiple community stakeholders requested that, when Census 2010 data were available, a comparable map be produced to identify changes that had occurred in the subsequent 10 years.

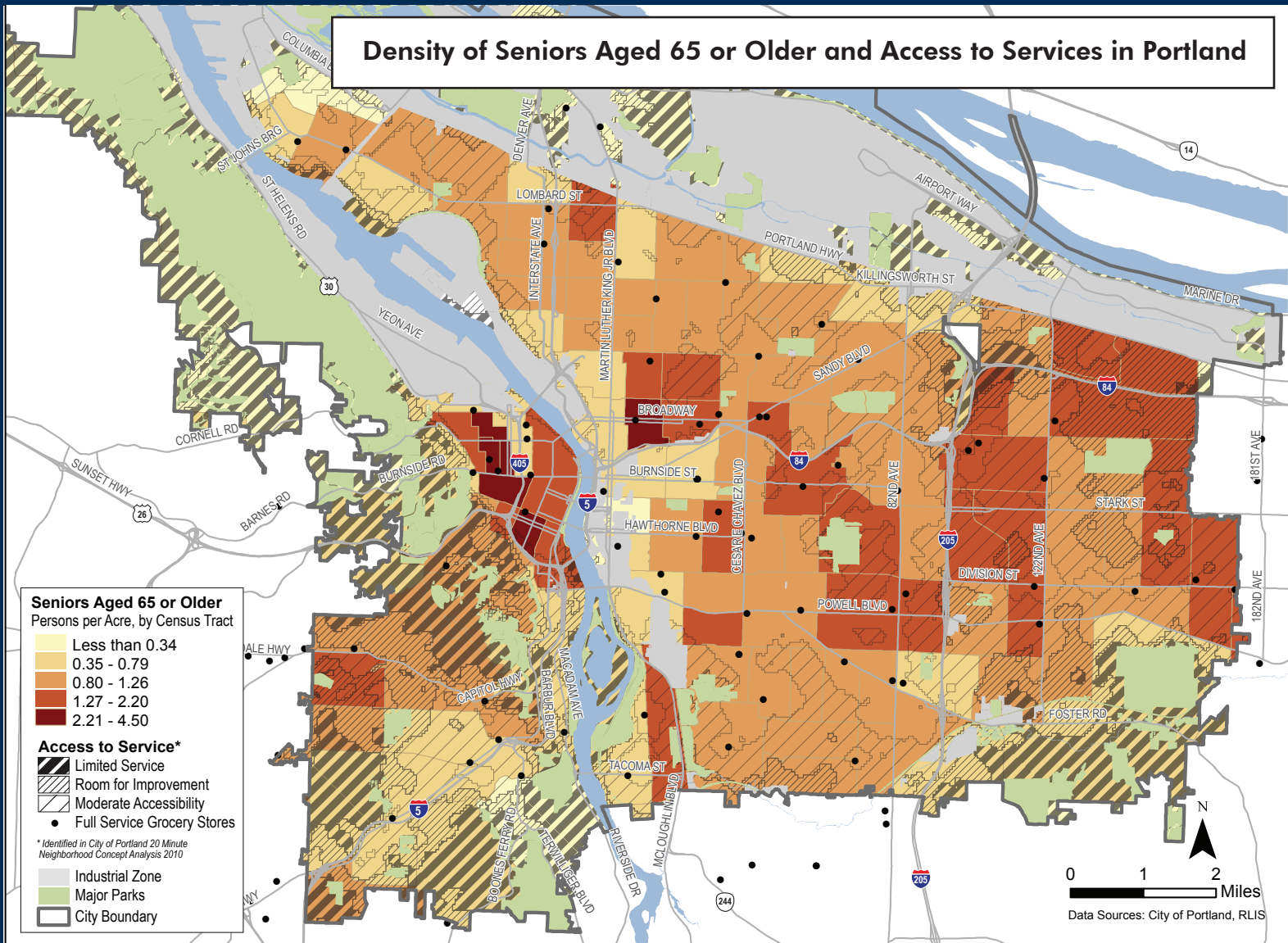
The 1990 to 2000 map highlights a drop in the proportion of older adults living in the core area of the Portland region and a growth in many periphery areas. It should be noted that the northern portion of downtown – this includes the Pearl District, which has seen a substantial number of new apartments and condominium growth since the 1990s – witnessed growth while other central areas declined in the proportion of those 65+. Although the change between 2000 and 2010 map shows continued growth on the periphery, it also highlights a reversal of trends in many census tracts in the core of the region where services are more prevalent (see page 18 for more details on services). It is also important to note that these maps do not distinguish between individuals who are aging in place and those who have moved into a census tract from somewhere else.

and Washington). In addition to organizing a citizens' advisory group that informs local government policy decisions, Elders in Action also administers an age- (or elder-) friendly business certification program that educates and helps businesses better serve customers. Older adult volunteers systematically evaluate aspects of access, layout, and customer service and then work with the business to make any needed changes. Businesses that undergo this process receive certification and are listed in a directory of other age-friendly businesses.

Government agencies have also begun focusing on the implications of population aging. In 2006, Metro funded a multidisciplinary project by Portland State University's (PSU) College of Urban and Public Affairs to examine age-related shifts in housing and transportation demand. That project informed modeling and forecasting efforts for the metropolitan area and fostered an early connection between municipal governments and PSU around the issue of planning for an aging society. The project's final report has been used by other governments, as well as non-profit agencies, in shaping projects and programs and has served as a launching point for further university partnerships with local government.

In late 2006, PSU's Institute on Aging (IOA) was approached by the World Health Organization (WHO) to participate in its global Age-Friendly Cities project. The project aimed at understanding the features of and barriers to age friendliness in the 33 cities in 22 countries that participated. Portland was the only U.S. city involved in the initial data collection effort for the first phase of this global project. In 2010, the WHO initiated its Global Network of Age-Friendly Cities, and Portland was accepted as one of just two U.S. cities (the other was New York) among the first group of six members. Portland was granted membership due to its participation in the original age-friendly cities project and due to the commitment of the Mayor, City Council, and the Bureau of Planning and Sustainability

Density of Seniors Aged 65 or Older and Access to Services in Portland



The City of Portland's Bureau of Planning and Sustainability has begun looking at access to services throughout the city in an effort to identify areas that are underserved. Among the services included in that mapping analysis are full-service grocery stores, parks, elementary schools, frequent-service transit stops, presence of sidewalks and intersections, and proximity to commercial services. In the above map, residential areas with high access to services are represented by an absence of cross-hatching; residential areas with moderate access, room for improvement, or limited service are denoted with increasingly dark cross-hatching. As the map highlights, the central core of the city has the best access to services, with the downtown area and central eastside areas showing the highest levels of access to services (i.e., no cross hatching).

In order to understand how the differences in access to services might impact older adults, the density

of persons aged 65 and older by census tract was added to the map. The downtown core (including inner southwest, northwest, and northeast) shows the highest concentration of older adults, as well as the best access to services. Moving away from the city center, however, we can see areas with limited access to services and, in certain areas, also high concentrations of older adults. Southwest Portland (not including downtown) has many areas that show room for improved access to services, although concentrations of older adults are not as high as in other areas of the city. East Portland, particularly beyond Interstate Highway 205 (which includes a considerable amount of post-WWII, automobile-oriented development), has the largest number of areas with both poor access to services and high concentrations of older adults. Additional analysis at the block level is needed to understand which neighborhood sub-areas are most impacted and need specific attention.

to collaborate, together with the IOA, to create an action plan for aging in the city. This plan includes developing indicators to be used to monitor success over time, and implementing changes aimed at creating a Portland for people of all ages and abilities. Guiding the work is the WHO's active aging framework, which focuses broadly on both the built and the social environment and includes eight domains: housing, transportation, outdoor spaces and buildings, social participation, respect and social inclusion, civic participation and employment, communication and information, and community support and health services.

Several county-led efforts have also emerged. Multnomah County's Task Force on Vital Aging was created in 2007 by the Multnomah County Board of Commissioners "to assess and identify new opportunities, best practices, barriers and recommendations for enhancing the independence, engagement, and contributions of older adults in Multnomah County and our region." Clackamas County's Social Services Division partnered with Oregon State University's Extension Service and AARP Oregon in 2011 to attempt to effect community change "by exploring aging-related issues and increasing and improving resources that will establish Clackamas County as an age-friendly place, a place for all ages." In Clark County, Washington, the Department of Community Planning, the Board of Clark County Commissioners, a 25-member task force, and engaged community stakeholders assessed the county's capacity to meet the needs of its growing number of older citizens and to connect the findings to long-range planning efforts. Washington County's Disability, Aging and Veteran Services is currently working with the Vision Action Network,

local communities, and the public, to write a three-year strategic plan that will improve service delivery systems in partnership with cities and stakeholders in order to meet the increasing needs of elders in the county.

In addition, last year the IOA at PSU undertook a statewide visioning effort, "Aging Matters in Oregon: Imagine the Possibilities in 2040," as part of an initiative funded by PSU alumni Drs. Michael DeShane and Keren Brown Wilson. This effort brought together about 75 thought leaders to explore innovative ideas for policies and services that will confront the realities of an aging society. Four invitational summits were convened. Participants included leaders in social services, education, economics, business, health care, research, policy, government, volunteerism, arts, community development, and long-term care and from urban and rural communities. They concluded that the "mental model" of aging must be changed from a focus on disability and loss to one that acknowledges and leverages the skills, knowledge, and contributions of older adults. They also agreed that intergenerational dialogue and exchange are needed concerning the meanings of age, aging, vitality, and frailty; that sustainable development policies and programs must address population aging; and that health, housing, and services should be integrated in novel ways.

Where do we go from here?

As our region ages, we have the opportunity to create a place that is more livable for people of all ages and abilities. For example, the WHO publication *Global Age-friendly Cities: A Guide* suggests strategies for creating cities that focus on enablement, not disablement, and are friendly to those of all ages, not just "elder-friendly." As we plan for our aging region, partner-

ships among government, educational and research institutions, and private and non-profit entities will be critical for achieving success. From the local to national levels, governments will undoubtedly face increasing pressure to provide adequate services and meet the demand for improved infrastructure. However, we must take advantage of the opportunities that accompany demographic changes, along with the challenges. Arriving at innovative solutions will require not only informed policy responses, but a shift in focus away from the increasing needs of older adults and toward the potential that they offer.

Oregon has long been seen as a pioneer and leader in home and community-based services for older adults. The economic downturn and limited public resources have taken their toll on this reputation in recent years. Many consider the growing numbers and proportions of older adults only as sources of further strain on existing public programs and services. In part, this response is due to our continued failure to find meaningful roles for older adults and to utilize their skills and talents. As the IOA's summits of thought leaders concluded, a new "mental model" is needed that acknowledges aging as the lifelong process that it is (we're all doing it, after all), and that actively engages people of all ages and abilities in planning for the age wave that is cresting as more and more Boomers reach the traditional age of retirement.

Local and regional governments should continue to partner with private and non-profit organizations in an attempt to explore the complexities of these demographic changes and to cultivate the human resources that they represent. At the federal level, we must explore the policy responses that have occurred through-

out the U.S., such as those highlighted in the recent AARP report *Aging in Place: A State Survey of Livability Policies and Practices*, as well as policies that address land use (e.g., transit-oriented development that provides appropriate housing with access to transportation and services); transportation (e.g., designing for a range of mobility options in urban and rural areas); and housing (e.g., creating affordable, accessible housing that promotes aging in community).

As our population ages, challenges and opportunities will continue to emerge. In order to navigate our way, we will need to make informed decisions based on research, community dialogue, and creative thinking.

The analysis in this article represents an effort to highlight the trends in state and regional population aging. As we move forward, this unprecedented, historic demographic transition begs several important questions:

- How can we best utilize the skills and talents of our region's older adults?
- What specific steps can be taken to assure the region's continued leadership in planning and governance?
- How can consideration of population aging, largely absent to date in discussions concerning the need for sustainable development and social equity, be incorporated into our planning efforts?
- How can the various local, regional and statewide planning efforts work together to assure that our communities are vibrant places for those of all ages and abilities?
- How do we monitor changes and trends over time; how will we know if we have been successful in creating livable communities and fostering a high quality of life? **M**

THE WORLD HEALTH ORGANIZATION'S AGE-FRIENDLY CITIES PROJECT IN PORTLAND, OREGON

Summary of Findings



Credit: Portland Oregon Visitors Association

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Institute on Aging, Portland State University

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Funding for this project was provided by Portland State University's Institute on Aging and School of Community Health. Support for printing and dissemination was provided by AARP Oregon.



Context

The older population is increasing in size in Portland, the state of Oregon, the United States, and the rest of the world. Our cities and regions are vital to the support of this demographic shift through the provision of quality built environments, services, and social, cultural, and civic engagement opportunities promote healthy and active aging.

Over the next 30 years, the Portland-Vancouver metropolitan area will see dramatic growth in the proportion of the population that is aged 65 and older. Although the total population will increase by 47 percent, the 65+ population will more than double, growing by over 137 percent, to comprise 17 percent of the population in 2030, compared to 10.5 percent in 2000. Fueling this increase will be the aging of the baby boomers. (Neal, M., et al.: http://www.upa.pdx.edu/IOA/documents/PSU_Age-Related_Final_Report_August_14_2006_000.pdf).

As a city and a region, changes that will enhance the quality of life, independence, and well-being of our aging population can be made. These include addressing important needs that are identified, and taking advantage of assets and resources that an older and experienced population provides. By doing this, as we conclude later in this report, we all will benefit:

“An age-friendly city is a city that is friendly for people of all ages and abilities.”

About the Study

In the late fall and early winter of 2006/07, researchers at the Institute on Aging in the School of Community Health, College of Urban and Public Affairs at Portland State University (PSU) in Portland, Oregon were invited to collaborate with the World Health Organization (WHO) on its “Age-Friendly Cities Project.” The WHO defines an age-friendly city as one that:

- Recognizes the great diversity among older persons
- Promotes older persons’ inclusion and contributions in all areas of community life
- Respects older persons’ decisions and lifestyle choices, and
- Anticipates and responds flexibly to aging-related needs and preferences

Portland was the only city in the United States to participate in the study, along with 32 other cities in 22 countries in North and South America, Europe, Africa, Asia, and Australia.

The goal of the project in Portland was to identify concrete indicators of an age-friendly city and produce a practical guide to stimulate and guide advocacy, community development, and policy change to make urban communities around the world age-friendly. Each participating city’s results will be used by the WHO in its booklet, *Global Age-Friendly Cities: A Guide*, to be released on October 1, 2007. The results from each city, as well as the WHO guide, are intended to inform citizens, policy makers, businesses, and social and health service providers as they strive to make their own cities more age-friendly.

To guide the project, a local team of advisers was formed. Although the study’s methods were stipulated by the WHO protocol, the team aided in identifying study participants and tackling project logistics. To address the study’s research questions, PSU researchers conducted eight focus groups (55 total participants) with older adults (aged 60-81), informal caregivers, and service providers and businesses (public, private, and voluntary/non-profit) within the city limits of Portland. The participants were recruited primarily through the Senior Adult Learning Center at PSU and through Elders in Action, a local non-profit advocacy organization. The sample was designed to include older adults in neighborhoods of various socioeconomic levels, older adults with functional impairments, and family caregivers acting as proxies for elders who would be unable to participate in a focus group.

The questions posed in the focus groups were aimed at gaining better understanding of the everyday experiences of older adults regarding existing age-friendly features, barriers to age-friendliness, and suggestions for improvement in the following eight topic areas:

- **Outdoor Spaces and Buildings**
- **Transportation**
- **Housing**
- **Respect and Social Inclusion**
- **Social Participation**
- **Communication and Information**
- **Civic Participation and Employment**
- **Community Support and Health Services**



In the section that follows, key findings are presented. In addition, examples of resources and links to websites are provided, where appropriate, to complement participants’ comments.

Key Findings

Outdoor Space and Buildings

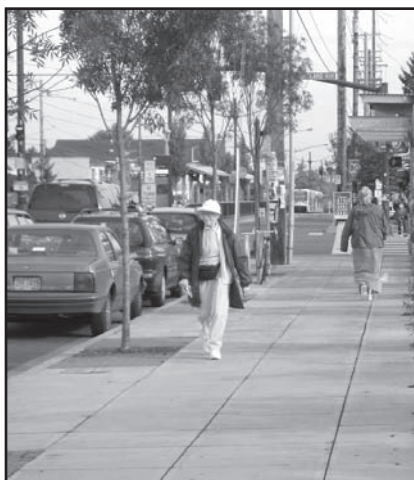
Natural Features and Green Spaces

- **Age-friendly feature(s):** Parks, trails, community gardens, and other natural features and green spaces afford locations for older adults to be active and engage in social activities; in November, 2006, voters approved a bond measure directing Metro, the regional government, to protect natural areas and lands near rivers and streams throughout the metro region, safeguard water quality, protect fish and wildlife habitat, and ensure access to nature for future generations (e.g., <http://www.metro-region.org/article.cfm?ArticleID=16894>).
- **Barrier(s) to age-friendliness:** Hills in certain areas of Portland are problematic for walking by some individuals; access to some trails and parks is limited to those using certain transportation modes (e.g., cars, bicycles).
- **Suggestions:** Provide new natural and green features where needed (e.g., residential neighborhoods outside of the city center) and maintain those currently available; make these areas accessible to those with physical limitations as well those using various transportation modes (e.g., bus); create more opportunities for animal (e.g., bird) and people watching; add additional recreational features to parks and open spaces, such as chess/checker boards and/or places for other outdoor activities.



“[The] outdoor spaces for me now are wonderful. [I] have access to Forest Park... I know where there are bathrooms...I just feel comfortable in and out of public and business buildings in the city”

– Older Adult



Pedestrian Infrastructure

- **Age-friendly feature(s):** Sidewalks, curb cuts, street lighting, benches, and traffic calming devices are well developed in certain areas of the city and provide some older adults with preferred routes to services and activities; the Portland Department of Transportation’s (PDOT) Sidewalk Program and Maintenance Bureau develop and maintain sidewalks, curbs, and corners according to Americans with Disabilities Act (ADA) standards and accept recommendations for needed improvements (tel: 503.823.1711); the Safe Routes to Senior Centers program is underway in PDOT (<http://www.portlandonline.com/shared/cfm/image.cfm?id=99357>).
- **Barrier(s) to age-friendliness:** There is limited funding for development and maintenance of pedestrian infrastructure (e.g., sidewalks, crosswalks, benches); areas of the city (e.g., southwest hills) have underdeveloped or insufficient pedestrian amenities.
- **Suggestions:** Improve pedestrian infrastructure; increase awareness of the city’s PDOT’s maintenance office; create safe routes to common destinations (e.g., community centers, libraries).

“There’s no reason to take my mother [downtown] again...it would be harder to get her around, she’d have to walk, there would be no immediate parking to the stores...when I do take her out, we go to the mall.” – Caregiver

Urban Form

- **Age-friendly feature(s):** Some older adults prefer the more dense, central locations that exist in Portland (e.g., pedestrian and transit-oriented developments), as they are able to easily reach services, desired destinations, etc.; other older adults prefer less dense, less hectic, more peripheral locations (e.g., suburban areas) that are accessible by automobile.
- **Barrier(s) to age-friendliness:** Living in an area that does not match one’s needs or desires (e.g., living in a low-density suburb without a car) is problematic for some older adults and those with disabilities, as are places with a lot of activity and/or where considerable construction is underway (e.g., downtown).
- **Suggestions:** Educate older adults who may be relocating about the best neighborhoods and housing units to suit their needs and desires (e.g., non-driving older adults should consider areas that are walkable and pedestrian friendly); allow for and promote a mix of uses in buildings and neighborhoods through zoning codes and planning tools (e.g., plan districts and comprehensive plans) that provide access to necessary services such as grocery stores, pharmacies, etc.; provide multiple transportation options in neighborhoods.



Buildings

- **Age-friendly feature(s):** New developments and redevelopments, including businesses and housing developments, are required to build or remodel buildings, parking lots, etc. according to ADA standards; some buildings, such as malls and larger retail stores, are accessible with good amenities (e.g., toilets, benches, rest areas, carts designed for those with impairments); a local advocacy organization, Elders in Action, provides Elder Friendly® business certification (<http://eldersinaction.org/whatwedo/elderfriendly/>).
- **Barrier(s) to age-friendliness:** Most new developments meet only minimum ADA requirements, rather than designing for a wide population of individuals in a universal fashion; certain buildings lack accessible features for older adults and those with disabilities (e.g., ramps, accessible bathrooms); many businesses and houses lack visible street numbers.
- **Suggestions:** Go beyond the ADA regulations toward universal design standards (e.g., elder-friendly certified businesses, level entries or ramps, first-floor bathrooms); require easily visible street numbers on businesses and houses.



(Wheelchair Lift)

General Outdoor Spaces

- **Age-friendly feature(s):** Many older adults feel safe and secure in the outdoor spaces of Portland.
- **Barrier(s) to age-friendliness:** Some older adults report a lack of a sense of physical safety and security in some areas in the city (e.g., downtown, certain light rail stops).
- **Suggestions:** None offered.

Transportation

“I give every new person [in my building] a ticket, tell them to get on the bus and ride the entire route, to see what they could do, where they could get off... it is a very convenient bus.” – Older Adult

Public Transportation System

- **Age-friendly feature(s):** TriMet, Portland’s public transportation system (<http://www.trimet.org/>), offers good general service provision for older adults and those with disabilities, including: light rail trains, buses, and special services for persons with disabilities and for low-income individuals with medical needs; there are brochures that detail transportation options for older adults and those with disabilities; RideWise, a collaborative effort between TriMet and the non-profit organization Ride Connection (<http://www.rideconnection.org/services/RideWise.htm>), assists older adults and people with disabilities to learn how to travel independently and safely using transit; public transit is affordable and includes a “fareless” zone in and around downtown Portland; transit is accessible for those with disabilities.
- **Barrier(s) to age-friendliness:** Some older adults experience discomfort on public transportation due to riders who are disrespectful or who do not yield seats designated as priority for older adults or those with disabilities; transit is not easily accessible for some older adults, especially in areas away from the central city; there are long waits for transit, especially at night; there is a lack of transit at certain times, especially nights and weekends; some people experience difficulty in signing up for TriMet’s LIFT (special transportation) program (<http://www.trimet.org/lift/index.htm>); some drivers of public transportation seem unaware of the needs of older adults and those with disabilities; on trains and at transit stops, crime and fear of crime deter older adults from using transit or feeling safe and secure on board; although there is an accessible light rail car, it is never in the same location, so riders cannot position themselves appropriately in advance.
- **Suggestions:** Place an accessible light rail car in the same location for those with disabilities; further educate public transit drivers about older adults and those with disabilities (e.g., cognitive impairments); provide more night and weekend transit service; give new residents of an area a free transit ticket and suggest exploring a full bus, light rail or streetcar line; educate older adults on how to use public transit; place security officers on light rail cars; design new transit stops so that illegal activities cannot be shielded from the view of others.



*“I think if you live next to the [public transportation] system... and you’re going someplace that’s next to it, you can’t beat it... for \$23 you can do that all month long.
- Older Adult*

Private Transportation (Driving)

- **Age-friendly feature(s):** Driving a private vehicle is a desired mode of transportation due to convenience, enjoyment, and familiarity.
- **Barrier(s) to age-friendliness:** Heavy traffic is a barrier, as are: rude and inconsiderate drivers; a lack of parking; construction delays and detours; insufficient and inadequate signage; trouble giving up driving; and the difficulty of maintaining driving skills as one ages.
- **Suggestions:** Older adults should attend AARP Driver Safety classes (http://www.aarp.org/families/driver_safety/) or similar programs; multiple modes of transportation and training in how to use them should be available.

