



Metro | Agenda

Meeting: Metro Council Work Session
Date: Tuesday, Feb. 19, 2013
Time: 1 p.m.
Place: Council Chamber

CALL TO ORDER AND ROLL CALL

- | | | |
|----------------|--|--|
| 1 PM | 1. ADMINISTRATIVE/ COUNCIL AGENDA FOR FEB. 21, 2013/ CHIEF OPERATING OFFICER COMMUNICATION | |
| 1:15 PM | 2. SECOND QUARTER FINANCIAL REPORT (UNAUDITED) – <u>INFORMATION / DISCUSSION</u> | Tim Collier
Ann Wawrukiewicz |
| 1:30 PM | 3. REGIONAL ACTIVE TRANSPORTATION PLAN UPDATE – <u>INFORMATION / DISCUSSION</u> | Lake McTighe |
| 2 PM | 4. BREAK | |
| 2:05 PM | 5. COMMUNITY INVESTMENT INITIATIVE: DEVELOPMENT-READY COMMUNITIES – <u>INFORMATION / DISCUSSION</u> | Gene Grant
Deanna Palm
Joel Schoening |
| 3:20 PM | 6. COUNCIL BRIEFINGS/COMMUNICATION | |

ADJOURN

Metro's nondiscrimination notice

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Agenda Item No. 2.0

**SECOND QUARTER FINANCIAL
REPORT (UNAUDITED)**

Metro Council Work Session
Tuesday, Feb. 19, 2013
Metro, Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: February 19 Time: 1:15 pm Length: 15 minutes

Presentation Title: Second Quarter Financial Report (unaudited)

Service, Office, or Center: Finance and Regulatory Services

Presenters (include phone number/extension and alternative contact information):

Tim Collier, Interim Director (x1913)

Ann Wawrukiewicz (x 1566)

ISSUE & BACKGROUND

The second quarter financial report is important for two specific reasons and one general reason:

1. Does the second quarter report indicate the need for any budget amendments in the current year which are necessary to insure performance within legal appropriations?

The budget is on track to perform the FY 2012-13 plan with limited adjustments.

Overall revenues are performing at the conservative pace set forth in the budget plan with some limited exceptions. Expenditures are on track.

The MERC Fund will need a budget amendment at year end to recognize increased food and beverage sales and an adjustment in how we record our new ticketing contract at PCPA. Revenues do exceed the costs of food and beverage. An increase in food and beverage business and a change in ticketing contractors are the reason main reasons for the projected amendment.

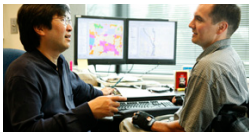
2. Do the ending balance projections for the current year signal any concerns about the FY 2013-14 budget plan?

A review of ending balances will determine the starting point for the FY 2013-14 budget process. Our balances are currently tracking where we projected them to be as we started next year's process. We will look to the third quarter projections to see if they hold or hopefully improve.

3. Lastly, this report fulfills a requirement of Metro's financial policies for monitoring and regular reporting to the Council of the budget's performance.

The third quarter report has been posted on Metro's website. Search under "financial reports".

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION __ Yes XX No
DRAFT IS ATTACHED __ Yes __ No

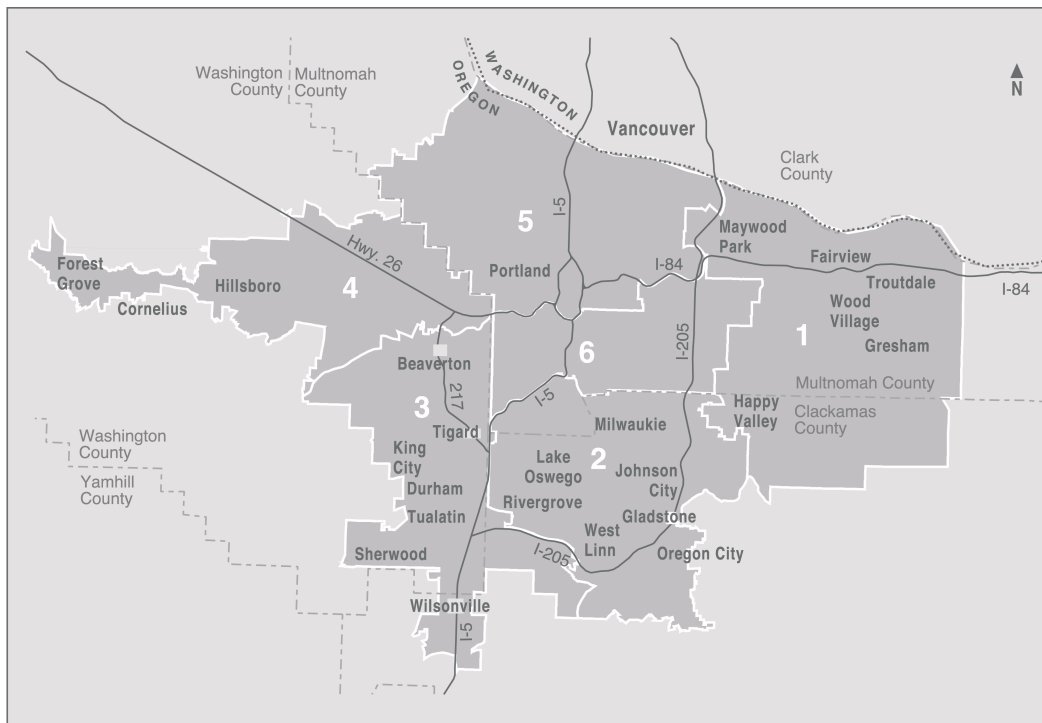


2012-13

SECOND QUARTER REPORT
October through December



Metro | *Making a great place*



Your Metro
representatives

Council President
Tom Hughes
503-797-1889

District 1
Shirley Craddick
503-797-1547

District 2
Carlotta Collette
503-797-1887

District 3
Craig Dirksen
503-797-1549

District 4
Kathryn Harrington
503-797-1553

District 5
Sam Chase
503-797-1546

District 6
Bob Stacey
503-797-1552

Auditor
Suzanne Flynn, CIA
503-797-1891

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 good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

2012-13

SECOND QUARTER REPORT
October through December

printed on recycled content paper

FY 2012-13 Quarterly Report

Second Quarter

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EXECUTIVE SUMMARY

February 19, 2013

President Tom Hughes
Members of the Metro Council
Interested Parties

On behalf of the Finance Team, I am today delivering Metro's Second Quarter Financial Report for FY 2012-13. As we pointed out in the first quarter's report, we expect this year's performance to track very closely to budget. This report covers the first half of the year and anticipates our financial position at year end, shown in the table below. The second quarter is particularly important for developing our next budget, both for operations and for capital improvement planning.

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Revenue						
Program Revenues	133,790,713	61,882,227	46.3%	126,221,278	94.3%	94.6%
General Revenues	83,457,319	59,004,191	70.7%	82,981,788	99.4%	99.5%
Other Financing Sources	0	502,200		502,200		N/A
Revenue	\$217,248,032	\$121,388,617	55.9%	\$209,705,266	96.5%	
	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	79,767,638	38,228,408	47.9%	77,236,065	96.8%	95.1%
Materials and Services	116,358,219	40,522,261	34.8%	102,953,420	88.5%	69.6%
Total Operating Expenditures	196,125,857	78,750,669	40.2%	180,189,485	91.9%	79.3%
Total Capital Outlay	62,382,104	9,852,272	15.8%	38,099,991	61.1%	44.3%
Total Renewal and Replacement	3,799,260	538,312	14.2%	3,001,034	79.0%	68.4%
Total Expenditures	\$262,307,221	\$89,141,252	34.0%	\$221,290,510	84.4%	72.3%

Estimating revenues conservatively proves wise

Revenues are budgeted conservatively to reflect the continuing sluggishness in the economy, an approach which continues to be wise. Total revenues are tracking to budget more closely than ever. There continues to be encouraging signs at the venues, as revenues are tracking higher than budget. A blockbuster ZooLights presentation and the birth of baby Lily returned the zoo to its positive revenue track after a small slump in the first quarter. Transient lodging tax and construction excise tax are returning to prerecession levels and are beginning to show a return to modest growth. Property tax collections are on target and are projected to end the year right on budget.

However, there are some areas of concern. The implementation of new cemetery fees last November has not demonstrated the impacts we were hoping for, and we are revisiting our pricing strategy on a go forward basis. Parks admission fees continue to slump, and we are still waiting on data to see how the new Glendoveer contract will perform. Solid waste tonnage in the region continues to slowly climb, but we are finding those returning tons are going to private facilities and not to Metro's transfer stations.

Expenditures also track closely to budget

Operating expenditures also remain closer to budgeted levels than in the past. In a positive way we are watching closely the revenue-expenditure tandem for the venues. As revenues increase with activity, expenditures for the cost of food and beverage and event staffing follow. As parks revenues continue to sag we will be looking to slow spending to lessen the budgetary impacts.

Capital project update

At the second and fourth quarters we report on the progress of the Capital Improvement Plan (CIP). The review at the second quarter is particularly helpful in updating and developing the plan for the following year.

The five-year CIP includes 52 projects. The greatest spending is anticipated for acquisition of land under the Natural Areas bond program and intensive construction at the zoo under the Oregon Zoo Infrastructure and Animal Welfare bond program. The second quarter saw completion of roof projects at Central Household Hazardous Waste and Expo. The zoo's conditional use master plan was well on its way to approval, which we received early in the third quarter.

The full report is included in the appendix.

Anticipating a third quarter bond refinancing

We have recently been reaffirmed as a AAA bond rated agency and will be looking to refund an outstanding bond issue at the MRC and zoo in third quarter. This refunding should save Metro a little more than \$1 million over the remaining term of the bonds.

Second quarter prognosis: on track

Generally the news has been positive. The venue activity is going well; zoo attendance received a good bounce from Lily and ZooLights. The tightness of the expenditures to appropriations will require close monitoring in the spring to avoid any exceptions.

What can we expect for FY 2013-14?

The budget process for FY 2013-14 has begun in earnest and we must continue to closely monitor revenues and expenditures to ensure financial stability in later years. While revenues are turning around in most areas, they still are not outpacing rising costs, particularly with PERS and health care increases. While we are not out of the woods yet and we will still have to make some hard choices for foreseeable budget cycles, our fiscal prudence in the past has set us up for continued success in the future.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tim Collier', with a stylized flourish at the end.

Tim Collier, CPA, MBA

Interim Director of Finance and Regulatory Services



METRO REVENUES

Overall Revenues

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
All Revenue						
Program Revenues	133,790,713	61,882,227	46.3%	126,221,278	94.3%	94.6%
General Revenues	83,457,319	59,004,191	70.7%	82,981,788	99.4%	99.5%
Other Financing Sources	0	502,200	NA	502,200	NA	NA
All Revenue	\$217,248,032	\$121,388,617	55.9%	\$209,705,266	96.5%	

Agency revenues totaled \$121.4 million through the second quarter, or 56 percent of the annual budget. By year-end, total revenues are expected to reach \$209.7 million, or 96.5 percent of budget. Revenues continued to be strong at the Oregon Convention Center (OCC) and Portland Center for the Performing Arts (PCPA) and a solid December improved the zoo's revenue outlook for the year. Tonnage at Metro solid waste facilities continues to fall below budgeted figures, impacting both departmental revenues and excise tax collections.

Program Revenues

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Program Revenues						
Charges for Services Revenue	115,017,139	57,219,469	49.7%	109,637,891	95.3%	95.8%
Internal Charges for Svcs-Rev	530,292	530,292	100.0%	530,292	100.0%	96.4%
Licenses and Permits	380,000	176,175	46.4%	375,000	98.7%	95.0%
Miscellaneous Revenue	340,261	436,782	128.4%	504,953	148.4%	112.3%
Grants	12,328,058	3,344,044	27.1%	9,933,743	80.6%	76.2%
Contributions from Governments	3,723,036	81,271	2.2%	3,749,446	100.7%	122.7%
Contributions - Private Source	1,441,927	67,318	4.7%	1,441,827	100.0%	121.6%
Capital Grants	30,000	26,876	89.6%	48,126	160.4%	418.1%
Program Revenues	\$133,790,713	\$61,882,227	46.3%	\$126,221,278	94.3%	70.2%

Revenues
generally on
track

PROGRAM REVENUE BY OPERATING UNIT

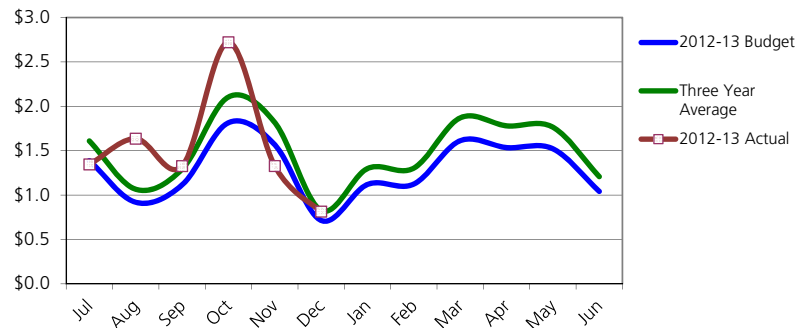
Finance and Regulatory Services

Contractors' Business License revenues through second quarter are similar to last year through December and are projected to reach \$375,000, just below the budgeted \$380,000.

Metropolitan Exposition Recreation Commission by Venue

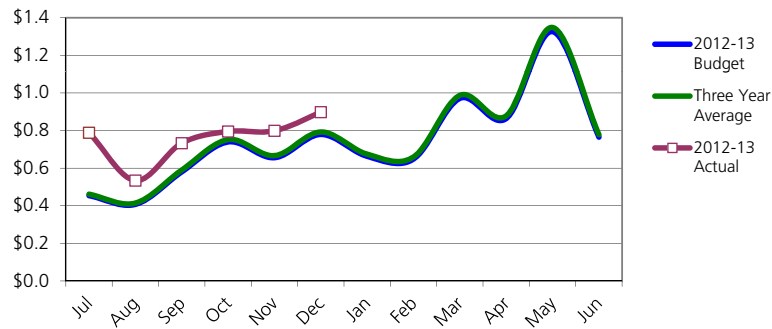
Oregon Convention Center- Program Revenues by Month

shown in millions



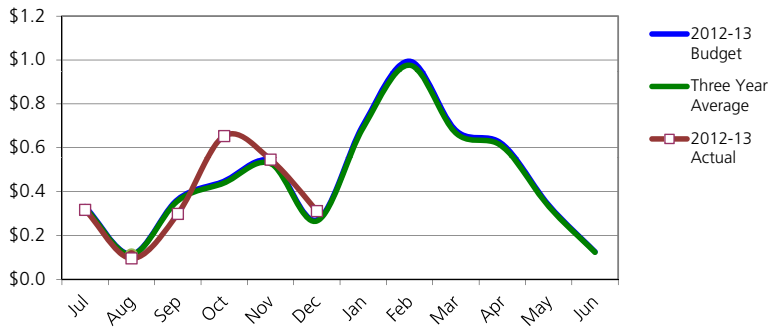
Portland Center for the Performing Arts- Program Revenues by Month

shown in millions



Portland Exposition Center- Program Revenues by Month

shown in millions



**MERC
performance
consistent with
last year**

MERC operating revenues for the first six months reached \$15.9 million year-to-date compared to \$15.8 million in the prior year. Year-end operating revenue is estimated to be greater than budget based on several factors. OCC's original budget included 32 national conventions. Current bookings have reached 37 conventions, however, with the additional five scheduled in spring 2013. PCPA revenue from operations is greater than budget, due partially to the way revenue and expenditures are recorded under the NewEra/TicketsWest ticketing contract. NewEra/TicketsWest provides PCPA with a ticket report which segregates the revenue (commission) and expenditures (fees, such as credit card, etc.). TicketMaster was unable to provide this detailed report; therefore, the amount posted to revenue was the net result. Expo operating revenue is trending close to budget, but year-end food and beverage sales are not expected to reach original budget estimates.

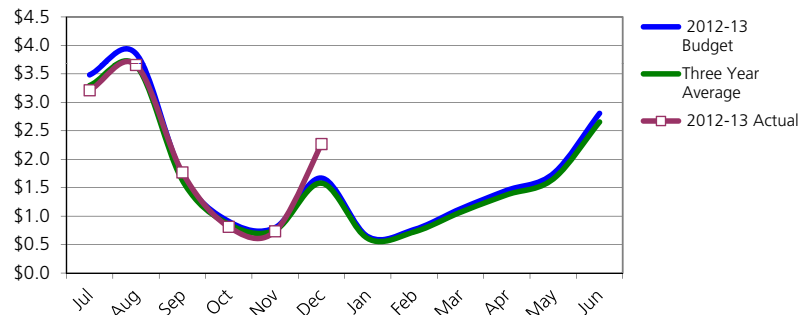
Expo's top grossing events during second quarter were America's Largest Christmas Bazaar (\$327,000) and the Fall Home & Garden Show (\$161,000). The top grossing events at OCC included 2012 Applied Superconductivity Conference – ASC (\$508,000) and the International Code Council (\$417,000). PCPA performances included the Nutcracker (\$196,000) and the Singing Christmas Tree (\$229,000).

During second quarter of FY 2012-13, Expo attendance was 2,080 greater than the same quarter of FY 2011-12, with one less tradeshow; OCC attendance was 1,450 greater, with six more events; PCPA attendance was 16,288 less, but with 27 more commercial performances than the prior year.

Oregon Zoo

Oregon Zoo- Program Revenues by Month

shown in millions



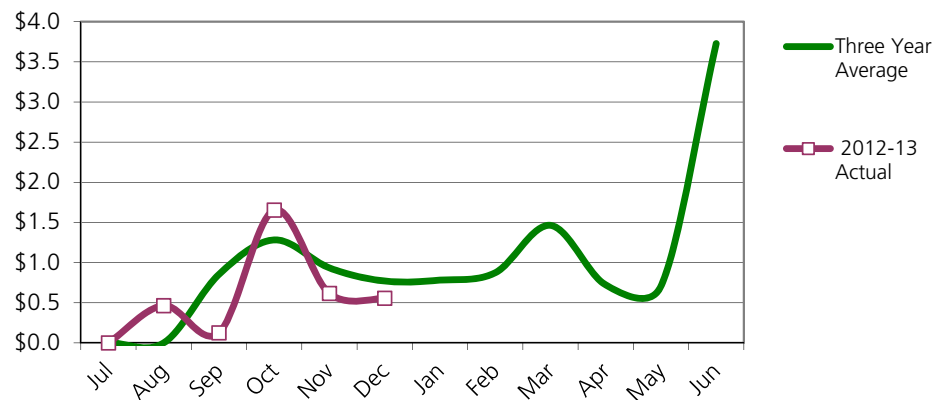
Zoo sets monthly attendance record in December

Attendance set a monthly record in December at 219,000, and the overall quarter was comparable with the prior year. ZooLights had the second-best attendance in history by drawing 183,000 visitors. Revenue picked up in the second quarter and year-to-date is 1 percent greater than the prior year. Revenue remains below budget, however, and management continues to monitor costs to maintain a balanced condition.

Planning and Development/Research Center

Planning and Development/Research Center- Program Revenues by Month

shown in millions



Planning revenues are projected to end the year 5 percent (\$580,000) below budget, primarily due to the first quarter rescoping of the Southwest Corridor project. Delayed grant funding includes \$200,000 for the Powell-Division Bus Rapid Transit project, now expected to begin in FY 2013-14. The department is still awaiting more than \$500,000 in grant funding for RTO work completed last year; this funding is expected in the third quarter. The October spike on the revenue chart includes July through September grant billing.

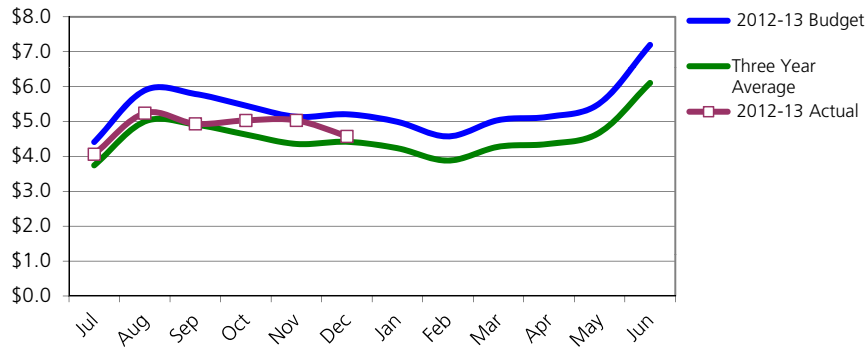
Because the timing of grant revenues varies significantly and unpredictably from year to year, the "budget" line is not included in the chart above. Each year the August revenues are adjusted in the Planning chart to account for year-end accounting entries.

Waste stream continues to shift to private facilities

Parks and Environmental Services

Parks and Environmental Services- Program Revenues by Month

shown in millions



Parks and Property Stewardship: Overall Parks and Property Stewardship revenues are anticipated to end the year 11.8 percent (\$485,000) lower than budgeted levels, a further decline of \$103,000 from the first quarter.

Despite November 2011 burial fee increases, cemetery revenues during the second quarter continued to fall below budgeted levels and below last year's levels. Increasing use of cremation services could be one contributing factor to the decrease in burial services, which is currently the only service that Metro provides. Metro is implementing a new reduced rate structure effective January 2013 to make burial services more competitive.

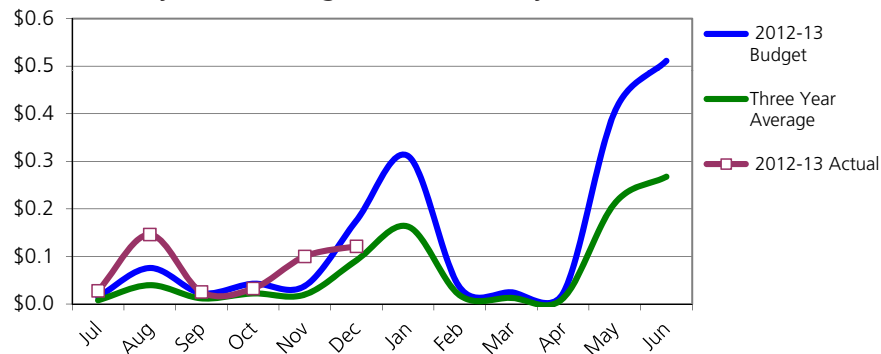
Metro negotiated a new contract during the second quarter for rental fees at the on-site child care facility. The rental fees were adjusted down and year-end projections are now expected to be about \$20,000 below budget.

Park admission revenues are down fiscal year-to-date over both FY 2011-12 and budgeted levels. Planned construction at Oxbow Park and Gleason Boat Ramp in the next six months may decrease park revenues further. A new Glendoveer Golf operating contract effective January 1, 2013, will necessitate a budget amendment to implement a new revenue and expenses structure.

Solid Waste Operations: Based on second quarter results, year-end tonnage at Metro facilities is expected to fall 13.7 percent below budget, while tonnage at non-Metro facilities is expected to be right on budget. The downturn at Metro transfer stations is primarily because waste continues to shift from Metro to private facilities and to a lesser degree because of changes in the waste stream, e.g., the Portland residential organics program. Year-end program revenues are projected to be 10.6 percent (\$6,100,000) lower than budgeted, although this year-end projection also includes higher than budgeted revenues for the MetroPaint Stewardship Program (PaintCare).

Sustainability Center

Sustainability Center- Program Revenues by Month



Sustainability Center program revenues are projected to end the year 3.3 percent higher than budget with almost no change from the first quarter. The ability to meet the projected revenues is dependent upon completion of the Blue Lake Trail section of the 40-Mile Loop Trail and the recognition of the expenditures made directly by the Oregon Department of Transportation as revenue (\$836,000) once the project is completed. The project is under review and moving forward; however, additional Metro matching funds may be required, and the project is likely to carry forward into FY 2013-14.

