600 NE Grand Ave.
Portland, OR 97232-2736

Metro | *Agenda*

Meeting: Metro Policy Advisory Committee (MPAC)
Date: Wednesday, May 8, 2013
Time: 5 to 7 p.m.
Place: Metro, Council Chamber

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5 PM	**1.**		**CALL TO ORDER**	**Loretta Smith, Chair**
5:02 PM	**2.**		**SELF INTRODUCTIONS & COMMUNICATIONS**	**Loretta Smith, Chair**
5:05 PM	**3.**		**CITIZEN COMMUNICATIONS ON NON-AGENDA ITEMS**	
5:10 PM	**4.**		**COUNCIL UPDATE**	
5:13 PM	**5.**	*	**CONSIDERATION OF THE APRIL 24, 2013 MINUTES**	
5:15 PM	**6.**		Legislative Update – INFORMATION • *Outcome*: Provide an update on the 2013 legislative session.	
5:25 PM	**7.**	*	Climate Smart Communities Scenarios Project: Recommended Phase 2 Investment Choices and Evaluation Criteria – RECOMMENDATION TO THE METRO COUNCIL TO MOVE FORWARD WITH THE PHASE 2 EVALUATION REQUESTED • *Outcome*: MPAC members will be asked to provide a recommendation to the Metro Council to move forward with the Phase 2 evaluation and report back in October. Before making a recommendation, we will share with MPAC a brief video on community leader perspectives, three completed community case studies and the results of an Opt In survey. MPAC will be asked to provide final input on the updated scenarios assumptions and evaluation criteria.	**Craig Dirksen, Councilor Kim Ellis**

Continued on back…

6:10 PM **8.** * Community Investment Initiative: Regional Infrastructure Enterprise (RIE)– DISCUSSION & FEEDBACK

- *Recap of Regional Infrastructure Enterprise proposal* — **Tom Imeson, CII Leadership Council**

- *Facilitated Discussion; Desired Outcome*: Provide feedback to the CII Leadership Council and Metro Council on: — **Adam Davis, DHM**
  - **Purpose of RIE**: invest in infrastructure to catalyze jobs
  - **Functions of RIE**: Pre-development technical assistance and financial packaging
  - **Approach to implementing RIE**: Phase in starting with a few demonstration projects
  - **Method of implementation**: Through an IGA between Metro and the Port of Portland
  - **Composition of governing board**: Mixed public/private with strong technical expertise on financing and development

6:50 PM **9.** **MPAC MEMBER COMMUNICATION**

7 PM **10.** **ADJOURN** — **Jody Carson, Vice Chair**

* Material included in the packet.

For agenda and schedule information, call Kelsey Newell at 503-797-1916, e-mail: kelsey.newell@oregonmetro.gov. To check on closure or cancellations during inclement weather please call 503-797-1700.

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2013 MPAC Tentative Agendas

As of 4/26/13

Items in italics are tentative; ***bold*** *denotes required items*

MPAC Meeting Wednesday, April 24, 2013 • Update from MPAC members who attended the Atlanta Best Practices trip – Discussion • 2035 RTP Amendments – Action • Eco-Efficient Employment – Information/Discussion • Community Investment Initiative – Regional Infrastructure Enterprise – Information	**MPAC Meeting** Wednesday, May 8, 2013 • Legislative Update –Information • Climate Smart Communities Scenarios project – Recommendation to the Metro Council requested • Community Investment Initiative: Regional Infrastructure Enterprise – Information
MPAC Meeting Wednesday, May 22, 2013 • *Community Investment Initiative: Development Ready Communities and schools – Information /Discussion* • *Presentation on health & land use featuring local projects from around the region* • *TriMet - Network Design Criteria and Management policies – Information* • ***2014 Urban Growth Report and growth management decision** – present draft timeline*	**MPAC Meeting** Wednesday, June 12, 2013 • *Legislative Update –Information* • *Presentation on the final draft of the **Regional Active Transportation Plan** – Information* • *Metro Planning & Development grants update*