Alternative Motorized Vehicles

- **Age-friendly feature(s):** Portland International Airport uses small motorized carts to transport those with mobility needs.
- **Barrier(s) to age-friendliness:** Certain facilities, especially larger campus-type facilities (e.g., hospitals) are difficult to negotiate for those with physical limitations.
- **Suggestions:** Consider using alternative motorized vehicles (e.g., golf carts, electric passenger carts) for transportation at larger facilities that serve older adults.

Parking for Private Vehicles

- **Age-friendly feature(s):** Ample and accessible and free parking exists in many shopping centers and malls, especially outside of the city center; central city parking spaces designated for longer than 30 minutes are free and available with no time limit to anyone with a Disabled Parking license plate or permit; “Park & Ride” locations provide good access to public transportation and services that are located nearby transit lines.
- **Barrier(s) to age-friendliness:** Parking is expensive or unavailable in the city center; parking that does not provide any protection from weather is a barrier; there are not enough “Park & Ride” options; there is a lack of parking near recreational areas (e.g., trails); there are insufficient valet services.
- **Suggestions:** For caregivers, older adults, and persons with disabilities, offer valet parking at hospitals and at public events; have “honored citizen” parking, rather than disabled or handicapped parking; provide covered walkways between parking lots and buildings to protect people from inclement weather; have awnings over passenger drop-offs at hospitals, health centers, and other facilities; provide more “Park & Rides” and parking near accessible recreational locations.



Specialized Transportation Services

- **Age-friendly feature(s):** Ride Connection (<http://www.rideconnection.org/>), a non-profit organization, assists in the coordination and provision of special transportation services, including information, assistance, and training on how to use alternative modes of transportation.
- **Barrier(s) to age-friendliness:** Taxis are scarce or unavailable during certain times of the day and night (e.g., after arts and cultural events); some older adults find having a myriad of transportation options overwhelming and difficult to negotiate.
- **Suggestions:** Create a special transportation cooperative that allows individuals to pre-pay for service; consider and encourage the development of neighborhood cooperatives that focus on older adults and those with disabilities; give taxi companies a list of local arts and cultural events so that they can provide timely service; increase awareness of current transportation programs that provide age-friendly transportation services, including travel training.



Bicycling

- **Age-friendly feature(s):** Bicycling options exist; PDOT has introduced a Senior Cyclist Program for new and experienced bicyclists (<http://www.portlandonline.com/transportation/index.cfm?a=bffbgh&c=dheab>).
- **Barrier(s) to age-friendliness:** Bicyclists are a concern for some older pedestrians and drivers.
- **Suggestions:** Create additional lanes for bicycling that are separated from cars; consider adding more bicycling trails that are wide enough for three-wheeled bicycles.

Pedestrian Environments

- **Age-friendly feature(s):** Pedestrian-friendly streets and neighborhoods (e.g., well lit areas, wide sidewalks, curb cuts, well marked crossings, benches for resting) foster a sense of safety and provide more accessibility for older adults; PDOT's Safe Routes to School program helps create better walking environments for older adults, too (<http://www.trans.ci.portland.or.us/SafeRoutes/>), as does its Safe Routes to Senior Centers; Metro has handbooks which provide guidance on the creation of safe and healthy streets (<http://www.metro-region.org/article.cfm?ArticleID=235>).
- **Barrier(s) to age-friendliness:** Construction areas and hectic urban spaces (e.g., downtown) are undesirable destinations for some older adults; automobile-dominated environments are difficult to negotiate for some older adults and those with disabilities.
- **Suggestions:** Continue adding pedestrian islands and traffic-calming devices such as curb extensions, and roundabouts; create special car-free zones.



Housing

Affordability

- **Age-friendly feature(s):** Programs are available to help older individuals find (e.g., <http://www.housingconnections.org/>) and obtain (e.g., <http://www.nwpilotproject.org/>) quality affordable housing; having affordable housing in the city is a goal for some leaders and agencies in Portland (e.g., City of Portland: <http://www.portlandonline.com/bhcd/index.cfm?c=dabec>; Metro: <http://www.metro-region.org/article.cfm?articleid=417>; Portland Development Commission: http://www.pdc.us/pubs/inv_detail.asp?id=670&ty=48).
- **Barrier(s) to age-friendliness:** The city lacks affordable housing; what is considered affordable by policy makers is not viewed as such by some older adults; programs for rent assistance/subsidy are limited, and there are long wait lists for available units; apartment-to-condominium conversions reduce the available rental housing stock; neighborhood gentrification can reduce social networks and the ability to find assistance from long-standing neighbors; high property values and taxes force some to move out of the city; the cost of housing for those who need assistance with activities of daily living (e.g., adult foster homes, assisted living facilities) is very high.

- **Suggestions:** Create additional affordable housing for older adults and those with disabilities; limit property tax increases for those with fixed incomes; assist older adults with fixed and restricted incomes who are experiencing “condo conversions” (e.g., provide ample time for relocation, provide relocation assistance, including help with moving expenses); ensure that housing near concentrated services is affordable for older adults who have restricted incomes.

Available Housing Options

- **Age-friendly feature(s):** Co-housing developments, which can be described as intentional communities of homes that are managed by residents and that foster interaction with neighbors, exist in parts of Portland (e.g., Trillium Hollow: <http://trilliumhollow.org/>). These developments, which have shared facilities and involve consensus decision making, are desirable housing options for some older adults; more traditional intergenerational housing options also exist (e.g., Center Commons: <http://www.huduser.org/research/AIA-2001.html>); the City of Portland allows the construction and use of accessory dwelling units (ADUs or “granny flats”) which provide options for older adults to live in more affordable housing or to increase their income by renting out such units (e.g., <http://www.portlandonline.com/bds/index.cfm?c=dgghg>); some realtors are certified as “Senior Real Estate Specialists” and assist older adults in finding housing that will allow them to age independently (e.g., <http://www.generationscounseling.com/resourcepagefora.html>).
- **Barrier(s) to age-friendliness:** There is a lack of knowledge about available quality housing that will allow an older adult to age in place successfully; there is only limited availability of federally subsidized housing (i.e., Sections 202 and 811: <http://www.hud.gov/offices/hsg/mfh/progdesc/eld202.cfm>) and housing assistance (i.e., Section 8: <http://www.hapdx.org/resident/sc8intro.html>).
- **Suggestions:** Provide a continuum of housing and care options that allow individuals to age in place within their neighborhood; explore the development and implementation of multigenerational and co-housing/cooperative housing environments that cut costs, offer shared facilities (e.g., community and dining rooms), and foster a sense of community, but recognize that these options will appeal to only some older adults; promote the current zoning allowance of ADUs as a viable and affordable option for older adults or for their caregivers or family, or for renting out as a source of additional income; explore the possibility of a public program to facilitate the development of quality and appropriate ADUs in Portland; educate older home buyers concerning how best to age in place (e.g., find housing with services and transit nearby); develop an understanding of older adults’ needs and preferences among realtors and developers.

Proximity to Services

- **Age-friendly feature(s):** Some housing in Portland is located very near to services and social activities; housing located near transit lines affords older adults easier access to services; downtown Portland offers free public transportation and a wealth of services and activities for older adults; some centers and corridors in Portland provide for a range of transportation options, a variety of businesses, housing opportunities, and urban amenities), and are especially beneficial for older adults (see Metro’s 2040 plan: <http://www.metro-region.org/article.cfm?articleid=231>).
- **Barrier(s) to age-friendliness:** Some housing in suburban and/or low-density areas is located far from public transportation options and important services used by older adults; some areas in Portland are designed for automobile access and limit the ability of older adults who do not drive to access services; some commercial and residential areas lack important businesses and services (e.g., grocery stores, pharmacies).

- **Suggestions:** Locate new age-specific developments (e.g., assisted living, co-housing) near services (e.g., grocery stores, parks, public transit options); ensure developments near planned centers and corridors are accessible, available, and affordable to older adults; develop links between programs for children and older adults (e.g., safe routes to schools/community centers); locate key services (e.g., grocery stores, pharmacies) in areas where there are large or growing populations of older adults; co-locate more services for older adults.

Housing Design, Amenities, and Accessibility

- **Age-friendly feature(s):** Some housing (e.g., single story) exists that facilitates aging in place; easy access to green spaces and gardening spaces is available in some units; some older adults feel that having multiple levels in housing (e.g., two stories) helps maintain physical well-being, as stairs must be climbed; some redevelopment and remodeling projects create accessible housing for older adults; many assisted living facilities and other care settings provide quality options for older adults to age with dignity; there are age-specific housing options that provide desirable living environments.
- **Barrier(s) to age-friendliness:** Higher density and infill developments are often built with stairs and multiple levels that make aging in place difficult and do not take older adults or those with functional impairments into consideration during design and development; there is a lack of housing that is appropriate for those with dementia or other cognitive disorders; there is a lack of housing that allows older adults or those with disabilities to age in place; there is little easily adaptable housing or housing that is universally designed (http://www.aarp.org/families/home_design/universaldesign/a2004-03-23-what_is_univdesign.html); limited housing options are available that allow pets to live with residents.
- **Suggestions:** Develop housing with green spaces, gardening areas, and balconies; allow pets in housing for older adults; for new developments, consider design possibilities to make them more accessible to an aging population (e.g., elevators in smaller buildings, town homes with accessible ground floor units); install higher toilets, higher electrical outlets, and door levers instead of handles for those with physical and cognitive disabilities; consider allowing accessibility improvements made by renters in housing to remain rather than requiring the unit to be restored to its original condition; design apartments and other shared housing for older adults to have windows facing hallways to foster a sense of community and safety; change building codes to require better accessibility in all homes; consider designing new housing to accommodate not only residents but also visitors with disabilities; develop an adequate supply of housing that has level entries (or ramps), first-floor bathrooms, rocker light switches, and wide hallways and doorways for wheelchair entry; provide seating and waiting areas outside of housing; develop single-level housing or multi-level housing with elevators or ground floor units;



(Two-story townhouse without level entry)

“A reporter [called] me and [told] me he was writing an article about new homes in the Portland area - brand new construction built to be accessible - and I laughed and said it would be a very short article.” – Professional Designer

develop flexible housing that can be easily converted into multiple dwellings and/or remodeled to add accessible features (e.g., grab bars); reduce glare on floors (e.g., avoid direct light shining on floor, use blinds and dimmers); eliminate dramatic changes in floor color; remodel housing so that it appears similar to prior living arrangements to aid those with cognitive impairment; install radiant heating in floors; place locks on doors and cabinets (such as those with cleaning supplies and install security systems and/or other technologies to help keep safe individuals with cognitive impairments).

Respect and Social Inclusion

Language, Recognition, and Consultation

- **Age-friendly feature(s):** Those aged 65 and older, Medicare members and persons with disabilities are recognized as “Honored Citizens” by TriMet (Portland’s regional transportation provider) and other agencies; some organizations publicly recognize the contributions of older adults; some organizations and agencies actively seek input from older adults (e.g., the Mayor’s office consulted Elders in Action for input concerning hopes and ideas for the future of Portland: <http://www.visionpdx.com/>; input was also sought for the Coordinated Human Services Transportation Plan for the tri-county Portland Metro Area: http://www.trimet.org/pdfs/publications/Coordinated_Human_Services_Transportation_Plan.pdf).
- **Barrier(s) to age-friendliness:** Service providers and older adults feel that some language used in the community establishes negative images of aging (e.g., “long-term care,” “anti-aging”); some older adults feel that their contributions to the community are not adequately appreciated or recognized; some older adults feel that their input is not sought out often enough from organizations and agencies in the community.
- **Suggestions:** Use language such as “honored citizen” rather than “old people,” “elderly” to refer to older adults; use the term “long-term living” rather than “long-term care;” publicly recognize the contributions of older adults; encourage more organizations and agencies to consult and listen to the advice of older adults.

Fare Category	Price
Adult • All Zones	\$2.05
Adult • 1 or 2 Zones	\$1.75
Honored Citizen 65+, Medicare or disability	\$.85
Youth/Student 7-17 or high school/GED	\$1.40

Education

- **Age-friendly feature(s):** There are many opportunities for education in the city; the Senior Adult Learning Center in the Institute on Aging at Portland State University (<http://web.pdx.edu/~psu01435/salc.html>) provides classes tuition-free to adults aged 65+; Portland Community College offers discounts on degree and non-degree classes for those aged 62+ (<http://www.pcc.edu/resources/tuition-fees/>); various organizations provide community and professional education regarding aging, caregiving, and other important topics that pertain to older adults (e.g., Elders in Action: http://www.eldersaction.org/whatwedo/community_education.php; the Institute on Aging at Portland State University: <http://www.upa.pdx.edu/IOA>; the Oregon Geriatric Education Center: <http://www.upa.pdx.edu/OGEC>; the Oregon Gerontological Association: <http://www.oregongero.org>).
- **Barrier(s) to age-friendliness:** Education regarding the process of aging throughout the life course is not as widely available as it should be.
- **Suggestions:** Educate those of all ages, including service providers, businesses, caregivers, etc., about the process of aging and the needs, assets, and contributions of older adults and those with disabilities, and debunk the myths and stereotypes about aging.

Intergenerational Events and Activities

- **Age-friendly feature(s):** Intergenerational activities are promoted by some agencies in Portland (e.g., Neighborhood House: <http://www.nhweb.org/programs/>; Portland Parks and Recreation: http://www.portlandonline.com/parks/index.cfm?c=djidd#cid_93132).
- **Barrier(s) to age-friendliness:** Events such as concerts, movies, public hearings, and cultural activities often have no accessible seating or assistive devices (e.g., hearing, vision).
- **Suggestions:** Continue to support intergenerational interaction and activities; designate preferred seating arrangements for frail older adults and those with disabilities; ensure that public meetings have proper equipment for those with functional impairments (e.g., adequate sound systems).

Transportation

- **Age-friendly feature(s):** Public and non-profit transportation providers such as TriMet and Ride Connection (i.e., RideWise) train vehicle operators to understand the special needs of older adults and those with disabilities; older adults feel that most public transit patrons are respectful and courteous.
- **Barrier(s) to age-friendliness:** Some older adults feel that some patrons do not demonstrate respect, courtesy, or politeness while on public transportation (many mentioned younger riders being the biggest problem); some older adults feel that it is disrespectful that some riders on light rail trains do not pay for their trips.
- **Suggestions:** Have public transit operators or security guards enforce and/or announce “honored citizens” seating arrangements; consider security on light rail trains and enforcing payments for riders outside of “Fareless Square” (the free public transit zone in the central city).



Social Participation

Educational Activities

- **Age-friendly feature(s):** Some colleges and universities offer free classes for those aged 65+ (e.g., the Senior Adult Learning Center at the Institute on Aging at Portland State University: <http://web.pdx.edu/~psu01435/salc.html>) or discounts on degree and non-degree classes for those 62+ (e.g., Portland Community College: <http://www.pcc.edu/resources/tuition-fees/>); various other non-academic educational opportunities exist in Portland for older adults as well (e.g., OASIS (<http://www.oasisnet.org/portland/>) and Life by Design Northwest, which is a partnership among nine major institutions in Portland to support people contemplating retirement and older adults by providing opportunities for in-depth assessment and life planning, lifelong learning, and civic engagement (<http://www.lifebydesignnw.org/aboutus.php>)).
- **Barrier(s) to age-friendliness:** Older adults who are better educated, more secure financially, or who live near educational institutions and facilities use these services most often.
- **Suggestions:** Inform all older adults about the many educational opportunities that exist in the city.

Physical Activity

- **Age-friendly feature(s):** Portland has many programs and opportunities for older adults to engage in physical activity (e.g., Portland Parks and Recreation; the YMCA, which offers programs for people with Parkinson’s Disease: <http://www.metro-ymca.org/parkinsonsprogram.html>) (also see the Outdoor Spaces section of this report); parks, trails, public spaces, malls, and other areas of the city offer locations for physical activity; existing programs are relatively affordable.
- **Barrier(s) to age-friendliness:** Rainy and cold weather for several months of the year can deter some older adults from outdoor physical activity.
- **Suggestions:** Encourage physical activity among individuals of all ages, through the funding of additional demonstration programs (e.g., the ABLE program at Terwilliger Plaza: <http://www.agingblueprint.org/MiniGrants/TPgrant.cfm>) and through creating walkable and bikeable communities, as these help to maintain physical well-being as well as facilitate social participation.

Engagement in Various Activities

- **Age-friendly feature(s):** Neighbors provide support and opportunities for engagement in some communities; there are many cultural opportunities and activities available in Portland neighborhoods; many activities are affordable and located conveniently; adult day services provide caregivers with the opportunity for social interaction and a break from caregiving responsibilities (e.g., Volunteers of America: <http://www.voao.org/service/senior.html>); there are many places for dining out in Portland, which can be a positive social experience for older adults and their caregivers as well.
- **Barrier(s) to age-friendliness:** Dining out with individuals who have cognitive impairments is seen as difficult for some caregivers.
- **Suggestions:** Open more community centers or public meeting locations in areas where many older adults live; encourage more multicultural activities within neighborhoods; service providers suggest creating vibrant centers that fall in line with Portland’s current plan for higher density and compact urban development that fosters social interaction (e.g., through creation of additional recreational space, enhanced access to convenient services, housing features that increase social contact).

“[My mom] really appreciated coming up here in my old neighborhood... [there are] a lot of people walking their dogs, so it [is] entertainment for her, so she really [enjoys] that.”

– Caregiver

Animals and Pets

- **Age-friendly feature(s):** Older adults and caregivers feel that opportunities to interact with people and their pets are available in Portland, as are places to view and enjoy wildlife; some establishments allow pets inside (e.g., the Lucky Labrador: <http://www.luckylab.com/>); some care providers recognize the importance of animals in the lives of older adults, and some facilities have “pet therapy” animals.
- **Barrier(s) to age-friendliness:** Many housing units and most commercial establishments do not allow pets inside their buildings.
- **Suggestions:** Allow pets and animals in more residential housing units; encourage the use of service and therapy animals in care facilities and in social programming with older adults and individuals with disabilities.



“Most of my activities revolve around the church...there’s something going on at the church every day of the week... because [my aunt] was so active in working with the church and church activities, I know that’s where she likes to go because she lightens up; she turns into a different person.”
- Caregiver



Religion and Spirituality

- **Age-friendly feature(s):** Many religious and spiritual opportunities exist throughout Portland.
- **Barrier(s) to age-friendliness:** Some older adults feel that Portland is not a very religious city.
- **Suggestions:** For people who are caring for individuals with cognitive impairment, attend familiar events such as church services with the elder; explore alternative spiritual endeavors (e.g., Garden Partners: http://www.gardenpartners.org/who_we_are/our_story.html).

Communication and Information

Multnomah County Aging and Disability Services Helpline (503.988.3646)

- **Age-friendly feature(s):** The county’s telephone hotline, the Helpline, is staffed 24 hours a day, seven days a week, and provides callers access to “a real, live person” for information about services for older adults; interpretation service in many languages is offered as part of the Helpline.
- **Barrier(s) to age-friendliness:** There is a lack of knowledge and use of the Helpline by some older adults.
- **Suggestions:** Continue operating the Helpline, and educate older adults about its existence and utility.

Internet Communication and Information

- **Age-friendly feature(s):** A vast amount of information is available on the internet (e.g., Network of Care: <http://oregon.networkofcare.org/>; Elders in Action: <http://www.eldersaction.org/>); internet access is available at public institutions such as universities and libraries; classes are available on how to use the internet and computers (e.g., at Multnomah County Library).
- **Barrier(s) to age-friendliness:** There is a lack of knowledge and understanding of technology such as computers and the internet on the part of some older adults; not all older adults have access at home to a computer and/or the internet.
- **Suggestions:** Create a comprehensive information website for older adults that is easily navigable; have older adults teach their peers how to use computers; ensure that information is distributed in ways other than just electronically, as not all older adults use computers and the internet.

Agencies and Organizations that Provide Information and Programs for Older Adults

- **Age-friendly feature(s):** Public institutions such as the libraries, Multnomah County Aging and Disability Services, and Portland Parks and Recreation provide information pertaining to older adults; there are radio and television programs geared toward older adults (e.g., Oregon Public Broadcasting and Senior Showcase, which is a local cable television show where older adults produce their own programs on lifestyles, hobbies, issues, entertainment, and information); TriMet has telephone and internet transportation planning information (tel. 503.238.7433; <http://www.trimet.org/>) and Senior and Disabled Citizen Information (tel. 503.962.2455); Ride Connection coordinates available transportation services and provides education and information for riders of public and special transit.
- **Barrier(s) to age-friendliness:** There is no central clearinghouse for print information; some older adults feel there is a general lack of access to services and information.
- **Suggestions:** Create a central clearinghouse for information (e.g., in local newspapers, on a website, at a grocery store); encourage people to use the public library to access information, including via the internet; create and distribute a local calendar of senior events at key locations (e.g., grocery stores, community centers).



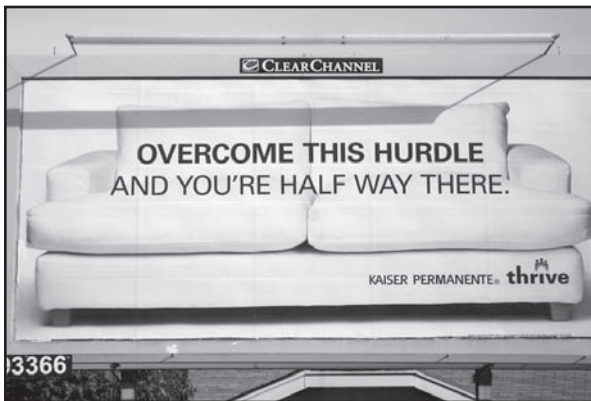
Civic Participation and Employment

Volunteer Opportunities/Civic Engagement

- **Age-friendly feature(s):** Several organizations, such as Elders in Action (<http://www.eldersaction.org/>) and Life by Design Northwest (<http://www.lifebydesignnw.org/aboutus.php/>) via Hands-On Portland (<http://www.handsonportland.org/>), have a number of ways for older adults to become civically engaged, such as through volunteer work that focuses on personal advocacy (e.g., preventing ID theft), community education (e.g., accessing public transportation); elder-friendly business/web evaluation, fundraising, getting involved in a committee that provides advice, direction, and advocacy for issues pertaining to older adults to local policy makers, volunteering with local non-profit organizations; there are opportunities to be engaged in volunteer activities through religious organizations; there are volunteer opportunities that allow for flexibility in schedules and commitments.
- **Barrier(s) to age-friendliness:** Volunteer opportunities for those with cognitive impairments are limited; some older adults lack motivation or access to information about volunteer opportunities, especially lower-income older adults; often the same people are involved in many of the volunteer activities; volunteer opportunities that are rigid in their schedules and time requirements are not as desirable; some feel age discrimination is present in volunteer opportunities.
- **Suggestions:** Involve older adults who are not typically engaged in volunteer activities (e.g., those with lower incomes, less education); develop volunteer opportunities for those with physical and cognitive impairments.