General Revenues

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
General Revenue						
Real Property Taxes	51,157,728	46,496,434	90.9%	51,155,000	100.0%	101.1%
Excise Taxes	15,639,971	6,941,725	44.4%	14,847,936	94.9%	95.4%
Construction Excise Tax	1,760,000	654,509	37.2%	1,800,000	102.3%	107.6%
Other Derived Tax Revenues	75,000	7,016	9.4%	30,000	40.0%	120.3%
Local Govt Shared Revenues	13,671,720	4,351,920	31.8%	14,018,444	102.5%	103.0%
Interest Earnings	1,152,900	552,587	47.9%	1,130,408	98.0%	89.4%
General Revenue	\$83,457,319	\$59,004,191	70.7%	\$82,981,788	99.4%	99.3%

Property Taxes– Most property tax revenues are received during the second quarter. Based on receipts to date, property tax revenues are projected to end the year right on budget.

Transient Lodging Tax– Year-to-date transfers received from Multnomah County are \$4.2 million compared to \$4.0 million in the prior year. Year-to-date room nights sold in the market are up 2.4 percent, occupancy rates (room nights per hotel) are up 2.1 percent and the average daily room rate is up 7.3 percent.

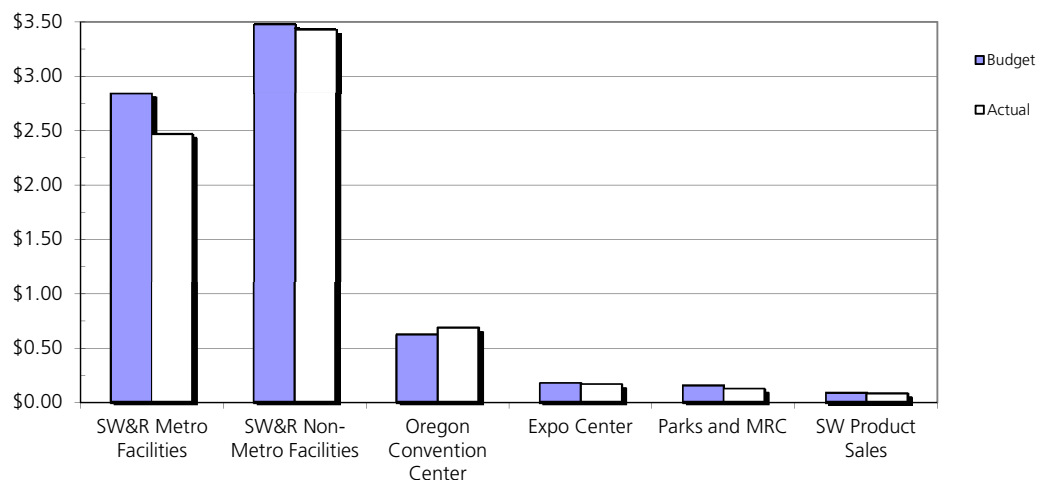
Interest Earnings– Total interest earnings are projected to end the year just below budget; interest rates remain extremely low.

**Property Tax
collections on
target**

Excise Tax

Excise Tax Received Through December 31, 2012, Budget vs. Actual

shown in millions



Non-tonnage excise tax is projected to end the year right at budget, led by strong revenues at OCC. Solid waste excise tax projections are currently 6 percent below budget, due to a slight further decline in tonnage at Metro facilities.

METRO EXPENDITURES– OPERATING DEPARTMENTS

Metro Operating Departments

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	62,043,634	29,687,936	47.9%	60,293,623	97.2%	94.8%
Materials and Services	105,327,198	37,469,416	35.6%	94,923,095	90.1%	61.6%
Total Operating Expenditures	167,370,832	67,157,352	40.1%	155,216,718	92.7%	74.0%
Total Capital Outlay	61,919,498	9,811,386	15.8%	37,804,746	61.1%	41.5%
Total Renewal and Replacement	2,944,383	298,293	10.1%	2,551,034	86.6%	71.3%
Total Expenditures	\$232,234,713	\$77,267,032	10.1%	\$195,572,498	84.2%	65.1%

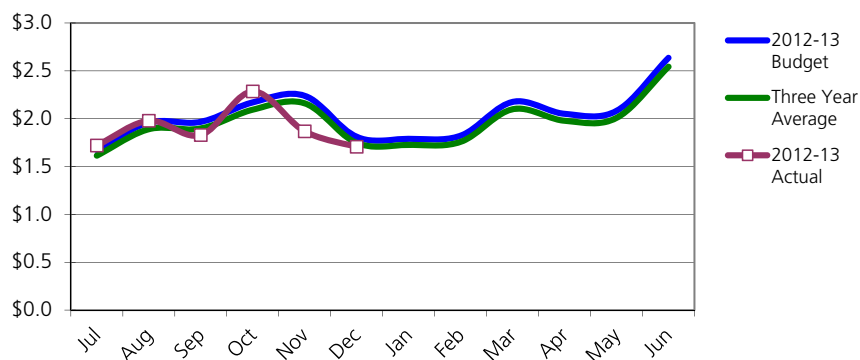
EXPENDITURES BY DEPARTMENT

MERC

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	17,403,962	8,238,654	47.3%	17,153,962	98.6%	94.3%
Materials and Services	24,341,158	10,628,714	43.7%	25,541,158	104.9%	95.9%
Total Operating Expenditures	41,745,120	18,867,368	45.2%	42,695,120	102.3%	95.1%
Total Capital Outlay	3,344,077	537,815	16.1%	3,044,077	91.0%	63.6%
Total Expenditures	\$45,089,197	\$19,405,183	43.0%	\$45,739,197	101.4%	92.5%

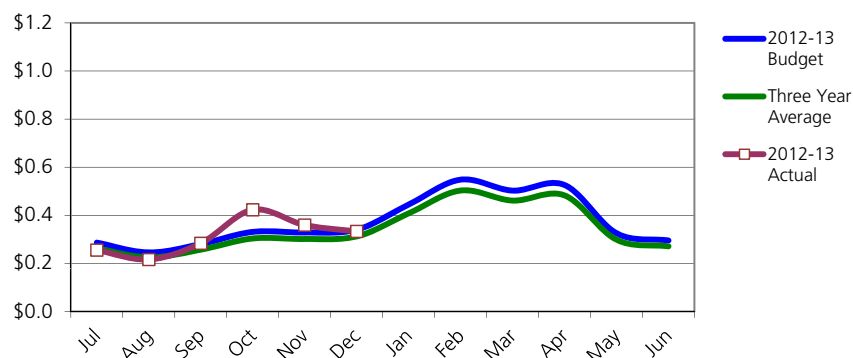
OCC- Operating Expenditures by Month

shown in millions



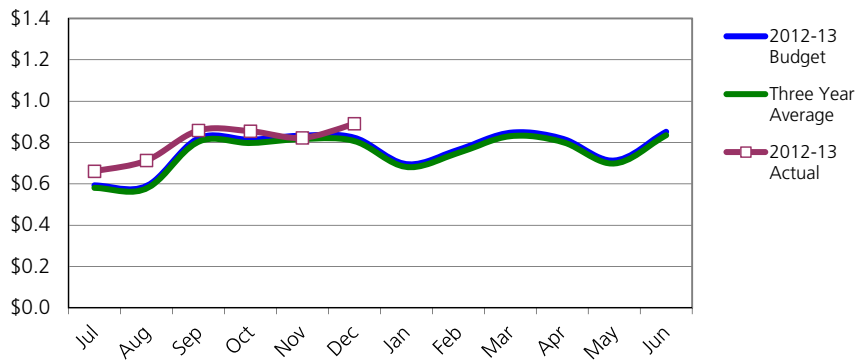
EXPO- Operating Expenditures by Month

shown in millions



PCPA- Operating Expenditures by Month

shown in millions



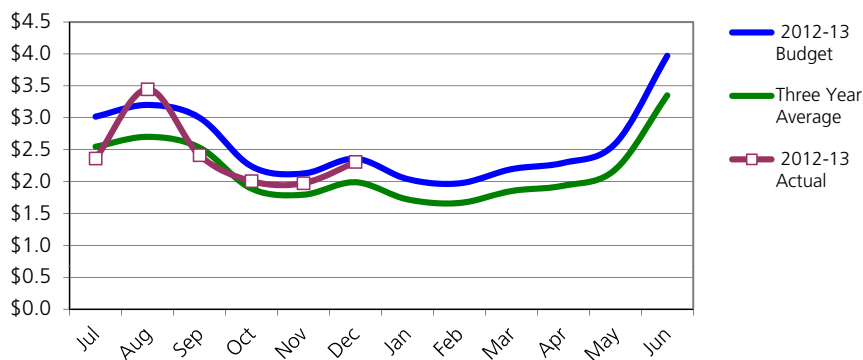
MERC operating expenditures year-to-date are \$18.9 million, compared to \$19.2 million in the prior year. Operating expenditures relate directly to the event schedule at each venue. Due to the increase of five conventions at OCC, the current food and beverage sales forecasts will generate an increase in the cost of goods sold, although OCC position vacancies continue to generate savings. With the change in the accounting for the NewEra/TicketsWest contract, PCPA expenditures will increase.

Oregon Zoo

	Budget	Actual	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	18,639,755	9,053,066	48.6%	17,945,637	96.3%	95.0%
Materials and Services	12,187,756	5,436,754	44.6%	12,187,756	100.0%	87.8%
Total Operating Expenditures	30,827,511	14,489,820	47.0%	30,133,393	97.7%	92.1%
Total New Capital	1,150,675	197,338	17.1%	1,072,322	93.2%	72.5%
Total Renewal and Replacement	797,754	185,331	23.2%	600,000	75.2%	70.6%
Total Expenditures	32,775,940	14,872,489	45.4%	\$31,805,715	97.0%	90.8%

Oregon Zoo- Operating Expenditures by Month

shown in millions



The zoo continues its very close monitoring of expenditures, with a focus on managing seasonal, temporary and overtime staffing.

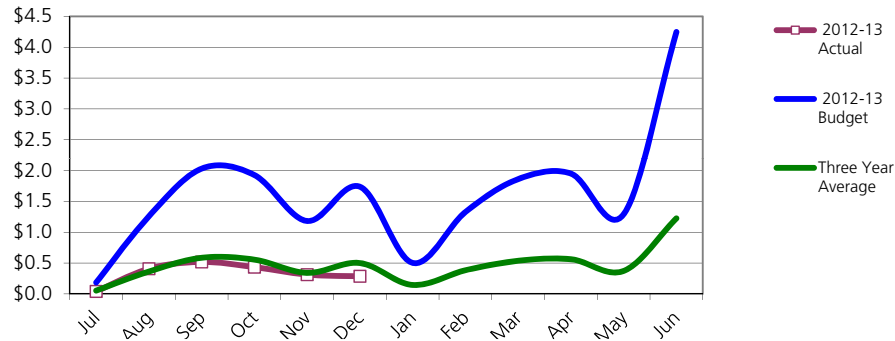
With the second quarter ended, focus is shifting to planning for the summer 2013 concert season, supporting moves and plans for the Elephant Lands project, and strategic and tactical planning for admissions, food services and facilities management.

Oregon Zoo Infrastructure and Animal Welfare Bond

	Budget	Actual	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	533,850	220,958	41.4%	443,458	83.1%	90.5%
Materials and Services	14,753	5,158	35.0%	14,753	100.0%	0%
Total Operating Expenditures	548,603	226,116	41.2%	458,211	83.5%	108.0%
Total Capital Outlay	18,963,162	1,777,750	9.4%	9,654,356	50.9%	51.1%
Total Expenditures	\$19,511,765	\$2,003,866	10.3%	\$10,112,567	51.8%	54.6%

Oregon Zoo Infrastructure and Animal Welfare Bond- Expenditures by Month

shown in millions



The Elephant Lands design team was approved to proceed to the construction document design phase. In December 2012 the Metro Council approved the staff recommendation to allocate a portion of bond sale premium funds to offset budget overage related to geotechnical challenges. Construction on the service road and Wildlife Live will begin in the third quarter.

Construction drawings on the Condor Habitat are 90 percent complete, with construction expected to begin in March and expected to be completed in September 2013.

The Metro Council directed staff to exercise the property purchase option for the Roslyn Lake property for the Remote Elephant Center. Land-use planning options and strategies are being developed as well as funding sources for long-term operating costs.

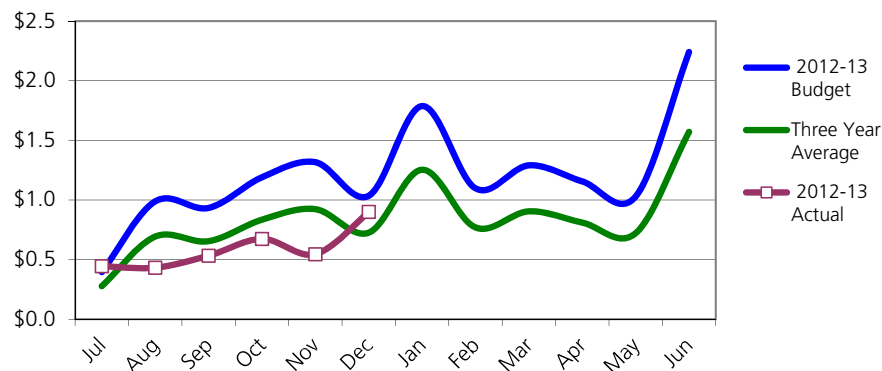
The City of Portland's Bureau of Development Services staff report for the Updated Conditional Use Master Plan was issued November 30, 2012, and the plan was approved with no appeal in late January 2013.

Planning and Development

	Budget	Actual	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	5,590,211	2,616,610	46.8%	5,225,000	93.5%	94.5%
Materials and Services	8,866,159	910,314	10.3%	4,400,000	49.6%	40.9%
Total Expenditures	\$14,456,370	\$3,526,924	24.4%	\$9,625,000	66.6%	61.0%

Planning and Development- Operating Expenditures by Month

shown in millions



Elephant
Lands project
proceeding as
scheduled

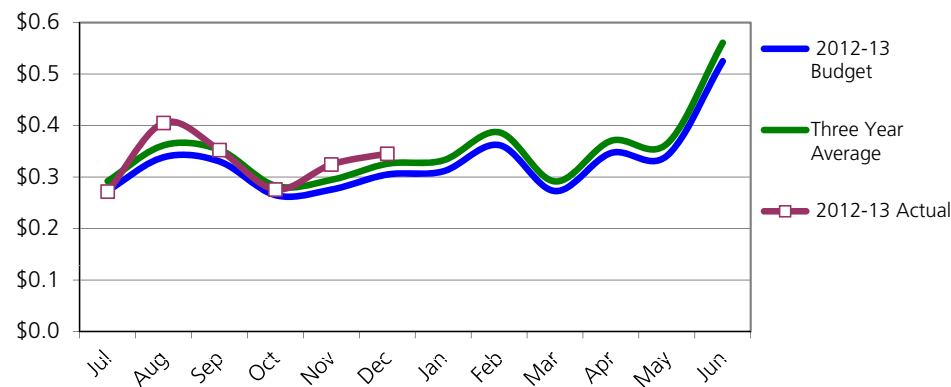
The re-scoping of the Southwest Corridors project will result in underspending of more than \$1.2 million. The Development Opportunity Fund expects a carry forward of \$427,000 in unfinished small construction grants. Underspending of \$2.1 million in the Transit Oriented Development program will be carried forward to fund projects in future years.

Research Center

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	3,327,876	1,579,490	47.5%	3,200,000	96.2%	96.3%
Materials and Services	617,779	395,049	63.9%	549,000	88.9%	87.7%
Total Expenditures	\$3,945,655	\$1,974,539	50.0%	\$3,749,000	95.0%	94.2%

Research Center- Operating Expenditures by Month

shown in millions



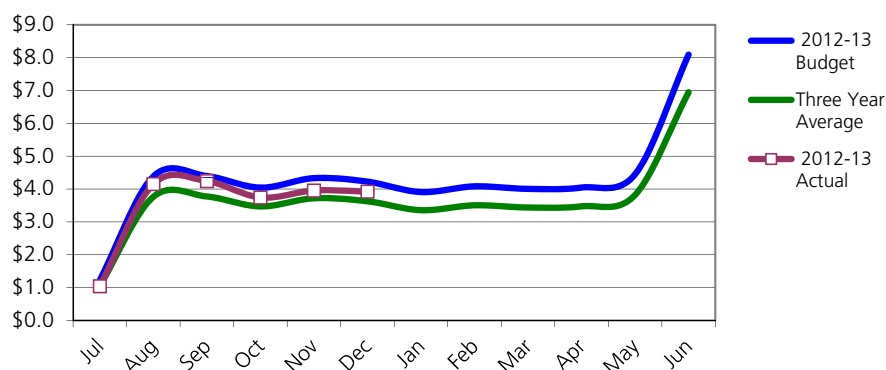
Research Center spending is projected to end the year very close to historical levels of spending.

Parks and Environmental Services

	Budget	YTD Actuals	YTD % of Budget	Year-End Projection	% of Budget	
General Fund	\$6,740,869	3,296,635	48.9%	\$6,576,389	97.6%	
Solid Waste Revenue Fund	\$49,645,731	18,111,461	36.5%	\$41,446,828	83.5%	
General Asset Management Fund	\$2,867,769	139,276	4.9%	\$2,672,174	93.2%	
All Funds	Budget	YTD Actuals	YTD % of Budget	Year-End Projection	% of Budget	3-year Average
Personal Services	9,906,145	4,752,271	48.0%	9,776,912	98.7%	94.1%
Materials and Services	41,183,674	16,244,477	39.4%	36,674,524	89.1%	91.5%
Total Operating Expenditures	51,089,819	20,996,748	41.1%	46,451,436	90.9%	92.0%
Capital Outlay	6,140,040	474,417	7.7%	2,381,381	38.8%	23.3%
Renewal and Replacement	2,123,169	112,962	5.3%	1,927,574	90.8%	
Total Expenditures	59,353,028	21,584,128	36.4%	50,760,391	85.5%	85.1%

Parks and Environmental Services- Operating Expenditures by Month

shown in millions



Parks and Property Stewardship: Operating expenditures are following seasonal patterns and are projected to end the fiscal year approximately \$165,000 below budget. A new Glendoveer operating contract effective January 1, 2013, will necessitate a budget amendment to implement a new revenue and expenses structure. Recognizing Parks and Property Stewardship revenue shortfalls, the department is assessing opportunities for cost reduction.

Solid Waste Operations: Based on first quarter results the year-end tonnage at Metro facilities is expected to fall 13.7 percent below budget, a slight decline from the first quarter. The expected shortfall in revenue will not be fully offset by a reduction in tonnage-related materials and services expenditures. The decline is not one-to-one because Metro's operations contracts contain fixed costs that must be paid regardless of tonnage. The department will monitor these trends closely over the next two quarters to determine the potential impact on the Solid Waste Fund reserves.

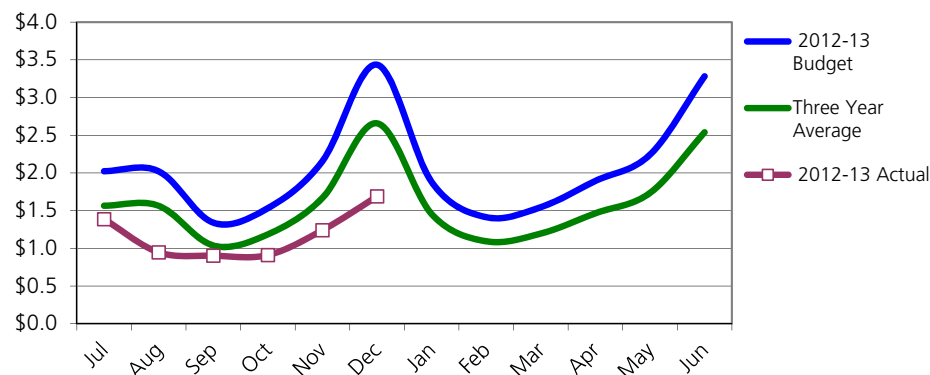
The department spent less than 7 percent of its capital budget through the second quarter of FY 2012-13. Capital spending during the first and second quarter is usually modest as capital projects are under needs assessment or in the scoping phase. About 66 percent of the capital budget is related to Solid Waste Operations. The year-end capital expenditures projection for Solid Waste Operations assumes that the St. Johns Landfill Remediation project (\$1 million) will be under the feasibility study phase during FY 2012-13 and will be carried forward to FY 2013-14. In addition, the projection assumes that current negotiations with a potential purchaser of landfill gas will be successful and the Gas to Energy project (\$1.15 million) will not move forward. Several projects at Metro Transfer Stations have been carried forward to FY 2013-14 due to design considerations, permitting, and feasibility studies. Construction for a major parks renewal and replacement project, the Gleason Boat Ramp (\$1.286 million), began during the second quarter.

Sustainability Center

	Budget	YTD of Budget	YTD %	Year-End Projection	% of Budget	
General Fund	\$4,332,136	\$1,981,132	45.7%	\$4,185,062	96.6%	
Solid Waste Revenue Fund	\$6,352,539	\$1,895,657	29.8%	\$5,460,592	86.0%	
Natural Areas Fund	\$45,177,698	\$9,942,358	22.0%	\$33,645,104	74.5%	
All Funds	Budget	YTD of Budget	YTD %	Year-End Projection	% of Budget	3-year Average
Personal Services	6,641,835	3,226,888	48.6%	6,548,654	98.6%	98.5%
Materials and Services	18,115,919	3,848,950	21.2%	15,555,904	85.9%	67.3%
Total Operating Expenditures	24,757,754	7,075,837	28.6%	22,104,558	89.3%	74.8%
Capital Outlay	32,321,544	6,824,066	21.1%	21,652,610	67.0%	45.1%
Renewal and Replacement	23,460	0	0.0%	23,460	100.0%	24.6%
Total Expenditures	57,102,758	13,899,903	24.3%	43,780,628	76.7%	57.3%

Sustainability Center- Operating Expenditures by Month

shown in millions, excluding capital acquisitions



Parks Planning and Development: Several projects are under review or in the scoping phase. The majority of the projects in this program require extensive involvement with stakeholders, general public, and public agencies at the local, regional, state and federal levels, causing projects to fall behind schedule. The year-end projection anticipates the completion of the Blue Lake Trail section of the 40-Mile Loop Trail (\$836,000) and the recognition of the expenditures made directly by the Oregon Department of Transportation as a Metro asset. The project is under review and moving forward; however, additional Metro matching funds may be required. A budget amendment during the first quarter increased expenditure authority (\$173,000) for a regional public involvement effort as part of evaluating a potential local option levy that will provide funding to restore natural areas, maintain and operate parks.

Resource Conservation and Recycling: Expenditures in this program generally take place from the second to fourth quarter, mainly as Grants to Other Governments. Historical underspending patterns are included in the year-end projections.

Natural Areas: Expenditures in materials and services from the Local Share program are below budget and three-year average trend. The year-end forecast for Local Share and for capital (land acquisition) is conservative, based on historical patterns and expected acquisitions by the end of the fiscal year.

EXPENDITURES– SUPPORT DEPARTMENTS

All Support Departments

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	17,644,204	8,493,244	48.1%	16,841,442	95.5%	95.6%
Materials and Services	3,791,983	1,212,946	32.0%	3,310,325	87.3%	75.6%
Total Operating Expenditures	21,436,187	9,706,190	45.3%	20,151,767	94.0%	92.0%
Total Capital Outlay	243,781	40,885	16.8%	245,245	100.6%	37.1%
Total Renewal and Replacement	854,877	240,018	28.1%	450,000	52.6%	45.6%
Total Expenditures	\$22,534,845	\$9,987,094	44.3%	\$20,847,012	92.5%	89.2%

Council Office

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	3,358,319	1,782,566	53.1%	3,287,200	97.9%	96.6%
Materials and Services	796,921	100,958	12.7%	523,325	65.7%	49.1%
Total Expenditures	\$4,155,240	\$1,883,524	45.3%	\$3,810,525	91.7%	87.8%

A second quarter budget amendment provided 12 months of support for development of the agency's Equity Strategy. Continuing funding for the project will be submitted via the FY 2013-14 budget process.