MPAC Meeting Wednesday, June 26, 2013 • *Large site industrial site readiness – further discussion of policy recommendations and update on 2013 state legislation.* • ***2040 Regional Transportation Plan*** *Update – Information* • Institutional Food Buying Alliance – presentation by Multnomah County, Clackamas County, private sector representatives – Information/ Discussion • *Affordable Housing Opportunities, tools and strategies-discussion*	**MPAC Meeting** Wednesday, July 10, 2013 • *MPAC field trip*
MPAC Meeting Wednesday, July 24, 2013 • *Consider cancellation*	**MPAC Meeting** Wednesday, Aug. 14, 2013 • *Metropolitan Export Initiative* • *SW Corridor Plan* • *Brownfields – presentation by City of Portland, continued MPAC discussion of policy recommendations to advance brownfields remediation in region.* • Climate Adaptation Presentation (building community resilience to future climate impacts (Kent Snyder – ACSI; Tim Lynch – Multnomah County Office of Sustainability; Kari Lyons-Eubanks – Multnomah County Environmental Health; Vivek Shandas – PSU
MPAC Meeting Wednesday, Sept. 11, 2013 • *Discuss next steps on brownfields/large site industrial if needed*	**MPAC Meeting** Wednesday, Sept. 25, 2013 • ***2040 Regional Transportation Plan*** *– Project Solicitation*
MPAC Meeting Wednesday, Oct. 9, 2013 • *20-year population and employment forecasts* • *Climate Smart Communities: Phase II Findings– update/discussion*	**MPAC Meeting** Wednesday, Oct. 23, 2012 • *Topics TBD*
MPAC Meeting Wednesday, Nov. 13, 2012 • *Topics TBD*	**MPAC Meeting** Wednesday, Dec. 11, 2012 • *Climate Smart Communities: Final check-in for 2013 – update/discussion*

Parking Lot:

- Equitable distribution of transit services in the region
- Presentation on Metro Council work plan for 2013
- Equity indicators in the region
- Apartments without parking
- Equity Atlas
- Oregon Energy Plan
- Statewide Transportation Strategy

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Metro Policy Advisory Committee

April 24, 2013

Metro Council Chamber

MEMBERS PRESENT	**AFFILIATION**
Annette Mattson	David Douglas School Board, Governing Body of School Districts
Bill Turlay	City of Vancouver
Bob Stacey	Metro Council
Craig Dirksen	Metro Council
Denny Doyle	City of Beaverton, Washington Co. 2nd Largest City
Doug Neeley	City of Oregon City, Clackamas Co. 2nd Largest City
Jerry Willey	City of Hillsboro, Washington Co. Largest City
Josh Fuhrer	City of Gresham, Multnomah Co. 2nd Largest City
Kent Studebaker	City of Lake Oswego, Clackamas Co. Largest City
Loretta Smith, *Chair*	Multnomah County
Maxine Fitzpatrick	Citizen, Representing Multnomah Co. Citizen
Peter Truax, *2nd Vice Chair*	City of Forest Grove, Washington Co. Other Cities
Sam Chase	Metro Council
Tim Clark	City of Wood Village, Multnomah Co. Other Cities
Tom Imeson	Port of Portland
Wilda Parks	Citizen, Representing Clackamas Co. Citizen
William Wild	Oak Lodge Sanitary District, Clackamas Co. Special Districts

MEMBERS EXCUSED	**AFFILIATION**
Amanda Fritz	City of Portland
Andy Duyck	Washington County
Bob Grover	Citizen, Washington Co. Citizen
Charlie Hales	City of Portland
Charlynn Newton	City of North Plains, City in Washington Co. Outside the UGB
Craig Prosser	TriMet
Jody Carson, *1st Vice Chair*	City of West Linn, Clackamas Co. Other Cities
Marilyn McWilliams	Tualatin Valley Water District, Washington Co. Special Districts
Martha Schrader	Clackamas County
Norm Thomas	City of Troutdale, Multnomah Co. Other Cities
Steve Clark	TriMet Board of Directors
Steve Stuart	Clark County