Employment Opportunities

- **Age-friendly feature(s):** Several companies in Portland employ and value the contributions of older adults (e.g., New Seasons Market: <http://www.newseasonsmarket.com/>), offer job placement services for older adults (e.g., Seniors Make Sense: tel. 503-533-2768) and persons with disabilities (e.g., Employed Persons with Disabilities: <http://www.oregon.gov/DHS/spw/pd/employ/empsev.shtml#epd>).
- **Barrier(s) to age-friendliness:** Age discrimination is seen as a barrier by some older adults, caregivers, and service providers; employment options for older adults are limited; the lack of computer skills on the part of some older adults is a barrier to employment; jobs that lack schedule flexibility are problematic.
- **Suggestions:** Educate employers concerning the benefits of hiring older adults.



“How do we preserve and [enhance] an individual’s assets as they age...we’ve talked about prevention forever, but I’d like to think we’re beginning to really take it seriously... I think both [older adults and health care providers] benefit if we can really focus on prevention.”

– Service Provider

Community Support and Health Services

Health Services

- **Age-friendly feature(s):** Some older adults feel that Portland offers quality health services (e.g., Oregon Health and Science University: <http://www.ohsu.edu/>) and a range of alternative health care options for older adults (e.g., National College of Natural Medicine: <http://www.ncnm.edu/>); some feel insurance plans benefit older adults (e.g., Providence ElderPlace: http://www.providence.org/Long_Term_Care/Elderplace/default.htm; Oregon Health Plan: <http://www.oregon.gov/DHS/healthplan/>); preventive services are offered (e.g., Kaiser Permanente: <http://members.kaiserpermanente.org/kpweb/entryPage.do?cfe=032>).
- **Barrier(s) to age-friendliness:** There is a lack of affordable health care; there is a lack of physicians and dentists with adequate training in geriatrics; some health care provided is of poor quality; acute care services are more available than preventative services; there is poor access to health care; some feel there is a lack of oversight of nursing and assisted living facilities; some older adults lack health insurance.
- **Suggestions:** Support the development of universal health care; train more doctors, dentists, and health care professional in geriatrics; develop a health care system that strives for a balance between preventive and acute care services for people of all ages.

Community-Based Social Services

- **Age-friendly feature(s):** A wide range of public and private non-profit community services is available (e.g., Volunteers of America: <http://www.voa.org/>; Alzheimer's Association: <http://www.alz.org/oregon/>; Goodwill Industries: http://www.meetgoodwill.com/testim_home.html; see Network of Care for many others: <http://networkofcare.org/home.cfm>); there are services that assist older adults to remain living in their communities, such as Oregon Project Independence (http://www.co.multnomah.or.us/ads/ads_services.shtml) and Loaves and Fishes' Meals-on-Wheels (<http://www.loavesandfishesonline.org/>); there are community organizations that provide personal advocates who speak with health care providers (e.g., Elders in Action: <http://eldersinaction.org/whatwedo/advocate.php>); service providers are beginning to co-locate services; neighbors and others in the community offer assistance with caregiving and health-related needs.
- **Barrier(s) to age-friendliness:** Some individuals lack knowledge or information about available programs; there have been large cutbacks in the funding of social and health services; there is a lack of adequate staffing and a lack of trained providers; regulations that require excessive paperwork to be completed by staff pose barriers to service; income and age eligibility requirements limit access.
- **Suggestions:** Encourage the co-location of various services; form partnerships between organizations to enhance available funding, deliver more efficient and effective services, and increase the responsiveness of services (e.g., culturally-appropriate meals); provide additional funding for programs that deliver quality services to older adults and people with disabilities; train staff and service providers on the needs of older adults and people with disabilities; reduce paperwork and bureaucracy in the service delivery system; consider needs-based rather than age- or income-based service delivery.



Conclusion

These findings emerged from a series of focus groups convened with older adults, family caregivers of older adults, and providers of services in the public, private, and voluntary/non-profit sectors. Participants identified important needs of older adults, as well as valuable assets that this population possesses, and suggestions for changes were made, either directly by participants or extrapolated from participants' comments (full report available at: <http://www.upa.pdx.edu/IOA/>).

It is clear that Portland currently has many age-friendly features, such as its numerous green spaces and natural features, its transportation system, and a wealth of services, as well as activities in which older adults can participate. At the same time, there is room for improvement. Inequities exist in regard to access to affordable housing, services, and health care.

This project does not represent the first effort to make Portland a better place to live for older adults. Indeed, service providers and advocates within the city and region have been working toward this end for a long time and with considerable success. The findings from this study help both to highlight some of these successes and to signal areas needing improvement. The results serve as a call to action to all of us - public officials, businesses, voluntary organizations, providers of senior and health services, older adults themselves, citizens of all ages. Preparing for our increasingly older population will benefit us all, and the time to begin is now: *An age-friendly city is a city that is friendly for people of all ages and abilities.*

Additional Resources Regarding Livable Communities

Resources from AARP (order from www.aarp.org/research/)

- A Report to the Nation on Livable Communities: Creating Environments for Successful Aging (D18316)
- Livable Communities: An Evaluation Guide (D18311)
- Home Modification (D18524)
- Universal Design and Home Modification (D16691)
- Home Made Money: A Consumers Guide to Reverse Mortgage (D12894)
- Your Home and Community: Are they Ready for You (D18566)
- Beyond 50: Livable Communities Quiz - www.aarp.org/beyond50
- Community Exchange is AARP's new web area devoted to housing and mobility issues and to living the richest and fullest lives we can live - <http://communityexchange.aarp.org/>
- AARP Bulletin - <http://www.aarp.org/bulletin/> Check out the 9/07 issue on StreetSmart
- AARP Magazine - <http://www.aarpmagazine.org> Check out the Location Scout and the 9/07 issue that features an article on 5 Great Places to Live (and Retire).

Northwest Initiatives

- Lake Oswego 50+ Dialogue Report - www.ci.oswego.or.us/acc/news.htm
- Elders in Action Elder Friendly Business Certification - www.eldersinaction.org/whatwedo/elderfriendly
- Housing Authority of Portland; New Columbia - www.hapdx.org/newcolumbia/index.html
- Clark County Initiatives - www.clarkcommunitychoices.org/ and www.stepstohealthierclarkco.org/

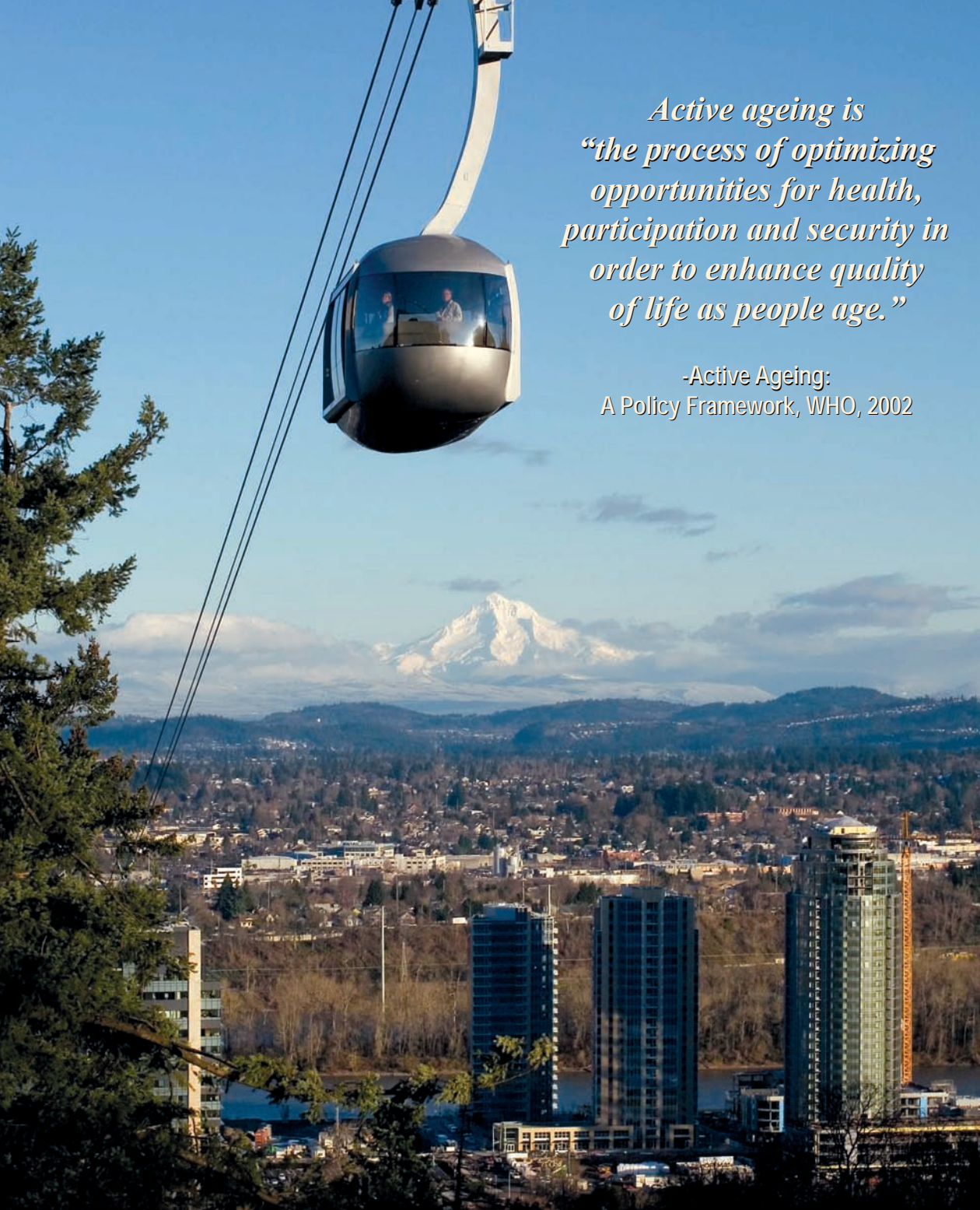
Other Regional Initiatives

- Beacon Hill - www.beaconhillonline.com/cgi-bin/index.cgi
- Traverse City, MI - www.tlcsurvey.org/
- Atlanta, GA - www.atlantaregional.com/cps/rde/xchg/arc/hs.xsl/467_ENU_HTML.htm and <http://dp06lcc.d-p.com/>
- Chicago HOME - www.homeseniors.org/inter/
- Georgia (Easy Home Living) - www.easylivinghome.org
- Burlington Livability Project - www.snellingcenter.org/filemanager/download/5881



Additional National Resources:

- NeighborWorks - www.nw.org/network/comstrat/agingInPlace/nwresources.asp
- Partners for Livable Communities - www.livable.com/
- Aging in Place Initiative - www.aginginplaceinitiative.org
- Coalition for Livable Future - www.cfuture.org/
- Viable Futures Toolkit - www.viablefuturestoolkit.org
- Walkable Communities - www.walkable.org
- Complete Streets - www.completestreets.org/
- US EPA Active for Life Initiative - www.epa.gov/aging/bhc/lnaa/index.htm
- Civic Ventures - www.civicventures.org/
- The AdvantAge Initiative - www.vnsny.org/advantage/
- Center for Civic Partnership - www.civicpartnerships.org/docs/home/Aging_Brief_Summary.htm
- Easter Seals Project ACTION - <http://projectaction.easterseals.com>
- Association of Metropolitan Planning Organizations - www.ampo.org/



*Active ageing is
“the process of optimizing
opportunities for health,
participation and security in
order to enhance quality
of life as people age.”*

-Active Ageing:
A Policy Framework, WHO, 2002

Credit: Tim Jewett

For additional information, please contact:

Portland State University - Institute on Aging

P.O. Box 751, Portland, OR 97207-0751

Web: www.ioa.pdx.edu; Fax: 503.725.5100

Dr. Margaret Neal at 503.725.5145 or nealm@pdx.edu

or

Alan DeLaTorre at 503.544.7532 or aland@pdx.edu

Materials following this page were distributed at the meeting.



Oregon

John A. Kitzhaber, M.D., Governor

Department of Transportation
Highway Division Administrator
4040 Fairview Industrial Drive, MS #1
Salem, OR 97302
503-986-3305

April 29, 2011

TO: Matthew Garrett, Director
Jerri Bohard, Deputy Director for Operations
Gregg Dal Ponte, Motor Carrier Division Administrator
HLT membership
PDLT membership
PBLT membership
MLT membership
Christy Jordan, Motor Carrier Over Dimension Permits
Michael Bufalino, Freight Mobility Planner
Region Mobility Liaisons

FROM: Paul Mather, Highway Division Administrator

On March 17, 2011, the Highway Leadership Team (HLT) approved a revised guidance and process document for implementation of ORS 366.215 (No Reduction of Vehicle-Carrying Capacity). This revised guidance and process document replaces the current guidance previously approved by HLT and addresses issues regarding consistency, definitions and clarity. Developed by Transportation Development Division (TDD), the updated guidance and process document has been reviewed and discussed by multiple business line teams, including HLT, PDLT, PBLT, MLT, and MCTAC.

Effective immediately, all business functions within the Department must follow the updated process, including Planning, Project Delivery, Development Review, and Maintenance. Please share this information with other staff and work groups within your business lines, units, and teams.

Various related manuals and documents will be updated accordingly and TDD will provide a Frequently Asked Question document in the next few weeks.

If you have questions, please contact:

Erik Havig, Interim Planning Section Manager, 503.986.4127

Robin Marshburn, Senior Transportation Planner 503.986.3696

Guidelines for Implementation of ORS 366.215 No Reduction of Vehicle-Carrying Capacity

Approved by HLT 03/17/11

General

This guidance document applies to all projects in planning, project development, development review and maintenance projects. The statute is presented on page 3. Page 4 of this document consists of a flow diagram of the process to use to implement this statute.

Hole-in-the-Air

The term hole-in-the air refers to the entire roadway, not just the load on the road at any particular moment. We need to think of a Reduction of Vehicle-carrying Capacity (RVC) the same way the freight stakeholders do - if they can get through the highway segment today, they want to get through there tomorrow. Assume that a proposed change reduces capacity if this condition is no longer true. Proposed striping changes that have the effect of narrowing lanes and/or the overall usable width of a highway are considered as affecting the hole-in-the-air.

Applicable Highways

The ORS 366.215 routes consist of the Oregon Highway Plan (OHP) freight routes, the National Network and seven additional routes. Link to [ORS 366.215 routes](#).

All projects that have the potential to reduce the hole-in-the-air (regardless of what highway they are on) must follow the process shown in the flow diagram on page 4.

Projects not on ORS 366.215 routes must follow the process in the flow diagram through Step 2a.

Projects on ORS 366.215 routes must follow the process in the flow diagram to the appropriate endpoint (Step 3a, 4 or 5b).

Communications

Communication should take place early on with your Region Mobility Liaison, the MCTD and freight stakeholders. Contact the MCTD Freight Mobility Coordinator (503-378-6192) to find out if a proposed change would reduce the hole-in-the-air. This determination could be usually be made via email. If the proposed change would reduce the hole-in-the-air, contact the Over-Dimensional Permit Coordinator to schedule a meeting with the freight stakeholders to obtain their input.

The ODOT sponsor for the proposed project or design feature is typically Planning, District or Project Delivery staff directly involved. The project sponsor should document the outcome of each step and communicate with the local government (if appropriate) throughout this process.

MCTD Needs

1. Location map, highway milepoints.
2. Brief description of the problem or issues. Be very clear and thoughtful about describing the need for and importance of the proposed change (e.g. safety, operations, livability, economics).
3. Brief description of the proposed change.
4. Diagram of the existing roadway cross section
 - Widths for travel lanes, shoulders, bike lanes, medians, parking, curb to curb dimensions, etc.Description of any existing structures or obstacles in the right-of-way that may impact the hole-in-the-air such as signs, guardrails, landscaping, or other roadside features .
(Need to consider features beyond the face of curb because there is overhang or off-tracking with some over-dimensional loads.)
5. Information on other pinch points on the highway near the proposed project.
(Example – the block to the west of the proposed project has a cross section with travel lanes that are two feet less in width than the width at the project site.)
6. Diagram of the proposed roadway cross section along with any existing or proposed structures or obstacles in the right-of-way that may impact the hole-in-the-air such as medians, landscaping, signs, or other roadside features.

Freight Stakeholder Review

Meeting with the statewide freight stakeholders to discuss your project is the key step in this process. In some cases, design issues can be resolved to the point where the freight stakeholders do not consider the project to be a RVC. Likewise, a proposed project may actually reduce the highway dimensions, but not significantly enough to impede the movement of over-dimensional freight. When either of these conditions occurs, the net effect is a finding of No RVC from the freight stakeholders. These are the types of situations that would lead to Step 3a. of the flow diagram.

It is entirely possible that after you meet with the freight stakeholders there is disagreement about whether or not the project should go forward. Disagreement does not mean that the proposed change is without merit. If the RVC is not supported by the freight stakeholders, there are two options to bring requests forward. First, if ODOT determines the proposed action is necessary for safety or access reasons, then the Region Manager can request approval from the OTC. The second option is if there is support for the change by the local government, then the project can be brought before the OTC as indicated in the flow diagram.

Oregon Transportation Commission (OTC) Action

All RVC determinations on ORS 366.215 routes that are unacceptable to the freight stakeholders need OTC approval. The OTC can approve the RVC if safety or access considerations require the

reduction. The OTC can also approve an exemption of the statute at the request of a local government where the OTC finds the action to be in the best interest of the state and freight movement is not unreasonably impeded.

Under either option, the ODOT sponsor prepares an OTC packet, identifying the formal requestor (ODOT or the local agency) and requests approval of the RVC exemption of the statute. All requests must be in accordance with the Highway Program Office requirements and are scheduled for an upcoming OTC meeting.

The OTC packet should include a cover memo, a letter of request from the local agency and/or ODOT Region, a staff report from region staff stating why the RVC or the exemption should be approved or disapproved, information on stakeholders (including freight) support or non-support of the request, and a map.

These are the minimum required items to be included in the packet. Depending on the proposal, there may be other items that should be included in the packet. The appropriate stakeholders should be informed of the upcoming OTC meeting well in advance.

Planning Projects

ORS 366.215 applies to all aspects of ODOT's work including planning and affects documents such as, but not limited to Transportation System Plans, refinement plans, and facility plans. Planning documents that propose features that could be a RVC must be in compliance with the statute. Regions may decide to obtain approval for proposed future actions by following this process guideline. However, most planning level documents do not contain the level of detail often required to determine if the action is a RVC or would be supported by the freight stakeholders. In most cases, it is best to wait until project implementation to follow this process. In these cases, it is encouraged for planning documents to include the following statement or equivalent.

Planning concept potentially reduces vehicle-carrying capacity of the highway; further evaluation of the project design will be required at the time of implementation to ensure compliance with ORS 366.215.

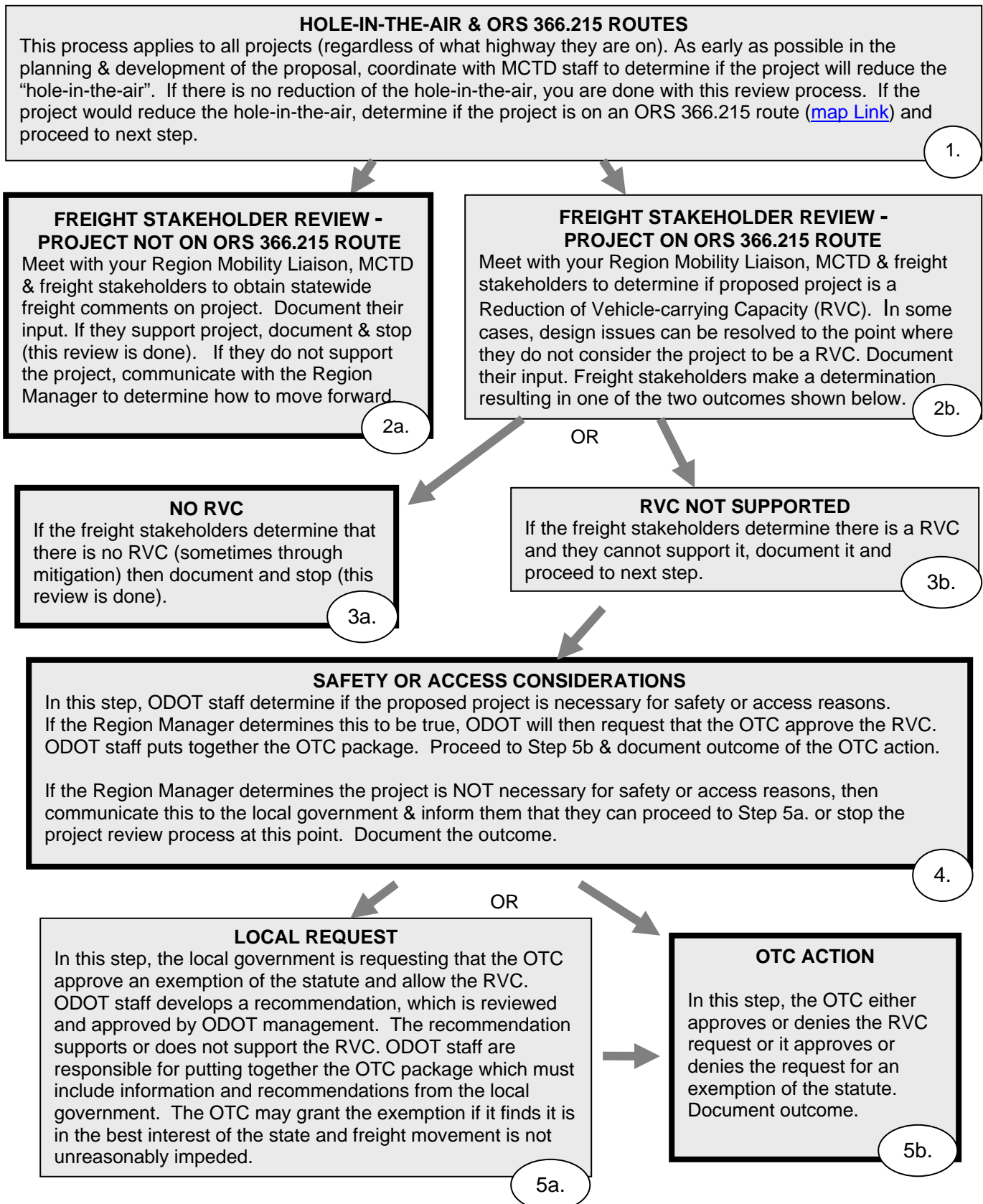
ORS 366.215 Creation of State Highways; Reduction in Vehicle-Carrying Capacity

(1) The Oregon Transportation Commission may select, establish, adopt, lay out, locate, alter, relocate, change and realign primary and secondary state highways.

(2) Except as provided in subsection (3) of this section, the commission may not permanently reduce the vehicle-carrying capacity of an identified freight route when altering, relocating, changing or realigning a state highway unless safety or access considerations require the reduction.

(3) A local government, as defined in ORS 174.116, may apply to the commission for an exemption from the prohibition in subsection (2) of this section. The commission shall grant the exemption if it finds that the exemption is in the best interest of the state and that freight movement is not unreasonably impeded by the exemption. [Amended by 1977 c.312 §2; 2003 c.618 §38]

ORS 366.215 - No Reduction of Vehicle-Carrying Capacity FLOW DIAGRAM



REVISED Public Review and Comment Period Notice

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>. The edits to the OHP provide a reference to an important part of the review or the review process of the design of highway projects.

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 **July 18** meeting in Salem. **Please send your comments to ODOT by June 5, 2012.**

Please contact Michael Bufalino if you have any questions or comments at 503-986-3208. Please email any public comments to: Michael.bufalino@odot.state.or.us or mail them to: 555 13th St NE, Ste 2, Salem, OR 97301, Attn Michael Bufalino

The following pages contain the proposed OHP changes.