Office of the Auditor

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	673,290	321,873	47.8%	625,142	92.8%	95.4%
Materials and Services	44,474	17,992	40.5%	32,000	72.0%	58.3%
Total Expenditures	\$717,764	\$339,866	47.4%	\$657,142	91.6%	93.2%

Office of the Metro Attorney

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	1,848,005	865,059	46.8%	1,746,000	94.5%	94.2%
Materials and Services	65,200	17,883	27.4%	65,000	99.7%	86.2%
Total Expenditures	\$1,913,205	\$882,942	46.1%	\$1,811,000	94.7%	93.9%

Communications

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	2,359,825	1,162,035	49.2%	2,340,000	99.2%	99.2%
Materials and Services	237,500	63,569	26.8%	230,000	96.8%	64.8%
Total Expenditures	\$2,597,325	\$1,225,605	47.2%	\$2,570,000	98.9%	95.7%

Finance and Regulatory Services

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	4,989,500	2,267,080	45.4%	4,625,000	92.7%	94.3%
Materials and Services	1,341,497	274,497	20.5%	1,190,000	88.7%	85.7%
Total Operating Expenditures	6,330,997	2,541,577	40.1%	5,815,000	91.8%	92.4%
Total Capital Outlay	233,781	29,420	12.6%	233,780	100.0%	0.0%
Total Expenditures	\$6,564,778	\$2,570,997	39.2%	\$6,048,780	92.1%	92.4%

Human Resources

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	1,732,402	826,641	47.7%	1,675,000	96.7%	95.1%
Materials and Services	402,431	139,561	34.7%	350,000	87.0%	83.4%
Total Expenditures	\$2,134,833	\$966,202	45.3%	\$2,025,000	94.9%	92.7%

Information Services

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	2,682,863	1,267,989	47.3%	2,543,100	94.8%	95.6%
Materials and Services	903,960	598,486	66.2%	920,000	101.8%	81.2%
Total Operating Expenditures	3,586,823	1,866,475	52.0%	3,463,100	96.6%	92.0%
Total New Capital	10,000	11,465	114.7%	11,465	114.7%	87.3%
Total Renewal and Replacement	854,877	240,018	28.1%	450,000	52.6%	28.0%
Total Expenditures	\$4,451,700	\$2,117,958	47.6%	\$3,924,565	88.2%	86.3%

A second quarter budget amendment provided appropriations for a consolidated Data Center, to be located at OCC. A portion of the funding was provided via underspending in IS personal services due to several vacancies.

EXPENDITURES– NON-DEPARTMENTAL

Non-departmental

	Budget	Actual YTD	YTD % of Budget	Year-end Projection	Year-end % of Budget	3-Year Average
Personal Services	79,800	47,228	59.2%	101,000	126.6%	
Materials and Services	4,597,762	711,795	15.5%	2,763,000	60.1%	25.4%
Total Operating Expenditures	4,677,562	759,023	16.2%	2,864,000	61.2%	25.4%
Total Debt Service	54,769,223	15,418,978	28.2%	54,769,223	100.0%	130.7%
Total Capital Outlay	218,825	0	0.0%	50,000	22.8%	66.4%
Total Expenditures	\$59,665,610	\$16,178,001	27.1%	\$57,683,223	96.7%	117.8%

Non-departmental special appropriation expenditures during the second quarter included the following:

- \$168,500 in Construction Excise Tax grant reimbursements.
- \$75,100 of \$150,000 expected for Metro's external financial audit.
- \$29,000 for the Metro web project. The project remains on schedule and on budget.
- \$24,000 in Nature in Neighborhood grant reimbursements.
- \$6,700 in dues to the Lloyd Business Improvement District.
- \$4,400 of \$15,250 in general agency sponsorships.







APPENDIX – All funds, year to year comparison, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	295,435,747		304,416,351		304,416,351	
Program Revenues	133,790,713	31,286,819	61,882,227	46.3%	126,221,278	94.3%
General Revenues	83,457,319	54,353,499	59,004,190	70.7%	82,981,788	99.4%
Interfund Transfers	23,258,538	4,546,143	10,199,689	43.9%	22,677,075	97.5%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	200	502,200		502,200	
Subtotal Current Revenues	240,506,570	90,186,661	131,588,306	54.7%	232,382,341	96.6%
Total Resources	535,942,317		436,004,657		536,798,692	
Requirements						
Operating Expenditures	196,125,857	41,267,198	78,750,669	40.2%	180,189,485	91.9%
Debt Service	54,769,223	7,078,718	17,989,301	32.8%	54,769,223	100.0%
Capital Outlay + Renewal and Replacement	66,181,364	3,541,119	10,390,583	15.7%	41,101,025	62.1%
Interfund Transfers	23,258,538	4,546,143	10,199,689	43.9%	22,677,075	97.5%
Contingency	60,468,739					
Subtotal Current Expenditures	400,803,721	56,433,179	117,330,242	29.3%	298,736,808	74.5%
Unappropriated Balance	135,138,596		318,674,415		238,061,884	
Total Requirements	535,942,317		436,004,657		\$536,798,692	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	165,415,447		175,983,543		175,983,543	
Program Revenues	132,623,896	29,318,332	61,061,977	46.0%	128,773,096	97.1%
General Revenues	68,304,854	42,633,331	46,752,105	68.4%	69,206,922	101.3%
Interfund Transfers	22,398,354	8,380,700	13,852,353	61.8%	21,837,400	97.5%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	416,184	417,584		195,942,542	
Subtotal Current Revenues	223,327,104	80,748,547	122,084,019	54.7%	415,759,960	186.2%
Total Resources	388,742,551		298,067,562		591,743,503	
Requirements						
Operating Expenditures	198,354,961	41,808,104	83,351,988	42.0%	172,359,957	86.9%
Debt Service	35,261,700	3,565,496	15,150,817	43.0%	64,941,026	184.2%
Capital Outlay + Renewal and Replacement	39,572,160	8,304,676	16,690,803	42.2%	28,188,766	71.2%
Interfund Transfers	22,398,354	6,429,551	11,901,204	53.1%	21,837,403	97.5%
Contingency	27,227,184					
Subtotal Current Expenditures	322,814,359	60,107,827	127,094,812	39.4%	287,327,152	89.0%
Unappropriated Balance	65,928,192		170,972,750		304,416,351	
Total Requirements	388,742,551		298,067,562		\$591,743,503	



APPENDIX – Fund Tables, year to year comparison

General Fund (consolidated), as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	27,621,707		31,796,742		31,796,742	
Program Revenues	39,159,885	7,495,633	17,578,898	44.9%	37,266,580	95.2%
General Revenues	30,051,190	15,387,274	18,685,296	62.2%	29,402,381	97.8%
Transfers	46,925,816	8,673,999	18,509,032	39.4%	38,479,169	82.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	2,000		2,000	
Subtotal Current Revenues	116,136,891	31,556,906	54,775,226	47.2%	105,150,130	90.5%
Total Resources	143,758,598		86,571,968		136,946,872	
Requirements						
Operating Expenditures	84,230,212	17,317,270	34,903,601	41.4%	75,462,415	89.6%
Debt Service	1,654,290	564,645	564,645	34.1%	1,654,290	100.0%
Capital Outlay	244,325	8,947	19,422	7.9%	67,000	27.4%
Interfund Transfers	7,764,625	535,921	2,796,895	36.0%	7,764,625	100.0%
Intrafund Transfers	33,762,699	5,874,222	12,751,264	37.8%	25,322,024	75.0%
Contingency	3,049,319					
Subtotal Current Expenditures	130,705,470	24,301,005	51,035,827	39.0%	110,270,354	84.4%
Unappropriated Balance	13,053,128		35,536,141		26,676,518	
Total Requirements	143,758,598		86,571,968		\$136,946,872	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	25,619,555	0	28,964,227		28,964,227	
Program Revenues	40,401,436	6,770,806	18,031,237	44.6%	37,910,912	93.8%
General Revenues	29,133,718	14,701,888	18,081,565	62.1%	28,603,636	98.2%
Transfers	47,242,596	9,138,572	16,026,397	33.9%	38,632,979	81.8%
Special Items	0	0	0	0.0%	0	
Extraordinary Items	0	0	0	0.0%	0	
Other Financing Sources	0	18,300	19,700	0.0%	24,400	
Subtotal Current Revenues	116,777,750	30,629,566	52,158,899	44.7%	105,171,927	90.1%
Total Resources	142,397,305		81,123,126		134,136,154	
Requirements						
Operating Expenditures	84,526,381	17,163,589	34,611,978	40.9%	70,901,861	83.9%
Debt Service	1,588,215	576,607	576,607	36.3%	1,588,214	100.0%
Capital Outlay	47,000	26,962	48,202	102.6%	130,131	276.9%
Interfund Transfers	5,053,606	698,150	2,991,122	59.2%	5,045,607	99.8%
Intrafund Transfers	32,830,111	3,166,149	7,319,814	22.3%	24,673,599	75.2%
Contingency	3,562,142					
Subtotal Current Expenditures	127,607,455	21,631,457	45,547,723	35.7%	102,339,412	80.2%
Unappropriated Balance	14,789,850		35,575,404		31,796,742	
Total Requirements	142,397,305		81,123,126		\$134,136,154	

General Asset Management Fund, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	7,058,047		7,507,546		7,507,546	
Program Revenues	1,070,220	12,570	12,570	1.2%	1,070,220	100.0%
General Revenues	27,800	7,911	13,358	48.1%	27,000	97.1%
Transfers	2,416,700	398,151	796,302	32.9%	2,416,700	100.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		0	
Subtotal Current Revenues	3,514,720	418,632	822,230	23.4%	3,513,920	100.0%
Total Resources	10,572,767		8,329,777		11,021,466	
Requirements						
Operating Expenditures	297,235	37,747	112,072	37.7%	264,000	88.8%
Debt Service	0	0	0			
Capital Outlay	5,680,309	732,620	858,833	15.1%	4,009,465	70.6%
Interfund Transfers	19,681	0	0	0.0%	19,681	100.0%
Intrafund Transfers	0	0	0		0	
Contingency	4,369,222					
Subtotal Current Expenditures	10,366,447	770,367	970,905	9.4%	4,293,146	41.4%
Unappropriated Balance	206,320		7,358,871		6,728,320	
Total Requirements	10,572,767		8,329,777		\$11,021,466	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	6,689,948		7,453,961		7,453,961	
Program Revenues	974,514	887,404	892,804	91.6%	929,245	95.4%
General Revenues	33,298	13,405	20,177	60.6%	48,304	145.1%
Transfers	2,193,368	732,621	1,109,748	50.6%	2,194,716	100.1%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		19,100	
Subtotal Current Revenues	3,201,180	1,633,430	2,022,729	63.2%	3,191,365	99.7%
Total Resources	9,891,128		9,476,690		10,645,326	
Requirements						
Operating Expenditures	898,483	184,620	200,388	22.3%	702,486	78.2%
Debt Service	0	0	0		0	
Capital Outlay	5,081,063	445,317	664,647	13.1%	2,435,293	47.9%
Interfund Transfers	0	0	0		0	
Intrafund Transfers	0	0	0		0	
Contingency	3,911,582					
Subtotal Current Expenditures	9,891,128	629,937	865,035	8.7%	3,137,779	31.7%
Unappropriated Balance	0		8,611,654		7,507,546	
Total Requirements	9,891,128		9,476,690		\$10,645,326	

MERC Fund, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	23,776,767		26,226,573		26,226,573	
Program Revenues	30,981,961	8,865,849	15,991,509	51.6%	32,429,520	104.7%
General Revenues	13,268,045	3,613,077	4,191,273	31.6%	13,568,045	102.3%
Transfers	2,768,633	12,501	25,002	0.9%	2,768,633	100.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		0	
Subtotal Current Revenues	47,018,639	12,491,427	20,207,784	43.0%	48,766,198	103.7%
Total Resources	70,795,406		46,434,357		74,992,771	
Requirements						
Operating Expenditures	41,745,120	9,942,350	18,867,368	45.2%	42,695,120	102.3%
Debt Service	0	0	0		0	
Capital Outlay	3,344,077	286,492	537,755	16.1%	3,044,077	91.0%
Interfund Transfers	4,806,913	1,785,016	2,755,118	57.3%	4,806,913	100.0%
Intrafund Transfers	0	0	0		0	
Contingency	8,001,724					
Subtotal Current Expenditures	57,897,834	12,013,858	22,160,241	38.3%	50,546,110	87.3%
Unappropriated Balance	12,897,572		24,274,116		24,446,661	
Total Requirements	70,795,406		46,434,357		\$74,992,771	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	24,615,569	26,357,848	26,357,848		26,357,848	
Program Revenues	34,699,978	8,470,011	15,903,082	45.8%	33,391,154	96.2%
General Revenues	11,278,141	3,144,315	4,120,541	36.5%	13,531,611	120.0%
Transfers	594,822	114,822	114,822	19.3%	594,822	100.0%
Special Items	0	0	0	0.0%	0	
Extraordinary Items	0	0	0	0.0%	0	
Other Financing Sources	0	0	0	0.0%	0	
Subtotal Current Revenues	46,572,941	11,729,148	20,138,445	43.2%	47,517,587	102.0%
Total Resources	71,188,510		46,496,293		73,875,435	
Requirements						
Operating Expenditures	41,491,272	9,814,019	19,179,974	46.2%	39,467,408	95.1%
Debt Service	0	0	0		0	
Capital Outlay	3,129,396	531,947	1,072,714	34.3%	2,044,279	65.3%
Interfund Transfers	6,162,880	1,671,940	2,541,691	41.2%	6,137,175	99.6%
Intrafund Transfers	0	0	0		0	
Contingency	4,336,123					
Subtotal Current Expenditures	55,119,671	12,017,906	22,794,379	41.4%	47,648,862	86.4%
Unappropriated Balance	16,068,839		23,701,914		26,226,573	
Total Requirements	71,188,510		46,496,293		\$73,875,435	

Natural Areas Fund, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	98,184,870		98,783,002		98,783,002	
Program Revenues	866,000	77,414	200,609	23.2%	1,066,500	123.2%
General Revenues	416,894	93,353	187,313	44.9%	375,000	90.0%
Transfers	19,681	0	0	0.0%	19,681	100.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	500,000		500,000	
Subtotal Current Revenues	1,302,575	170,767	887,922	68.2%	1,961,181	150.6%
Total Resources	99,487,445		99,670,924		100,744,183	
Requirements						
Operating Expenditures	13,739,938	1,438,242	3,118,542	22.7%	12,207,000	88.8%
Debt Service	0	0	0		0	
Capital Outlay	31,437,760	1,290,237	6,823,816	21.7%	21,438,000	68.2%
Interfund Transfers	1,783,226	427,653	900,306	50.5%	1,515,742	85.0%
Intrafund Transfers	0	0	0		0	
Contingency	25,000,000					
Subtotal Current Expenditures	71,960,924	3,156,132	10,842,664	15.1%	35,160,742	48.9%
Unappropriated Balance	27,526,521		88,828,260		65,583,441	
Total Requirements	99,487,445		99,670,924		\$100,744,183	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	36,715,000		36,469,224		36,469,224	
Program Revenues	866,000	248,380	297,757	34.4%	950,828	109.8%
General Revenues	183,575	42,631	50,657	27.6%	139,417	75.9%
Transfers	13,176	13,176	13,176	100.0%	13,176	100.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		90,015,894	
Subtotal Current Revenues	1,062,751	304,188	361,591	34.0%	91,119,314	8573.9%
Total Resources	37,777,751		36,830,815		127,588,539	
Requirements						
Operating Expenditures	13,725,133	2,207,163	7,207,182	52.5%	11,026,441	80.3%
Debt Service	0	0	0		0	
Capital Outlay	20,939,000	5,571,729	10,523,019	50.3%	16,261,986	77.7%
Interfund Transfers	1,780,005	410,012	801,977	45.1%	1,517,109	85.2%
Intrafund Transfers	0	0	0		0	
Contingency	1,333,613					
Subtotal Current Expenditures	37,777,751	8,188,904	18,532,177	49.1%	28,805,537	76.3%
Unappropriated Balance	0		18,298,638		98,783,002	
Total Requirements	37,777,751		36,830,815		\$127,588,539	

Oregon Zoo Infrastructure and Animal Welfare Bond Fund, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	78,374,866		77,630,727		77,630,727	
Program Revenues	0	0	0		0	
General Revenues	225,000	72,475	166,383	73.9%	220,000	97.8%
Transfers	0	0	0		0	
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		0	
Subtotal Current Revenues	225,000	72,475	166,383	73.9%	220,000	97.8%
Total Resources	78,599,866		77,797,110		77,850,727	
Requirements						
Operating Expenditures	548,603	109,087	226,116	41.2%	458,000	83.5%
Debt Service	0	0	0		0	
Capital Outlay	18,963,162	925,749	1,777,750	9.4%	9,654,500	50.9%
Interfund Transfers	292,677	73,171	146,806	50.2%	292,677	100.0%
Intrafund Transfers	0	0	0		0	
Contingency	3,963,195					
Subtotal Current Expenditures	23,767,637	1,108,007	2,150,672	9.0%	10,405,177	43.8%
Unappropriated Balance	54,832,229		75,646,438		67,445,550	
Total Requirements	78,599,866		77,797,110		\$77,850,727	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	9,649,239		8,876,891		8,876,891	
Program Revenues	0	44	44		66	
General Revenues	24,648	8,179	19,209	77.9%	32,364	131.3%
Transfers	3,735	3,735	3,735	100.0%	3,735	100.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		75,705,459	
Subtotal Current Revenues	28,383	11,958	22,988	81.0%	75,741,623	266855.6%
Total Resources	9,677,622		8,899,879		84,618,514	
Requirements						
Operating Expenditures	628,075	143,432	333,989	53.2%	885,264	140.9%
Debt Service	0	0	0		0	
Capital Outlay	6,432,825	1,556,557	3,652,155	56.8%	5,804,545	90.2%
Interfund Transfers	365,414	63,946	102,026	27.9%	297,978	81.5%
Intrafund Transfers	0	0	0		0	
Contingency	2,251,308					
Subtotal Current Expenditures	9,677,622	1,763,935	4,088,171	42.2%	6,987,787	72.2%
Unappropriated Balance	0		4,811,708		77,630,727	
Total Requirements	9,677,622		8,899,879		\$84,618,514	

Risk Management Fund, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	2,344,251		2,732,345		2,732,345	
Program Revenues	585,292	780,649	782,013	133.6%	832,000	142.2%
General Revenues	10,000	3,423	5,603	56.0%	12,000	120.0%
Transfers	1,591,592	397,899	1,050,293	66.0%	1,591,592	100.0%
Special Items	0	0	0	0.0%	0	
Extraordinary Items	0	0	0	0.0%	0	
Other Financing Sources	0	0	0	0.0%	0	
Subtotal Current Revenues	2,186,884	1,181,971	1,837,910	84.0%	2,435,592	111.4%
Total Resources	4,531,135		4,570,255		5,167,937	

Requirements						
Operating Expenditures	2,641,276	412,637	1,128,124	42.7%	1,957,000	74.1%
Debt Service	0	0	0		0	
Capital Outlay	0	0	0		0	
Interfund Transfers	295,207	73,803	147,606	50.0%	285,000	96.5%
Intrafund Transfers	0	0	0		0	
Contingency	500,000					
Subtotal Current Expenditures	3,436,483	486,440	1,275,730	37.1%	2,242,000	65.2%
Unappropriated Balance	1,094,652		3,294,525		2,925,937	
Total Requirements	4,531,135		4,570,255		\$5,167,937	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	2,364,250		2,629,579		2,629,579	
Program Revenues	627,807	(12,030)	1,429	0.2%	669,072	106.6%
General Revenues	25,000	5,426	7,913	31.7%	18,187	72.7%
Transfers	1,819,183	454,799	1,202,346	66.1%	1,818,311	100.0%
Special Items	0	0	0		0	
Extraordinary Items	0	0	0		0	
Other Financing Sources	0	0	0		0	
Subtotal Current Revenues	2,471,990	448,195	1,211,688	49.0%	2,505,571	101.4%
Total Resources	4,836,240		3,841,267	79.4%	5,135,149	

Requirements						
Operating Expenditures	2,815,266	239,553	908,723	32.3%	1,531,054	54.4%
Debt Service	0	0	0	0.0%	0	
Capital Outlay	0	0	0	0.0%	0	
Interfund Transfers	875,210	597,320	736,265	84.1%	871,750	99.6%
Intrafund Transfers	0	0	0	0.0%	0	
Contingency	382,680					
Subtotal Current Expenditures	4,073,156	836,873	1,644,988	40.4%	2,402,804	59.0%
Unappropriated Balance	763,084		2,196,279		2,732,345	
Total Requirements	4,836,240		3,841,267		\$5,135,149	

Solid Waste Revenue Fund, as of December 31, 2012

FY 2012-13

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Projection	% Budget
Resources						
Beginning Fund Balance	40,199,273		39,731,933		39,731,933	
Program Revenues	60,743,758	13,994,095	27,233,853	44.8%	54,633,545	89.9%
General Revenues	197,749	39,486	62,834	31.8%	198,660	100.5%
Transfers	208,778	0	0	0.0%	208,778	100.0%
Special Items	0	0	0	0.0%	0	
Extraordinary Items	0	0	0	0.0%	0	
Other Financing Sources	0	200	200	0.0%	0	
Subtotal Current Revenues	61,150,285	14,033,781	27,296,888	44.6%	55,040,983	90.0%
Total Resources	101,349,558		67,028,820		94,772,916	
Requirements						
Operating Expenditures	52,796,867	11,447,134	20,365,005	38.6%	47,421,236	89.8%
Debt Service	0	0	0	0.0%	0	
Capital Outlay	5,361,781	296,764	466,478	8.7%	1,636,781	30.5%
Interfund Transfers	8,157,903	1,650,580	3,452,958	42.3%	8,157,903	100.0%
Contingency	15,105,279					
Subtotal Current Expenditures	81,421,830	13,394,478	24,284,441	29.8%	57,215,920	70.3%
Unappropriated Balance	19,927,728		42,744,379		37,556,996	
Total Requirements	101,349,558		67,028,820		94,772,916	

FY 2011-12

	Adopted Budget	Actuals 2nd Qtr	YTD Actuals	YTD % of Budget	June 30 Actuals	% Budget
Resources						
Beginning Fund Balance	39,914,107		42,792,555		42,792,555	
Program Revenues	55,035,122	12,944,198	25,914,815	47.1%	53,254,478	96.8%
General Revenues	196,526	68,600	103,072	52.4%	235,712	119.9%
Transfers	267,625	85,880	85,880	32.1%	257,744	96.3%
Special Items	0	0	0	0.0%	0	
Extraordinary Items	0	0	0	0.0%	0	
Other Financing Sources	0	450	450	0.0%	22,750	
Subtotal Current Revenues	55,499,273	13,099,128	26,104,217	47.0%	53,770,685	96.9%
Total Resources	95,413,380		68,896,772		96,563,240	
Requirements						
Operating Expenditures	50,268,448	11,771,782	20,115,542	40.0%	47,522,223	94.5%
Debt Service	0	0	0	0.0%	0	
Capital Outlay	3,726,000	171,514	236,859	6.4%	1,588,721	42.6%
Interfund Transfers	7,988,738	2,771,896	4,511,836	56.5%	7,720,363	96.6%
Contingency	14,588,745					
Subtotal Current Expenditures	76,571,931	14,715,192	24,864,238	32.5%	56,831,307	74.2%
Unappropriated Balance	18,841,449		44,032,534		39,731,933	
Total Requirements	95,413,380		68,896,772		96,563,240	

APPENDIX – Excise Tax Annual Forecast, as of December 31, 2012

Total Excise Tax Collections

7.5% Excise Tax

Facility/Function	FY 2012-13 Budget	Revised Annual Forecast	Difference	% Difference
Oregon Convention Center	1,295,334	1,376,292	80,958	6.25%
Expo Center	460,226	435,069	(25,157)	-5.47%
Planning Fund	14,675	10,272	(4,403)	-30.00%
SW Product Sales	170,250	170,250	-	0.00%
Parks and MRC	284,701	230,608	(54,093)	-19.00%
Total	2,225,186	2,222,491	(2,695)	-0.12%

Solid Waste Per Ton Excise Tax

	FY 2012-13 Budget	Revised Annual Forecast	Difference	% Difference
Solid Waste and Recycling Metro Facilities	5,494,968	4,753,147	(741,821)	-13.50%
Solid Waste and Recycling Non Metro Facilities	7,919,817	7,872,298	(47,519)	-0.60%
Total Solid Waste Per Ton Excise Tax	13,414,785	12,625,445	(789,340)	-5.88%
Grand Total Excise Tax	15,639,971	14,847,936	(792,035)	-5.06%

Reserve for Future One Time Expenditures Balance

Solid Waste General by Code	11,851,103	11,851,103
Transfer to Res. for Future One Time Expenditures	1,563,682	771,647

Reserve for Future One Time Expenditures Balance

Beginning Balance from FY 2011-12	\$ 1,087,575
Projected FY 2012-13 Contribution	\$ 771,647
Projected FY 2012-13 Spending*	\$ 1,100,000
Projected FY 2012-13 Ending Balance	\$ 759,222

Assumptions:

*Contribution from FY 2010-11 has been identified for General Fund streetcar assessment, expected to be billed in FY 2012-13. Estimated cost is \$500,000.