ALTERNATES PRESENT	**AFFILIATION**
Jennifer Donnelly	Oregon Dept. of Land Conservation and Development
Lise Glancy	Port of Portland
Marc San Soucie	City of Beaverton, Washington Co. 2nd Largest City

STAFF: Maria Ellis, Tom Kloster, Robin McArthur, Andy Cotugno, Kelsey Newell, Nick Christiansen, Ramona Perrault, Grace Cho, Roger Alfred, Beth Cohen, Ina Zucker, John Williams, Councilor Carlotta Collette, Councilor Shirley Craddick

1. CALL TO ORDER AND DECLARATION OF A QUORUM

Chair Loretta Smith called the meeting to order and declared a quorum at 5:09p.m.

2. SELF INTODUCTIONS & COMMUNICATIONS

All attendees introduced themselves.

3. CITEZEN COMMUNICATION ON NON-AGENDA ITEMS

Mayor Pete Truax called for a moment of silence in memory of all those impacted by the events at the Boston Marathon.

4. COUNCIL UPDATE

Councilor Bob Stacey provided an update on the following items:

- Metro is seeking members for the Equity Strategy and Advisory Committee. The committee members will be selected through an application process and appointed by Metro's Chief Operating Officer, Martha Bennett. The committee is an 18 month commitment and applications are due May 9, 2013 at 5pm. For more information, visit www.oregonmetro.gov/equity.
- Metro's Chief Operating Officer, Martha Bennett, will present the proposed 2013-14 Metro Budget to the Metro Council. The total budget for the fiscal year is $481.7 million and focuses on implementing the Parks and Natural Areas Levy, the 2040 vision, addressing the future of Metro's Visitor Venues, and intends to further develop the Solid Waste Road Map. There will also be a public hearing on May 2 and when the Council approves a budget, it will go to the Tax Supervision and Conservation Commission on June 6, 2013. Final Metro Council action is expected on June 20, 2013.

5. CONSENT AGENDA

- **Consideration of the April 10, 2013 minutes**

MOTION: Mayor Denny Doyle moved, Mayor Pete Truax seconded, to approve the consent agenda.

ACTION: With all in favor, the motion passed.

6. THE COMMUNITY INVESTMENT INITIATIVE REGIONAL INFRASTRUCTURE ENTERPRISE

Mr. Andy Cotugno introduced Mr. Tom Imeson who provided feedback on the draft Regional Infrastructure Enterprise concept that would spur investment in our communities. Mr. Imeson stated that his goal was to provide information to MPAC so they can advise the Metro Council on how to proceed regarding the CII's Regional Infrastructure Enterprise (RIE) business plan.

Mr. Imeson stated that the last time he presented at MPAC, he shared the results of a regional catalytic infrastructure survey. These results have helped the CII Leadership Council members start shaping a recommendation for a RIE. The proposed draft concept addresses project evaluation, project type, delivery of services, governance of the RIE board, and how these relate to the 3 phase development process. CII is developing strategies to help access additional resources for infrastructure investments that support local and regional development plans. The CII will release a preliminary Regional Infrastructure Enterprise Business Plan this July.

That plan will recommend actions for implementation by Metro and other regional partners. They will have to consider whether and how to proceed. Mr. Imeson stated that he will again be present for discussion on these issues on May 8th. For more information, visit communityinvestmentinitiative.org.

Member discussion included:

- Members stated that they are curious to hear about the project selection process.
- Members asked who will have governance of the RIE board. Mr. Imeson stated that although elected officials will be on the board, no one will be elected to the board.
- Members asked about the promised deliverable and who they will be delivered to. Mr. Imeson stated that they are going to be delivered to the Port of Portland and Metro, but more importantly, delivered to the region.
- Mayor Jerry Willey stated that he is concerned with this process, specifically; the need for regional taxation and the significant influence Metro will have on the process. Mayor Willey stated that he does not see any city or county representation. Because the RIE will have a great amount of influence and money, I am concerned with how this will play out in terms of management.