**1999
OREGON
HIGHWAY
PLAN**



**Policy
Element**

1 Policy Element

2 Goal 1: System Definition

3 *To maintain and improve the safe and efficient movement of people*
4 *and goods and contribute to the health of Oregon's local, regional,*
5 *and statewide economies and livability of its communities.*

6 Overview

7 The state highway classification system divides state highways into five categories
8 based on function: Interstate, Statewide, Regional, District, and Local Interest
9 Roads. Supplementing this base are four special purpose classifications: land use,
10 statewide freight routes, scenic byways, and lifeline routes. These address the special
11 expectations and demands placed on portions of the highway system by land uses,
12 the movement of trucks, the Scenic Byway designation, and significance as a lifeline
13 or emergency response route. Information contained in these special designations
14 supplement the highway classification system and will be used to guide management,
15 needs analysis, and investment decisions on the highway system.

16 The System Definition section also includes policies on highway mobility standards
17 and major improvements, which further define state highway management goals
18 and objectives.

19 STATE HIGHWAY CLASSIFICATION SYSTEM

20 Background

21 The 1991 Highway Plan's Level of Importance Policy classified the state highway
22 system into four levels of importance (Interstate, Statewide, Regional and District)
23 to provide direction for managing the system and a basis for developing funding
24 strategies for improvements. Realizing that limited funding would not allow all
25 the statewide highways to be upgraded, the 1991 Highway Plan also designated
26 some of the statewide highways as the Access Oregon Highway system to focus

The categories recognize that different highway types have importance for certain areas and users. The categories are not the same as the federal government's functional classification system. It is the responsibility of the Oregon Transportation Commission to establish and modify the classification systems and the routes in them.

Policy 1A: State Highway Classification System

It is the policy of the State of Oregon to develop and apply the state highway classification system to guide ODOT priorities for system investment and management.

Action 1A.1

Use the following categories of state highways, and the list in Appendix D, to guide planning, management, and investment decisions regarding state highway facilities:

- **Interstate Highways** (NHS) provide connections to major cities, regions of the state, and other states. A secondary function in urban areas is to provide connections for regional trips within the metropolitan area. The Interstate Highways are major freight routes and their objective is to provide mobility. The management objective is to provide for safe and efficient high-speed continuous-flow operation in urban and rural areas.
- **Statewide Highways** (NHS) typically provide inter-urban and inter-regional mobility and provide connections to larger urban areas, ports, and major recreation areas that are not directly served by Interstate Highways. A secondary function is to provide connections for intra-urban and intra-regional trips. The management objective is to provide safe and efficient, high-speed, continuous-flow operation. In constrained and urban areas, interruptions to flow should be minimal. Inside Special Transportation Areas (STAs), local access may also be a priority.
- **Regional Highways** typically provide connections and links to regional centers, Statewide or interstate Highways, or economic or activity centers of regional significance. The management objective is to provide safe and efficient, high-speed, continuous-flow operation in rural areas and moderate to high-speed operations in urban and urbanizing areas. A secondary function is to serve land uses in the vicinity of these highways. Inside STAs, local access is also a priority. Inside Urban Business Areas, mobility is balanced with local access.
- **District Highways** are facilities of county-wide significance and function largely as county and city arterials or collectors. They provide connections and links between small urbanized areas, rural centers and urban hubs, and

1 **Policy Element**

2 also serve local access and traffic. The management objective is to provide
 3 for safe and efficient, moderate to high-speed continuous-flow operation in
 4 rural areas reflecting the surrounding environment and moderate to low-speed
 5 operation in urban and urbanizing areas for traffic flow and for pedestrian
 6 and bicycle movements. Inside STAs, local access is a priority. Inside Urban
 7 Business Areas, mobility is balanced with local access.

- 8 • **Local Interest Roads** function as local streets or arterials and serve little or
 9 no purpose for through traffic mobility. Some are frontage roads; some are
 10 not eligible for federal funding. Currently, these roads are District Highways
 11 or unclassified and will be identified through a process delineated according
 12 to Policy 2C. The management objective is to provide for safe and efficient,
 13 low to moderate speed traffic flow and for pedestrian and bicycle movements.
 14 Inside STAs, local access is a priority. ODOT will seek opportunities to
 15 transfer these roads to local jurisdictions.

16 ***Action 1A.2***

17 By action of the Oregon Transportation Commission upon consultation with
 18 affected local governments, classify and/or develop Expressways as a subset of
 19 Statewide, Regional and District Highways.



20 *Expressways provide for high speed and high volume traffic with minimal interruption on*
 21 *highways like the Salem Parkway.*
 22

23 **a. Definition.** Expressways are complete routes or segments of existing two-
 24 lane and multi-lane highways and planned multi-lane highways that provide for

safe and efficient high speed and high volume traffic movements. Their primary function is to provide for interurban travel and connections to ports and major recreation areas with minimal interruptions. A secondary function is to provide for long distance intra-urban travel in metropolitan areas. In urban areas, speeds are moderate to high. In rural areas, speeds are high. Usually there are no pedestrian facilities, and bikeways may be separated from the roadway.

In this classification, “expressway” refers to the kind and number of accesses allowed on a highway segment. It does not refer to the ownership of access rights. Other characteristics include the following:

- Private access is discouraged;
 - There is a long-range plan to eliminate, as possible, existing approach roads as opportunities occur or alternate access becomes available;
 - Access rights will be purchased and a local road network may be developed consistent with the function of the roadway;
- Public road connections are highly controlled;
- Traffic signals are discouraged in rural areas;
- Nontraversable medians are encouraged; and
- Parking is prohibited.

b. Classification. Initiation of the process to classify Expressways will occur as a result of a corridor planning process, ODOT special study or action of the Transportation Commission.

Because of the importance of maintaining system mobility, the Transportation Commission will classify new Expressways as a subset of National Highway System (Interstate and Statewide) highways in consultation with local governments.

The Transportation Commission will classify new Expressways as a subset of Regional and District Highways with the agreement of directly affected local governments.

Highways that are already limited access will be automatically classified as Expressways by the Transportation Commission. These are highways where ODOT owns the access rights and direct access is not allowed and where users enter or exit the roadway only at interchanges.

c. **Criteria.** Highways proposed to be Expressways will be classified on the basis of the following criteria:

- Importance as an NHS route with high volumes of traffic;
- Designation as part of the Oregon Freight Plan Strategic Corridors;
- Designation as a part of the State Highway Freight System;
- Designation as a safety corridor; or
- Function as an urban bypass.

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The process of classifying segments as Expressways will first focus on highway segments where posted speeds are 50 miles per hour or greater.

Action 1A.3

Conduct a study of highway classifications statewide to determine whether highways function as they are classified. Conduct this study after the adoption of the Highway Plan as a special study of the classification system or as a part of corridor planning. Consider changing the classification of a state highway if the function of the highway has changed significantly since its original classification or the function does not fit the classification description. The classification change will be effective when the Oregon Transportation Commission adopts the change as part of a corridor plan or other planning process.

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LAND USE AND TRANSPORTATION³

Background and Intent

The federal Intermodal Surface Transportation Efficiency Act of 1991 requires the establishment of a National Highway System “to provide an interconnected system of principal arterial routes which will serve “interstate and inter-regional travel.” ODOT has an obligation to ensure that the National Highway System (the routes designated Interstates and most Statewide Highways and intermodal connectors) adequately performs this function of serving a larger geographic area. Historically, however, communities have grown up along the early trails and roads that have become statewide travel routes. This means that in addition to providing mobility for people, goods and services between communities, regions and states, the state highway system often also provides access to homes, businesses, industry and other destinations within communities.

³ The Land Use and Transportation Background and Policy were replaced in August 2005, OHP Amendment 05-16.

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The Land Use and Transportation Policy addresses the relationship between the highway and patterns of development both on and off the highway. It emphasizes development patterns that maintain state highways for regional and intercity mobility and supports compact development patterns that are less dependent on state highways than linear development for access and local circulation. The state highway classification system in Policy 1A is the framework used to address the relationship between mobility and accessibility. Interstates and Expressways are where mobility is emphasized. District and Regional Highways are where accessibility is more easily accommodated. Statewide highways are where accessibility and mobility are balanced.

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Policy 1B recognizes that state highways serve as the main streets of many communities, and the policy strives to maintain a balance between serving those main streets, freight movements and the through traveler. It emphasizes management of the transportation system for safety and efficient use of resources. The highway system's ability to address both mobility and accessibility depends in large part on community land use patterns and the ways that land uses are served by the transportation system. Development with numerous or poorly designed accesses along highways and incomplete street networks often focuses local traffic on state highways. Such patterns reduce the ability of state highways to move through traffic and provide connections between communities. Communities with compact urban design that incorporate well-designed access and transportation networks of arterials and collectors reduce traffic impacts on state highways and make communities safer for pedestrians.

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Policy 1B applies to all state highways. It provides guidance to ODOT regarding system management planning and implementation activities. It is designed to clarify how ODOT will work with local governments and others to link land use and transportation in transportation plans, facility and corridor plans, plan amendments, access permitting and project development. The role of ODOT and local governments in designating highway segments is to work together so that planned community development patterns are individually tailored yet also meet statewide highway needs for safety and mobility. Under most circumstances, the elements of Policy 1B are advisory and recommendations are provided to give local jurisdictions guidance to aid in transportation and land use planning along corridors. The intent of Policy 1B is that all urban commercial areas situated along state highways should aspire to the objectives and standards of this policy.

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Policy 1B implements the Oregon Transportation Plan's Urban Accessibility Policy to "assure balanced, multi-modal accessibility to existing and new development within urban areas to achieve the state goal of compact, highly livable urban areas." The Highway Plan's policies on Bypasses, Major Improvements, Highway Mobility Standards, Partnerships, Off-System Improvements, and Travel Alternatives complement the Land Use and Transportation Policy. The policy also supports and is consistent with the Land Conservation and Development Commission Transportation Planning Rule.

1 **Policy Element**

2 The overall goal and focus of the Land Use and Transportation Policy is to connect
3 land use and transportation in a way that achieves long-term objectives for the state
4 highway and the local community. In applying the policy, ODOT will recognize the
5 regional and topographical differences of communities throughout Oregon.

6 Focusing growth in more compact development patterns can have the following
7 transportation benefits:

- 8 • Reduction of local trips and travel on state highways;
- 9 • Shorter vehicle trips;
- 10 • More opportunity to walk, bicycle, or use available transit services;
- 11 • Increased opportunities to develop transit;
- 12 • Reduction of the number of vehicle trips to shop and do business; and
- 13 • Potential air quality enhancement and energy conservation.

14 ODOT acknowledges that the best way to implement the policy is to establish
15 cooperative working relationships with local governments. This includes a
16 commitment on ODOT's part to:

- 17 • Participate actively, early, and continuously in the development, review and
18 amendment of comprehensive plans, transportation system plans, facility plans,
19 downtown plans and periodic review;
- 20 • Look for creative and innovative transportation and land use solutions to
21 transportation problems;
- 22 • Work within the context of acknowledged land use plans and zoning; and
- 23 • Support planning and implementation of improvements within centers and
24 highway segments, as well as off-system improvements that benefit operation
25 of the state highway system.

26 The policy recognizes that:

- 27 • Local governments are responsible for planning and zoning land uses within their
28 jurisdictions and for developing and managing the local transportation system;
- 29 • ODOT is responsible for developing and managing the state highway system;

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Policy 1B provides the framework for supporting rules, standards, policies and guidance information. Reference to this supporting material is necessary for implementation of Policy 1B and is available electronically on the ODOT web site.⁴

Planning for and Managing Highway Segment Designations

Highway segment designations may generally be located within urban growth boundaries and urban unincorporated communities on District, Regional or Statewide Highways that are not on Interstate Highways or Expressways. All designations require clearly defined boundaries identified by milepoint and nearest cross street. Location of an STA or Commercial Center on a Statewide Highway that is also a designated OHP Freight Route requires development of a management plan approved by both ODOT and the local government. UBAs, which may be designated in commercial areas with posted speeds greater than 35 miles per hour, also require management plans.

As State Highway Freight Routes are reviewed and updated, it will become necessary for local governments to develop management plans for previously designated highway segments on newly designated Freight Routes on Statewide Highways when updating their transportation system plans or other legislatively mandated planning effort. Where management plans are not required, the elements are recommended planning and project development considerations, as applicable. Where management plans are required, the following elements are required, as applicable:

- Goals and objectives;
- Provisions for transition areas bordering highway segments to introduce the motorist to different highway functions and speeds;
- Design standards to improve local access and community functions, as applicable. These may include highway mobility standards, street spacing standards, signal spacing standards and street treatments.

⁴ Oregon Highway Plan and amendments: <http://www.oregon.gov/ODOT/TD/TP/orhwyplan.shtml>
Oar Chapter 734, Division 52: http://arcweb.sos.state.or.us/rules/OARS_700/OAR_734/734_051.html
ODOT Highway Design Manual: http://egov.oregon.gov/ODOT/HWY/ENGSERVICES/hwy_manuals.shtml
ODOT Statewide Transportation Improvement Program (STIP): <http://www.oregon.gov/ODOT/HWY/STIP/index.shtml>
ODOT Area Commissions on Transportation: http://www.oregon.gov/ODOT/COMM/act_main.shtml
ODOT Development Review Guidelines: <http://www.oregon.gov/ODOT/TD/TP/docs/publications/05drg.pdf>
ODOT Transportation System Plan Guidelines: <http://www.oregon.gov/ODOT/TD/TP/TSP.shtml>

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- Strategies for addressing freight and through traffic including traffic speed, possible signalization, parallel or other routes and actions in other parts of the corridor which address through traffic needs;
- Parking strategies which address the design characteristics of the STA, UBA, or Commercial Center designation;
- Provision for a network of local traffic, transit, pedestrian and bicycle circulation;
- An analysis of the regional and local traffic and safety impacts of the designation;
- Identification of needed improvements within the segments or improvements that will support access to the segment and designation of the party responsible for implementation, likely funding sources and anticipated time frame;
- Identification of maintenance and operational strategies to be employed;
- Coordination with local and statewide freight stakeholders during the design of projects that may reduce freight mobility on the highway (see information on ORS 366.215 on page 67.)

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Special Transportation Areas (STAs)

A Special Transportation Area (STA) is a designated district of compact development located on a state highway within an urban growth boundary in which the need for appropriate local access outweighs the considerations of highway mobility except on designated OHP Freight Routes where through highway mobility has greater importance.

While traffic moves through an STA and automobiles may play an important role in accessing an STA, convenience of movement within an STA is focused upon pedestrian, bicycle and transit modes. STAs look like traditional “Main Streets” and are generally located on both sides of a state highway. The primary objective of an STA is to provide access to and circulation amongst community activities, businesses and residences and to accommodate pedestrian, bicycle and transit movement along and across the highway. Direct street connections and shared on-street parking are encouraged. Local auto, pedestrian, bicycle and transit movements to the area are generally as important as the through movement of traffic. Traffic speeds are slow, generally 25 miles per hour or lower.

1 **Policy Element**2 ***Action 1B.1***

3 Actively pursue the objectives and designations in the Background, Intent and
4 Actions in Policy 1B, as appropriate, through:

- 5 • Access management planning and permitting;
- 6 • Facility and transportation system plans;
- 7 • Metropolitan planning organization and local transportation system plans;
- 8 • Periodic review of local comprehensive plans;
- 9 • Local planning and zoning amendments;
- 10 • Review of major development proposals that have a significant impact on a
11 state highway;
- 12 • Review of site acquisition and construction of proposed public facilities;
- 13 • Review of urban growth boundary amendments; and
- 14 • Highway facility design and project development.

15 ***Action 1B.2***

16 Use the rules, standards, policies and guidance developed by ODOT to implement
17 Policy 1B. These include but are not limited to Oregon Administrative Rule
18 Chapter 734, Division 51 on Access Management, the ODOT Highway Design
19 Manual, ODOT Transportation System Plan Guidelines and ODOT Development
20 Review Guidelines, [ORS 366.215 guidance on freight mobility \(see page 67\)](#),
21 LCDC Goal 12 on Transportation and the Transportation Planning Rule.

22 ***Action 1B.3***

23 Use the following categories to designate highway segments when the concept
24 is identified in a local transportation system plan, downtown plan, facility plan
25 or other adopted plan and is supported by both the local government and ODOT.
26 The categories, in part, define whether or not a management plan is required.
27 Written management plans are required for STAs and Commercial Centers
28 on designated Freight Routes on Statewide Highways. Management plans are
29 required for UBAs on any state highway where the posted speed is greater than
30 35 mph and a UBA designation is needed. As State Highway Freight Routes are
31 reviewed and updated, local governments will need to develop management plans
32 for previously designated highway segments when updating their transportation

STATE HIGHWAY FREIGHT SYSTEM⁹

Background

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According to the 2002 Federal Highway Administration's Analysis Framework, trucks carried nearly 76 percent of the total freight tonnage and 82 percent of the total freight value for the year. To ensure that freight is able to move efficiently on the state's major trucking routes, this plan designates a State Highway Freight System. The key criteria of freight volume, tonnage, connectivity, and linkages to National Highway System intermodal facilities were augmented in the 2005 [State Highway Freight Route](#) designation update. Other factors that were considered included connectivity to regional freight routes and freight routes in other states, percent of trucks on state highways to reflect urban/rural characteristics, freight generating sites and the implications of highway segment designations.

The primary purpose of the State Highway Freight System is to facilitate efficient and reliable interstate, intrastate, and regional truck movement through a designated freight system. This freight system, made up of the Interstate Highways and certain Statewide, Regional and District Highways, the majority of which are on the National Highway System, includes routes that carry significant tonnage of freight by truck and serve as the primary interstate and intrastate highway freight connection to ports, intermodal terminals, and urban areas.

Deleted: It supersedes and replaces the designation of primary freight corridors in the Oregon Transportation Plan. Freight routes designated on Regional or District Highways will be managed according to their highway classification.

In 2010, the OTC adopted the Oregon Freight Plan, which is a multimodal topic plan for the state's freight system. The OFP implements the Oregon Transportation Plan Vision and defines a strategic network of multimodal freight corridors. These freight corridors support a healthy economy by safely and efficiently moving goods within Oregon, the nation and to global markets. The OHP State Highway Freight System is consistent with the OFP strategic freight corridors and identifies state highways that are important for movement of freight by truck.

Freight depends upon timely and dependable movement of goods over the system; some industries structure their facilities and processes on just-in-time deliveries. Highway efficiency for goods movement in an expanding economy will require public and private investments in infrastructure as well as changes in road operations to reduce congestion on freight routes. Designating a network of freight routes of primary importance to the state implements the OTP and OFP and will help ensure that these investments are coordinated in a way that reinforces the unique needs of the freight system.

Improving and maintaining the efficiency of highway operations requires balancing the needs of freight movement with the needs of other users of the highway system. Some state highways that are important goods movement corridors also serve as communities' main streets and may be designated as Special Transportation Areas. It may be the objective of local officials to reduce or slow traffic passing through the town, with potentially adverse impacts to freight mobility. Therefore, a

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1 management plan will be developed that combines local land use planning needs
2 while recognizing the special significance of the freight route

3 ⁹The State Highway Freight System Background was replaced in August 2005, OHP Amendment
4 05-16.



1 **Policy Element**

2 designation. See Policy 1B which requires that STAs on Statewide Highways that
 3 are OHP Freight Routes include the development of a management plan approved
 4 by both ODOT and the local government. Improvements proposed by local
 5 governments to designated freight routes may impact highway design elements such as
 6 roadway section widths, median barriers and intersection design. Statewide Freight
 7 Routes in general have higher mobility standards than other highways of the same
 8 classification. Regional and local jurisdictions may designate their own freight
 9 route systems, but these designations should be compatible with or complementary
 10 to the State Highway Freight System.

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11 In 2011, ODOT staff developed a guidance document to help maintain freight
 12 mobility and balance the multiple functions of the highways. The guidance
 13 document implements ORS 366.215 and applies to the State Highway Freight
 14 System and some other state highways that are important for the movement of
 15 freight.¹

16 The State Highway Freight System designation does not guarantee additional
 17 state investment in these routes. However, three special management strategies
 18 are available:

- 19 • Highways included in this designation have higher highway mobility standards
 20 than other Statewide Highways (see Policy 1F).
- 21 • The highway's function as a freight route should be balanced with local
 22 accessibility in Special Transportation Areas.
- 23 • Freight system routes may be treated as Expressways outside of urban growth
 24 boundaries and unincorporated communities. (See Action 1C.3 and the definition
 25 of Expressways in Action 1A.2.)

26 **Policy 1C: State Highway Freight System**

27 *It is the policy of the State of Oregon to balance the need for movement*
 28 *of goods with other uses of the highway system, and to recognize the*
 29 *importance of maintaining efficient through movement on major truck*
 30 *freight routes.*

31 ***Action 1C.1***

32 Apply performance standards appropriate to the movement of freight on
 33 freight routes.

¹ Some proposed projects may reduce the vehicle-carrying capacity of a state highway. ORS 366.215 states the OTC may not permanently reduce the vehicle-carrying capacity of an identified freight route. Specific exceptions to this prohibition are allowed by statute. The statute, guidance document, maps and an FAQ document can be found at: <http://www.oregon.gov/ODOT/TD/TP/ORS366.215.shtml>

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2 ***Action 1C.3***

3 In the development of corridor plans, work with local governments to examine
4 options to:

- 5 • Treat designated freight routes as Expressways where the routes are outside
6 of urban growth boundaries and unincorporated communities. Continue to
7 treat freight routes as Expressways within urban growth boundaries where
8 existing facilities are limited access or where corridor or transportation system
9 plans indicate limited access; and
- 10 • Recognize and balance freight needs with needs for local circulation, safety
11 and access in Special Transportation Areas and on ORS 366.215 routes.

12 ***Action 1C.4***

13 Consider the importance of timeliness in freight movements in developing and
14 implementing plans and projects on freight routes.