The FY 2012-13 adopted budget committed \$600,000 for one-time expenses: Nature in Neighborhoods Grants (\$200,000); Glendoveer upgrades (\$200,000) and sustainable upgrades for renewal and replacement

APPENDIX – Capital Budget Mid-Year Status

SUMMARY

The following pages present the status of all projects with anticipated spending of greater than \$100,000, including a comparison of budgeted capital projects with activity and expenditures through December 31, 2012.

This year's budget includes 52 capital projects greater than \$100,000. Through December 31, 2012, six projects are complete. An additional 22 projects are projected to be completed by fiscal year end, three projects were canceled and the remainder are expected to carry forward to FY 2013-14 or are ongoing projects: those that require substantial capital maintenance over time or that consist of a department's grouped renewal and replacement projects less than \$100,000 each.

Completed projects:

- Expo Portable Bleacher Replacement
- Expo Roof Repair, Hall D
- PCPA Antoinette Hatfield Hall Exterior Insulation
- Zoo Updated Conditional Use Master Plan and Land Use Reviews
- Metro Regional Center Front Plaza Planters
- Metro Central Household Hazardous Waste Roof Replacement



Finance and Regulatory Services

FY 2012-13 Capital Projects status through December 31, 2012

Solid Waste Information System (SWIS)

This project will implement a state of the art system of data collection and reporting to support Metro's responsibility to collect regional system fees and excise taxes.

FY 2012-13 Adopted Budget	113,781
Dollars spent as of 12-31-12	29,420
CIP estimated cost	693,965
Completion date	06/30/2013

Comments: This project will be substantially complete by year end. This contract has been amended to provide extended warranty support, within the original project budget.

Budget Module

This project will implement software to make budget development and monitoring more efficient.

FY 2012-13 Adopted Budget	120,000
Dollars spent as of 12-31-12	197,476
CIP estimated cost	310,000
Completion date	06/30/2013

Comments: A change in the approach to licensing has increased the cost. A budget amendment will go to Council in the 3rd quarter.

Information Services

FY 2012-13 Capital Projects status through December 31, 2012

Metro Web Improvement Project

This project will upgrade Metro's website content and migrate the site to the Drupal platform.

Comments: The project is on time and on budget and is scheduled to be completed during FY 2013-14.

FY 2012-13 Adopted Budget	367,125
Dollars spent as of 12-31-12	50,954
CIP estimated cost	592,000
Completion date	06/30/2014

Information Technology R&R Projects

Information Technology renewal and replacement projects less than \$100,000.

Comments: Several projects are likely to carry forward in to FY 2013-14.

FY 2012-13 Adopted Budget	433,169
Dollars spent as of 12-31-12	38,587
CIP estimated cost	n/a
Completion date	Ongoing

Data Center

This project will create a more robust consolidated Metro data center at the Oregon Convention Center.

Comments: This project is expected to be completed on time.

FY 2012-13 Adopted Budget	156,500
Dollars spent as of 12-31-12	69
CIP estimated cost	286,500
Completion date	06/30/2013

Enterprise Storage

Includes the replacement of the Net Appliance Alex File Server.

Comments: This project will in completed ahead of schedule.

FY 2012-13 Adopted Budget	245,243
Dollars spent as of 12-31-12	201,432
CIP estimated cost	245,243
Completion date	06/30/2013

Metropolitan Exposition Recreation Commission

FY 2012-13 Capital Projects status through December 31, 2012

Expo - Parking Lot Maintenance

Ongoing project with funding set aside every year; work includes grinding, repaving and seal coating.

Comments: This work was completed but was a maintenance expense rather than a capital expense.

FY 2012-13 Adopted Budget	50,000
Dollars spent as of 12-31-12	-
CIP estimated cost	n/a
Completion date	Ongoing

Expo - Portable Bleacher Replacement

Replaces a portion of the bleachers at Expo.

Comments: This is an ongoing project. This year's planned purchases are complete.

FY 2012-13 Adopted Budget	50,000
Dollars spent as of 12-31-12	54,257
CIP estimated cost	Ongoing
Completion date	Ongoing

Expo - Roof Repair Hall D

Repair of the roof at Hall D.

Comments: This project is complete.

FY 2012-13 Adopted Budget	150,000
Dollars spent as of 12-31-12	119,927
Completed project cost	119,927
Completion date	12/31/2012

OCC - Close Circuit TV Replacement

Replacement of security cameras and development of master plan for overall security.

Comments: An RFP was issued and this project is currently in the design phase.

FY 2012-13 Adopted Budget	275,000
Dollars spent as of 12-31-12	-
CIP estimated cost	275,000
Completion date	06/30/2014

OCC - Energy Conservation Upgrades

Includes Energy Trust of Oregon incentives of \$60,000.

Comments: This project is in progress

FY 2012-13 Adopted Budget	150,000
Dollars spent as of 12-31-12	32,463
CIP estimated cost	150,000
Completion date	06/30/2013

Metropolitan Exposition Recreation Commission (continued)**FY 2012-13 Capital Projects status through December 31, 2012****OCC - Electrical Sub Metering**

Add additional meters.

FY 2012-13 Adopted Budget	191,383
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Dollars spent as of 12-31-12	3,240
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CIP estimated cost	200,000
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Comments: The return on investment on the original plan was not feasible. The project scope is being revised.

Completion date	06/30/2013
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OCC - Lighting Upgrade Phase II

Lights and dimmers for Exhibit Halls and ABC Meeting Rooms. Includes Energy Trust of Oregon incentives of \$190,000.

FY 2012-13 Adopted Budget	500,000
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Dollars spent as of 12-31-12	1,199
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CIP estimated cost	500,000
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Comments: The work is in progress.

Completion date	06/30/2013
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OCC - Main Kitchen Walk-in Coolers and Freezer

The coolers are inefficient and contain refrigerant that is no longer compliant with regulations.

FY 2012-13 Adopted Budget	250,000
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Dollars spent as of 12-31-12	4,865
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CIP estimated cost	250,000
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Comments: The work is in progress.

Completion date	06/30/2013
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OCC - Original Roof Replacement

The roof of the original side of the Convention Center is old and has leaks. Phase I through FY 2013-14 includes design and engineering.

FY 2012-13 Adopted Budget	100,000
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Dollars spent as of 12-31-12	547
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CIP estimated cost	176,119
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Comments: Bids came in higher than budgeted and the project and CIP will be amended.

Completion date	06/30/2014
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OCC - Replace Chrome Entry Doors

Replacement of entry doors on the original side of the convention center.

FY 2012-13 Adopted Budget	125,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	225,000
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Comments: A required change in scope is likely to push this project into FY 2013-14 and increase the total budget to \$225,000.

Completion date	09/30/2013
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Metropolitan Exposition Recreation Commission (continued)**FY 2012-13 Capital Projects status through December 31, 2012****PCPA - AHH Cooling Tower**

Replacement of the Cooling Tower and associated piping at Antoinette Hatfield Hall.

FY 2012-13 Adopted Budget	150,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	255,000
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Comments: Bids came in higher than budgeted and the project and CIP will be amended.

Completion date	06/30/2013
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PCPA - AHH Exterior Insulation

Includes design, demolition and construction.

FY 2012-13 Adopted Budget	100,000
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Dollars spent as of 12-31-12	111,141
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Completed project cost	111,141
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Comments: Project is complete.

Completion date	12/31/2012
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Oregon Zoo

FY 2012-13 Capital Projects status through December 31, 2012

Zoo Renewal and Replacement Projects

All zoo renewal and replacement projects less than \$100,000.

FY 2012-13 Adopted Budget	541,695
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Dollars spent as of 12-31-12	185,331
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CIP estimated cost	Ongoing
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Comments: Completed projects include the Penguin Roof and HVAC. Several projects have been moved to later years or will be carried forward to FY 2013-14.

Completion date	Ongoing
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Roof Replacement AfriCafe

Regular replacement of the roof on the AfriCafe.

FY 2012-13 Adopted Budget	128,593
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Dollars spent as of 12-31-12	-
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CIP estimated cost	139,265
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Comments: Due to a much higher than budgeted cost to replace this roof, the current plan is to complete a reconditioning of the roof instead.

Completion date	06/30/2013
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Cascade Grill Improvements

This project will provide an upgrade of the outdated dining space.

FY 2012-13 Adopted Budget	150,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	150,000
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Comments: The project will be carried forward to FY 2013-14.

Completion date	06/30/2014
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Aviary Marsh Mesh

The Aviary Marsh Mesh exhibit will undergo a full renovation and structural replacement.

FY 2012-13 Adopted Budget	295,876
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Dollars spent as of 12-31-12	7,523
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CIP estimated cost	295,876
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Comments: Project is in progress.

Completion date	06/30/2013
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Africa Lagoon Aviary

Renovation of the Africa Lagoon Aviary to enhance visitor experience and the introduction of a new species (flamingos).

FY 2012-13 Adopted Budget	573,479
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Dollars spent as of 12-31-12	155,149
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CIP estimated cost	573,479
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Comments: Project is in progress.

Completion Date	06/30/2013
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Oregon Zoo Bond Projects

FY 2012-13 Capital Projects status through December 31, 2012

Condor Exhibit

The new exhibit will highlight the Oregon Zoo's successful breeding program

FY 2012-13 Adopted Budget	1,985,057
Dollars spent as of 12-31-12	174,056
CIP estimated cost	2,714,125
Completion date	09/30/2013

Comments: Consultants are finishing construction documents, and a permit set has been submitted to the City of Portland for review.

Improving Elephant On Site Facilities

This project includes the new elephant habitat, as well as Wildlife Live facilities, zoo train rerouting and new service building, construction of the perimeter service road, and new utilities from the central to east hubs along the main zoo pathway.

FY 2012-13 Adopted Budget	15,363,237
Dollars spent as of 12-31-12	1,545,067
CIP estimated cost	58,753,709
Completion date	05/15/2015

Comments: In December 2012 the Metro Council approved the staff recommendation to allocate a portion of bond sale premium funds to offset budget overage related to geotechnical challenges. The design team is approved to proceed with construction documents on the elephant portion of the project.

Remote Elephant Center

The 2008 bond called for an assessment of the feasibility of an off-site facility. Staff is developing the capital and operating costs for a facility, assessing property, and reviewing ideas for funding sources.

FY 2012-13 Adopted Budget	1,775,000
Dollars spent as of 12-31-12	866
CIP estimated cost	7,200,000
Completion date	TBD

Comments: The Metro Council has directed staff to exercise the property purchase option for the Roslyn Lake property. Project plan development continues. Major components include planning and design, funding strategy, securing land use approvals and communications.

Updated Conditional Use Master Plan and Land Use Reviews

Prepare and achieve land use approvals from the city of Portland for the updated master plan, bond program projects and other improvements at the zoo campus.

FY 2012-13 Adopted Budget	50,000
Dollars spent as of 12-31-12	17,071
Completed project cost	847,630
Completion date	01/31/2013

Comments: This project is complete; final approval of the updated Conditional Use Master Plan was received in January.

Parks and Environmental Services

FY 2012-13 Capital Projects status through December 31, 2012

MRC Front Plaza Planters

Project to repair and prevent leaks in the plaza planters.

FY 2012-13 Adopted Budget	65,000
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Dollars spent as of 12-31-12	50,802
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Completed project cost	126,000
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Comments: This project is complete.

Completion date	08/30/2012
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Regional Parks Renewal and Replacement

All parks renewal and replacement projects less than \$100,000.

FY 2012-13 Adopted Budget	309,204
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Dollars spent as of 12-31-12	8,600
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CIP estimated cost	n/a
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Comments: Projects in progress.

Completion date	Ongoing
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Blue Lake Wetland, Pathway, Trail

Regular replacement of existing trail and pathway.

FY 2012-13 Adopted Budget	195,595
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Dollars spent as of 12-31-12	-
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CIP estimated cost	195,595
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Comments: This project remains on hold due to permitting issues.

Completion date	TBD
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Glendoveer Golf Course Improvements

Improvements in this project include a new cart barn, bathroom renovations and irrigation planning.

FY 2012-13 Adopted Budget	331,000
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Dollars spent as of 12-31-12	21,394
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CIP estimated cost	331,000
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Comments: Projects are in progress.

Completion date	06/30/2013
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Glendoveer Tennis Center Roof

Will replace roof that is currently leaking.

FY 2012-13 Adopted Budget	129,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	129,000
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Comments: Project is in planning/bid stage.

Completion Date	11/30/2010
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Parks and Environmental Services (continued)

FY 2012-13 Capital Projects status through December 31, 2012

M. James Gleason Boat Ramp - Phase IV		
Represents the cost of repaving the existing parking lot.	FY 2012-13 Adopted Budget	1,285,900
	Dollars spent as of 12-31-12	37,039
Comments: A spring budget amendment will recognize an additional grant for this project.	CIP estimated cost	1,285,900
	Completion Date	06/30/2013
Regional Parks Renewal and Replacement		
All parks renewal and replacement projects less than \$100,000.	FY 2012-13 Adopted Budget	309,204
	Dollars spent as of 12-31-12	8,600
Comments: Projects in progress.	CIP estimated cost	Ongoing
	Completion Date	Ongoing
Oxbow Park Capital Improvements		
Project will include improvement identified by the Oxbow Park Master Plan to be completed in FY 2012-13.	FY 2012-13 Adopted Budget	363,600
	Dollars spent as of 12-31-12	-
Comments: Master plan update is still in progress and no expenditures are anticipated this fiscal year.	CIP estimated cost	363,600
	Completion Date	6/30/2014
Solid Waste Renewal and Replacement		
All solid waste renewal and replacement projects under \$100,000.	FY 2012-13 Adopted Budget	665,000
	Dollars spent as of 12-31-12	112,239
Comments: Completed projects include the Metro Central and Metro South Radiation Detection Systems. Other projects are in process; several may be carried forward to FY 2013-14.	CIP estimated cost	n/a
	Completion Date	Ongoing
Improvement to Metro South Truck Entrance/Exit		
The project scope involves adding landscaping and a new automatic gate.	FY 2012-13 Adopted Budget	100,000
	Dollars spent as of 12-31-12	-
Comments: Since the road realignment work is still installing landscaping, this project will be carried forward to FY 2013-14.	CIP estimated cost	100,000
	Completion Date	06/30/2014

Parks and Environmental Services (continued)**FY 2012-13 Capital Projects status through December 31, 2012****Metro Central Organics/Food Handling Area Improvements**

Project to improve food handling capabilities.

FY 2012-13 Adopted Budget	250,000
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Dollars spent as of 12-31-12	174,591
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CIP estimated Cost	250,000
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Comments: The push wall and pit fill portion of the area modifications has been completed. Additional improvements are being considered.

Completion Date	6/30/2013
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Metro Central Stormwater Improvements

This project will improve the removal of solids from our storm water discharge.

FY 2012-13 Adopted Budget	150,000
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Dollars spent as of 12-31-12	2,226
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CIP estimated cost	425,000
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Comments: Some equipment has been purchased but the scope is still dependent on DEQ and new permit requirements.

Completion Date	06/30/2014
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Metro South HHW - Extend Canopy

This project expands the covered work area for unloading vehicles and reduces rainfall entering the spill containment tank.

FY 2012-13 Adopted Budget	75,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	50,000
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Comments: Project is under construction and expected to come in at \$50,000.

Completion Date	06/30/2013
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St. Johns Landfill-Gas to Energy Conversion

The project proposed to implement the conversion of the excess gas into either electricity or a compressed gas suitable for use in vehicles.

FY 2012-13 Adopted Budget	1,150,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	n/a
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Comments: Project was not deemed feasible and as been canceled.

Completion Date	n/a
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St. Johns - Landfill Remediation

St. Johns Landfill is on the DEQ confirmed release list and inventory, which identifies sites in Oregon where release of hazardous substances into the environment has been confirmed, where further investigation is required and remediation may be needed.

FY 2012-13 Adopted Budget	1,000,000
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Dollars spent as of 12-31-12	-
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CIP estimated cost	3,000,000
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Comments: This project has not been implemented, and none of the budget has been expended. Depending on regulatory developments, implementation will occur in either FY 2013-14 or FY 2014-15.

Completion Date	06/30/2015
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Parks and Environmental Services (continued)**FY 2012-13 Capital Projects status through December 31, 2012****Metro Central - Replace Metal Wall System**

Replace deteriorated metal siding as needed throughout the site buildings.	FY 2012-13 Adopted Budget	170,000
	Dollars spent as of 12-31-12	-
	CIP estimated cost	n/a
Comments: This project was forecast through a renewal and replacement study several years ago. It has not been necessary to this point.	Completion Date	n/a

Metro Central - Replace Slow Speed Shredder

This project will replace the slow speed shredder used to grind wood debris at Metro Central Transfer Station.	FY 2012-13 Adopted Budget	600,000
	Dollars spent as of 12-31-12	-
	CIP estimated cost	600,000
Comments: This project will be moved out until organics and wood debris issues are resolved, to be completed in FY 2014-15.	Completion Date	06/30/2015

Metro Central HHW - Roof Replacement

This project replaces the roof at the Metro Central HHW facility.	FY 2012-13 Adopted Budget	40,000
	Dollars spent as of 12-31-12	48,863
	Completed project cost	136,000
Comments: This project is complete.	Completion Date	09/30/2012

Metro South - Roof Replacement

The metal roofing at the South Transfer Station will reach the end of its expected life in 2013.	FY 2012-13 Adopted Budget	335,000
	Dollars spent as of 12-31-12	-
	CIP estimated cost	n/a
Comments: This project has been canceled. The two areas of roof that need replacement are being completed under separate projects approved for green roof consideration.	Completion Date	n/a

Metro South - Bays 1 and 2 Ventilation System

Replaces exhaust fans that were part of the original construction in 1993.	FY 2012-13 Adopted Budget	110,000
	Dollars spent as of 12-31-12	4,029
	CIP estimated cost	110,000
Comments: Project specifications and engineering are complete, construction likely to carry forward to FY 2013-14.	Completion Date	06/30/2014

Parks and Environmental Services (continued)**FY 2012-13 Capital Projects status through December 31, 2012****Metro South Control Room Green Roof**

This project will evaluate feasibility of replacing the membrane roof with a green roof.

FY 2012-13 Adopted Budget	150,000
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Dollars spent as of 12-31-12	9,000
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Comments: Green roof was determined infeasible. Membrane roof replacement bids were received 1/17/13.

CIP estimated cost	150,000
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Completion Date	06/30/2013
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Metro South Front Entry Roof

This project will evaluate feasibility of replacing the built-up roof with a green roof.

FY 2012-13 Adopted Budget	120,000
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Dollars spent as of 12-31-12	-
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Comments: Green roof was determined infeasible. Standard built-up roof replacement bids were received 1/17/13.

CIP estimated cost	120,000
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Completion Date	06/30/2013
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Sustainability Center

FY 2012-13 Capital Projects status through December 31, 2012

40-Mile Loop Trail Construction at Blue Lake Park

This section of the 40-Mile Loop Trail will close a key gap along Marine Drive. The trail will be built on Metro-owned property in Blue Lake Park.

FY 2012-13 Adopted Budget	1,087,760
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Dollars spent as of 12-31-12	1,629
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CIP estimated cost	1,087,760
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Completion Date	06/30/2013
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Comments: This project is underway but is expected to carry forward to FY 2013-14.

Natural Areas Acquisition

Voters approved a \$224.7 million General Obligation Bond Measure to acquire natural areas for the purpose of water quality and habitat protection.

FY 2012-13 Adopted Budget	30,000,000
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Dollars spent as of 12-31-12	9,062,000
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CIP estimated cost	137,000,000
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Completion Date	06/30/2016
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Comments: Project is ongoing.

Natural Areas Information System

Database project to track acquisitions from 1995 and 2006 bond programs.

FY 2012-13 Adopted Budget	350,000
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Dollars spent as of 12-31-12	179,609
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Completed project cost	650,000
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Completion Date	06/30/2013
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Comments: This project will be complete at the end of the fiscal year, although an additional phase will be proposed.

Canemah Bluff Improvements

The project includes trail improvements, signage installation, and an overlook/safety fence design and construction.

FY 2012-13 Adopted Budget	119,350
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Dollars spent as of 12-31-12	-
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CIP estimated cost	119,350
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Completion Date	06/30/2013
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Comments: Projects in progress.



Agenda Item No. 3.0

**REGIONAL ACTIVE
TRANSPORTATION PLAN UPDATE**

Metro Council Work Session
Tuesday, Feb. 19, 2013
Metro, Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: February 19, 2013 Time: 1:30 p.m. Length: 30 minutes

Presentation Title: Regional Active Transportation Plan Update

Service, Office, or Center:

Regional Transportation Planning

Presenters (include phone number/extension and alternative contact information):

Lake Strongheart McTighe, x1660, Tom Kloster x1832

ISSUE & BACKGROUND

Metro is developing a regional plan for active transportation (the “ATP”) to provide a regionally agreed upon implementation strategy and framework for prioritizing and funding projects.¹ Phase one of the ATP is complete, providing a comprehensive existing conditions analysis of the current regional pedestrian and bicycle networks.² Phase two of the project is underway, identifying project needs and evaluating a range of improvements to the networks. Phase three of the project will result in the final plan with a focus on prioritization and investment strategies.

The **purpose of the work session** is to provide information on the project in preparation for the Council’s consideration of recommended policy and priorities for active transportation in June 2013, when the Council will be asked to consider a “resolution of intent” to support amendment of the ATP into the RTP and Regional Transportation Functional Plan (RTFP) during the scheduled update of the RTP in 2014. Councilors will receive one more briefing in April in preparation for the June 2013 resolution. (See Attachment A.)

Staff will give an overview on preliminary outcomes from the current evaluation and modeling of improvements to the Principal Regional Pedestrian and Bicycling Networks and seek feedback from the Council on input on the draft principles for the active transportation network and criteria for evaluating and prioritizing network alternatives and projects.

Need for the ATP

A national emphasis on active transportation has emerged in recent years because of the link to health, quality of life, economic prosperity, vibrant neighborhoods and business districts and clean air and water reduced household transportation. **The ATP will allow the region to compete more effectively for limited funding and coordinate projects for seamless connections. Development of the ATP was identified as a recommended**

¹ Active transportation is human-powered transportation that engages people in healthy physical activity while they travel from place to place. Walking, the use of strollers, wheelchairs and mobility devices, skateboarding, bicycling and rollerblading are included active transportation. Active transportation supports public transportation because most trips on public transportation include walking or bicycling.