7. 2035 RTP AMENDMENTS – RECOMMENDATION TO THE METRO COUNCIL REQUESTED

Mr. Tom Kloster gave a brief overview of the 2035 Regional Transportation Plan (RTP) amendments, quickly explaining each draft ordinance and resolution. Mr. Kloster also stated that MPAC has the opportunity to support resolutions that change the RTP's financially constrained list of projects through a recommendation to the Metro Council.

Member discussion included:

- Members expressed concern about the U.S. 26 project and the I-84 project. Mr. Kloster stated that these two projects are proposed by the Oregon Department of Transportation to address safety and congestion concerns in their respective areas.
- Members referenced the public comment report, asking about a letter stating that Metro was out of compliance with Clean Air Act requirements, and specifically, what they failed to comply with? Mr. Kloster stated that this was an air quality issue that is being addressed on a separate track and does not affect the proposed RTP amendments. Ms. Robin McArthur emphasized that Metro is not yet out of compliance, but is taking steps to address air quality policy issues raised in the comment letter.

MOTION: Mayor Pete Truax moved, Mayor Denny Doyle seconded, to recommend adoption of the 2035 Regional Transportation Plan amendments to the Metro Council.

ACTION: With all in favor, the motion passed.

8. ATLANTA BEST PRACTICES TRIP UPDATE

Councilor Bob Stacey provided an update on the Atlanta Best Practices Trip. Councilor Stacey stated that Atlanta and Portland share a lot of similarities, but at the same time are extremely different. He stated that one of the biggest projects impacting their region is the Atlanta Beltline Project. This project addresses the needs for improved transportation, parks, environmental awareness, affordable housing, and economic development and job creation. He also noted that this project is competing for the same funds that Metro's Intertwine and SW Corridor projects are seeking.

Member discussion included:

- Members asked how Atlanta was dealing with equity issues. Councilor Stacey stated that he does not really know. However, he noted that the political climate in the south, in terms of social equity, is quite different that the Pacific Northwest.
- Ms. Robin McArthur stated that one of the speakers during the conference addressed the displacement issues facing the city of Atlanta. She stated that Atlanta is very aware of future issues in terms of social equity.
- Mr. Andy Cotugno stated that the Beltline Partnership, a non-profit organization in Atlanta, has been extremely proactive in community involvement and helping disadvantaged youth.
- Mayor Jerry Willey noted that every city has its issues. He stated that Atlanta is a tourism driven city, which unfortunately supports a large amount of low wage employment. He stated that Portland should be in a position to host a best practices conference.

9. ECO-EFFICIENT EMPLOYMENT PILOT PROJECTS

Ms. Miranda Bateschell, Mr. Ken Anderson from the Port of Portland and Ms. Jeannine Rustad from the City of Hillsboro presented on the Eco-efficient Employment Pilot Projects.

Ms. Bateschell stated that the goal of the Eco-efficient Employment projects is to help businesses realize their economic and ecological benefits by utilizing operations that produce more with less – less water, less energy, less capital, less land, and over all, less waste. The third volume of projects is focused on tools to support employment areas. There was a group of local stake holders engaged in this process which focused on the content of projects. The framework and processes of these projects are community driven, engagement based, include facilitated decision making, as well as technical assistance. The two pilot projects currently underway are the Old Town Sustainable Businesses in Hillsboro and the Gresham Vista Business Park.

Ms. Jeannine Rustad provided an update on the Old Town Sustainable Business project in the City of Hillsboro. The City established an Urban Renewal District in the downtown in 2010. As a follow on, the City is currently engaged in developing an Old Town Reinvestment Strategy which will prioritize capital improvements. The area is also characterized by a cluster of "home grown" business operations that are producing goods and services for the local economy and a growing national as well as international market.