15 **Table 5: Designated Freight Routes¹⁰ Revise map to reflect**
16 **change to OR140. We have better maps now too.**

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17 ¹⁰ Table was omitted when Policy 1C was amended in August 2005; Amendment
18 05-16. Freight Route designations are now listed in the system inventory table in

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Appendix D: Highway Classification by Milepoint. Revise Appendix D to reflect change to OR140

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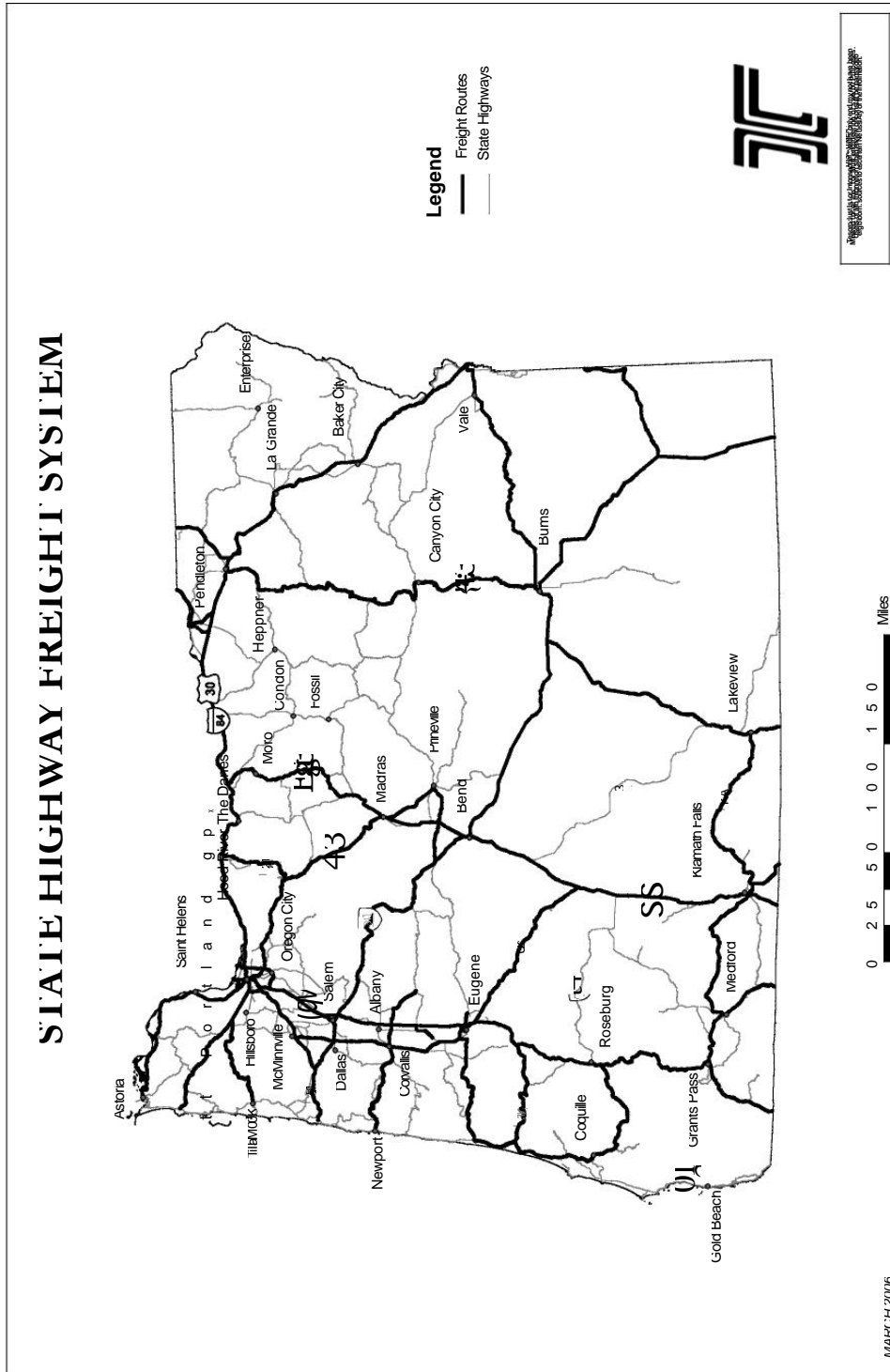


Figure 10a: Designated freight routes

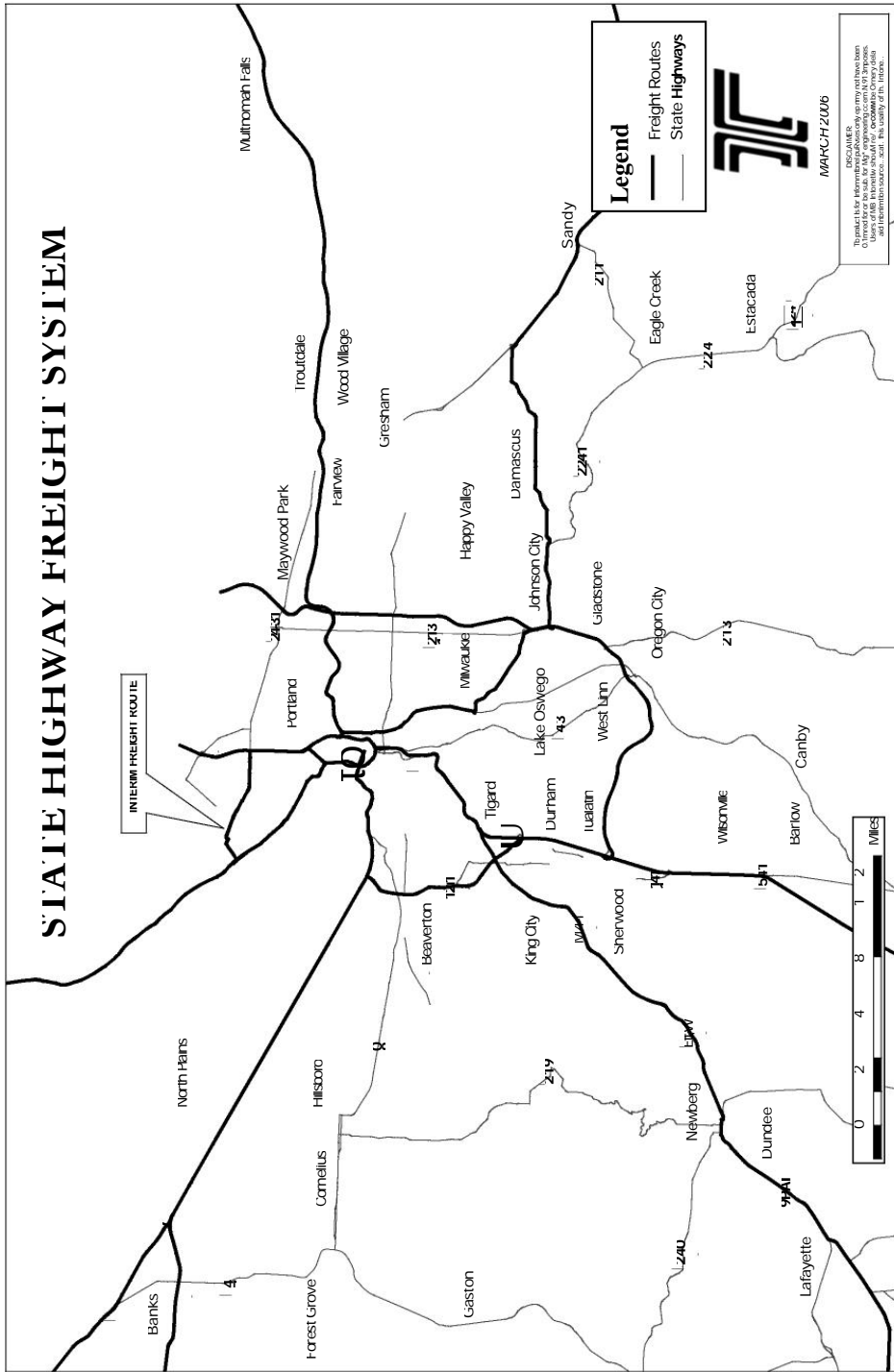


Figure 10b: Designated freight routes (inset)

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Goal 4: Travel Alternatives

T

o optimize the overall efficiency and utility of the state highway system through the use of alternative modes and travel demand management strategies.

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Overview

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The state highway system serves different modes of transportation, including auto, bus, truck, bicycle, and pedestrian, as well as different travel purposes including freight movement and person trips. Maintaining and improving the performance of the highway system requires that it function as part of a well-coordinated and integrated multimodal system. Intermodal connections for people and goods must be efficient, and appropriate alternative mode choices must be available to allow users to take advantage of the efficiencies inherent in each mode.

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Alternative passenger modes, transportation demand management, and other programs can help reduce the single-occupant vehicle demand on the highway system, thus maintaining performance while increasing the person-carrying capacity of the system. Alternative freight modes and related strategies which strive for more efficient commercial vehicle operation will help maintain the overall reliability and performance of the goods movement networks. All of these strategies can contribute to meeting the objectives of Statewide Planning Goal 12, which requires transportation plans to “avoid principal reliance upon any one mode of transportation” and “conserve energy.”

23



FREIGHT

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Background

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An efficient, safe, and environmentally sound system of moving goods through the state is an important economic development goal identified in the Oregon Transportation Plan and the OFP. These statewide plans also stress the importance of promoting a balanced freight transportation system that takes advantage of the inherent efficiencies of each mode. For the highway system, this means both improving the efficiency with which motor carriers can operate and promoting alternative (non-highway) modes for the movement of freight, where appropriate.

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Improving and maintaining the efficiency of highway operations will require balancing the needs of goods movement with the needs of other users of the highway system. For example, some state highways that are important goods movement corridors also serve as communities’ main streets.

1 **Policy Element**

2 Improving highway operational efficiency also involves working for more
3 standardization in the areas of commercial vehicle regulations and Intelligent
4 Transportation System technologies. Improving efficiency for goods movement
5 will likely entail public and private investments in infrastructure, especially in an
6 expanding economy. Oregon's Intermodal Management System (see page 23) is a
7 key part of tracking the need for improvements to intermodal connections.

8 However, public policies or projects often have limited impact on outcomes such as
9 mode split in freight transportation. Freight transportation patterns are a product of
10 industry trends, the requirements of shippers, the quality, range of services, and rates
11 provided by freight carriers, and other factors outside the public sector realm. The
12 State should not attempt to subsidize one mode over another or otherwise interfere
13 with the market for freight transportation, but should consider making investments
14 in non-highway freight network improvements where doing so will benefit the
15 efficiency of the state highway system.

16 There are sometimes specific infrastructure problems, bottlenecks, or regulations
17 that pose a barrier to efficiency or exacerbate trends that would be detrimental to
18 the highway system. For example, it is important to maintain a viable deep draft
19 and shallow draft water freight system on the Columbia River to prevent increased
20 congestion on major highway freight routes. Shortages of rail equipment and lack
21 of access to capital may pose a barrier to the increased use of shortline rail for bulk
22 commodity movements. In these cases, public policies and actions should aim to
23 mitigate physical and institutional obstacles and promote safety while avoiding



24 *The intermodal connector at the Port of Morrow connects Interstate 84 to port facilities where*
25 *goods are transferred from truck to barge. (Photo courtesy of Port of Morrow)*
26

undue meddling in the marketplace. The following policy and actions pertaining to freight transportation and the highway system were developed to be consistent with this philosophy.

Policy 4A: Efficiency of Freight Movement²³

It is the policy of the State of Oregon to maintain and improve the efficiency of freight movement on the state highway system and access to intermodal connections. The State shall seek to balance the needs of long distance and through freight movements with local transportation needs on highway facilities in both urban areas and rural communities.

Action 4A.1

Identify roadway obstacles and barriers to efficient truck movements on state highways, especially the Statewide Freight System. These include bridges with load limits and geometric constraints that prohibit the travel of legal size vehicles. Set up a process through the Statewide Transportation Improvement Program to systematically improve the highway segments that hinder or prevent freight movements and utilize benefits/cost analysis to determine whether improvements are warranted.

Action 4A.2

Encourage uniform commercial vehicle regulations at the regional and national levels where the safety and efficiency of Oregon's transportation system will benefit. These might include regulation regarding vehicle design.

Action 4A.3

Support further development, standardization, and/or compatibility of Intelligent Transportation System Commercial Vehicle Operation technology in the western United States.

Action 4A.4

Maintain and improve roadway facilities serving intermodal freight facilities and support development of new intermodal roadway facilities where they are part of a local or regional transportation system plan. Recognize National Highway System Intermodal

Deleted: that are part of Oregon's Intermodal Management System,

²³Policy 4A and Implementing Actions 4A.1, 4A.4 were amended, and Actions 4A.8 and 4A.9 were added as part of Amendment 05-16, dated August 17, 2005.

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Connectors as part of the freight network in transportation planning and funding considerations. Manage state-owned Intermodal connectors according to their state highway classification as Regional or District Highways.

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Action 4A.5

Support the establishment of stable funding or financing sources for transportation systems that will improve the efficiency of freight movement on the highway system. These transportation systems include non-highway freight modes and intermodal connectors.

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Action 4A.6

Work with the private sector (e.g., carriers, shippers), local governments, metropolitan planning organizations, port authorities and others to improve planning coordination between public investments in highways and other investments in the freight transportation infrastructure.

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Action 4A.7

Support the maintenance and improvement of non-highway infrastructure that provides alternative freight-moving capacity in the OFP Strategic Corridors where doing so will maintain or improve the overall performance of the highway system.

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Action 4A.8

Recognize that local truck routes are important linkages in the movement of freight throughout the state. ODOT will consider requests to establish local government designated truck routes that will serve to detour trucks off the state highway system. ODOT staff has created a procedure to follow for these requests. ODOT will coordinate with local jurisdictions when designating, managing and constructing a project on a local freight route.

Action 4A.9

Develop an amendment process for the identification of additional routes or modifications to the State Highway Freight System.

 **ALTERNATIVE PASSENGER SERVICES**

Background

FAQs
Implementation of ORS 366.215
(No Reduction of Vehicle-Carrying Capacity)
May 10, 2011

Note: Many general questions can be answered by reading the document, “Guidelines for Implementation of ORS 366.215 – No Reduction of Vehicle-Carrying Capacity.”

1. When was ORS 366.215 adopted?

The legislature adopted changes to ORS 366.215 with respect to state highways in 2003. Subsequent revisions to the statute were made in 2005.

2. When should you take a project through this process?

Planning studies and proposed construction projects should go through this review process as soon as possible in order to avoid mobility conflicts that may arise later. Early communication is the key issue in this process. In order to obtain input from the freight stakeholders, the proposed planning study and project needs to be far enough along in design in order to provide the MCTD and freight stakeholders what they need to provide input. The guidance document identifies what you need to submit.

3. What is the difference between a reduction in the hole-in-the-air vs. a Reduction in Vehicle-carrying Capacity (RVC)?

The term hole-in-the air refers to the entire area (height, width and length) a truck and its load will occupy while traversing a section of roadway. This term is only used in the first step of the flow diagram of the review process by the MCTD and acts as a trigger for further review. A reduction in the hole-in-the-air does not automatically mean there is a reduction in vehicle-carrying capacity. Many projects that reduce the hole-in-the air may not result in a RVC. Other projects that reduce the hole-in-the-air may be acceptable to the freight stakeholders or can be mitigated, and therefore are not a RVC.

A RVC comes into play after it has been determined that a proposed project would reduce the hole-in-the air, is located on an ORS 366.215 route, and is determined to negatively affect the ability of freight to move loads through a specific area. A RVC not supported by the freight stakeholders means that a proposed project may not allow some truck loads to navigate that section of highway. A RVC does not include proposed improvements such as new traffic signals, new or modified access points, and changes to posted speed limits.

4. Why does it take a meeting of the freight stakeholders to determine if there is a reduction in RVC?

In many cases one individual alone will not be able to determine if a proposed design concept constitutes a RVC because each situation is different including the types of over-dimensional loads transported on various highways. This is the primary reason why the procedure requires a meeting of a various freight stakeholders. Although the Highway Design Manual contains urban highways standards it does not address over-dimensional loads. There is no "design vehicle" that represents the maximum size of an over-dimensional load. (Some of the issues can be resolved by email or phone calls with the MCTD Mobility Coordinator rather than attending the Wednesday meeting described in Question 6 below.)

5. Why can't the freight stakeholders participate on the city's technical advisory committee during the development of downtown plans and TSPs like other stakeholders?

With almost 300 cities and counties across the state, it would be very difficult for the small group of freight stakeholders, who represent the statewide freight mobility perspective to keep track of and attend all of the technical advisory committees conducted by these governments. Remember that local haulers located in the project area are important stakeholders to include in your project development process, but they may not have the same issues/perspectives of the larger statewide interests. In light of that situation, the best way to get input from the freight stakeholders is through their Wednesday freight mobility meetings in Salem.

6. How often does the freight stakeholder group meet and who do they represent?

The "Wednesday Meetings" as they have come to be called, meet as often as requested by the Region Mobility Coordinators. They meet in the Public Utility Commission Building (550 Capitol St. NE Salem, OR), where the MCTD is located. The typical attendees are:

- 1) MCTD Administrator
- 2) Over-Dimensional Permit Manager (aka the MCTD Mobility Coordinator)
- 3) MCTD Over-Dimensional Permit Unit technical coordinator
- 4) Bob Russell representing the Oregon Trucking Association (OTA) (includes log truck perspective)
- 5) Don Miner representing the Oregon Manufactured Housing Association (OMHA)
- 6) Specific ODOT Project Manager, Project Leader or Planning Manager
- 7) Region Roadway, Traffic or other Project Team members
- 7) Often times specific project contractor
- 8) On occasion a representative of local government interested in project
- 9) And any number of other specific motor carriers who either use the route being discussed or operate equipment that is the kind of vehicle combination deemed most likely to have a conflict with a particular change in the roadway design that is being described. Their perspective about the vehicle combination's maneuvering capacity is often needed.

7. How do we address adopted TSPs or facility plans that include roadway proposals that may impact the hole-in-the-air?

One option is to wait until there is an update of the TSP and take the proposed roadway proposal through the ORS 366.215 review process. If the proposal is not deemed a RVC, then that review could be documented in the TSP as part of the update.

Another option during the plan update is to not go through the review process at that time and add a caveat to the plan referencing ORS 366.215. The local agency adopts the plan with caution: "Planning concept potentially reduces capacity on highway subject to ORS 366.215; subject to final approval by ODOT and OTC". Note that until a project has been approved through the RVC process it can not be constructed by any entity regardless of funding source.

8. Will there be any statewide public outreach effort to inform the local jurisdictions about ORS 366.215 and the process?

It is anticipated that a public outreach effort to the local governments about ORS 366.215 will take place later this year after we complete the internal outreach effort.

9. Can an alternate route help with mitigation?

The freight stakeholders will certainly consider that when looking at the proposed project if it is part of the submittal. Please keep in mind that the alternate route should be a state highway and not add a significant amount of time or miles to the overall truck trip. If the alternate route is proposed on a local street then ODOT and the city must both agree to the routing. The "ODOT Approval Procedure for Local Truck Routes" can be downloaded at: www.oregon.gov/ODOT/TD/TP/docs/publications/truckRtProcedure.pdf

10. Where can we find examples of design solutions and good information that are supported by the freight stakeholders?

At this time, your best source for this information is through your Region Mobility Coordinator. It is anticipated that in the near future, the MCTD will be setting up a share drive (or another intranet location) that will store the proposed project information and the subsequent input from the freight stakeholders.

11. Some ODOT funding programs do not have a formal process for freight stakeholder review before funds are awarded. ODOT may be funding projects that we don't know the agency will allow to be built, or built as desired by the applicant. How do we resolve these issues?

Staff working within any grant or federal-aid program like the TGM Program, Safe Routes to School Program, Bicycle & Pedestrian Program, the Transportation Enhancements (TE) Program, Congestion Management Air Quality (CMAQ) Program, Surface Transportation
FAQ – Implementation of ORS 366.215 – No Reduction of Vehicle-Carrying Capacity

Program (STP) Program, Safety Program, Emerging Small Business (ESB) Program, Scenic Byway Program, etc. must review applications for many issues including freight mobility prior to awarding funds. The Freight Mobility Unit is working with other ODOT units that process grants or federal-aid to coordinate early input from the freight stakeholders on projects that may impact freight mobility. Again it is important to remember that projects can not be constructed until completing the RVC process regardless of funding source. For some of these grant or federal-aid programs, it is important to have the Regional Tech Centers or District Offices watching for projects during their review processes to ensure the process has been followed and documented.

12. How does an STA affect the outcome of a proposed RVC?

A Special Transportation Area (STA) is an ODOT highway segment designation for an existing downtown or planned downtown that straddles the state highway. The primary objective of an STA is to provide access to community activities and businesses to accommodate pedestrian, bicycle and transit movement.

An STA designation will be part of the considerations that the OTC will look at when a local government requests an exemption of the statute. The STA designation and management plan may help convey the city's goals and plans for that section of the highway. The OTC will evaluate the request and strive to balance accessibility and freight mobility needs. Remember that even though the primary objective of an STA is to accommodate pedestrian, bicycle, and transit, freight haulers must still have the ability to move goods and services including over-dimensional loads.

13. Where do bike lanes fit in?

As a result of recent change in Oregon law, permitted loads are now allowed to occupy the bike lanes if needed to navigate through a section of state highway. However, the addition of bike lanes to an existing state highway is considered a reduction of the hole-in-the-air and needs to go through this review process if there are proposed changes to the existing number, width, and configuration of lanes. The number of travel lanes, lane width and other factors are taken into consideration by the freight stakeholders when determining if there is a RVC and whether or not they can support it or not.



TRANSPORTATION POLICY ALTERNATIVES COMMITTEE
MARCH 30, 2012
Metro Regional Center, Council Chamber

MEMBERS PRESENT

Karen Buehrig
Elissa Gertler, Chair
Carol Gossett
Katherine Kelly
Nancy Kraushaar
Alan Lehto
Margaret Middleton
Dave Nordberg
Paul Smith
Charlie Stephens

AFFILIATION

Clackamas County
Metro
Community Representative
City of Gresham, Representing Cities of Multnomah Co.
City of Oregon City, Representing Cities of Clackamas Co.
TriMet
City of Beaverton, Representing Cities of Washington Co.
Oregon Department of Environmental Quality
City of Portland
Community Representative

MEMBERS EXCUSED

Chris Beanes
Brent Curtis
David Eatwell
Heidi Guenin
John Hoefs
Scott King
Dean Lookingbill
Satvinder Sandhu
Karen Schilling
Rian Windsheimer
Sharon Zimmerman

AFFILIATION

Community Representative
Washington County
Community Representative
Community Representative
C-TRAN
Port of Portland
Southwest Washington Regional Transportation Committee
Federal Highway Administration
Multnomah County
Oregon Department of Transportation
Washington State Department of Transportation

ALTERNATES PRESENT

Andy Back
Phil Healy
Jane McFarland
Lainie Smith

AFFILIATION

Washington County
Port of Portland
Multnomah County
Oregon Department of Transportation

STAFF: Dick Benner, Kim Ellis, Daniel Kaempff, Nuin-Tara Key, Tom Kloster, Ted Leybold, John Mermin, Josh Naramore, Kelsey Newell, Dylan Rivera, Marc Week.

1. CALL TO ORDER AND DECLARATION OF A QUORUM

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

2. COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS

Mr. John Mermin of Metro announced that, in April 2012, TPAC will be asked to make a recommendation to JPACT proposed amendments to the Regional Transportation Functional Plan (RTFP) and schedule. Metro staff will recommend amending the RTFP procedures for extending compliance deadlines and granting exceptions to specific requirements. Exemptions would be granted though by the Metro Chief Operating Officer.

Ms. Nancy Kraushaar discussed the successful Highway 213 bridge replacement. The replacement went smoothly and traffic diversion did not impact I-205. There was, however, impact to Highway 99. Drivers did not follow the predetermined detour but instead created their own detour.

Ms. Carol Gossett stated that on February 24 Mr. Scott King provided a tour of the Portland International Airport and Water port. Ms. Gossett stated she appreciated his time and talent.

Chair Elissa Gertler stated that community representative Ms. Carla Danley has stepped down from TPAC and there will be recruitment for another citizen representative.

3. CITIZEN COMMUNICATIONS TO TPAC ON NON-AGENDA ITEMS

There was none.

4. CONSIDERATION OF THE TPAC MINUTES FOR FEBRUARY, 17 2012

Ms. Kraushaar stated that on the February 17, 2012 minutes should be corrected to read, "...Highway-214 213..."

MOTION: Ms. Kraushaar moved, Mr. Alan Lehto seconded, to approve the Transportation Policy Alternatives Committee (TPAC) minutes for February 17, 2012 as amended.