² Available at www.oregonmetro.gov/activetransport

follow up activity in the 2035 RTP to address this need.³ It was also identified as an element of the recommended Mobility Strategy of Metro’s Blue Ribbon Committee for Trails.⁴ The Metro Council provided further direction in *Resolution 11-4239 For the Purpose of Supporting Development of a Regional Active Transportation Plan* and at the February 9, 2012 and September 4, 2012 Council work sessions.

Individual communities and the region have completed ambitious projects and walking and biking for all trips continue to rise. However, large gaps in the network and safety issues prevent the region from enjoying the wide ranging benefits and substantial impacts of a complete and connected active transportation network. This is especially true for parts of the population that are “active transportation dependent”.

The current list of projects in the 2035 RTP does not include projects to fill many of the pedestrian and bicycle gaps in the region; the ATP will identify these gaps and propose projects to fill them. Additionally, funding has not prioritized active transportation. Though over 17% of all trips in the region are made by walking and bicycling, 3% of transportation funding for capital projects is dedicated to stand-alone active transportation projects.⁵

The project kicked-off on January 4, 2012 and must be completed by June 30, 2013. Metro received a \$280,000 Transportation Growth Management grant from the Oregon Department of Transportation (ODOT) that is providing funding for the project in addition to Metro resources.

Next Steps (See Attachment B)

Feb. 22- Executive Council for Active Transportation mini-retreat

April 9- Metro Council Work session: direction on implementation strategy and financing plan and proposed policy changes

April – Presentations to County Coordinating Committees, Bicycle and Pedestrian Committees, and other key stakeholder groups

April-May-Presentations to MTAC, TPAC, MPAC, and JPACT

May 9 –ATP Public Open House

June 20 -Metro Council Meeting: “resolution of intent” to amend the ATP into the RTP and RTFP.

OPTIONS AVAILABLE

Not applicable for information update.

IMPLICATIONS AND SUGGESTIONS

Not applicable for information update.

QUESTION(S) PRESENTED FOR CONSIDERATION

1. Is the ATP project going generally going in the right direction? Do you have any concerns about the project? (see Attachment D)

³ The current 2035 RTP includes several adopted modal plans. However, there is no regional modal plan for active transportation.

⁴ The Mobility Strategy is available on Metro’s website at:

http://library.oregonmetro.gov/files/blueribboncommittee_casestatement.pdf

⁵Existing Conditions, Findings and Opportunities Report for the Regional Active Transportation Plan, October 2012

2. The ATP Stakeholder Advisory Committee has identified “principles for the active transportation network” and “evaluation/prioritization criteria” (see Attachment C). Has anything been missed?
3. The ATP Stakeholder Advisory Committee has developed three alternative Regional Bicycle Parkway Network Concepts and a Regional Pedestrian Network Concept. Do you have any questions about the concepts? (Concept maps not included in packet, will be provided to Councilors prior to the work session)
4. The Regional Bicycle Parkway Network Concepts and a Regional Pedestrian Network Concept are being evaluated to better understand the impact and benefits of improvements to the existing networks. Staff will present some of the preliminary results at the work session. Do you have any questions about the initial evaluation results? (information provided at work session)

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION _Yes __No

No legislation is required at this time. Legislation will be required in June 2013, when the Metro Council is anticipated to consider a resolution of intent to support adoption of the Regional Active Transportation Plan and amendment to the 2035 Regional Transportation Plan and Regional Transportation Functional Plan during the as part of the regularly scheduled RTP update in 2014.

DRAFT IS ATTACHED __Yes XNo

Attachments:

- A. Metro Council Check-in Points (updated January 2013)
- B. ATP Committee Meeting and Stakeholder Outreach Schedule
- C. Draft principles for the active transportation network and evaluation and prioritization criteria.
- D. Existing Conditions Findings and Opportunities Executive Summary (*copies of the entire report are available at www.oregonmetro.gov/activetransport*)

Updated January 8, 2012 – Subject to change

Date	PROJECT PHASE AND CHECK-IN POINTS
	PHASE I Existing Conditions and Framing Choices
Feb 9	Project overview, workplan and project approach, stakeholders, and connection to other Metro projects <i>Objective: Metro Council provides direction on communication with partners and messaging and understands role in process</i>
Sept. 4 Network	Findings from Existing Conditions report; provide direction on Concepts
	PHASE II Network Concepts and Select Alternative
Feb 19	Preliminary outcomes from evaluation and modeling of Principal Regional Pedestrian and Bicycling Networks, feedback on principles and criteria. <i>Objective: Metro Council is informed and updated on the project, provides input on principles and criteria, understands project in context of other Metro priorities and update of RTP.</i>
	PHASE III Identifying Priorities and Implementation Plan
April 9 strategy	Proposed priorities, proposed policy changes to RTP and RTFP Project implementation and phasing, proposed funding strategies <i>Objective: Metro Council provides direction on implementation and financing plan and proposed policy changes</i>

Metro Council Check in Points

June 20 Presentation on final ATP and recommended policy changes and project implementation.

2/13/2013

ATTACHMENT B



METRO

Regional Active Transportation Plan Meetings & Milestone Calendar *Updated January 29, 2013 – Subject to Change*

Phase 1: Existing Conditions/Frame Choices, JAN-JUNE 2012

Existing conditions analysis, Findings Report drafted

Phase 2: Develop Principles, Criteria, Network Concepts, JULY-DEC 2012

Principles and criteria developed, bicycle network concepts identified, pedestrian network confirmed, evaluation measures developed

Phase 3: Identify Priorities/Implementation Plan, JAN-JUNE 2013

January – Evaluate and model alternative networks

Jan 2 – EMCTC TAC, project update

Jan 3- Gresham Transportation Subcommittee, *project update*

Jan 10 – Stakeholder Advisory Committee meeting, *evaluation methodology and initial findings*

Jan 30 – Regional Trails Qtly Forum, *project update*

February – Evaluate and model alternative networks

Feb 19 – Metro Council worksession, *initial findings of evaluation, direction on network concepts*

Feb 21 – Stakeholder Advisory Committee meeting, *evaluation progress*

Feb 20 – Elders in Action, Multnomah County, *project overview*

Feb 22 – Executive Council for Active Transportation meeting, *project update*

March – Report on evaluation of bike and pedestrian network alternatives, final plan started

March 21- Stakeholder Advisory Committee meeting, *evaluation results, funding and phasing*

April – Stakeholder outreach, select preferred alternative, priority bundles and phasing strategy

Dates TBD -Targeted stakeholder outreach, coordinating committees, bike/ped/freight/trail groups, etc.

Early April – *One on one meetings with trail and transportation planners*

April 2 – Clackamas County Bicycle and Pedestrian Committee, *project update*

*April 4 – Clackamas County Coordinating Committee, *project update*

*April 9 – Metro Council works session, *review proposed phased priorities, funding strategies*

*April 9 – Portland Bicycle Advisory Committee

April 10 – Multnomah County Bike and Pedestrian Advisory Committee, *project update*

April 16 - Portland Pedestrian Advisory Committee, *project overview*

April 23&24 – Oregon Active Transportation Summit, Salem, *ATP highlighted*

April 24 – Executive Council for Active Transportation (meeting at 2013 OATS)

April 25 – Washington County Coordinating Committee, *project update*

*April 26 – TPAC, *project update*

ATTACHMENT B

May – Finalize draft plan, priority bundles and phasing strategy

*May 1 – MTAC, *project update*

Early May - Joint JPACT/MPAC summit, *active transportation elements highlighted*

May 9 - Public engagement/open house for project

May 2 - Stakeholder Advisory Committee meeting, *proposed phased priorities, funding strategies*

May 16 – Stakeholder Advisory Committee workgroups

June – Plan finalized and presented

June 6 – Final Stakeholder Advisory Committee meeting

June 12 – MPAC, presentation on plan

June 13– JPACT, presentation on plan

June 13 – Final Executive Council for Active Transportation for ATP

*June 20 - Metro Council, *Resolution of intent for ATP and proposed amendments to RTP/ RTFP*

ATTACHMENT C

Regional Active Transportation Plan

DRAFT - Principles for the Regional Active Transportation Network

The following principles are used to **guide policies and development** of the regional active transportation network.

1. Cycling, walking, and transit routes are integrated and connections to regional centers and regional destinations are seamless.
2. Routes are direct, form a complete network, are intuitive and easy-to-use and are accessible at all times.
3. Routes are safe and comfortable for people of all ages and abilities.
4. Routes are attractive and travel is enjoyable.
5. Routes are integrated with nature and facility designs are context sensitive.
6. Relieves strain on other transportation systems.
7. Increases access to regional destinations for low income, minority, disabled, non-English speaking, youth and elderly populations..
8. Measurable data and analysis inform the development of the network and active transportation policies.
9. Implements regional and local land use and transportation goals and plans to achieve regional active transportation modal targets.

DRAFT - Regional Active Transportation Network Evaluation and Prioritization Criteria

Access. Does the network improve access to destinations?

Safety. Does the network make it safer to walk and ride a bike for all users, regardless of age and ability?

Equity. Does the network increase access low income, minority, disabled, non-English speaking, youth and elderly populations?

Increased activity. Does the network increase the number of trips made by walking and bicycling?

www.oregonmetro.gov

Executive Summary: Existing Conditions, Findings and Opportunities Report

Regional Active Transportation Plan

September 4, 2012

**DRAFT 3 – Advisory Committees and Metro
Council Review Copy**



Metro | *Making a great place*

About Metro

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

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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Metro Council President

Tom Hughes

Metro Councilors

Shirley Craddick, District 1

Carlotta Collette, District 2

Carl Hosticka, District 3

Kathryn Harrington, District 4

Rex Burkholder, District 5

Barbara Roberts, District 6

Auditor

Suzanne Flynn

EXECUTIVE SUMMARY



Active transportation is increasingly being recognized as a highly desirable and sustainable form of transportation that provides a wide range of economic, social and environmental benefits. A growing number of cities and metropolitan areas, including the Portland region, are seeing more people walking, bicycling and using other forms of active transportation than ever before. This is due in part to sustained investment in active transportation facilities and programs.

Today, nearly 18% of *all* trips in Clackamas, Multnomah and Washington counties are made by walking and bicycling, and the number of bicycle trips has tripled since 1994. People in the region are using active transportation to make all kinds of trips such as run errands, shop, visit friends, go out to eat and get to work and school. People of all income levels, race, ethnicities and age groups are getting around actively. People with lower incomes, people with disabilities, young people and non-white households in the region tend to make more trips by foot, bicycle or transit than other groups. Many of these people are active transportation dependent, raising issues of transportation equity for safety and access.

Active transportation provides many benefits to the region including: healthier people and lower health care costs, fewer emissions from transportation and cleaner air and water, support of local businesses and the economy, tourism and a billion dollar niche industry, business retention and attraction, increased development feasibility and property values, transportation options for those who cannot or choose not to drive, lower crash rates and reduced cost of crashes. All of this is a high return on investment considering that, historically, dedicated funding for bicycling and walking projects has comprised approximately 3% of the total funding the region spends on capital projects.

Increasing the levels of bicycling, walking and transit are essential to reaching the region's transportation goals, such as reduced congestion, clean air and transportation equity. However, the 2035 Regional Transportation Plan project list does not achieve many of the region's adopted transportation targets. Strategically investing in stand-alone, high quality active transportation projects that link together a connected, safe, accessible, direct, intuitive and seamless network will provide more options for the 80-85% of people in the region that say they would like to walk and bicycle more for transportation. Conditions for safe and comfortable walking and bicycling vary widely across the region. Local and regional policies and tools need to be flexible enough to apply to a wide range of situations and rigorous enough to effectively and efficiently prioritize projects that will achieve transportation targets and goals and allow everyone, of all ages and abilities, to use and enjoy the system. The Existing Conditions report provides baseline information to help inform the development for the Regional Active Transportation Plan to help the region achieve its transportation goals and implement the 2035 Regional Transportation Plan.

FINDINGS AND OPPORTUNITIES



Photo: Alliance for Biking and Walking

Findings

- A. **Regional levels of active transportation are increasing, especially bicycling.** One in six of all trips in Multnomah, Clackamas and Washington counties are made by active transportation; 84% of all transit trips are accessed by foot or bicycle. The regional active transportation mode share increased 36% between 1994 and 2011, from 13.1% to 17.8% of all trips. The regional bicycle mode share increased by nearly 191%, from 1.1% to 3.2%. Walking increased by over 14%.¹ (Chapter 2)
- B. **Lower income households in the region make more of their trips using active travel, especially walking, than do households with higher incomes.** As level of income increases, so does the percentage of trips made by auto. Households with annual incomes of less than \$35,000 make up to 25% of their trips walking, bicycling and taking transit.² (Chapter 2)
- C. **Non-white householders in the region make a greater percentage of their trips by walking, bicycling and transit than white householders.** Non-white householders make 20.5% of all their trips by walking and bicycling and transit, while white householders make 15% of all their trips by walking and bicycling and transit.³ (Chapter 2)
- D. **Younger people in the region are making more trips by active transportation.** For example, children under the age of 14 make over 23% of all walk trips (the highest of any age group) and over 15% of all bicycle trips in the region.⁴ (Chapter 2)
- E. **People between the ages of 25 and 34 make nearly 25% of their trips using active modes,** the highest level of any age group.⁵ (Chapter 2)

¹ 2011 Oregon Household Activity Survey (OHAS). Active transportation trips: bicycling 3.2%, walking 10.4%, and transit-bicycle and walk access, 4.2% in the 3-county area, Multnomah, Clackamas and Washington counties.

² 2011 OHAS.

³ 2011 OHAS (Only Householders (head of household) were asked race.) and 2010 U.S. Census.

⁴ 2011 OHAS

⁵ 2011 OHAS.

- F. **People with disabilities rely on transit and walking more than people without disabilities.** Nearly 7% of the population reports having a disability that affects their ability to travel. People with disabilities particularly rely on transit, and therefore accessing transit, for travel.⁶ (Chapter 2)
- G. **People want to make more trips by bicycle and foot.** National, regional and local polls indicate that people support investment in active transportation. In Multnomah, Clackamas and Washington counties 86-91% of respondents in each county were interested in using a bicycle more often for transportation and between 70-79% stated that they were interested in walking more for transportation.⁷(Chapter 2)
- H. **The majority of all trips made by auto in the region are for short trips.** Over 66% of all trips made by autos within the 4-county area are less than six miles in length, nearly 44% are less than three miles in length, and nearly 15% are less than one mile in length. ⁸ (Chapter 2)
- I. **Current transportation plans do not achieve regional transportation targets.** The 2035 RTP project list does not achieve many of the region’s adopted transportation targets; including a decrease in non-drive alone trips and reductions in green house gas emissions, congestion and vehicle miles traveled and travel delay. ^{9, 10} (Chapter 4)
- J. **Levels of investment in active transportation do not match demand or need.** Nearly 18% of all trips in Multnomah, Clackamas and Washington counties are made by walking or bicycle, while stand alone bicycle, pedestrian and trail projects have received approximately 3% of capital transportation funds.¹¹ (Chapters 5,8)
- K. **Many of the region’s arterial streets are also regional pedestrian and bicycle routes.** Arterials often provide the most direct and efficient route for travel for all modes, especially in suburban areas where there may not be alternative parallel routes. Many essential destinations and services and transit stops are located on arterials. Regional trails and other pedestrian and bicycle routes intersect with arterials. ¹² (Chapter 5)

⁶ 2011 OHAS

⁷ Metro Opt in Poll. http://panel.decipherinc.com/images/uploads/optin/Metro_Active_transportation--Nov1.pdf

Opt In is an online survey tool open to all residents in the region.

⁸ 2011 OHAS. The 4-county area includes Multnomah, Washington, Clackamas and Clark counties. The analysis includes all trips made by auto less than 30 miles in length (one way).

⁹ Some of the projects may be folded into roadway projects which are more expensive, may take longer to be implemented and may not prioritize pedestrian and bicycle travel.

¹⁰ 2035 RTP Performance Evaluation findings.

¹¹ Metro analysis of transportation funding 200

¹² See the 2035 RTP System Maps for roadway classifications.

- L. **Most serious pedestrian and bicycle crashes occur on arterials, at intersections and mid-block crossings.** Over 52% of all serious bicycle crashes and 67% of all serious pedestrian crashes occur on arterials. Arterials have the highest crash incident rate of any facility type for all modes. Nearly 80% of serious and fatal pedestrian crashes occur at intersections and mid-block crossings and 73% of serious and fatal bicycle crashes occur at intersections.¹³ (Chapter 3)
- M. **Women are still making fewer trips by bicycle than men, but that is changing.** Women and girls are often seen as an “indicator species” for comfort of the bicycling environment. As the comfort and safety of the bicycling environment increases, so do the number of women and girls riding bicycles. Women in the region make 1.8% of their trips by bicycle, compared to 4% for men. However, the proportion of women riding bicycles is increasing up 16.5% since 1994.¹⁴ (Chapter 2)
- N. **Existing conditions for cycling vary across the region and present different opportunities and challenges to increasing bicycle ridership.** Large differences exist for factors that influence cycling such as road connectivity, road density, topography, permeability, land use mix/density, as well as the existing bikeways in the region in terms of bike network density, bike network connectivity and bikeway comfort.¹⁵ (Chapter 6)
- O. **Major regional pedestrian and transit corridors and districts lack sidewalks, have high levels of traffic and high traffic speeds.** These corridors often provide the most efficient and direct routes and access to services and destinations.¹⁶ (Chapter 6)
- P. **Lack of data on walking and bicycling, especially accurate counts of pedestrian and bicycle activity, make it difficult to adequately measure demand and performance.** What does not get counted, does not count. Current transportation models do not adequately represent walking and bicycling. Adequate data will make sure that investments in bicycling and walking are cost efficient. (Chapter 10)
- Q. **Regional investment in walkable and bikeable communities is a contributing factor to people engaging in more physical activity and lower rates of obesity compared to national and state levels.** Among other factors, the built environment, such as street connectivity/density and density and quality of pedestrian and bicycling infrastructure contribute to how much people, walk, ride bicycles and take transit.^{17, 18} (Chapter 3)

¹³ “Metro State of Safety Report: A compilation of information on roadway-related crashes, injuries, and fatalities in the Portland Metro region and beyond”, Metro, April 2012

http://library.oregonmetro.gov/files//state_of_safety_report_043012.pdf

¹⁴ 2011 OHAS

¹⁵ Metro 2012 Cycle Zone Analysis

¹⁶ Metro 2012 Analysis of the Regional Pedestrian Network

¹⁷ Oregon BRFSS County Combined Dataset 2006-2009; Oregon Health Authority, Oregon Overweight, Obesity Physical Activity and Nutrition Facts, 2012

- R. **Programs and education help reduce the number of trips made by auto in the region.** Nearly 19% of the Portland area population has reduced their car trips as a result of Drive Less Save More, and a conservative estimate of reduction in vehicle road miles is 21.8 million, which translates into a reduction of about 10,700 tons of CO₂.¹⁹ Beaverton's Findley Middle School reduced the number of autos dropping and picking students up from 800+ a day to 400 cars by introducing a Safe Routes to School Program.²⁰ (Chapter 7)
- S. **There are areas of the region with incomplete bicycling and walking facilities, less access to essential services and destinations, and have higher concentrations of environmental justice and underserved communities,** including communities in East Multnomah County, Portland east of I-205, areas of North Portland, areas along McLoughlin Blvd. and 82nd Avenue, areas of unincorporated Clackamas County, including the North Clackamas Revitalization Area, Forest Grove, Cornelius, Aloha and Beaverton.²¹ (Chapter 8)
- T. **Crashes and the resulting injuries and deaths cost the region \$958 million a year in property damage, medical costs, and lost productivity.**²² Studies have found that more people walking and riding bicycles make it safer to walk and ride a bicycle and increase road safety records for all users. (Chapter 3)
- U. **Investments in active transportation have provided a high return on investment and multiple benefits to the region.** Comparatively small investments in capital active transportation projects and programming have benefitted the region on multiple levels, including cleaner air and water, healthier people, lower transportation costs, increased development feasibility and safer streets. (Chapter 2)
- V. **Active transportation trips are being made for a variety of purposes, not just commuting.** Active transportation trips are consistently undercounted due to a reliance on US Census data which only collects information on travel to work. In the region, 18.5% of all trips to work, 15.1% of all school college trips, and 16.4% of all errands, entertainment and social trips are made by walking or bicycling.²³

¹⁸ Other determinants of health and weight include education level, parent's education level, access to grocery stores, heredity.

¹⁹ <http://www.drivlesssavemore.com/pages/faqs#impact>

²⁰ Information provided by Beaverton Safe Routes to School Program Coordinator for the 2009-10 year. The program does not have funding secured for 2012-13.

²¹ Metro, Metropolitan Transportation Improvement Program, 2014-15 Regional Flexible Fund Allocation Transportation Equity Analysis (January 2012, available at www.oregonmetro.gov/mtip)

²² Metro State of Safety Report presentation, 2012.

²³ 2011 OHAS



Opportunities

The opportunities below raise policy questions and potential implementation strategies that will be explored in the next phases of the ATP project.

- A. **There is opportunity to support populations that are already driving less by improving conditions and providing more transportation options, making it easier to drive less.** Young people, people with lower incomes, people of color and people with disabilities that affect their transportation choices already drive less. Because lower income households, people with disabilities, young people and households of color use active transportation and transit more often than other populations, more transportation options, programs, access and mobility, provides transportation equity and helps the region achieve its transportation goals.²⁴
- B. **There is opportunity to dramatically increase safety for pedestrians and bicyclists and increase levels of active transportation by focusing improvements for active transportation on arterials, intersections and mid-block crossings.** A high level of walking and bicycle activity and accessing transit occurs on arterials; these roads often provide the most direct and efficient route for all modes. Metro's State of Safety Report recommends improving pedestrian and bicycle crossings particularly on multi-lane arterials, improving lighting and providing protected bicycle facilities along high-volume and/or high-speed roadways such as buffered bike lanes, cycle tracks, multi-use paths, or low-traffic alternative routes.²⁵
- C. **Replacing just 15% of short auto trips (one to three miles) with walking and bicycling would reduce congestion, reduce green house gas emissions, lower transportation costs, reduce wear and tear on roadways and increase health in the region.** A national study found that replacing 6-21% of short trips under three miles made by auto with walking and bicycling would avoid 21- 52 billion miles of driving annually in the U.S. A slow-paced, three mile bicycle trip takes less than 20 minutes; it takes about 15 minutes to walk one mile.²⁶ Focusing

²⁴ 2011 OHAS

²⁵ Metro State of Safety Report: A compilation of information on roadway-related crashes, injuries, and fatalities in the Portland Metro region and beyond, April 2012

²⁶ Pg. 14, Active Transportation for America, the case for increased federal investment in bicycling and walking. Rails to Trails Conservancy. The report notes that these are conservative estimates.

improvements on areas with high levels of short auto trips could reduce barriers to walking and bicycling and improve active travel access to transit.