Ms. Rustad stated that the goal of this project is to provide a range of traded sector services and goods through local businesses; to employ a business network that collaborates to achieve greater operational efficient and development advantages; and to leverage its unique characteristics and sense of place. Next steps of this project include coordination with the Chamber of Commerce to create a project consortium and to develop a city-wide small business directory. The City is committed to convening and reporting progress throughout the year as well as taking action on immediate needs in the second quarter of this year.

Mr. Ken Anderson provided an update on the Gresham Vista Business Park. The Port of Portland and the City of Gresham have a partnership agreement (IGA) that details joint goals in marketing the site to create an employment center that attracts traded sector investment and local jobs. Since the Port's acquisition of the site, consulting work has been completed to educate the Port Development Team and key staff from the City of Gresham on the potential of an Eco Park/ Eco-Industrial concept and potential deployment of green storm water infrastructure. The pilot program builds on this completed work to identify specific tools that will help move implementation forward and bring details to the existing master plan. The park will implement best

practices such as green infrastructure, water conservation and reuse, waste management, as well as create a district energy strategy.

For more information on the Eco-efficient Pilot Project, visit oregonmetro.gov.

Member discussion included:

- Members asked if Metro will be a technical assistance partner for these projects. Ms. Bateschell stated that Metro has already been serving in this capacity and will not only continue to do so, but there is even the possibility of Metro expanding its role throughout this process.
- Councilor Josh Fuhrer expressed his gratitude for the work that the Port of Portland has been doing in Gresham. Councilor Fuhrer stated that Metro partnership has been key in accomplishing the overarching goals of the project. He also thanked Councilor Shirley Craddick for her involvement in the project as well.

10. MPAC MEMBER COMMUNICATION

Mayor Doug Neeley informed members that Oregon City has been recognized as a great city for trees on Arbor Day 2013.

11. ADJOURN

Chair Loretta Smith adjourned the meeting at 7:02 p.m.

Respectfully Submitted,

Joe Montanez
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR APRIL 24, 2013
The following have been included as part of the official public record:

Item	Doc. Type	Doc. Date	Doc. Description	Doc. Number
6	Handout	6/2012	CII Strategic Plan Executive Summary	42413m-01
6	PowerPoint	N/A	CII RIE	42413m-02
7	Handout	4/23/13	Errata Sheet for RTP Amendments	42413m-03
7	PowerPoint	N/A	RTP Amendments	42413m-04

8	PowerPoint	N/A	Atlanta Beltline	42413m-05
9	PowerPoint	N/A	Eco-Efficient Employment Pilot Project	42413m-06
N/A	Handout	Spring 2013	Green Scene 2013	42413m-07

MPAC Worksheet

Agenda Item Title: Climate Smart Communities Scenarios Project - Recommended Phase 2 Investment Choices and Evaluation Criteria

Presenter(s): Metro Councilor Dirksen and Kim Ellis

Contact for this worksheet/presentation: Kim Ellis

Date of MPAC Meeting: May 8, 2013

Purpose/Objective
MPAC will be asked to provide a recommendation to the Metro Council to move forward with the Phase 2 evaluation and report back in October.

Before making a recommendation, we will share with MPAC a brief video on community leader perspectives, three completed community case studies and the results of an Opt In survey. MPAC will be asked to provide final input on the updated scenarios assumptions and evaluation criteria.

Action Requested/Outcome
MPAC recommends moving forward with the Phase 2 evaluation, as set forth in the staff memo and Attachments 1 and 2, and report back in October.

How does this issue affect local governments or citizens in the region?
The Climate Smart Communities Scenarios project is a multi-year, collaborative effort between Metro, state agencies, local governments and other regional partners. It is focused on working together to find the right combination of land use and transportation actions (e.g., policies and investments) that will keep communities vibrant and prosperous, and meet the greenhouse emissions reduction target set for the region by the Land Conservation and Development Commission.