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

5. ACTION ITEMS

5.1 Draft 2012-13 Unified Planning Work Program (UPWP)

Mr. Josh Naramore of Metro introduced Resolution No. 12-4335 which, if approved, would certify that the Portland metropolitan area is in compliance with the Federal Transportation Planning requirements and would adopt the fiscal year 2012-13 Unified Planning Work Program. JPACT, the Metro Council, and the Southwest Washington Regional Transportation Council are required to adopt the UPWP annually. The UPWP is a report that fully describes the region's planned projects for the upcoming fiscal year and is the basis for grant and funding applications. Mr. Naramore noted changes in the document since it was presented to TPAC in January 2012 and asked for input from the committee.

The committee discussed the following items:

- Streetcar Technical Methods funding and updates to the Streetcar Concept plan affecting the UPWP.
- Restrictions on re-allocating funding from the Portland to Lake Oswego Transit Project.
- The committee noted that the Sullivan's Gulch plan may be added the UPWP.

MOTION: Ms. Andy Back moved, Mr. Paul Smith seconded, to recommend that JPACT approve Resolution No. 12-4335

Discussion:

Mr. Back addressed the difficulty in receiving the finished UPWP after the approval process. This time frame limits the decision-making ability of local jurisdictions to add input into discretionary spending. Mr. Back recommended that members be more involved in the process before the final UPWP is developed. Metro staff will be considering a 2 year process which would allow for more time for local government involvement.

The committee discussed the City of Damascus' recent approval of a ballot measure that requires a public vote on all land use spending. The committee expressed concerns that the city would not be able to complete a TSP and that previously allocated Federal funding could go unused.

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

6. INFORMATION/DISCUSSION ITEMS

6.1 Climate Smart Communities Scenarios Phase 2 Work Plan

Ms. Kim Ellis of Metro presented the Phase 2 work plan and engagement approach for the Climate Smart Communities scenarios project. The Climate Smart Communities (CSC) scenarios project is a multi-year, collaborative effort between Metro, local governments and other regional partners. Since January 2012, Metro staff and Councilors have begun briefing local elected officials and other stakeholders on the project and Phase 1 findings. Ms. Ellis overviewed the challenges brought forth through local engagement including: balancing local/regional planning, the complexity of the project, building consensus, and the current economic climate. The project is composed in two tracks, *Creating Building Blocks for Scenarios* which is policy focused and *Creating Score Card for Scenarios* which is technically focused. Staff will bring a modified draft to MPAC and JPACT for discussion and endorsement on April 11th and 12th respectively.

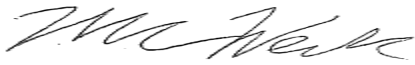
The committee discussed the following items:

- Of the 144 possible scenarios, 93 have been evaluated to meet carbon reduction targets. The committee discussed what intermediate steps are needed to identify three to four scenarios from those 93.
- The timeline of implementation, balancing with short term issues like daily operation, and achieving all needs with limited resources.
- Evaluation framework and linking it with the Community Investment Initiative.
- The committee discussed support CSC has seen in local Communities
- Opportunities the statewide greenhouse gas mandate can create to deal with long term energy challenges.
- How the Rulemaking Advisory Committee will allow for flexibility in CSC process and leave room for evolution of the project. The committee requested metro staff keep them informed on the RAC process.
- How freight and fleet traffic factor into the CSC.

7. ADJOURN

Chair Gertler adjourned the meeting at 11:13 a.m.

Respectfully submitted,



Marcus Week
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR MARCH 30, 2012

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

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
6.1	PPT	3/12	Climate Smart Community Scenarios Phase 2: Define Choices	033012t-01
6.1	Handout	3/12	Climate Smart Communities Scenarios – Phase 2 Policy Track	033012t -02
6.1	Handout	3/12	Climate Smart Communities Scenarios – Phase 2 Technical Track 2	033012t -03
6.1	Handout	3/12	Climate Smart Communities Scenarios Timeline	033012t-04

- Establish agreements on local, regional and state actions to support implementation of the community investment strategy.
- Develop multi-modal solutions that distribute both benefits and burdens of growth, support active lifestyles and enhance the natural environment.
- Actively engage public in developing the criteria to prioritize transportation investments and land use changes.
- Conduct a transit Alternatives Analysis to determine the best alignment, associated service changes and capital improvements of a high capacity transit route.
- Incorporate refined transportation planning into RTP.

3) Previous Corridor Refinement Work Program Prioritization

a) Background

The 2000 Regional Transportation Plan (RTP) identified a significant transportation need in 18 corridors but specified that additional work was needed before a specific project could be implemented. In FY 2000-01, the Corridor Initiatives Program prioritized completion of the corridor plans and refinements. Per that recommendation, Metro initiated and led corridor studies including the Powell/Foster and Highway 217 corridors. The phase I Powell/Foster plan was completed and the findings were adopted by JPACT and the Metro Council in FY 2003/04.

In winter 2005, Metro again consulted with regional jurisdictions to identify the next priority corridor(s) for commencement of planning work. Based on the consultation, in winter 2005/06, JPACT and Metro Council approved a corridor planning work plan update, which called for initiation of five new corridor plans in the next five years. In winter 2007/08, Metro commenced work on one of the corridor planning efforts identified in that work program, the Regional High Capacity Transit System Plan.

As part of the Regional Transportation Plan update, in 2009, Metro worked with technical committees and local jurisdictions to identify and prioritize remaining corridor needs. Five corridors were found to need refinements and a phased approach was established to accomplish all remaining refinement plans by 2020. Mobility Corridor #15 (East Multnomah County connecting I-84 and US 26) and Mobility Corridors #2 and #20 (in the vicinity of I-5/Barbur Blvd, from Portland Central City southward to approximately the "Tigard Triangle") were designated as the next priorities based on technical factors, as well as local urgency and readiness (Resolution 10-4119, approved by Metro Council on February 25, 2010). The East Metro Connections and Southwest Corridor Plans commenced shortly thereafter and will be completed in June and December 2012 respectively.

4) 2010 Metro Council Prioritization as directed by Resolution No. 10-4119

- a) Resolution No. 10-4119 listed six remaining multimodal mobility corridors needing refinement planning, along with one HCT Corridor ("Powell Vicinity"), the latter which is the subject of this staff report and related resolution.
- b) Two plans are underway, per that prioritization: East Metro Connections Plan and Southwest Corridor Plan.
- c) The assumption at the time this previous corridor refinement prioritization was completed (i.e., February 2010) was that "Vicinity of Powell Corridor" transit and transportation needs and opportunities would in part be studied as a First Tier HCT corridor within the framework of an Oregon Transportation and Growth Management Program funded study that came to be called the

~~Outer Powell Boulevard Conceptual Design Plan.~~ A draft of the final report of that study, the Outer Powell Boulevard Conceptual Design Plan was released in December 2011, and is discussed briefly below.

d) Resolution No. 10-4119 also anticipated regular review of the proposed, to ensure that regional priorities continue to be reflected in refinement plan efforts and directed staff to coordinate corridor refinement planning work with HCT planning efforts. It also anticipated the initiation of an alternatives analysis for the HCT corridor in the vicinity of Powell Blvd to occur in 2012, as shown in the Exhibit C to the resolution (Attachment 1 to this staff report.) The order presented in the phasing and sequencing shown in Attachment 1 considered not only the accepted technical rankings, but also took into account then-current levels of local support, as listed below:

- Technical rankings
- Demonstrated local support
- Respective levels of effort of the five corridors
- Ability of local jurisdictions to take more responsibility for one or more pieces of work that are likely to be required in a given corridor
- Ability to logically segment work (e.g. to postpone corridor refinement planning)
- Potential for project development to proceed on a separate track
- Ramp-up time needed for more complex corridors (to be included in a preparatory phase described below)—allowing staggered plan initiation points
- A proposed scenario for linking High Capacity Transit (HCT) system expansion process and priorities to the corridor refinement planning process, where appropriate

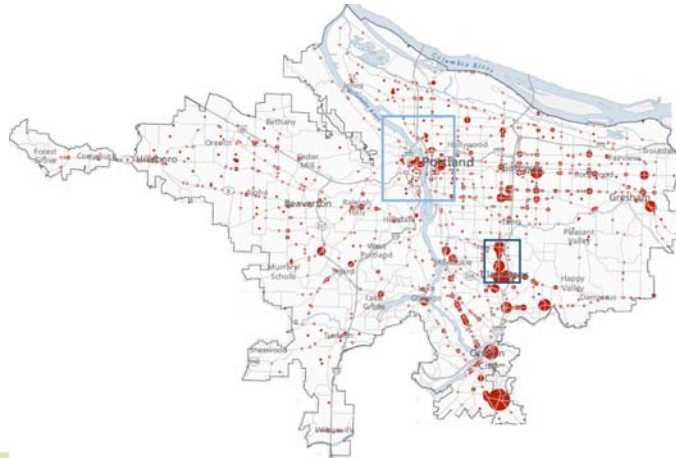
e) High Capacity Transit (HCT) Corridors

In July 2009, the Metro Council adopted the Regional High Capacity Transit (HCT) System Plan. The HCT plan identifies and prioritizes corridors for implementation based on a set of evaluation criteria consistent with the goals of the RTP and the region's 2040 growth concept. The HCT plan was adopted by the region as part of the Regional Transportation Plan in June 2010. In July 2011, the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council adopted the High Capacity Transit System Plan Expansion Policy guidelines to further describe the process for moving projects forward.

Both the HCT plan and the system expansion policy identify the Portland Central City to Gresham (in general, Powell-Division Corridor) as a Near-Term regional priority corridor. The rigorous HCT process included the application of 25 evaluation criteria approved by the Metro Council and Joint Policy Advisory Committee on Transportation. System Expansion policy targets were applied to both the SW and Powell-Division corridors. While on many measures such as transit supportive land use and community support, regional network connectivity and integrated transportation system development the corridors scored equally. In terms of Housing needs supportiveness, Powell actually measured higher. In the areas of financial capacity and partnership, political leadership and ridership (particularly in projected increase) the SW corridor scored higher.

The SW corridor is currently in an AA process. Given the strong land use needs and opportunities, community support, current ridership, and housing needs, the Powell-Division corridor should move forward at this time.

Regional Crash and Safety Analysis Portland Metro Region



 Metro | *Making a great place*

Regional Vision for Safety

- One of the 6 Desired Outcomes
- 2035 RTP Goal
- 2035 RTP Performance Target

Getting Started

- Convened Regional Safety Workgroup
- State of Safety in the Region report
(<ftp://ftp.oregonmetro.gov/pub/tran/TSMO/Safety/>)
- Regional Transportation Safety Plan (May TPAC meeting)

Section 1 National and International data

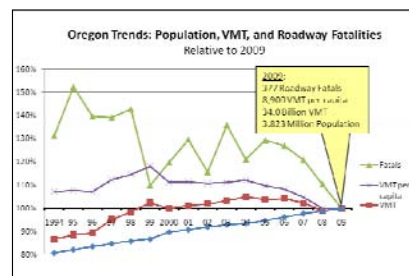
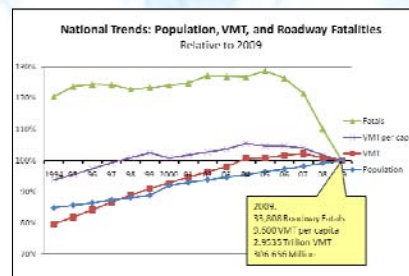
Source: NHTSA

The Problem

- US roads
 - 2000 – 2009: 411,212 people killed
 - Average of one person killed every 13 minutes....24/7 for 10 years straight
 - Leading cause of accidental deaths
 - Leading cause of all deaths, age 15 – 34
- Metro region roads
 - 2007 – 2009: 159 people killed, 1,400+ severely injured
 - Societal costs of \$958 Million/year

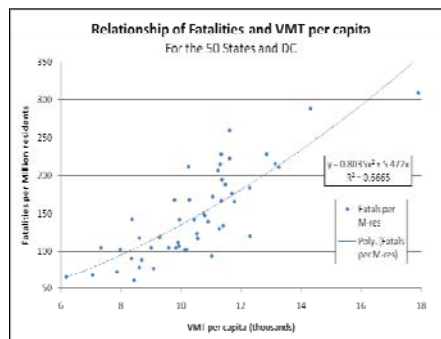
State and National Trends

- Fatalities are decreasing nationally
- From 43,510 in 2005 to 33,808 in 2009.
- Declines are greater than VMT



VMT and Fatalities

- By State
- Relationship with VMT is strong but only part of the story



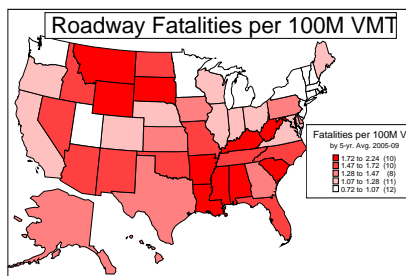
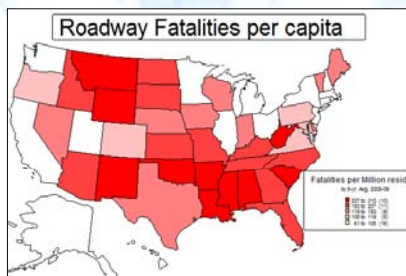
State-by-State

- Southeast and Mountain West are doing most poorly



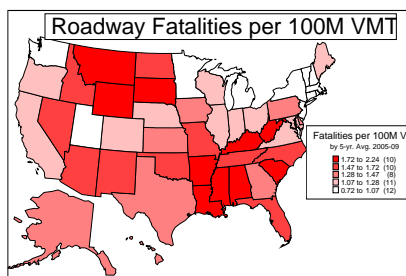
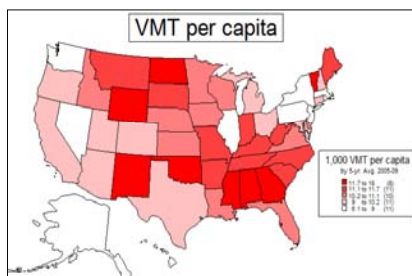
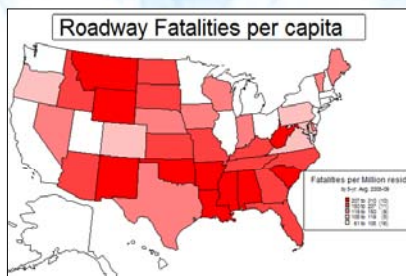
State-by-State

- Southeast and Mountain West are doing most poorly

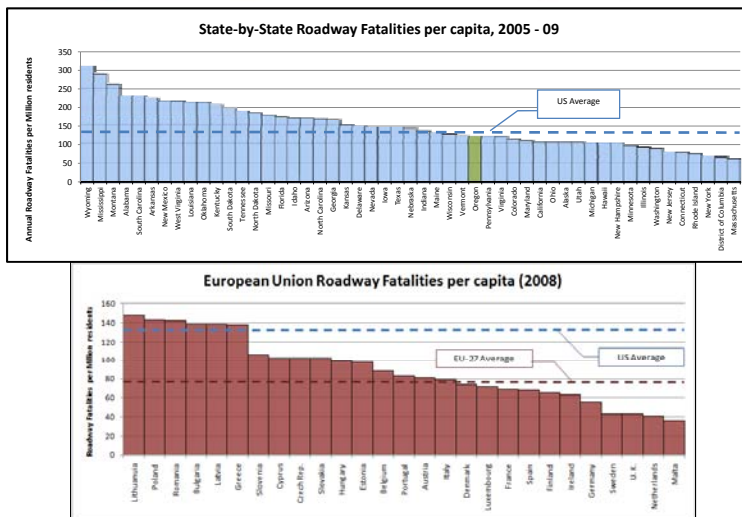


State-by-State

- Southeast and Mountain West are doing most poorly

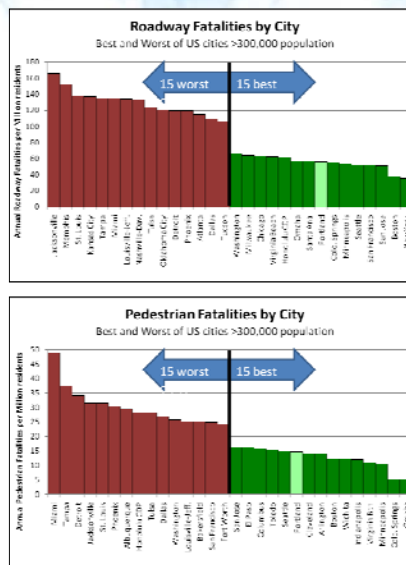


National & International context



Fatalities by large US city

- Portland does well for both all fatalities and pedestrian fatalities



Section 2

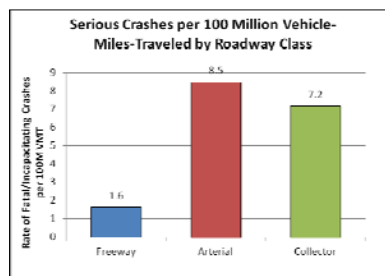
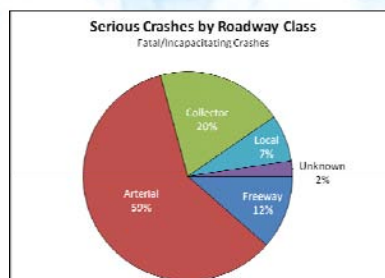
Data in the Metro region

Sources: ODOT Crash Reporting, Metro RLIS, Metro Traffic Model

- What this is: *High-level comparison of roadway types to crash types*
- What this isn't: *Detailed analysis of why crashes are/aren't occurring in any given location*

Roadway class

- Arterials are the main problem
- 59% of all serious crashes
- Arterials include 82nd, Foster, 181st, 185th, etc.
- Collectors include NE Fremont, SW Millikan Way, SE River Rd, etc.



By Day and Hour

Serious Crashes by Day of Week and Hour
Annual Faith+Housing Crashes

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Hour	Avg Weekday	Avg Weekend
12 AM	0.0	1.0	1.0	0.7	1.0	1.7	4.0	12 AM	1.0	2.0
1 AM	0.0	1.0	1.0	0.7	2.0	0.7	4.0	1 AM	1.0	2.0
2 AM	1.7	1.0	0.0	0.0	0.0	1.0	1.0	2 AM	1.0	1.0
3 AM	1.7	0.0	0.0	0.0	0.0	1.0	1.0	3 AM	0.0	1.0
4 AM	0.0	0.0	0.0	0.0	0.0	0.0	0.7	4 AM	0.0	1.0
5 AM	1.3	1.7	1.3	1.3	0.7	1.3	0.0	5 AM	1.0	0.7
6 AM	0.7	0.7	0.3	0.0	0.3	0.0	0.7	6 AM	1.0	0.7
7 AM	1.7	3.3	3.7	3.3	5.0	3.7	1.3	7 AM	3.0	1.0
8 AM	1.0	1.7	1.3	1.7	1.3	0.0	1.3	8 AM	4.0	1.0
9 AM	0.7	2.3	4.7	1.3	1.3	3.7	2.7	9 AM	3.7	1.7
10 AM	0.0	0.0	4.3	4.3	2.0	3.7	2.0	10 AM	3.0	2.0
11 AM	0.0	0.0	3.7	4.0	2.7	4.7	4.0	11 AM	3.0	3.0
12 PM	0.0	0.0	4.7	5.3	2.7	2.7	4.0	12 PM	4.0	1.0
1 PM	0.7	0.0	0.7	0.7	4.7	4.0	7.0	1 PM	1.7	1.0
2 PM	0.0	0.0	0.0	4.3	2.3	0.0	1.7	2 PM	4.0	1.0
3 PM	0.7	7.0	5.3	7.0	5.3	2.7	4.7	3 PM	2.7	2.0
4 PM	0.0	6.3	0.7	6.0	6.3	5.0	3.7	4 PM	4.0	1.0
5 PM	0.0	11.0	6.3	7.7	7.7	6.0	2.7	5 PM	6.0	6.0
6 PM	0.0	0.7	5.0	3.7	4.0	0.0	3.7	6 PM	1.0	1.0
7 PM	0.0	4.0	2.3	2.7	5.3	4.7	0.0	7 PM	3.0	4.0
8 PM	1.0	1.3	0.0	1.7	5.0	3.0	1.7	8 PM	2.0	1.0
9 PM	0.0	0.0	0.0	0.0	3.0	3.0	2.0	9 PM	2.0	2.0
10 PM	0.0	1.7	1.7	1.3	2.0	4.0	4.0	10 PM	2.0	3.0
11 PM	0.0	0.0	0.0	1.7	2.0	3.7	3.0	11 PM	3.0	1.0
All Day	62.0	81.7	76.7	70.0	76.7	84.7	76.7	All Day	76.0	47.7

By Day and Hour

Serious Crashes by Day of Week and Hour
Annual Faith+Housing Crashes

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Hour	Avg Weekday	Avg Weekend
12 AM	0.0	1.0	1.0	0.7	1.0	1.7	4.0	12 AM	1.0	2.0
1 AM	0.0	1.0	1.0	0.7	2.0	0.7	4.0	1 AM	1.0	2.0
2 AM	1.7	1.0	0.0	0.0	0.0	1.0	1.0	2 AM	1.0	1.0
3 AM	1.7	0.0	0.0	0.0	0.0	1.0	1.0	3 AM	0.0	1.0
4 AM	0.0	0.0	0.0	0.0	0.0	0.0	0.7	4 AM	0.0	1.0
5 AM	1.3	1.7	1.3	1.3	0.7	1.3	0.0	5 AM	1.0	0.7
6 AM	0.7	0.7	0.3	0.0	0.3	0.0	0.7	6 AM	1.0	0.7
7 AM	1.7	3.3	3.7	3.3	5.0	3.7	1.3	7 AM	3.0	1.0
8 AM	1.0	1.7	1.3	1.7	1.3	0.0	1.3	8 AM	4.0	1.0
9 AM	0.7	2.3	4.7	1.3	1.3	3.7	2.7	9 AM	3.7	1.7
10 AM	0.0	0.0	4.3	4.3	2.0	3.7	2.0	10 AM	3.0	2.0
11 AM	0.0	0.0	3.7	4.0	2.7	4.7	4.0	11 AM	3.0	3.0
12 PM	0.0	0.0	4.7	5.3	2.7	2.7	4.0	12 PM	4.0	1.0
1 PM	0.7	0.0	0.7	0.7	4.7	4.0	7.0	1 PM	1.7	1.0
2 PM	0.0	0.0	0.0	4.3	2.3	0.0	1.7	2 PM	4.0	1.0
3 PM	0.7	7.0	5.3	7.0	5.3	2.7	4.7	3 PM	2.7	2.0
4 PM	0.0	6.3	0.7	6.0	6.3	5.0	3.7	4 PM	4.0	1.0
5 PM	0.0	11.0	6.3	7.7	7.7	6.0	2.7	5 PM	6.0	6.0
6 PM	0.0	0.7	5.0	3.7	4.0	0.0	3.7	6 PM	1.0	1.0
7 PM	0.0	4.0	2.3	2.7	5.3	4.7	0.0	7 PM	3.0	4.0
8 PM	1.0	1.3	0.0	1.7	5.0	3.0	1.7	8 PM	2.0	1.0
9 PM	0.0	0.0	0.0	0.0	3.0	3.0	2.0	9 PM	2.0	2.0
10 PM	0.0	1.7	1.7	1.3	2.0	4.0	4.0	10 PM	2.0	3.0
11 PM	0.0	0.0	0.0	1.7	2.0	3.7	3.0	11 PM	3.0	1.0
All Day	62.0	81.7	76.7	70.0	76.7	84.7	76.7	All Day	76.0	47.7