- D. **Including bicycle and walking projects in roadway preservation projects, and following best-practice design guidelines, would improve the region's ability to make regional pedestrian and bicycle routes complete streets²⁷.** The region is missing out on opportunities to improve walking and bicycling conditions in retrofit and preservation roadway projects.²⁸ For example, the 2005, \$38 million renovation and redesign project of the St. John's bridge, which is a critical link in the regional pedestrian and bicycle network and the only bridge spanning the Willamette River for five miles north or south, did not improve the facility for bicyclists or pedestrians. A new highway project, the Sunrise Corridor in Clackamas County, while increasing auto capacity is reducing pedestrian and bicycle connectivity.
- E. **Updates to local Transportation System Plans (TSPs), the 2035 RTP and the Regional Transportation Functional Plan (RTFP) provides opportunities to include policies and best practices for implementation.** Current regional and local transportation plans have clear visions, goals, and for balanced transportation systems that include bicycling, walking and taking transit, but not all of the policies and tools needed to implement. Best practices for implementable plans include prioritized project lists, concept level designs, funding plans and performance targets. Specific guidelines for some of the pedestrian and bicycle requirements in the RTFP would support performance measurement and consistent implementation across the region.
- F. **Adjusting the regional mode share target for bicycle travel to reflect the increase in bicycling in the region (an increase of 191% since 1994) provides an opportunity to acknowledge the potential of bicycling in relieving strain on the regional transportation system.** The region has met the 2035 regional mode share target of tripling bicycle trips by 2035. All types of trips are made by bicycle in the region.
- G. **Increasing the level of investment in active transportation in the 2035 RTP (walking, bicycle and trail projects) provides an opportunity to reach regional transportation goals and targets.** Regional transportation goals and targets, such as reducing congestion and transportation emissions, rely heavily on an increasing trips made by walking, bicycling and transit. Increasing access to destinations by foot, bike and transit, improving safety, designing comfortable, connected and enjoyable networks and providing education and programs have been proven to increase levels of active travel.

²⁷ Oregon's current complete streets law, ORS 366.51, states that new construction projects or projects that increase capacity for automobiles (such as adding a turn-lane) must include bicycle and pedestrian improvements. Preservation and maintenance projects (e.g. roadway resurfacing) are not required to include bicycle and pedestrian enhancements.

²⁸ *Willamette Pedestrian Coalition, Complete Streets Policy Report Card: A 40 Year Progress Report for Oregon 2012.*

Agenda Item No. 5.0

**COMMUNITY INVESTMENT INITIATIVE:
DEVELOPMENT-READY COMMUNITIES**

Metro Council Work Session
Tuesday, Feb. 19, 2013
Metro, Council Chamber

Work Session Worksheet

Presentation Date: February 19, 2013 Time: 2:05 p.m. Length: 60 minutes

Presentation Title: Community Investment Initiative: Development-Ready Communities

Service, Office, or Center: Office of the Chief Operating Officer

Presenters: Gene Grant, Deanna Palm, Joel Schoening (x7573)

ISSUE & BACKGROUND

At the September 18, 2012 work session, the Metro Council indicated an interest in being an active participant in the Community Investment Initiative's (CII) Development-Ready Communities pilot program for the current fiscal year. The Development-Ready Communities program is piloting a readiness assessment that assists willing communities in achieving their economic development goals. The assessment looks at alignment in building codes, permitting, zoning, public engagement, staff capacity, and financial tools to meet the community's development goals.

The Metro Council would like this program to build off of the many efforts and partnerships already under way to support development in communities with underutilized capacity. The Metro Council also indicated its support for the Leadership Council's efforts to engage communities who want to voluntarily participate in the pilot program and who will take ownership of the opportunities it will present.

As the Development-Ready Communities implementation group moves through the pilot program design and implementation, they are engaging elected officials, business groups, and community leaders to continuously assess how the program could elevate the region's development capacity. If stakeholders and participants consider the program a success, the group aims to have a business plan to move forward by July.

The Metro Council will be asked to provide input along the way on the program design, partners, and future need and governance. There may be a decision point for the Metro Council in the spring of 2013 regarding your future role in the project.

Staff provided an update on the progress of the Development-Ready Communities pilot program in November 2012. Since that time, the work has proceeded as scheduled and achieved the following:

- Completion of the discovery phase:
 - Outreach to public and private sector development professionals
 - Incorporation of feedback from MTAC and MPAC into program design
 - Delivery of a Framework of Development Challenges and Opportunities to be used in the design of a pilot development-readiness assessment tool (see attached)
- Initiation of program design efforts:
 - Completion of a draft assessment tool
 - Continued engagement with public and private sector development professionals
- Initiation of pilot program with a Oregon City

The Development-Ready Communities implementation group has been working to identify a long-term institutional home for a program if it is deemed desirable. The group has identified the Urban Land Institute (ULI) as a potential partner. The ULI is a nonprofit research and education organization

representing the entire spectrum of land use and real estate development disciplines. The ULI has earned the respect of land use professionals by providing nearly 80 years of objective research and technical support services.

The CII steering committee and the Development-Ready Communities implementation group have been supportive of this partnership based on the following assets of ULI:

- Reputation for independent, objective, and high quality research and technical expertise
- Record of success with the Quality Growth Alliance in Seattle
- Independent and parallel recognition of the benefits associated with maximizing the development potential of land within the Urban Growth Boundary
- Desire to establish a higher profile presence in the Portland Region through the Thriving Cities Alliance

OPTIONS AVAILABLE

The CII steering committee and Development-Ready Communities implementation group support continued efforts to establish a partnership with the Urban Land Institute and, in particular, the Thriving Cities Alliance. This partnership would:

- Recognize the significant efforts and contributions made by the CII, Metro, and other partners
- Take advantage of the ULI's unique position to capitalize on the outcomes of the Development-Ready Communities pilot program
- Clarify the roles of the CII, Metro, and the ULI as they relate to implementation of the Thriving Cities Alliance

IMPLICATIONS AND SUGGESTIONS

A partnership between the CII and the ULI would entail the following:

- Bringing the significant social and political capital of the CII and the ULI's Thriving Cities Alliance into alignment around the issue of "readiness"
- Raising the profile of both the CII and the ULI in the region
- Ensuring that the products of the Development-Ready Communities pilot program were implemented region-wide
- Incorporating ongoing participation from the CII as needed
- Identifying potential for ongoing participation from Metro in a technical assistance and/or advisory role
- Publicizing this landmark success for the CII and the completion of the Development-Ready Communities work plan

QUESTION(S) PRESENTED FOR CONSIDERATION

- What additional feedback does the Metro Council have for the Development-Ready Communities implementation group regarding pilot program and potential partnership?
- Do you have recommendations regarding who the ULI should engage in developing a proposed program that reflects regional priorities?

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION __Yes __X__No

DRAFT IS ATTACHED __Yes __X__No

Framework of Development Challenges and Opportunities

Economic development, especially that which produces living-wage jobs in the region's centers, corridors and employment areas, is an essential component of a resilient economy and is a core focus of the Community Investment Initiative. Yet, there is a widely held perception that the region's municipal jurisdictions could more efficiently and effectively achieve their desired community and economic development aspirations without sacrificing the spirit of their regulatory and policy structures.

In an effort to identify and document the development challenges and opportunities faced by jurisdictions and developers, the Community Investment Initiative (CII) has consulted with Metro to compile and review a significant body of research on this topic. A survey of this research resulted in the creation of the Framework of Development Challenges and Opportunities below.

The Framework is intended to provide a simple, yet universal, categorization of the challenges and opportunities that jurisdictions may respond to in their community and economic development efforts. The framework is also intended to provide a baseline for a "development readiness" pilot program that would aid participating municipalities in assessing the challenges and opportunities specific to their development goals.

The framework should be read from the perspective a jurisdiction seeking economic development. The categories in the framework below are intentionally broad and are meant to cover a range of opportunities and challenges with the understanding that in actual practice, these challenges and opportunities require context specific responses at the local level. On the following page, find examples further illustrating each of the categories in the framework.

Framework of Development Challenges and Opportunities		
Physical Challenges/Opportunities	Institutional Challenges/Opportunities	Financial Challenges/Opportunities
Environment: Topography	Leadership	Market: Macro
Environment: Regulation	Staff Knowledge	Market: Micro
Infrastructure: Transportation	Development Savvy	Tax and Fee Structure
Infrastructure: Utilities	Vision & Planning	Incentive Structure
Historical use	Regulation & Code	Reliability of process: Time
Land Availability	Public Education & Engagement	Amenities
	Multiple and/or Conflicting Agencies	Parking

Framework of Development Challenges and Opportunities: Examples	
Challenge/Opportunity	Example
Physical Barriers	
Environment: Topography	Scenery, slope, soil properties, vegetation, bodies of water, or drainage, wildlife
Environment: Regulation	Waterfront setbacks, mitigation requirements
Infrastructure: Transportation	Freight access, passenger vehicle access, active transportation access, high capacity transit access and frequency, street connectivity
Infrastructure: Utilities	Water, sewer, gas, electric, broadband
Historical Use	Brownfield, contamination, derelict structures, historic preservation,
Land Availability	(Up)Zoning, parcelization, or inclusion in UGB
Institutional Barriers	
Leadership	Elected leaders and senior staff attitudes concerning development and commitment to development goals
Staff Knowledge	Level of staff knowledge of challenges faced by developers, staff attitudes about development/developers, and staff commitment to public service
Development Savvy	Level of staff and leadership experience in economic and community development
Vision & planning	Existence of an economic and community development plan that is realistic and has the support of the community
Regulation & Code	Complexity of code, flexibility of code, predictability of permitting
Public Education & Engagement	Existence of public engagement process, depth of engagement required by developers, time required to complete engagement, certainty of engagement process and outcomes, public awareness of benefits and burdens of development
Multiple and/or Conflicting Agencies	Necessity of multiple permits, engagement processes, alignment of regulations, government agencies with overlapping jurisdiction
Financial Barriers	
Market: Macro	National or global economic conditions and market trends
Market: Micro	Site location, local economic conditions, labor market, economic clusters, demographics
Taxes and fee structure	Alignment of taxes and fees with desired outcomes
Incentive Structure	Alignment of incentives with desired outcomes
Reliability of Process: time	Degree of certainty/flexibility in permitting process, predictability of permitting process
Public amenities	Provision of public plazas, sidewalks, and trees
Parking	Parking requirements, metering, street design

Materials following this page were distributed at the meeting.



The ATP: Network Concepts, Principles & Criteria



Metro Council Presentation
Feb. 19, 2013



Lake McTighe
Senior Transportation Planner
Regional Transportation Planning



Metro | *Making a great place*



from this...





to this....





Project overview

PHASE I January - July 2012

Existing Conditions and Framing Choices

PHASE II August 2012-February 2013

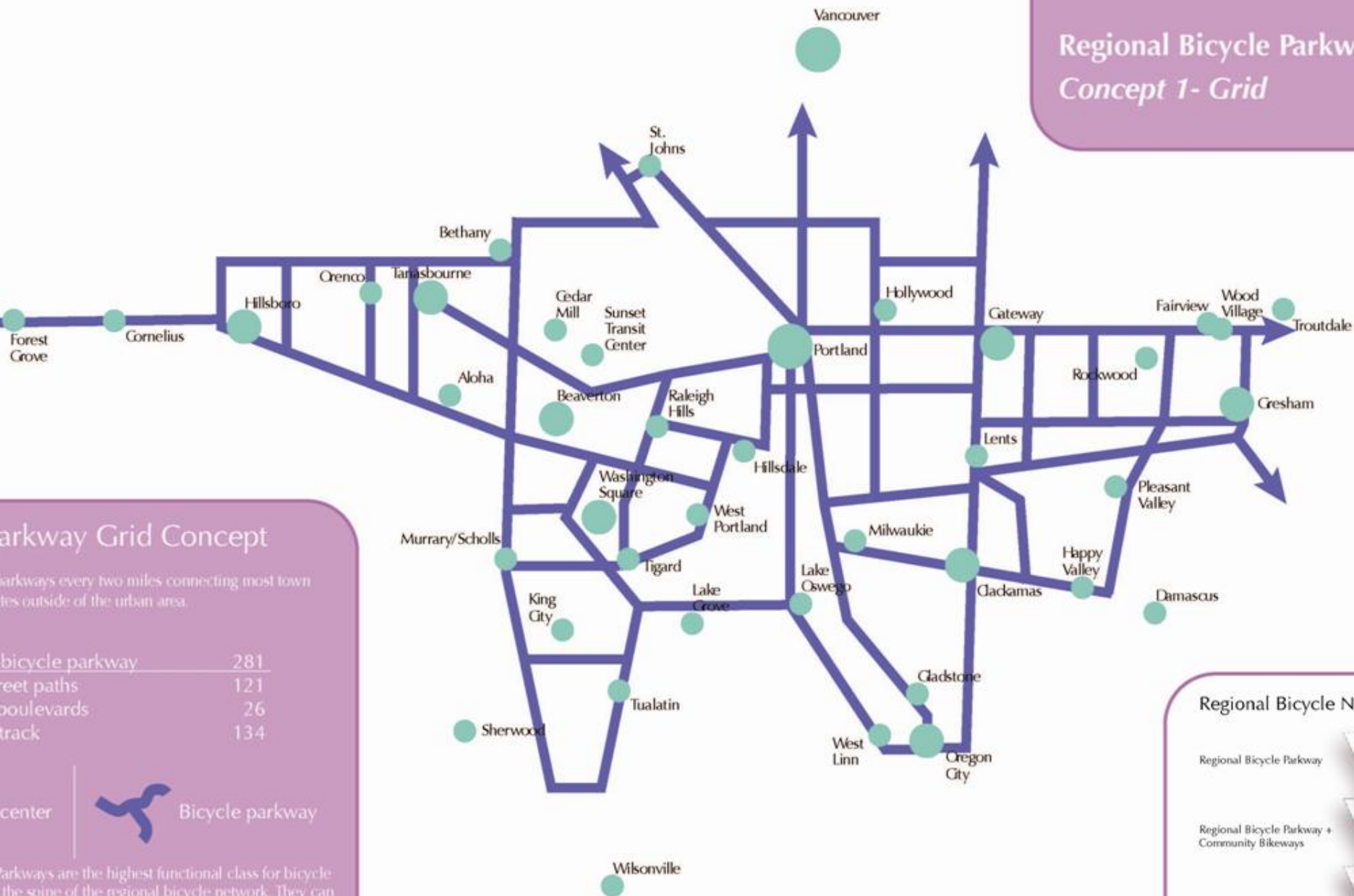
**Develop Network Concepts, Evaluate and
Select Alternative**

PHASE III March - June 2013

Identify Priorities & Implementation Plan

Active Transportation Plan

Regional Bicycle Parkways Concept 1- Grid



Bicycle Parkway Grid Concept

Bicycle parkways every two miles connecting most town centers outside of the urban area.

Bicycle parkway	281
Street paths	121
Boulevards	26
Track	134

center



Bicycle parkway

Bicycle parkways are the highest functional class for bicycle network. They are the spine of the regional bicycle network. They can take many forms, such as trails, separated on-street bike boulevards and are designed to provide a higher level of safety and comfort/protection from motorized traffic than other bicycle facilities like trails and boulevards.

Regional Bicycle Network

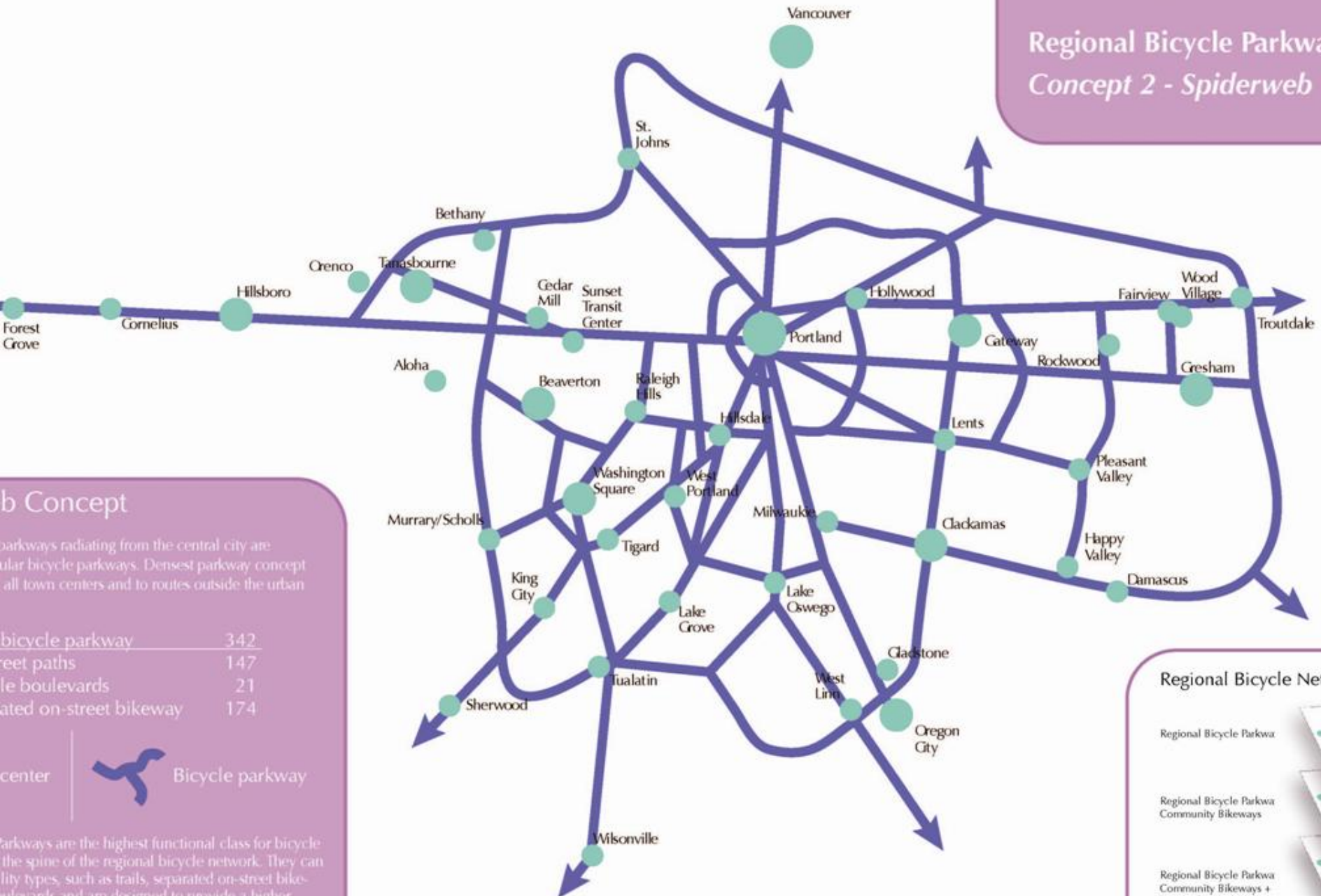
Regional Bicycle Parkway

Regional Bicycle Parkway +
Community Bikeways

Regional Bicycle Parkway +
Community Bikeways +
Local Bikeways

Active Transportation Plan

Regional Bicycle Parkway Concept 2 - Spiderweb



b Concept

parkways radiating from the central city are
ular bicycle parkways. Densest parkway concept
all town centers and to routes outside the urban

bicycle parkway	342
street paths	147
le boulevards	21
ated on-street bikeway	174

center



Bicycle parkway

parkways are the highest functional class for bicycle
the spine of the regional bicycle network. They can
lity types, such as trails, separated on-street biko-
boulevards and are designed to provide a higher
and comfort/protection from motorized traffic
and bike paths, trails, and boulevards.

Regional Bicycle Network

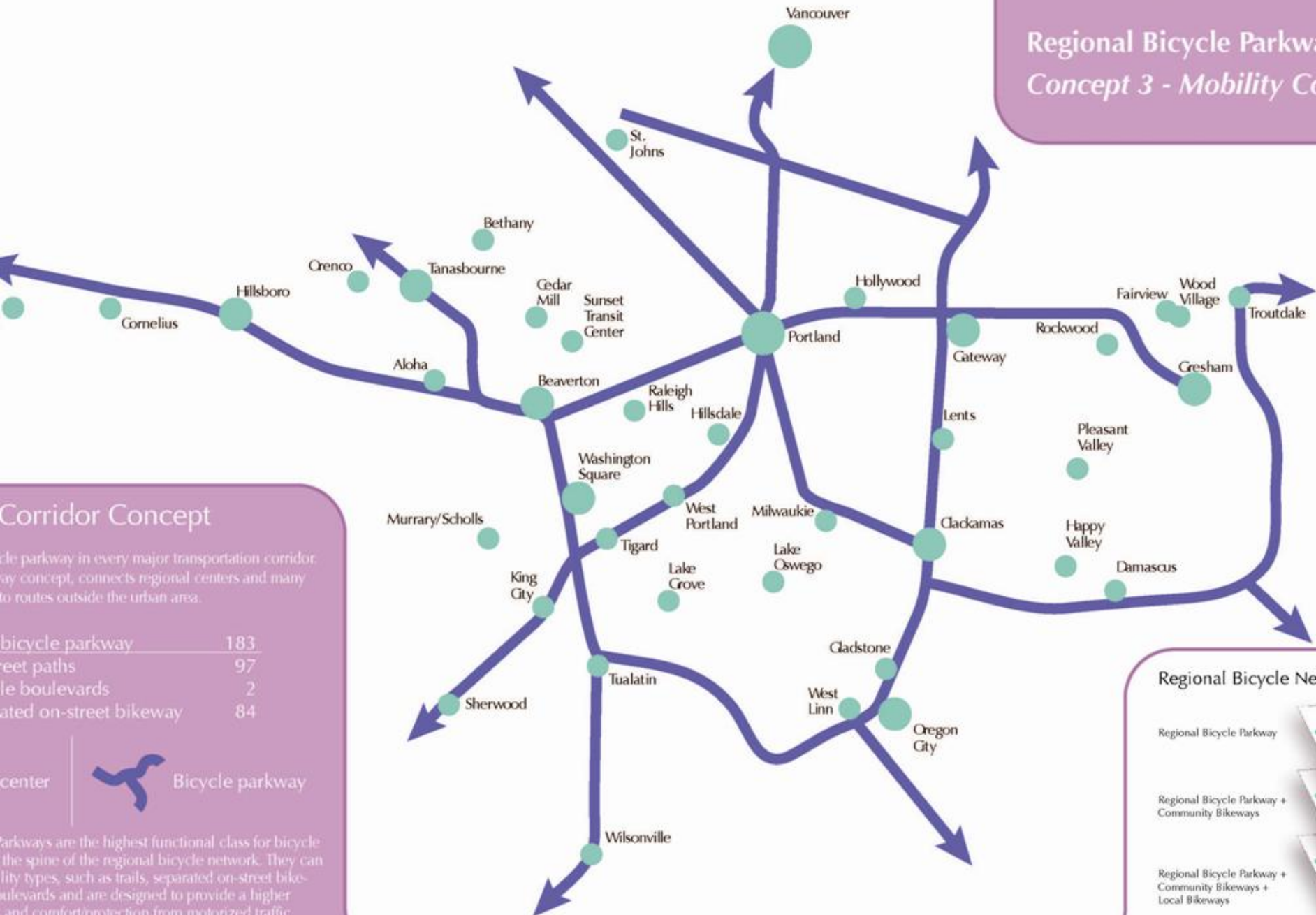
Regional Bicycle Parkway

Regional Bicycle Parkway
Community Bikeways

Regional Bicycle Parkway
Community Bikeways +
Local Bikeways

Active Transportation Plan

Regional Bicycle Parkway Concept 3 - Mobility Corridor



Active Transportation Plan

Regional Pedestrian Network

Principal Pedestrian Corridors and Districts



Network Concept

Legend	Potential corridors
 Off-street paths	
 Frequent transit corridors	
 Bicycle parkway concepts	

Network of on and off-street corridors anchored by transit that provide access to transit and key destinations. Principal pedestrian districts are the region's urban centers where pedestrian activity is highest. Principal on-street corridors mirror major transit routes. Multi-use and pedestrian only trails provide a network connecting to the on-street network, transit and bicycle parkways are also principal regional corridors. The principal pedestrian network provides the backbone for the regional pedestrian network.