While the project responds directly to state and regional goals to reduce greenhouse gas emissions from cars and small trucks, the project provides an opportunity for Metro, state agencies, local governments and others to work together to advance the ambitions of each community. The goal of the Scenarios Project is to build consensus, ownership and support for state, local and regional investments and actions needed to achieve local ambitions for growth and development and meet our climate goals.

What has changed since MPAC last considered this issue/item?

- Staff completed production of a brief project video and three of eight community case studies.
- Staff completed the last of six business focus groups. A report documenting the focus groups will be completed in May.
- Staff updated the Phase 2 evaluation scenario assumptions and evaluation criteria to reflect input received to date.
- TPAC and MTAC reviewed the updated materials on April 26 and May 1, respectively, and recommended moving forward with the Phase 2 evaluation as recommended in the staff memo and Attachments 1 and 2.

What packet material do you plan to include?

- Memo to MPAC, JPACT and interested parties on Climate Smart Communities: Recommended Phase 2 Investment Choices Evaluation (May 2, 2013).
    - Attachment 1: Recommended Scenario Assumptions (May 2, 2013)
    - Attachment 2: Recommended Phase 2 Evaluation Framework and Criteria (May 2, 2013)
- Memo to MPAC, JPACT and interested parties on Climate Smart Communities: Summary of Changes Reflected in Recommended Phase 2 Scenario Assumptions and Evaluation Criteria (May 2, 2013).
- Beaverton Community Case Study (Spring 2013)
- Hillsboro Community Case Study (Spring 2013)
- Wilsonville Community Case Study (Spring 2013)

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DATE: May 2, 2013

TO: MPAC, JPACT and Interested Parties

FROM: Kim Ellis, Principal Transportation Planner

SUBJECT: Climate Smart Communities Scenarios Project – Recommended Phase 2 Investment Choices and Evaluation Criteria

****

This memorandum outlines the approach staff will use to evaluate three scenarios for the Climate Smart Communities Scenarios Project during the summer of 2013. Findings from Phase 1, Phase 2 work, community leader input, and Metro Council and advisory committee discussions have informed development and refinement of this approach.

> The Oregon Legislature has required the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 2035.

The analysis will evaluate the effects of distinct land use and transportation policy and investment choices on the future of the Portland metropolitan region. The investment choices-focused approach is based on the premise that by helping communities implement their local visions and plans for main streets, downtowns and employment areas, citizens and businesses will experience all the benefits of increased transportation and housing choice, jobs, equity, cleaner air and water, and access to nature along with the added benefit of a reduction in greenhouse gas emissions from cars and small trucks.

The results of the analysis will be released in October 2013 - launching the third, and final, phase of the project. Phase 3 will use the analysis results to stimulate a regional discussion aimed at deciding which elements from each of the three scenarios should go forward into a preferred land use and transportation scenario for the Metro Council to adopt in December 2014.

The Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC) recommend moving forward with the Phase 2 evaluation (as set forth in this memo and Attachments 1 and 2) on April 26 and May 1, respectively.

ACTION REQUESTED

Recommendation to the Metro Council to move forward with the Phase 2 evaluation, as set forth in the staff memo and Attachments 1 and 2, and report back in October.

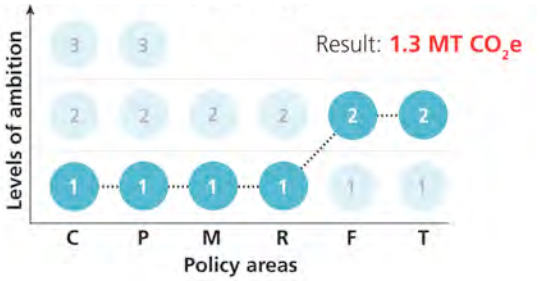
OVERVIEW OF PHASE 1 AND 2 – UNDERSTANDING AND SHAPING LAND USE AND TRANSPORTATION CHOICES

All the work in the Planning and Development Department (e.g., East Metro Connections Plan, Southwest Corridor Plan, Regional Active Transportation Plan, Industrial Lands Readiness effort, TOD program) is focused on implementing the Region 2040 Growth Concept. The Climate Smart Communities Scenarios Project has the same focus: implementation.