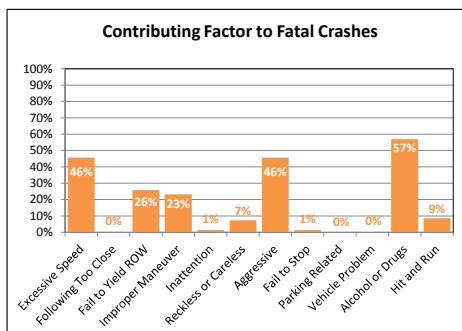
Late Fri nite / early Sat

Weekday + Saturday PM Peak

Weekday PM Peak

Contributing Factor

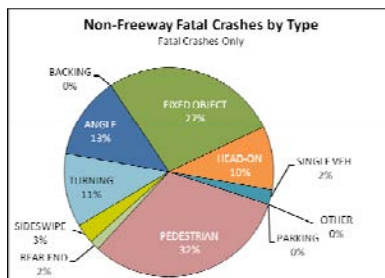
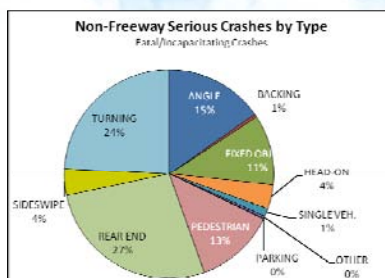
- Alcohol and Drugs
- Excessive Speed
- Aggressive Driving



Section 3 Non-Freeway Data

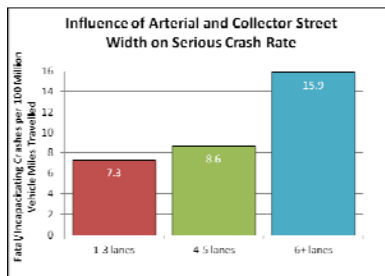
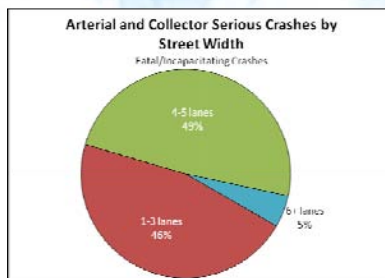
Crash Type

- Serious: Turning, Rear End
- Fatal: Pedestrian, Fixed Object



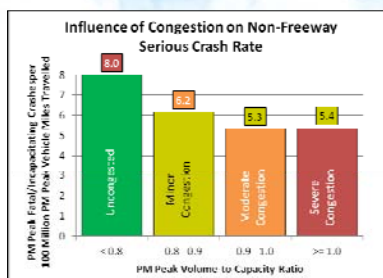
Number of Lanes

- Streets with more lanes have higher crash rates
- Rate increases for 6+ lanes
- Consistent with HSM



Non-Freeway Congestion

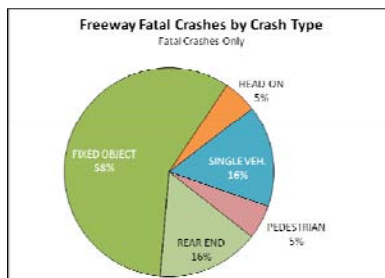
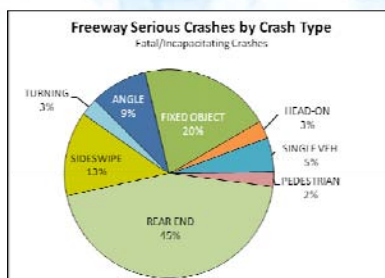
- Surface streets with more congestion have lower serious crash rates
- Likely due to speed



Section 4 Freeway Data

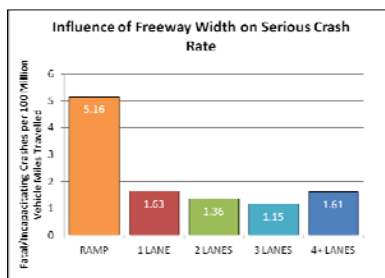
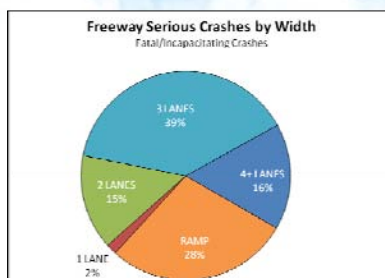
Freeway Crash Type

- Serious: Rear end
- Fatal: Fixed object



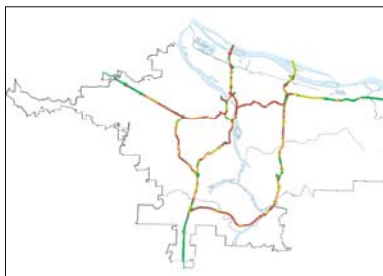
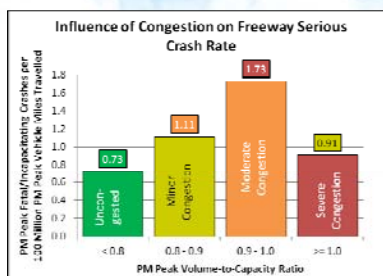
Number of Freeway Lanes

- Ramps
- 3 lanes including aux lanes has lowest crash rate
- Crash rate is higher above 3 lanes



Freeway Congestion

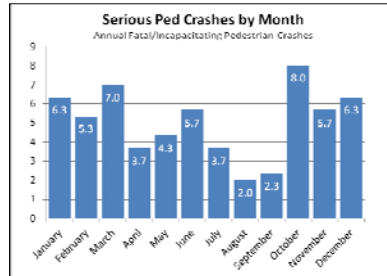
- Serious crash rate increases with increasing congestion; drops with severe congestion
- Likely due to speed



Section 5 Pedestrians

By month

- Summer is better, winter months have more crashes



Pedestrians by Day and Hour

Serious Pedestrian Crashes by Day of Week and Hour
Annual Fatal/Incapacitating Pedestrian Crashes

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Hour	Mon	Tue	Wed
12:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12:00	0.0	0.0	0.0
1:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1:00	0.0	0.0	0.0
2:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2:00	0.0	0.0	0.0
3:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3:00	0.0	0.0	0.0
4:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4:00	0.0	0.0	0.0
5:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5:00	0.0	0.0	0.0
6:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6:00	0.0	0.0	0.0
7:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7:00	0.0	0.0	0.0
8:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8:00	0.0	0.0	0.0
9:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9:00	0.0	0.0	0.0
10:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10:00	0.0	0.0	0.0
11:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11:00	0.0	0.0	0.0
12:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12:00	0.0	0.0	0.0
1:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1:00	0.0	0.0	0.0
2:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2:00	0.0	0.0	0.0
3:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3:00	0.0	0.0	0.0
4:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4:00	0.0	0.0	0.0
5:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5:00	0.0	0.0	0.0
6:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6:00	0.0	0.0	0.0
7:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7:00	0.0	0.0	0.0
8:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8:00	0.0	0.0	0.0
9:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9:00	0.0	0.0	0.0
10:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10:00	0.0	0.0	0.0
11:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11:00	0.0	0.0	0.0
12:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12:00	0.0	0.0	0.0

Pedestrians by Day and Hour

Annual Fatal/Incapacitating Pedestrian Crashes

Day	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Average	Average
12:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:00	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:30	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All Day	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Friday + Saturday Evening

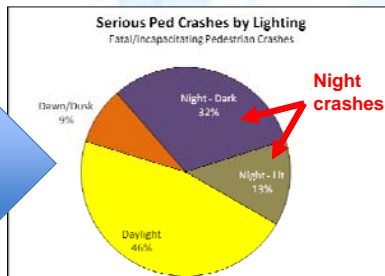
Weekday PM Peak + Evening

Friday + Saturday

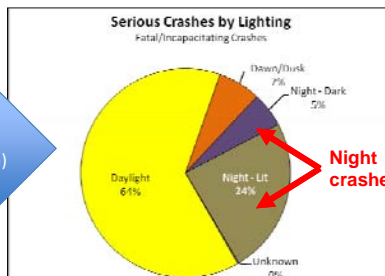
By Lighting

- More crashes at night than autos or bikes

Pedestrians

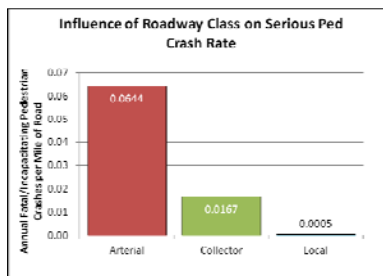
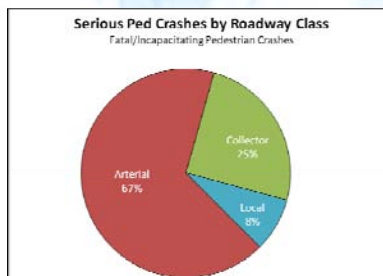


All crashes (comparison)



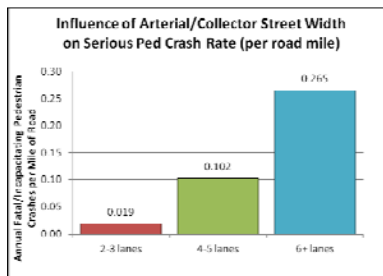
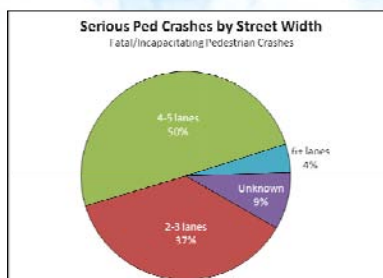
Roadway Class

- 67% of serious ped crashes happen on arterials
- Often serve as bus routes



Number of Lanes

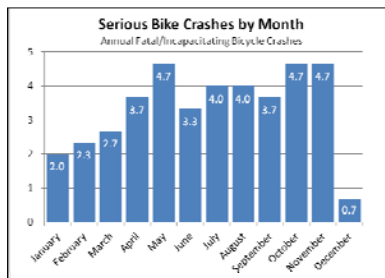
- Wider roads are disproportionately represented



Section 6 Bicyclists

By month

- Warmer, drier months have more crashes



Bicyclists by Day and Hour

Serious Bicycle Crashes by Day of Week and Hour
Annual Total/Responsible Bicycle Crashes, 2007 - 2008

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Average	Average
	0000	0100	0200	0300	0400	0500	0600	0700	0800
12:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All Day	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Bicyclists by Day and Hour

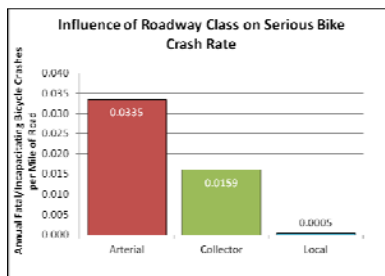
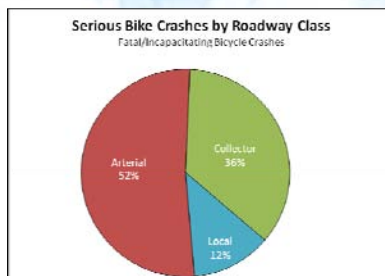
Serious Bicycle Crashes by Day of Week and Hour
Annual Total/Responsible Bicycle Crashes, 2007 - 2008

Hour	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Average	Average
	0000	0100	0200	0300	0400	0500	0600	0700	0800
12:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:00AM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11:00PM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
All Day	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Weekday PM Peak

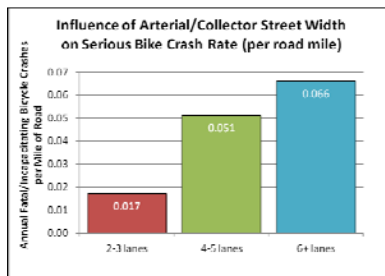
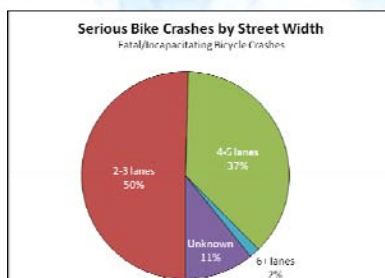
Roadway Class

- Arterials are the problem (again!)
- 52% of serious bike crashes are on arterials



Number of Lanes

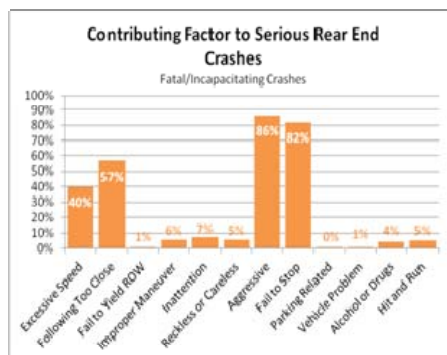
- Most crashes happen on 2-3 lane roads
- Crash rate increases with street width



Section 7 Contributing Factors

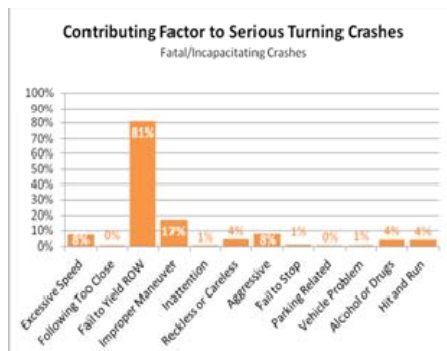
Rear End crashes

- Most common serious crash type (29%)



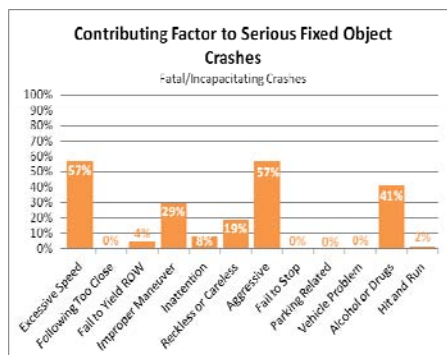
Turning crashes (usually left turns)

- 2nd most common serious crash type (22%)



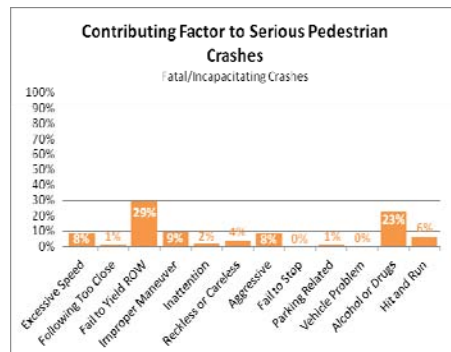
Fixed Object crashes

- Most common fatal crash type (31%)

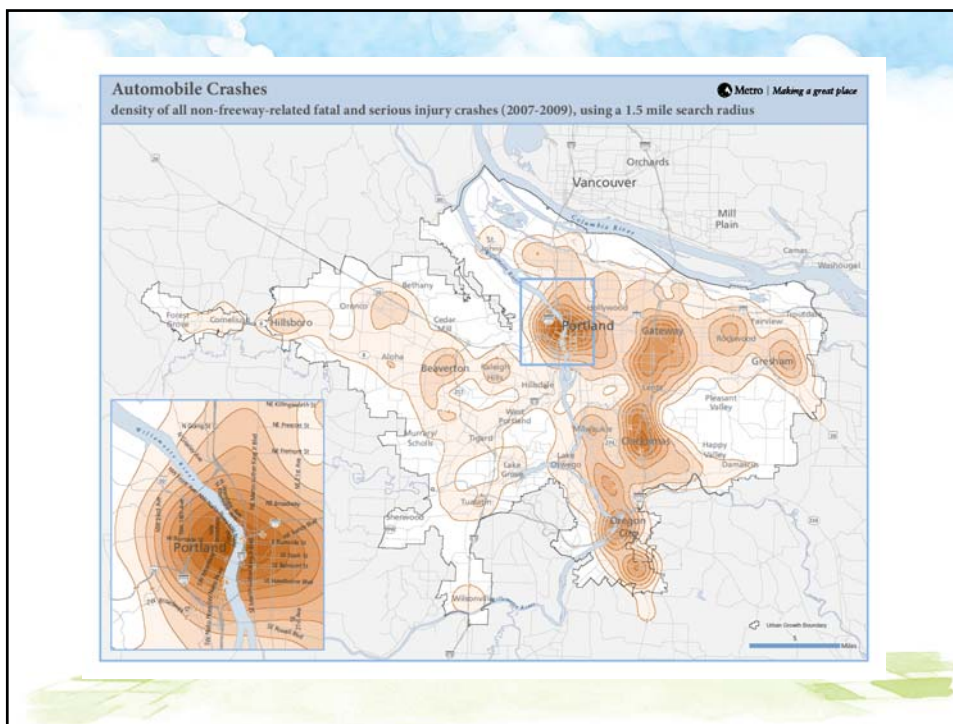


Pedestrian crashes

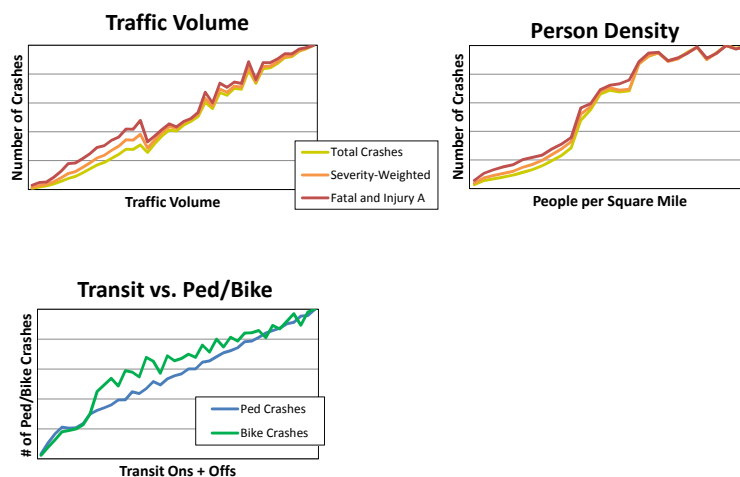
- 2nd most common fatal crash type (29%)
- Most likely to be fatal



Section 8 Land Use



Relationship of Variables



Transit and Rail

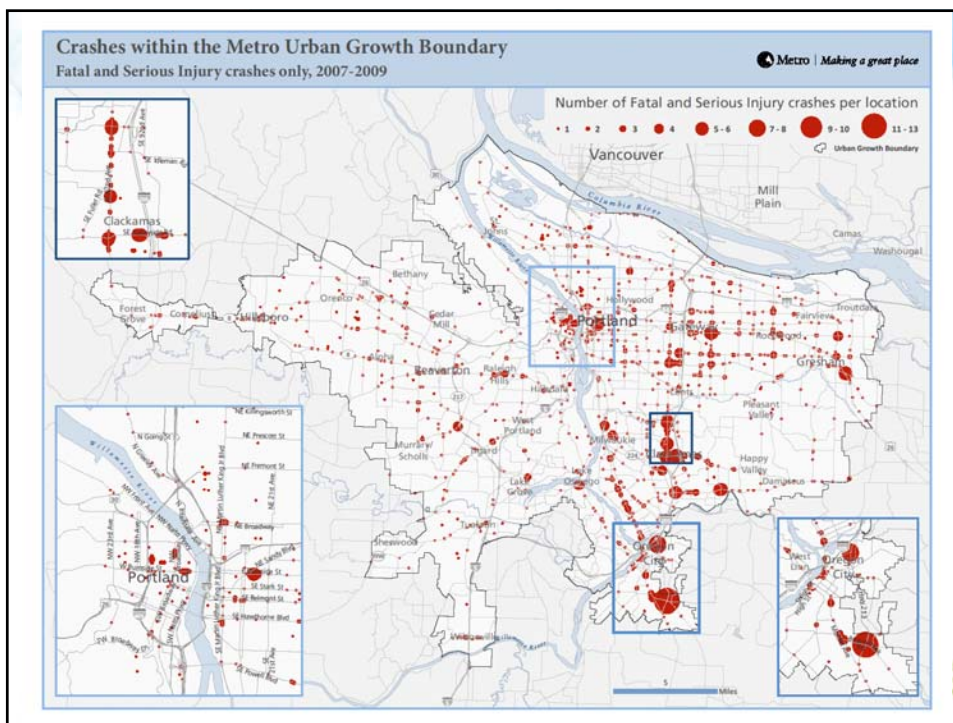
- TriMet
 - 2007 – 2009: 3 accidental fatalities (1/year)
 - 0.23 fatalities/100M passenger-miles (compared to 0.42 for all vehicles)
- Freight Rail
 - 2007 – 2009: No reported fatalities at RR crossings

What are the general patterns?

- Arterials are the major safety challenge in the region
- Alcohol/Drugs, Speed, and Aggressive Driving are major factors to be addressed
- Higher VMTs = more serious crashes
- Streets with more lanes = higher serious crash rates, particularly for people walking
- Risk for people walking increases most after dark
- Street lighting is important for bikes and peds

Next Steps

- Policy discussion at May TPAC meeting of Regional Safety Workgroup recommendations
- What should the region’s approach to improving safety be?