Regional Pedestrian Network

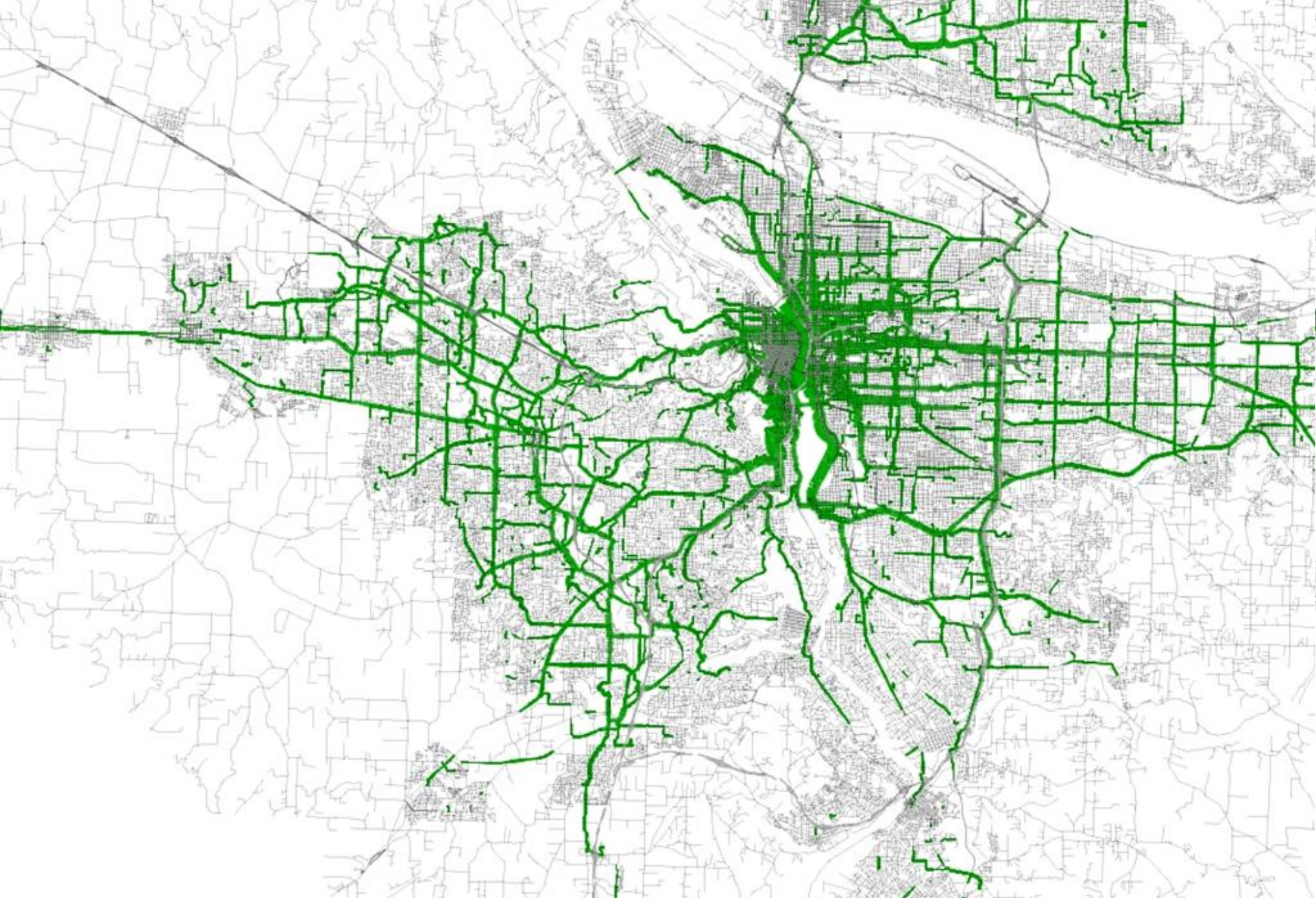
- Principle pedestrian corridors and districts
- Community pedestrian corridors
- Local pedestrian corridors

Network Principles

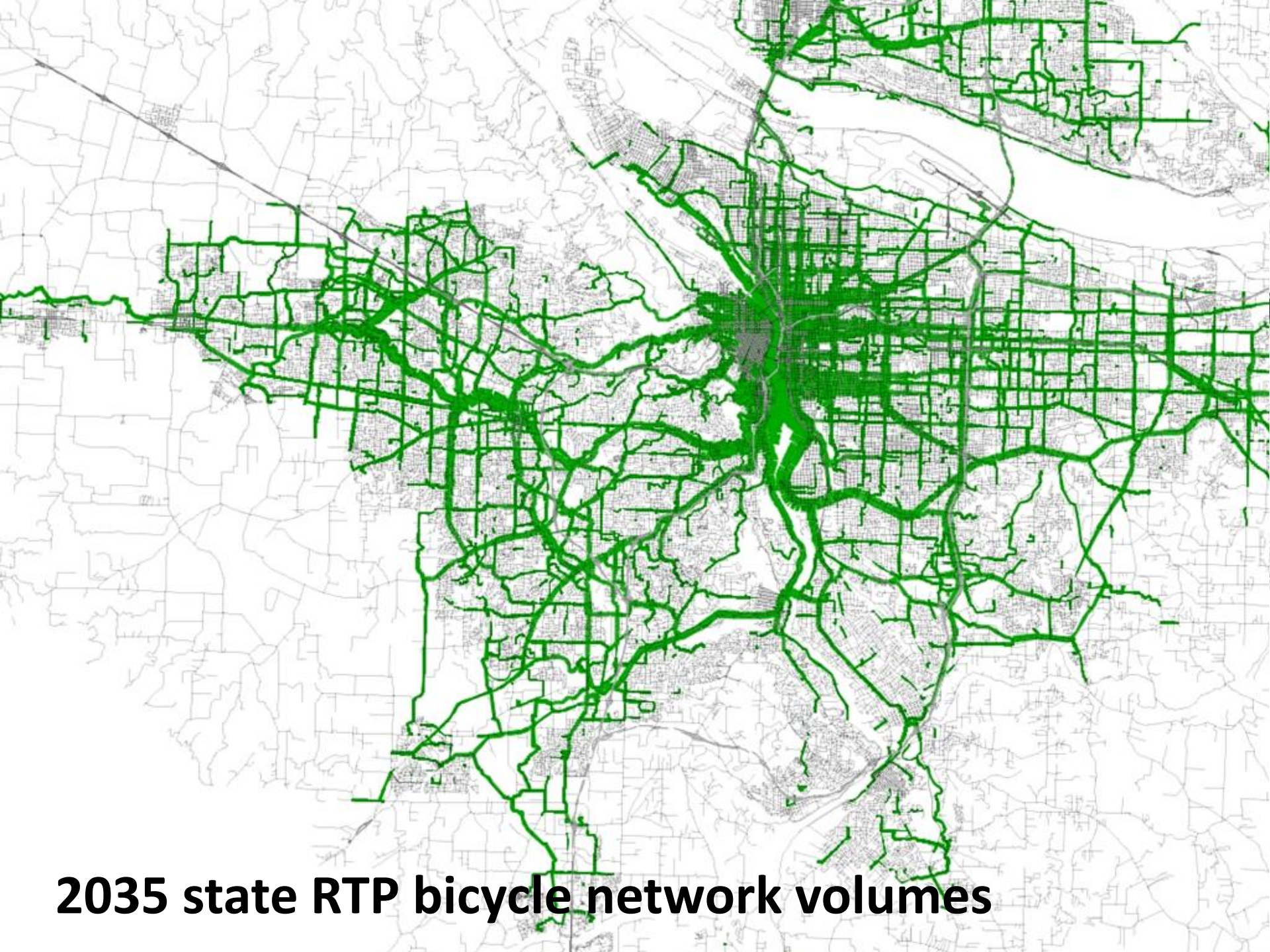
1. Integrated and connected.
2. Direct, complete, intuitive, easy-to-use accessible.
3. Safe and comfortable for people of all ages and abilities
4. Attractive and enjoyable.
5. Integrated with nature, context sensitive.
6. Relieves strain on other transportation systems.
7. Equitable access.
8. Data driven.
9. Implements goals, plans and targets.

Criteria

1. **Access.** Does the network improve access to destinations?
2. **Safety.** Does the network make it safer to walk and ride a bike for all users, regardless of age and ability?
3. **Equity.** Does the network increase access low income, minority, disabled, non-English speaking, youth and elderly populations?
4. **Increased activity.** Does the network increase the number of trips made by walking and bicycling?



2010 bicycle network volumes



2035 state RTP bicycle network volumes

Initial bike facts

1. $\frac{1}{4}$ - $\frac{1}{3}$ of all BMT are on bike network concept facilities.
2. The concept network facilities have about 2.5 times more bike traffic than the average bike facility.
3. BMT more than doubles between 2010 and 2035.
4. Bike trips increase about 65%.

Thank you!

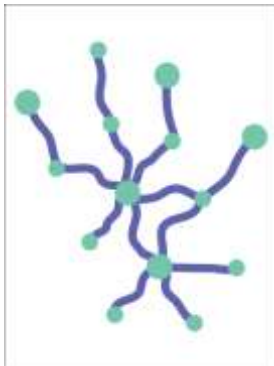


Regional Active Transportation Plan

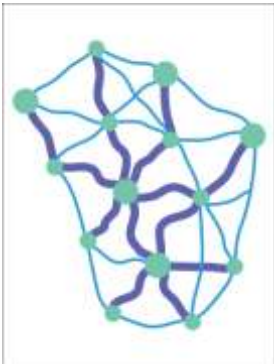
Regional Bicycle and Pedestrian Network Concepts & Functional Classes

REGIONAL BICYCLE NETWORK CONCEPT

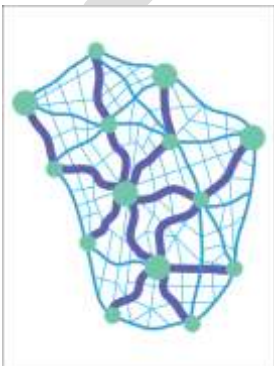
A dense network of off-street trails, in-street separated bikeways, bicycle boulevards and other bicycle facilities make up the regional bicycle network. The regional bicycle network has a functional hierarchy similar to that of the regional street and throughway network.



Regional Bicycle Parkways are a new functional class for bicycles and are the highest functional class for bicycle facilities, providing the highways of bicycle travel. Bicycle Parkways make up the spine of the bicycle network and allow for long distance intra-regional trips, connecting centers and provide connections to key destinations and routes outside of the region. Parkways can be any type of facility designed to parkway standards. Facility types can include off-street trails, separated in-street bikeways and bicycle boulevards. Implementation requires cross-jurisdictional coordination and strong stakeholder support. Bicycle parkways are the highest priority for the regional bicycle network.



Regional Bikeways combine and replace the 2035 RTP functional classes of regional and community bikeways. Regional bikeways can be any type of facility, including off-street trails, separated in-street bikeways and bicycle boulevards. On-street regional bikeways located on arterial and collector streets are designed to provide separation from traffic on streets with higher auto speeds and volumes. Regional bikeways provide connections to regional bicycle parkways and provide to destinations that parkways do not reach— they are the arterials of bicycle travel. Implementation requires some cross-jurisdictional coordination and strong stakeholder support. Regional bikeways are the second highest priority for the regional bicycle network.



Local Bikeways are a new functional classification and include trails, streets and connections not identified as regional bicycle parkway or regional bikeway. Local bikeways are the local collectors of bicycle travel. They are typically shorter routes with less bicycle demand and use. Implementation carried out primarily by local jurisdiction and requires no cross-jurisdictional coordination. Not all local bikeways are eligible for federal funding.

Regional Active Transportation Plan

Regional Bicycle and Pedestrian Network Concepts & Functional Classes

REGIONAL PEDESTRIAN NETWORK CONCEPT

All streets (except limited access highways) and off-street trails are part of the regional pedestrian network. The regional pedestrian network is organized into functional classes.



Principal Regional Pedestrian Network – Corridors and Districts is the highest functional class of pedestrian facilities and the highest priority for the regional pedestrian network. A connected network of on and off-street corridors anchored by pedestrian districts that provide access to transit and key destinations in the region. Pedestrian districts are the region's urban centers where pedestrian activity is highest. Principal on-street corridors mirror frequent transit routes. Multi-use and pedestrian only trails provide off-street corridors, connecting to the on-street network, transit and nature. All regional bicycle parkways are also principal regional pedestrian corridors.

The principal pedestrian network provides the spine for regional pedestrian corridors and local pedestrian connectors to make a complete regional pedestrian network. Implementation requires cross-jurisdictional coordination and strong stakeholder support.



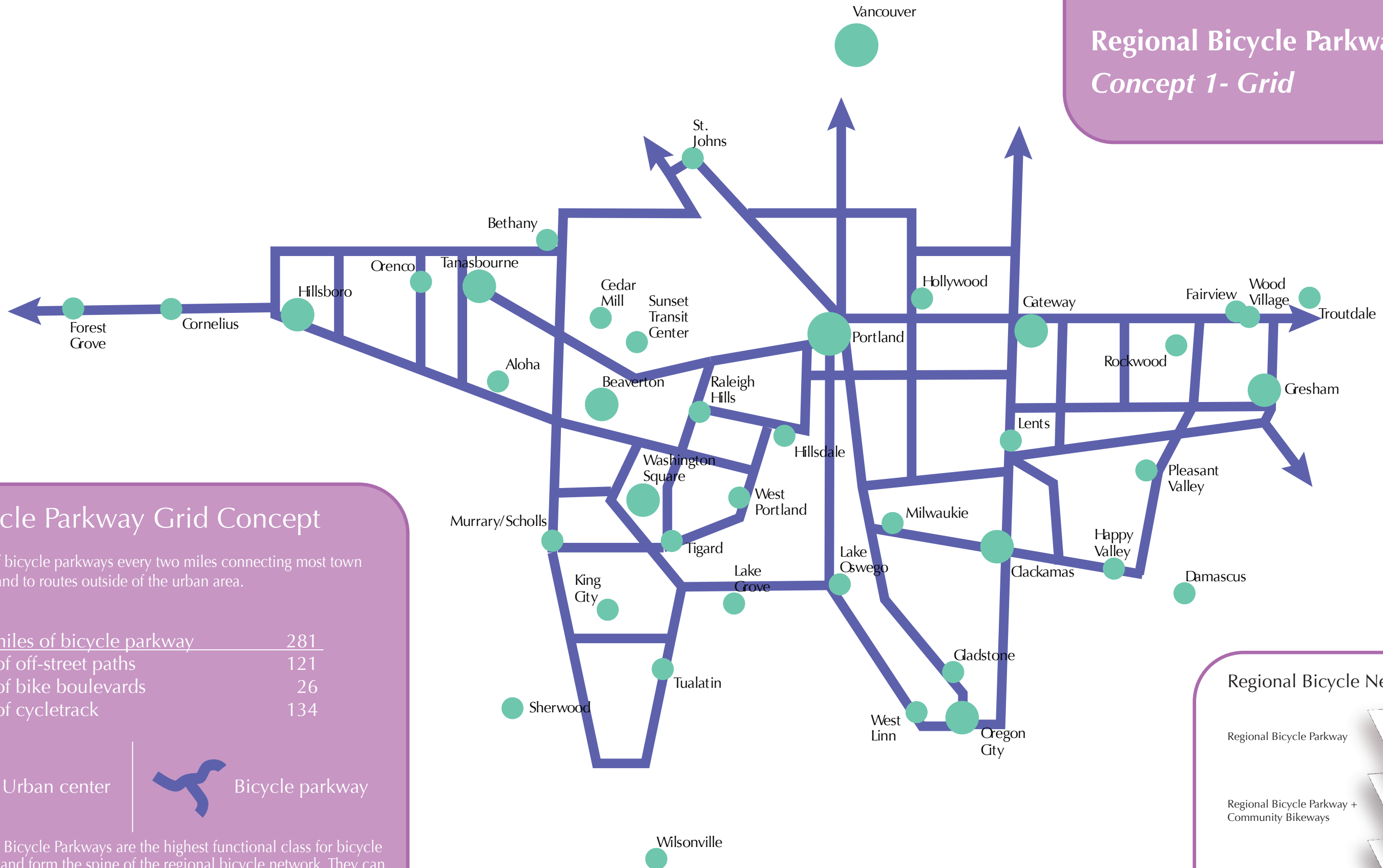
Community Pedestrian Corridors is the second highest functional class of the regional pedestrian network and the second highest priority. On-street community pedestrian corridors are any major or minor arterial on the regional arterial network that is not part of the principal regional pedestrian network. Off-street community pedestrian corridors are community trails not included in the principal regional pedestrian network. Community pedestrian corridors experience less transit access and/or pedestrian activity. Implementation of the corridors can require cross-jurisdictional coordination.



Local Pedestrian Connectors are all streets and trails not included in the principal regional or regional corridor networks. Local connectors experience lower volumes of pedestrian activity and on-street connectors are typically on residential and low-volume/speed roadways. Connectors, however, are an important element of the regional pedestrian network because they allow for door-to-door pedestrian travel. Implementation carried out primarily by local jurisdictions and requires no cross-jurisdictional coordination. Not all local connectors are eligible for federal funding.

Active Transportation Plan

Regional Bicycle Parkways Concept 1- Grid



Bicycle Parkway Grid Concept

A grid of bicycle parkways every two miles connecting most town centers and to routes outside of the urban area.

Total miles of bicycle parkway	281
miles of off-street paths	121
miles of bike boulevards	26
miles of cycletrack	134



Urban center



Bicycle parkway

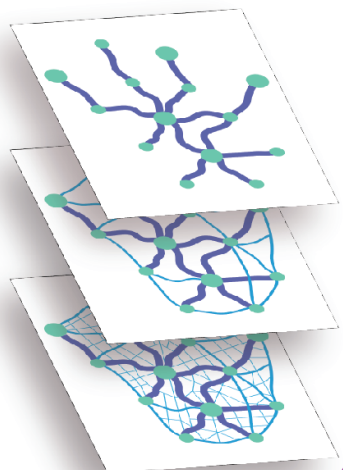
Regional Bicycle Parkways are the highest functional class for bicycle facilities and form the spine of the regional bicycle network. They can be a variety of facility types, such as trails, separated on-street bike-ways or bicycle boulevards and are designed to provide a higher degree of capacity and comfort/protection from motorized traffic compared to an average bicycle lane, trail or boulevard.

Regional Bicycle Network Concept

Regional Bicycle Parkway

Regional Bicycle Parkway +
Community Bikeways

Regional Bicycle Parkway +
Community Bikeways +
Local Bikeways



Active Transportation Plan

Regional Bicycle Parkways

Concept 3 - Mobility Corridors

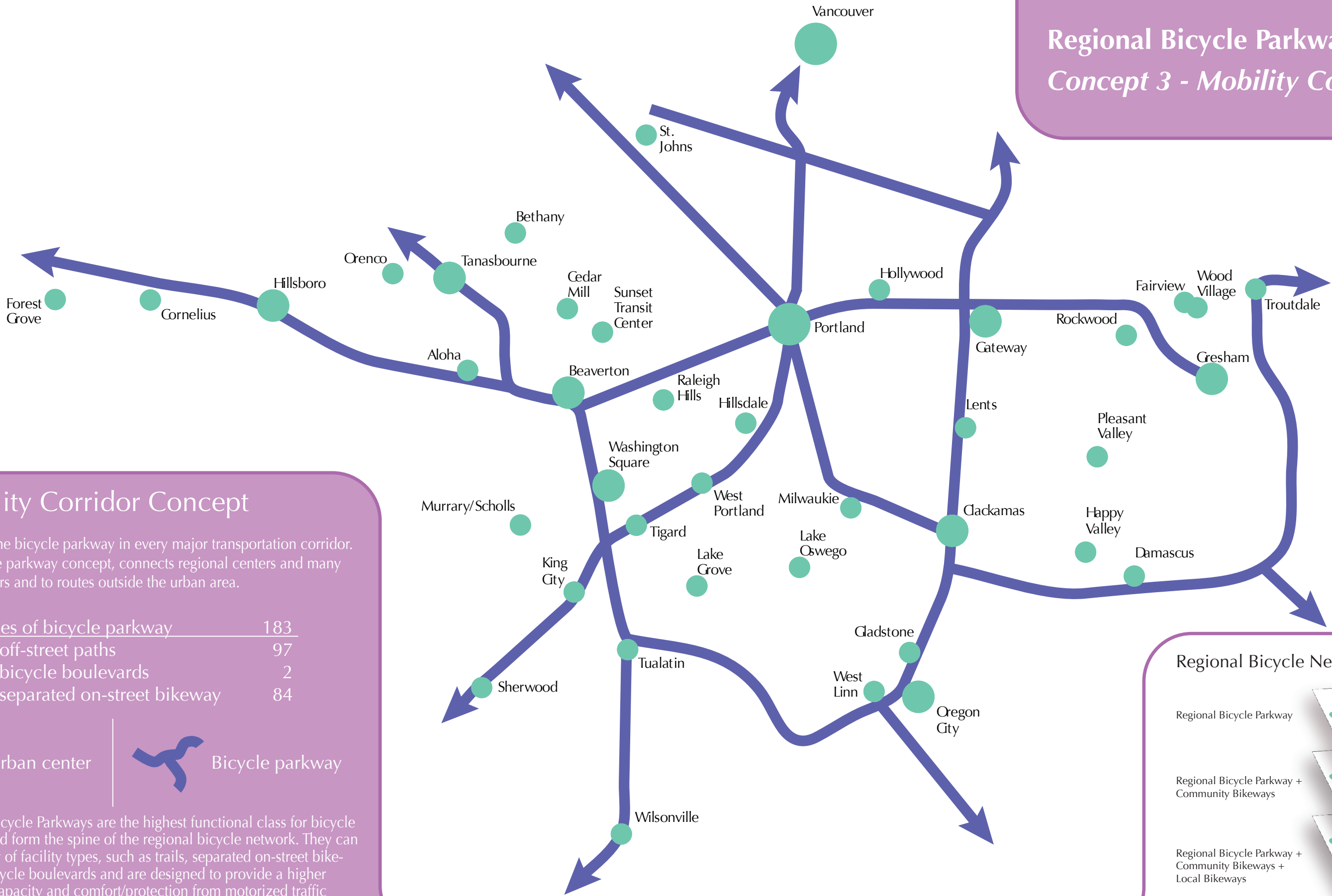
Mobility Corridor Concept

Provides one bicycle parkway in every major transportation corridor. Least dense parkway concept, connects regional centers and many town centers and to routes outside the urban area.

Total miles of bicycle parkway	183
miles of off-street paths	97
miles of bicycle boulevards	2
miles of separated on-street bikeway	84



Regional Bicycle Parkways are the highest functional class for bicycle facilities and form the spine of the regional bicycle network. They can be a variety of facility types, such as trails, separated on-street bike-ways or bicycle boulevards and are designed to provide a higher degree of capacity and comfort/protection from motorized traffic compared to an average bicycle lane, trail or boulevard.

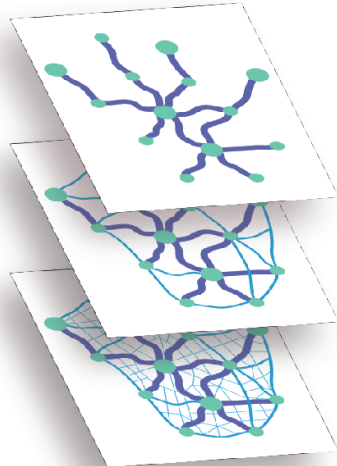


Regional Bicycle Network Concept

Regional Bicycle Parkway

Regional Bicycle Parkway + Community Bikeways

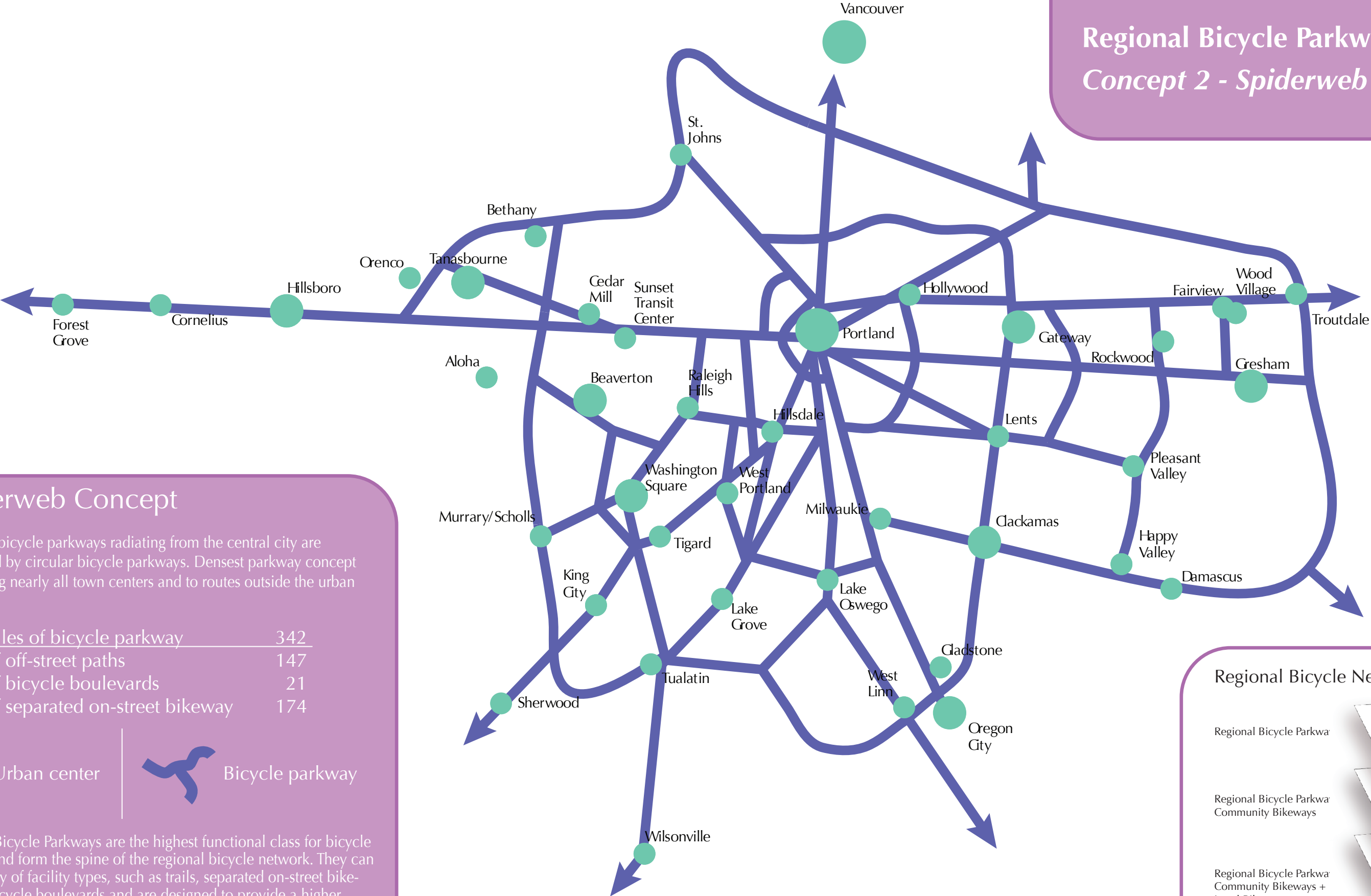
Regional Bicycle Parkway + Community Bikeways + Local Bikeways



Active Transportation Plan

Regional Bicycle Parkways


Concept 2 - Spiderweb




Spiderweb Concept

Diagonal bicycle parkways radiating from the central city are connected by circular bicycle parkways. Densest parkway concept connecting nearly all town centers and to routes outside the urban area.

Total miles of bicycle parkway	342
miles of off-street paths	147
miles of bicycle boulevards	21
miles of separated on-street bikeway	174

 Urban center

 Bicycle parkway

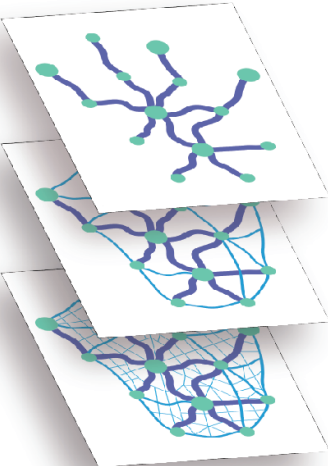
Regional Bicycle Parkways are the highest functional class for bicycle facilities and form the spine of the regional bicycle network. They can be a variety of facility types, such as trails, separated on-street bike-ways or bicycle boulevards and are designed to provide a higher degree of capacity and comfort/protection from motorized traffic compared to an average bicycle lane, trail or boulevard.

Regional Bicycle Network Concept

Regional Bicycle Parkway

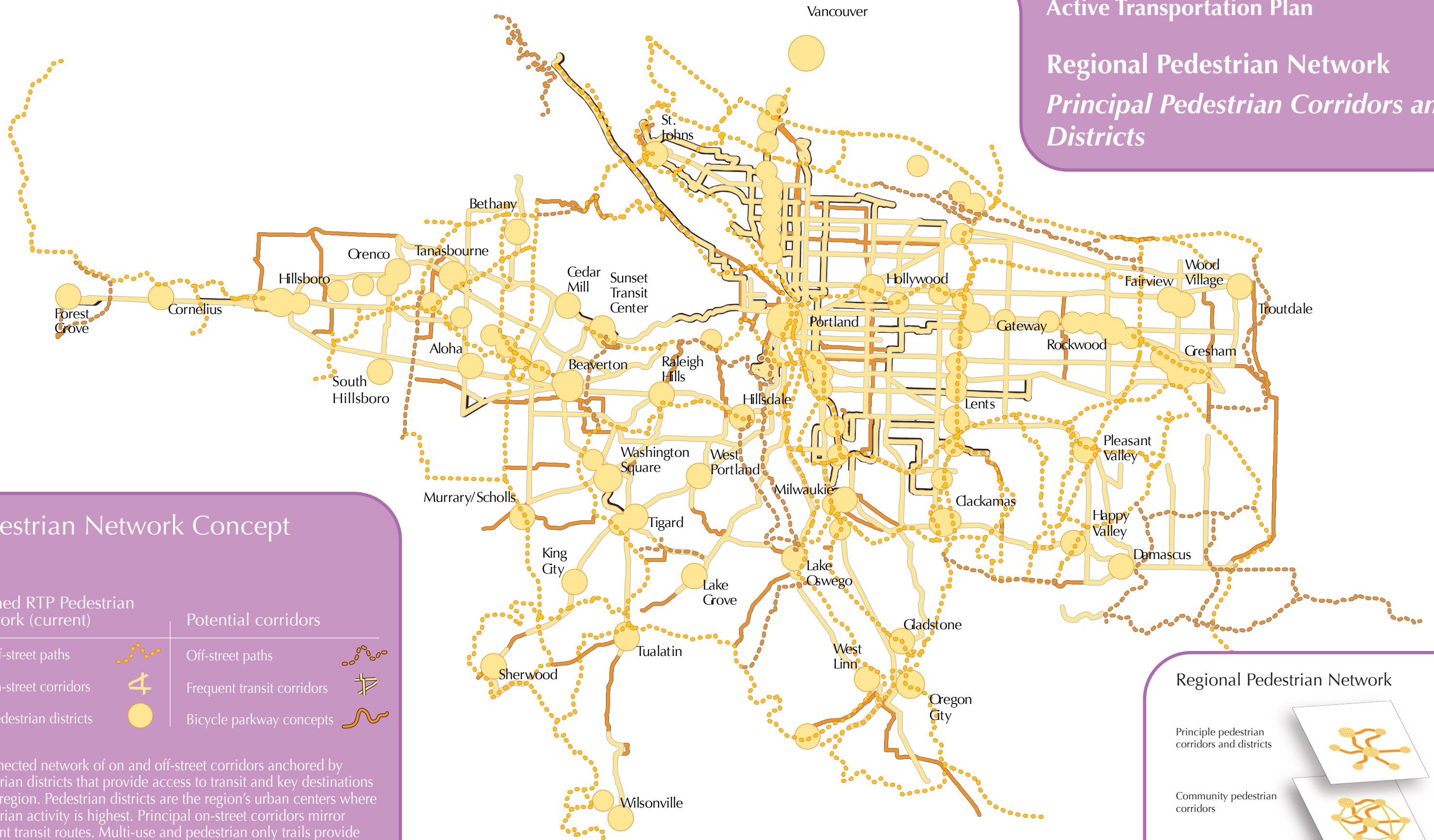
Regional Bicycle Parkway
Community Bikeways

Regional Bicycle Parkway
Community Bikeways +
Local Bikeways



Active Transportation Plan

Regional Pedestrian Network Principal Pedestrian Corridors and Districts



Pedestrian Network Concept

Planned RTP Pedestrian Network (current)

- RTP off-street paths
- RTP on-street corridors
- RTP pedestrian districts

Potential corridors

- Off-street paths
- Frequent transit corridors
- Bicycle parkway concepts

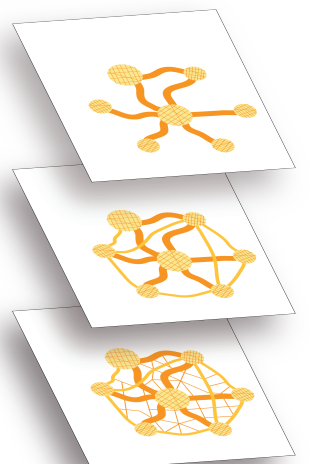
A connected network of on and off-street corridors anchored by pedestrian districts that provide access to transit and key destinations in the region. Pedestrian districts are the region's urban centers where pedestrian activity is highest. Principal on-street corridors mirror frequent transit routes. Multi-use and pedestrian only trails provide off-street corridors, connecting to the on-street network, transit and nature. All regional bicycle parkways are also principal regional pedestrian corridors. The principal pedestrian network provides the spine for regional pedestrian corridors and local pedestrian corridors to make a complete regional pedestrian network.

Regional Pedestrian Network

Principle pedestrian corridors and districts

Community pedestrian corridors

Local pedestrian corridors



What is The Quality Growth Alliance?

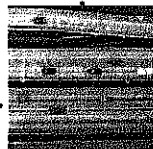
The Quality Growth Alliance was formed out of a landmark day-long visioning exercise called Reality Check, held on April 30, 2008. Two hundred fifty political, business, community and conservation leaders from King, Kitsap, Pierce, and Snohomish Counties worked together to identify barriers and solutions to quality growth.

The same groups that organized Reality Check have committed to building on the consensus formed at Reality Check, leading an action agenda to break down the barriers to quality growth.

What is Quality Growth?



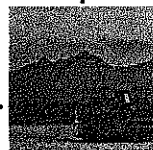
Infrastructure Investment



Energy Independence



Healthy Communities

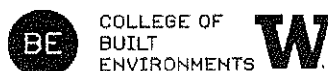


Transit-Oriented Development



Economic Prosperity

The Quality Growth Alliance Partner Organizations



futurewise



Contact Us:

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Seattle, WA 98104

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Quality Growth Alliance

A Framework for Sound Action



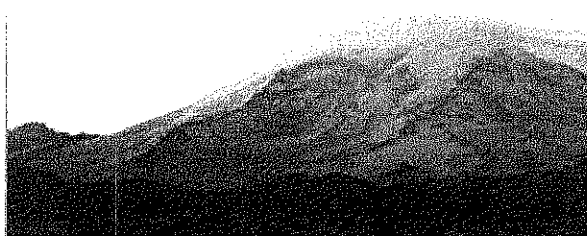
Members of The Quality Growth Alliance

The Quality Growth Alliance is a diverse group of regional organizations whose members include major institutions, developers, and conservationists.

ULI Seattle is a district council of the Urban Land Institute with more than 800 active members throughout Washington State and Oregon representing a full range of disciplines related to land use and urban development. The Urban Land Institute is a 501(c)(3) non-profit research and education organization supported by its 35,000 members. The mission of ULI is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide.

Puget Sound Regional Council (PSRC) works with local government, business, and citizens to build a common vision for the region's future through three connected major activities: VISION 2040, the region's growth strategy; Destination 2030, the region's long-range transportation plan; and Prosperity Partnership, which advances the region's economic strategy.

University of Washington College of Built Environments (CBE) represents the schools of architecture, landscape architecture, urban planning and construction management. The College dedicates its resources to the tangible improvement of the built and natural environments, emphasizing the value of craft, critical inquiry, social justice, and sustainability.



Enterprise Community Partners is a national non-profit organization whose mission is to see that all low-income people in the United States have the opportunity for fit and affordable housing and to move up and out of poverty into the mainstream of American life.

Cascade Land Conservancy is Washington's largest independent land conservation and stewardship organization that envisions a region that combines spectacular landscapes, a vibrant economy and great places to live. Their work is closely tied to communities, including active volunteer leadership groups in the Puget Sound region.

Master Builders Association of King and Snohomish Counties was founded in 1909 on the goals of actively working with government to develop laws that protect the environment while still providing attractive, affordable communities and homes for the families of the Puget Sound region.

Futurewise is a statewide public interest group working to promote healthy communities and cities while protecting farmland, forests, and shorelines. The organization focuses primarily on organizing and advocacy work, as well as providing public education, legal efforts, and technical support to local groups.

National Association of Industrial and Office Properties (NAIOP) is an organization dedicated to improving the climate for commercial real estate development, providing opportunities for professional development, and creating a forum for networking and business improvement. The Washington State Chapter has more than 500 members representing leading firms in commercial real estate development.

Who Benefits?

Everyone. Quality growth will allow us to accommodate more people and prosper economically while maintaining our way of life. The creation of compact, walkable, thriving communities in established and emerging regional urban centers will allow us to capitalize on these investments, preserve forests and farmland, lessen our dependence on imported energy, and reduce our greenhouse gas emissions.



What will

The Quality Growth Alliance do?

The Quality Growth Alliance will:

- **Provide expertise** to those major cities, suburbs and neighborhoods where the greatest amount of growth is expected, and assist these areas in becoming walkable, thriving communities.
- **Raise awareness** of how land use affects climate change – from a regional transit system with housing near jobs, to the protection of our region's natural environment.
- **Research** compact development policy and best practices to help inform leaders.
- **Highlight successes** to acknowledge achievements in compact development—from recognizing instrumental political leaders to visionary projects.

Quality Growth Alliance



RECOGNITION PROGRAM

The Quality Growth Alliance will formally recognize and provide independent support for specific development proposals in King, Snohomish, Pierce and Kitsap counties that exemplify smart, sustainable, high-quality growth.



The program intends to support and encourage the approval of outstanding project proposals by informing regulators, public officials, citizen groups, and others of the benefits these projects bring to a community and the region.

What projects are eligible?

Residential, commercial, institutional, or mixed-use projects (both new construction and rehabilitation) are eligible for consideration. Only developments that are – or shortly will be – under review for development approval and have not completed the entitlement process or broken ground are eligible to apply.

Apply today! Visit
www.qualitygrowthalliance.org
to learn more.

What is the deadline?

The 2010 application deadlines are:
June 15th and September 30th.

Will applications be confidential?

All applications will be kept strictly confidential. If applications are not granted recognition, the jury's comments will be provided and the applicant will be encouraged to re-apply.

Who will make the decision?

Applications are reviewed by an independent jury consisting of representatives of Alliance member organizations and other at-large jurors from throughout the region, who are appointed for their professional expertise and experience in development-related disciplines.

What are the evaluation criteria?

- Location
- Density, Design, and Mix of Uses
- Transportation/Mobility/Accessibility
- Environment
- Mixed-Income Housing (for residential projects)
- Community Benefits
- Community Participation

To learn more, visit our web site
or contact us at
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206.224.4500

www.qualitygrowthalliance.org

Thriving Cities Alliance Executive Summary

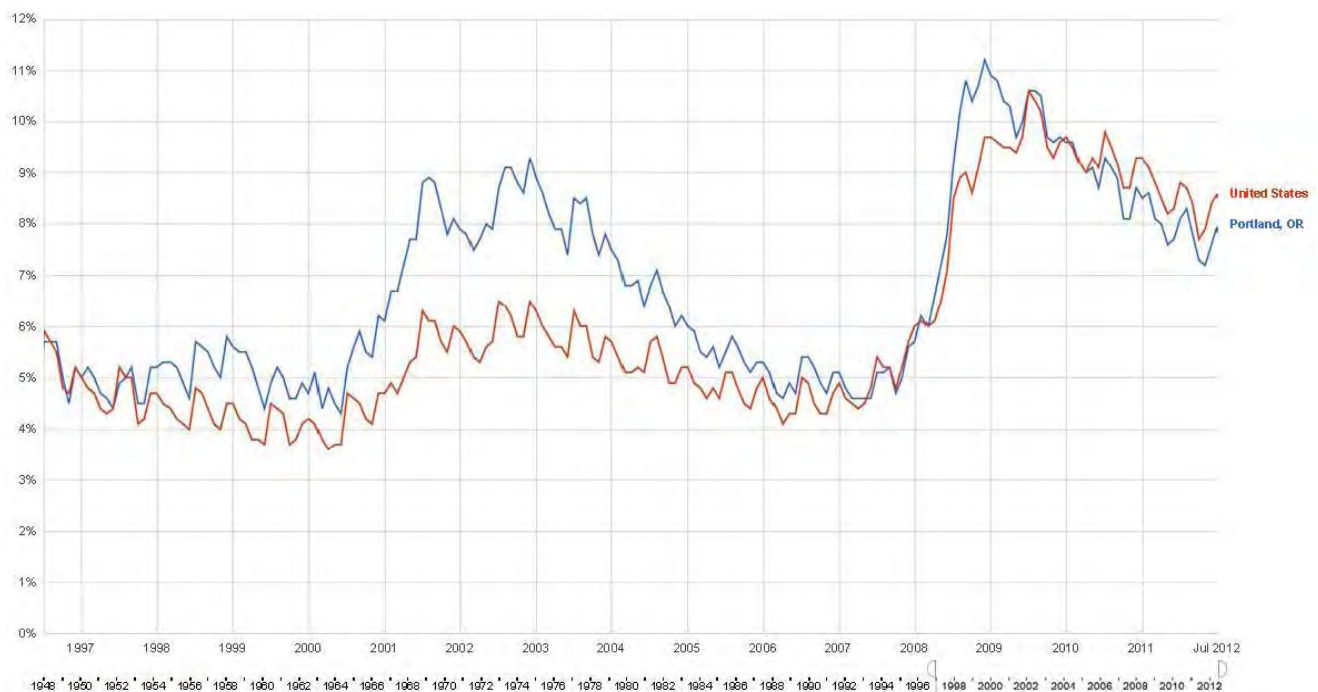
The Opportunity

To position our region for the future, Urban Land Institute Northwest District Council proposes a new initiative called the Thriving Cities Alliance to promote real estate development readiness of Metro Cities and high quality real estate developments that will support the long-term economic vitality and sustainability of the Portland Metro Region. Thriving Cities have strong economic growth, offer great places to live, work, and play, and are the heart of our communities. The right kind of growth can be an economic catalyst, as well as the social and cultural sustenance or rebirth of a community. The Portland Region consists of 25 cities and three counties, and business climate, community attitudes and public actions have varied widely jurisdiction to jurisdiction. Some communities place high value on quality growth and economic development results and at the other end of the spectrum, communities whose leaders and values have not welcomed development. The Great Recession has provided an opportunity to build more of a regional consensus in support of quality development and thriving cities.

The Challenge

The Portland Metro Region maintains many wonderful attributes, most notably, one of the best areas in the United States for quality of life. Between 2000 and 2011, the Region experienced higher unemployment, lower wage levels and higher costs of living than many communities in its competitive set. The reasons for these economic conditions are complex and the solutions are equally challenging. However, regional efforts focusing on the creation of jobs is bearing fruit, with unemployment in 2010 falling below the national average for the first time in 15 years.

COMPARISON OF UNITED STATES AND PORTLAND METROPOLITAN AREA UNEMPLOYMENT RATES



Data from U.S. Bureau of Labor Statistics. Last updated: Sep 3, 2012
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Portland is the geographic heart of the region and remains a major employment center. However, as in many regions across the country, employment centers have spread out or transitioned to suburban areas. Portland's Central City has not enjoyed the employment growth it once experienced, and in fact, is at the same level as in 1988 (122,000 jobs), but its share of regional employment has shrunk from 15% in 1988 to 13% in 2012. To address this, the City of Portland updated its Comprehensive Plan and its Economic Development Strategy to recognize that it must actively encourage, direct and incent economic viability to enable Portland to maintain its job base *and* also its quality of living. The city also realigned the Portland Development Commission's mission from that of an urban renewal agency to more keenly focus on economic development. Why is this important? Because Portland is the signature central city that sets the tone and perceptions from both a national and regional perspective.

The private and public sectors of the Portland Metro Region have come together during the Great Recession to revamp Greater Portland, Inc., as their regional economic development agency in recognition of the need for a coordinated approach to maintaining existing and growing new businesses in the Region, and therefore supporting thriving and resilient cities. As in past recessions, the key to recovery is promoting and supporting the entrepreneurial innovation that leads to spurring growth of existing businesses and creating new companies and new jobs.

The Proposal

The Urban Land Institute provides leadership in the responsible use of land and in creating and sustaining thriving communities. Its Northwest District Council proposes to spearhead the formation of a Portland Metro Thriving Cities Alliance of nine organizations for the purpose of promoting economic prosperity and resilience in all of the Portland metro area cities. This Thriving Cities Alliance will have three main initiatives:

Regional Convening – In 2013 the Thriving Cities Alliance members will convene a half day regional forum that will present the common vision shared by the Alliance members for an economically prosperous Portland Metro Region and will seek input from forum attendees on the key attributes identified by the members as the common ingredients that are necessary for a successful and sustainable community jobs strategy.

Thriving Cities Certification - By competitive application, the Thriving Cities Alliance will certify cities as development ready – measured by the infrastructure, land use, regulations, and employer support that are in place compared to best practices and state-of-the-art planning and codes. This designation would be a “barometer” for the business and real estate development communities and an important marketing tool for the participating city to attract and nurture investors, employers and talent.

Thriving Places Recognition Program - The Thriving Cities Alliance members will formally recognize and provide independent support for specific development proposals in the Portland Metro Region that are most likely to achieve long-term economic vitality and to contribute to the region's quality of life. The program intends to support and encourage the approval of outstanding project proposals by informing regulators, public officials, citizen groups, and others of the benefits these projects bring to a community

and the region. As noted above, our region has a wide variety of cities, some of which to a greater or lesser degree are not development ready for a variety of different reasons.

ULI has a long history of providing technical advisory services to cities regarding economic development and land use. The Thriving Cities Alliance, composed of the ULI with other key local organizations with similar expertise, can provide a source of assistance to those cities whose leadership has reached a consensus on their need for development of a thriving and resilient local innovation economy. This assistance and certification would be entirely voluntary as an effort to encourage the best economic development and land use practices regionally.

The Thriving Cities Alliance will help to promote regional prosperity through the collective technical expertise of its members to recognize exemplary cities and proposed new developments that support the members' shared goal of long-term economic vitality and sustainability. ULI's experience in other comparable regions and cities such as Seattle shows such an Alliance will succeed if its members include organizations that represent a sufficiently broad spectrum of interests.

The ULI Northwest hopes to lead the Thriving Cities Alliance as a means to achieve regional consensus as to the best ideas, methods and means by which our cities can attract development providing economic, environmental and social benefits that sustain the region's quality of life and prosperity.

The ULI will take the leading role in providing initial funding (\$90,000), and staffing to launch this Thriving Cities Alliance process. While the Alliance membership will grow over time to include public, private and non-profit supporters the Alliance's initial work would be done by its founding Partners tentatively contemplated as follows:

Urban Land Institute NW District Council
Metro (Cheryl Twete on task force)
NAIOP (met with David Kotansky)
Portland State University (met with Jon Fink and Erin Flynn)
1000 Friends of Oregon (Jason Miner on task force)

To be considered:
Oregon Health & Science University
Coalition for a Livable Future
Community Colleges PCC and CCC
American Planning Association Oregon Chapter
American Institute of Architects Oregon Chapter