Age-Friendly Communities and Transportation



Metro – Transportation Policy Alternatives Committee

April 27, 2012

Dr. Margaret B. Neal & Alan DeLaTorre

Institute on Aging |  Portland State
UNIVERSITY

An “Age-Friendly” City/Community:

- Is a World Health Organization designation
 - Original Age-Friendly Cities project started in 2006
- Is defined as a city that:
 - *is “an inclusive and accessible urban environment that promotes active ageing”*
 - *“emphasizes enablement rather than disablement”*
 - *“is friendly for all ages, not just age-friendly”*

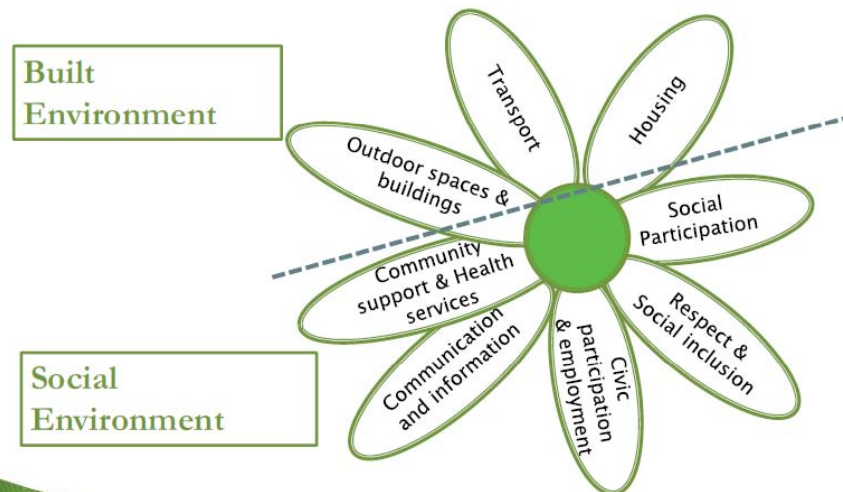
The WHO Age-Friendly Cities Study Objectives

- **For WHO:** to identify concrete indicators of an age-friendly city and produce a practical guide to stimulate and guide advocacy, community development and policy change to make urban communities age-friendly
- **For participating cities:** to increase awareness of local needs, gaps and good ideas for improvement in order to stimulate development of more age-friendly urban settings



World Health Organization

An Age-Friendly City: Eight Domains

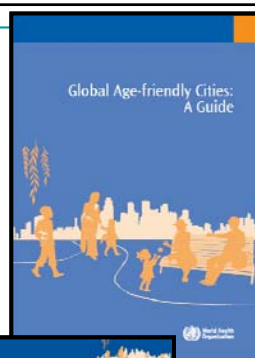


Source: Suzanne Garon,
University of Sherbrooke



The Guide & Checklist

- The recurring themes and variations among communities were reported in detail in the WHO main report: *Global Age-friendly Cities: A Guide* →
- A set of core features of an age-friendly city was identified in the Guide and in a four-page *Checklist of Essential Features of Age-friendly Cities*
 - The Guide and Checklist are intended to → serve as a reference for other communities to assess their strengths and gaps, advocate for and plan change, and monitor progress



http://www.who.int/ageing/age_friendly_cities_guide/en/

WHO Age-Friendly Cities Project in Portland, Oregon



Portland: The Capital of Good Planning¹

- Some urban planners have viewed the Portland region as “the poster child for regional planning, growth management and other innovative urban planning policies²”
- Planning for older adults has received insufficient attention in relation to the rapid aging of society



Photo credit: Portland Oregon Visitors Association

¹Carl Abbott (2000). *Greater Portland: Urban Life and Landscapes in the Pacific Northwest*

²Mayer & Provo (2004). In Ozawa (ed.) *The Portland Edge: Challenges and Successes in Growing Communities*

Portland State University's Institute on Aging

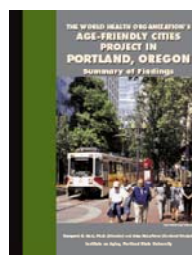
- Institute on Aging (IOA) established in 1969
- Portland State University's (PSU) motto: *"Let Knowledge Serve the City"*
- IOA located in the School of Community Health, College of Urban and Public Affairs
- IOA mission: *"Enhance understanding of aging and facilitate opportunities for elders, families, and communities to thrive"*



Photo credit: Adam J. Benjamin

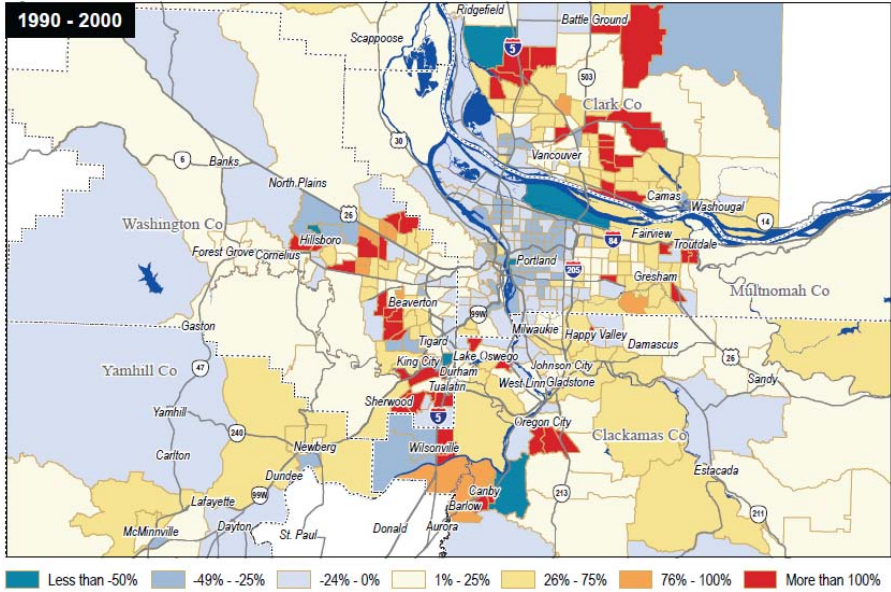
Background: Relevant IOA Research

- ***Planning for an Aging Society*** (APA PAS Report # 451, 1994)
- *Report to Metro: ***Age-Related Shifts in Housing and Transportation Demand*** (2006)
- *WHO ***Age-Friendly Cities*** project in Portland (2007)
- *WHO ***Global Network of Age-Friendly Cities*** (2010-present)
- *Metroscape article: ***Planning for an Aging Society*** (2012)

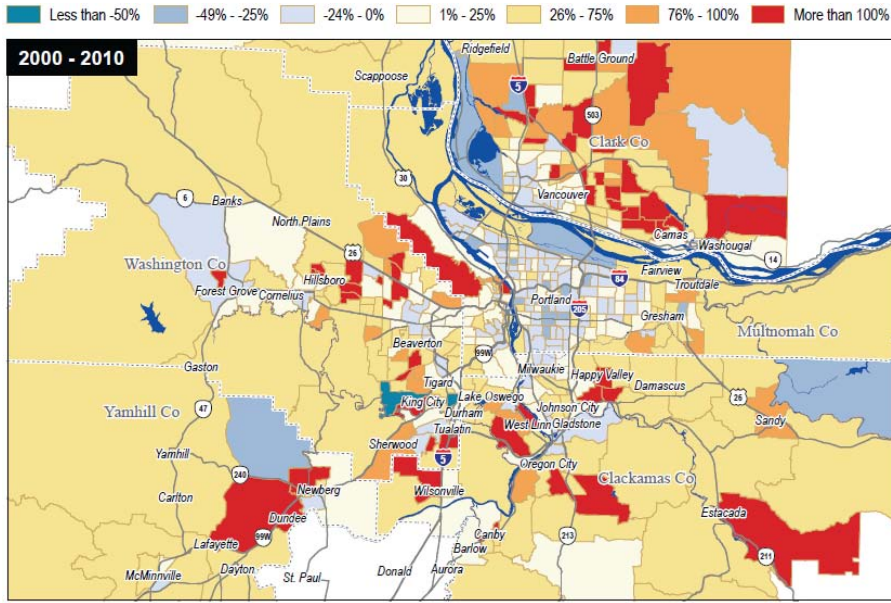


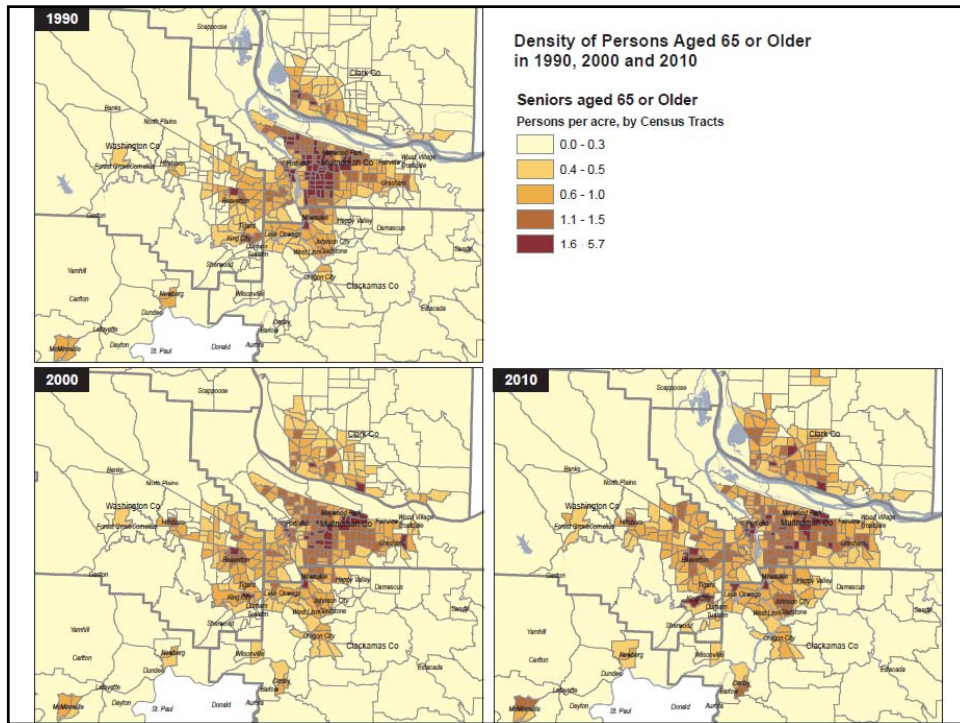
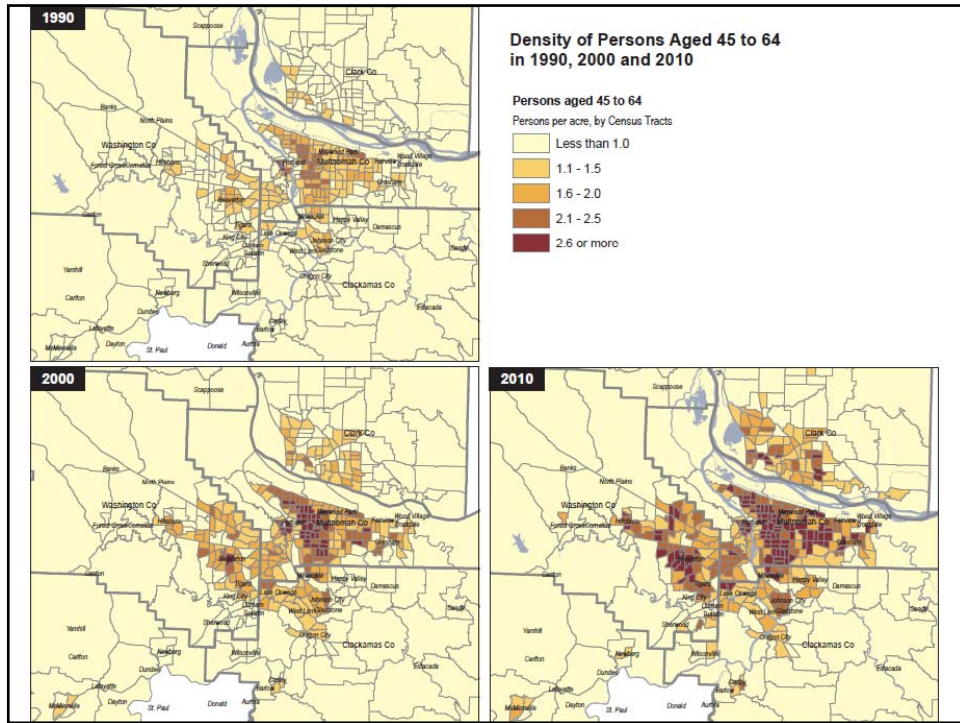
* <http://www.pdx.edu/ioa/recent-publications>

Percent Change in Persons Aged 65 or Older, by Census Tract



Percent Change in Persons Aged 65 or Older, by Census Tract





Overview of Portland's Efforts Connected to the WHO's Age-Friendly Cities Project

- **Fall 2006:** Portland (via IOA) invited to participate in WHO's global Age-Friendly Cities project
- **Spring 2007:** Project completed, participated in meeting re: findings in London, England →
- **Fall 2007:** Launched findings on Oct. 1st, *International Day of Older Persons*
- **2008-2010:** Continued dissemination of findings and building of partnerships →



Initial Convening of WHO's Age-Friendly Cities Participants in London – March, 2007



Presentation to the City Club of Portland with Bill Novelli, AARP CEO – October, 2007

Select Findings: Transportation Public Transit: Age-Friendly Features

- **TriMet offers good general service** for older adults and those with disabilities (light-rail trains, buses, and special services)
- **Services are considered affordable**, including a “fareless” zone in and around downtown Portland



“I think if you live next to the [public transportation] system...and you're going someplace that's next to it, you can't beat it”

-Older Adult

Public Transportation - Suggestions

- Explore the full bus, rail, street car line

“One of the things I do is I give every new person [in my building] a ticket, tell them to get on the bus and ride the entire route, to see what they could do, where they could get off...it is a very convenient bus.”

- Older adult



Public Transportation - Suggestions (cont.)

- Put the accessible light-rail car in the same location on each train
- Provide more night and weekend transit service
- Place security officers on light rail cars
- Design transit stops so illegal activities cannot be shielded from view



Public Transportation - Suggestions (cont.)

- Further educate public transit drivers about the needs of older adults and those with disabilities
- Educate older adults about how to use public transit (advertise Ride Connection education program)



Specialized Transportation Service – Age-friendly features

- **Ride Connection**, a non-profit community service organization, assists in the coordination and provision of transportation services for those with special needs



Proximity to Services

- Suggestions

- Co-locate transportation, housing and services such as grocery stores, community/ senior centers
- Educate older home buyers on appropriate places to age in place (e.g., those with services, transit nearby)



A New Opportunity: The WHO Global Network of Age-Friendly Cities

- **Spring 2010:** IOA/City applied for membership
- **Summer 2010:** IOA/City among first 9 cities accepted
- **2010-12:** Contributed to development of City's Portland Plan
- **Summer 2011:** Presented certificate of membership to Portland City Council ↗
- **Fall 2011:** Attended 1st Intl. Conference on Age-Friendly Cities in Dublin, Ireland →
- **Fall 2011:** Formed Advisory Council for Network work



Presentation of Certificate of Membership to Portland's City Council, June, 2011

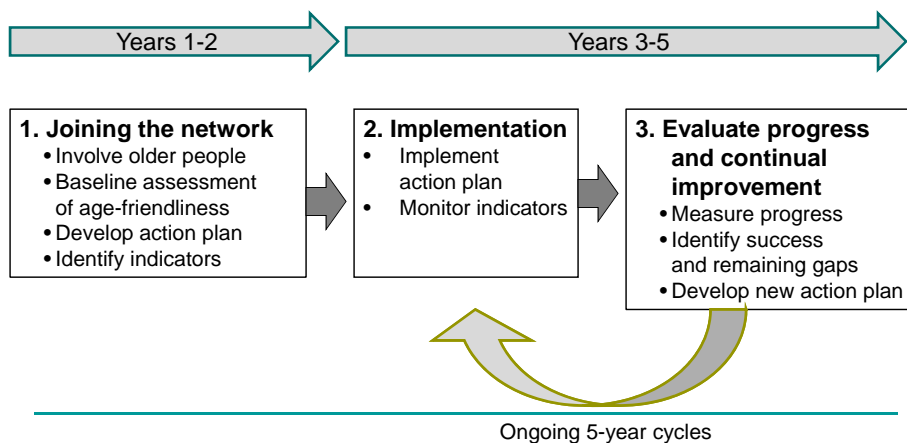


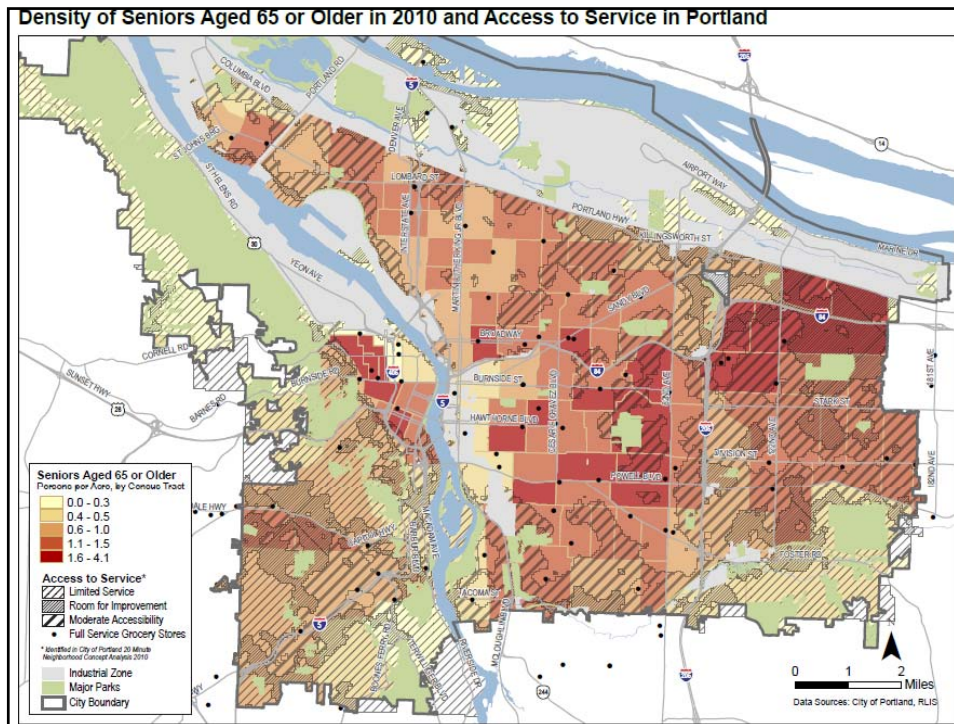
Members of the WHO Global Network of Age-Friendly Cities, October, 2011

Advisory Group Formation

- Representatives from:
 - Institute on Aging (PSU)
 - Institute of Portland Metropolitan Studies (PSU)
 - Elders in Action
 - AARP Oregon
 - Bureau of Planning and Sustainability
 - Multnomah County Aging and Disability Services
 - Offices of Mayor Adams, Commissioners Fish and Fritz
 - Coalition for a Livable Future
 - Native American Youth & Family Center
 - Urban League
 - United Way
 - Bloom Anew
 - Metro
 - OHSU (invited)
 - Portland Business Alliance (invited)
 - Faith-based (proposed)
 - Mental health (proposed)

WHO Proposed Cycle for Members of the Global Network of Age-friendly Cities[©]





From Research to Policy



- Portland Plan goal: make Portland a more thriving and sustainable city for all residents
 - Intended to inform a “once-in-a-generation” opportunity to revision Portland’s 25-year strategic, comprehensive plan
- Mayor created the Portland Plan Advisory Group (PPAG) to advise the project
 - Invited IOA researchers to serve on PPAG
 - IOA role: ensure attention given to needs, strengths of older adults and persons with disabilities

“Portland [will be] a Place for All Generations”

- Draft Plan released March 2012
- Written comments submitted addressing needed age-friendly improvements
- BPS requested a meeting with aging and disability representatives to discuss comments
- March 19, 2012 – IOA presented to Portland's Planning and Sustainability Commission
- April 16, 2012, aging and disability representatives testified at Portland's City Council hearings
- Final result: Portland Plan now specifically addresses how Portland can become a more age-friendly city

THE PORTLAND PLAN



PORTLAND IS A PLACE FOR ALL GENERATIONS.

Portland must become a city that is a great place to live for people of all ages and abilities. The Thinking Educated team strategy focuses on the need to provide support and opportunities for youth to thrive so this will ultimately benefit all of Portlanders and is key to reducing disparities among our communities.

Although Portland has been named one of the best places to retire in the U.S. on national lists, over the next 25 years Portland must become a more age-friendly city. The aging of the Baby Boom and Gen X generations and their increasing longevity will present challenges and opportunities that will be a key part of how we plan for the future of our city. The Portland Plan moves forward on making Portland a more age-friendly city in several ways:

- **Framework for Equity.** The framework for equity recognizes that Portland must become a city where access to opportunities, safe neighborhoods, safe and sound housing, healthy food, efficient public transit and parks and green space are available to people of all ages and abilities, and calls for meeting and exceeding the Americans with Disabilities Act.
- **Age-friendly city action plan.** Portland is one of only two U.S. cities accepted as pioneer members of the World Health Organization's Global Network of Age-Friendly Cities. According to the WHO, an Age-Friendly City is one that: "Adapt its structures and services to be accessible to, and inclusive of, older people with varying needs and capacities... it emphasizes empowerment rather than disempowerment and is friendly for all ages." The City of Portland and its community partners will update an Action Plan on Aging to create how Portland can become a more age-friendly city and identify implementation strategies.
- **Accessible housing.** Finding accessible, barrier-free housing can be difficult for older adults and others with mobility needs, especially given that the majority of Portland's housing is over 10 years old and typically has stairs and other features that limit accessibility. The Portland Plan places a new priority on expanding the availability of housing that incorporates accessible design to meet the needs of people of all ages and abilities.
- **Accessible community hubs.** People of all ages need safe, welcoming places that encourage physical activity and social inclusion and connection. Recognizing that many older adults and people with disabilities cannot walk or roll very far, the Portland Plan promotes locating more housing for older and mobility-limited residents in places, such as neighborhood hubs, where proximity to services and transit and accessible sidewalks makes it easier to live independently. The plan also encourages schools, colleges and universities to flexibly accommodate mobile functions, among community members of all ages.
- **Safety and accessibility on civic corridors.** While all civic spaces are fully accessible, getting to some bus stops can be challenging. Safety and accessibility of some of Portland's major transit areas can be enhanced by sidewalks and marked crosswalks. The Healthy Connected City strategy (see corridor approach) will prioritize improvements to prominent transit areas to make them hub transit and pedestrian-oriented places, with improved sidewalks, pedestrian crossings and transit facilities. They will include features that support community health and environmental sustainability.
- **Medical institutions.** Portland's aging population will increase the demand for medical services. The Portland Plan responds to this growing need by calling for new approaches to accommodate the growth of institutional facilities and neighborhood centers that may support health facilities, and for increasing workforce training in health care and senior services.
- **Inter-generational mentoring.** The accumulated knowledge and wisdom of Portland's older population is an invaluable asset to the community. The Thinking Educated team strategy recognizes this and encourages more inter-generational mentoring.

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Recommended Draft (March 2012) www.portlandplan.com

Portland Plan Actions Items

- Develop an age-friendly city **action plan**
- Prioritize expansion and availability of **accessible housing**
- Concentrate on age-friendly, accessible **community hubs**
- Foster safe and accessible **civic corridors** (e.g., infrastructure and transit)
- Increase access to and services connected to **medical institutions**
- Increase **inter-generational mentoring** opportunities
- Bolster the **framework for equity**, including integration with newly forming Office of Equity and Human Rights

PSU Current Efforts

- Seeking **funding to augment baseline data** concerning Portland's age friendliness at the neighborhood level
- April 7, 2012 – **Mayoral candidate forum** hosted by community partners focused on "Creating an Age-Friendly Portland" and a **community conversation** hosted by us to collect data related to visions for a more age-friendly Portland
- Partnering with PSU's Institute of Metropolitan Studies on a regional indicators project to **develop specific age-friendly indicators**
- Continuing to **partner** with the City (Bureau of Planning and Sustainability)
 - Recommendations to the Portland Plan to include age-friendly elements
 - Jointly advising a PSU Masters of Urban and Regional Planning student workshop project focused on public outreach and policy recommendations connected to creating an age-friendly Portland

Next Steps

- BPS forming **Policy Expert Groups** to advise on the Comprehensive Plan policy updates needed with respect to:
 - Public participation
 - Neighborhood centers and corridors
 - Network and public infrastructure (e.g., transit)
 - Residential development and compatibility
 - Economic development
- We will join and **further cultivate connections** with governmental agencies beyond BPS:
 - Metro, Portland's regional government
 - TriMet, regional transportation providers
 - Portland's Bureaus of Housing and Transportation

Barriers to Creating an Age-Friendly Portland

- Multiple **jurisdictions** providing different services:
 - City (infrastructure, local planning), County: social services, aging services), Region (transportation, long-term planning)
- Lack of government **resources**
 - For maintenance, development and redevelopment
- Competing **agendas** of stakeholders (e.g., elected officials, researchers, private sector)
 - Planning for older adults varies as a priority (e.g., compared to education, economic development, homelessness, bike friendliness)
- This university-government-community **partnership** model is imperfect and evolving
 - “Where’s the champion, where’s the torch?”
 - Ongoing, translational research is needed and funding required
- **Transitions in government leadership**

The University’s Role

- Conduct the baseline research and disseminate findings
- Engage the mayor’s office & write Network application
- Engage Bureau of Planning and Sustainability staff
- Serve as a resource to BPS staff & liaison to Network
- Enlist & collaborate with community partners
- Read draft Portland plan, write written comments
- Remain calm, committed, and be persistent
- Write Action Plan, contribute to Comprehensive Plan
- Develop and measure indicators of progress
- Collaborate, collaborate, collaborate



For further information, please contact us!

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