Working together with city, county, state, business and community leaders, Metro is researching how land use and transportation policies and investments can be leveraged to help us create great communities, support the region's economy and meet goals for reducing greenhouse gas emissions. The adopted land use plans and zoning of cities and counties across the region are the foundation for the scenarios to be tested, with a goal of creating a diverse yet shared vision of how we can keep this region a great place for years to come – for everyone – and meet state greenhouse gas emissions goals.

PHASE 1: UNDERSTANDING OUR LAND USE AND TRANSPORTATION CHOICES

Phase 1 focused on understanding the region's choices for reducing greenhouse gas emissions from cars and small trucks. Staff tested 144 different combinations of land use and transportation policies (called scenarios) to learn what it might take to meet the region's greenhouse gas emissions reduction target. More than 90 scenarios met or exceeded the target. In addition, staff found that current plans and policies together with advancements in fleet and technology get the region close to the target. [1]



Phase 1 found that current plans and policies together with advancements in fleet and technology get the region close to the state target of 1.2 MT CO_2e per capita.

A range of choices exist to meet the region's state greenhouse gas emissions reduction target and most of the strategies under consideration are already being implemented to varying degrees in communities to achieve other important economic, social and environmental goals.

Staff also conducted sensitivity analysis of the Phase 1 scenarios to better understand the GHG emissions reduction potential of individual strategies.[2 and 3] The strategies tested included pay-as-you-drive insurance, traffic operations, expanded transit service, pricing, transportation demand management programs, community design and advancements in clean fuels and vehicle technologies.

Assuming adopted community plans and national fuel economy standards, the most effective individual strategies for reducing greenhouse gas emissions were found to be:

- **Fleet and technology** advancements
- **Transit** service expansion
- **Pricing of transportation** (e.g., fuel price, pay-as-you-drive insurance, parking fees, mileage-based fee, and carbon fee)

The reductions found for each strategy individually do not reflect synergistic benefits that could come from combining various strategies. It is also important to note that while some strategies did not individually achieve significant GHG reductions, such as increasing walking or bicycle mode

[1] Understanding Our Land Use and Transportation Choices: Phase 1 Findings (January 2012).
[2] Memo to TPAC and interested parties on Climate Smart Communities: Phase 1 Metropolitan GreenSTEP scenarios sensitivity analysis (June 21, 2012).
[3] Memo to TPAC and interested parties on Climate Smart Communities: Updated Draft Scenario Options Framework (June 26, 2012).

share or participation in marketing and incentives programs, they remain important elements to complement more effective strategies such as transit service expansion and building walkable downtowns and main streets as called for in community plans.

To date, no evaluation has been conducted on the potential financial, political, social equity, environmental or economic implications of the different strategies; these implications will be considered as part of the upcoming evaluation.

PHASE 2: SHAPING OUR LAND USE AND TRANSPORTATION CHOICES

Phase 2 has focused on shaping future choices for the region to advance implementation of community visions and meet the region's greenhouse gas emissions reduction target. The Climate Smart Communities Scenarios Project made significant progress in 2012 and early 2013:

- **Engaged local governments and other stakeholders to share project information and early findings.** From January to September 2012, Metro councilors and staff shared the Phase 1 findings and other project information through briefings to city councils, county boards, county-level coordinating committees, state commissions, Metro advisory committees, regional and state conferences and other meetings. Staff also regularly convened a local government staff technical working group in 2012. The work group provided technical advice to Metro staff, and assistance with engaging local government officials and senior staff.
- **Convened workshops with community leaders on the public health, equity/environmental justice, and environmental outcomes that are most important to consider in the scenario evaluation process.** Reports documenting the Public Health, Environmental and Equity/Environmental Justice workshops can be downloaded from the project website – www.oregonmetro.gov/climatescenarios.
- **Partnered with business associations to host a series of focus groups to understand their challenges, opportunities and priorities.** The first four focus groups have been held in partnership with the Columbia Corridor Association, the East Metro Economic Alliance, the Clackamas County Business Alliance, the Westside Economic Alliance and Wilsonville and Greater Hillsboro Chambers of Commerce, and the Portland Business Alliance small business group. One focus group remains that will be held in partnership with the Home Builders Association to provide perspectives from residential and commercial builders and real estate developers. A summary report will be prepared upon completion of the focus groups in May.
- **Developed a community investment choices frame to guide development of three alternative scenarios to be tested in Summer 2013.** The project's technical work group continues to serve an important advisory role to staff and helped develop the framework. The work group will continue to assist Metro staff during the evaluation to finalize assumptions and review the results of the analysis.
- **Researched eight case studies to spotlight local success stories and the innovative strategies they have implemented to achieve their local visions and that will also help reduce greenhouse gas emissions.** Staff expects to complete the case studies in May in consultation with local planning staff.
- **Convened workshops with local staff to affirm visions for future community development using Envision Tomorrow to make sure the latest information on local land use goals is incorporated into the project.** Southwest Corridor project staff used Envision Tomorrow to develop the draft land use vision for the corridor last fall. All of these assumptions will be used as land use inputs in the scenarios tested in the summer, 2013.

- **Conducted OptIn survey to gauge public awareness of and support for GHG reduction goals, land use and transportation strategies being considered to reduce emissions, and willingness to take personal action.** Detailed results of the survey are available on the project website at www.oregonmetro.gov/climatescenarios.

OVERVIEW OF INVESTMENT CHOICES TO BE TESTED IN PHASE 2

To stimulate thinking about our choices for the future and the possibilities they present, three scenarios will be tested in 2013. The three alternative scenarios to be evaluated are conceptual in nature, and are not intended to represent a preferred scenario or future Metro Council, Oregon Transportation Commission (OTC), local government or TriMet policy intentions. The scenarios draw from the policies tested in Phase 1 and bear greater resemblance to realistic, yet ambitious policy alternatives than the 144 scenarios tested in Phase 1 of the project.

The evaluation process is consistent with OAR 660-044-0040, which requires the region to evaluate at least 3 scenarios – a reference case scenario that reflects implementation of existing adopted comprehensive plans and transportation plans and at least two alternative land use and transportation scenarios for meeting greenhouse gas reduction targets.

The adopted land use visions (as expressed in local plans and zoning codes) of cities and counties across the region are the foundation for the scenarios to be tested. The analysis will consider transportation investments together with different levels of funding, advancements to clean fuels and vehicle technologies and, to the extent possible, and emerging community visions identified through the Southwest Corridor Plan. The analysis will inform development of a preferred land use and transportation scenario and identification of the policies, tools, investment and actions needed to implement it. It is important to emphasize that the preferred scenario developed in 2014 will likely include elements from all 3 scenarios tested.

Purpose

The purpose of scenario planning is to test a range of potential futures that reflect choices policymakers, businesses and individuals might make to help answer policy questions that forecasted growth and fiscal constraints raise about our ability to protect the region's quality of life and economy for current residents and future generations, and meet state targets for reducing greenhouse gas emissions.

Major objectives of the analysis are to:

- Test distinct investment policy choices that frame the boundaries of the political landscape and public opinion to better understand the impact of different levels of investment on public health, travel behavior, development patterns, social equity, the economy, the environment and greenhouse gas emissions.
- Evaluate the relative effect and cost of different investment choices in order to recommend what combinations of investments, tools and strategies are needed to best achieve community visions and state greenhouse gas emissions reductions.
- Provide recommendations to guide development and implementation of a preferred land use and transportation scenario.

Questions to Answer with the Evaluation

The evaluation has been designed to answer several policy questions, including:

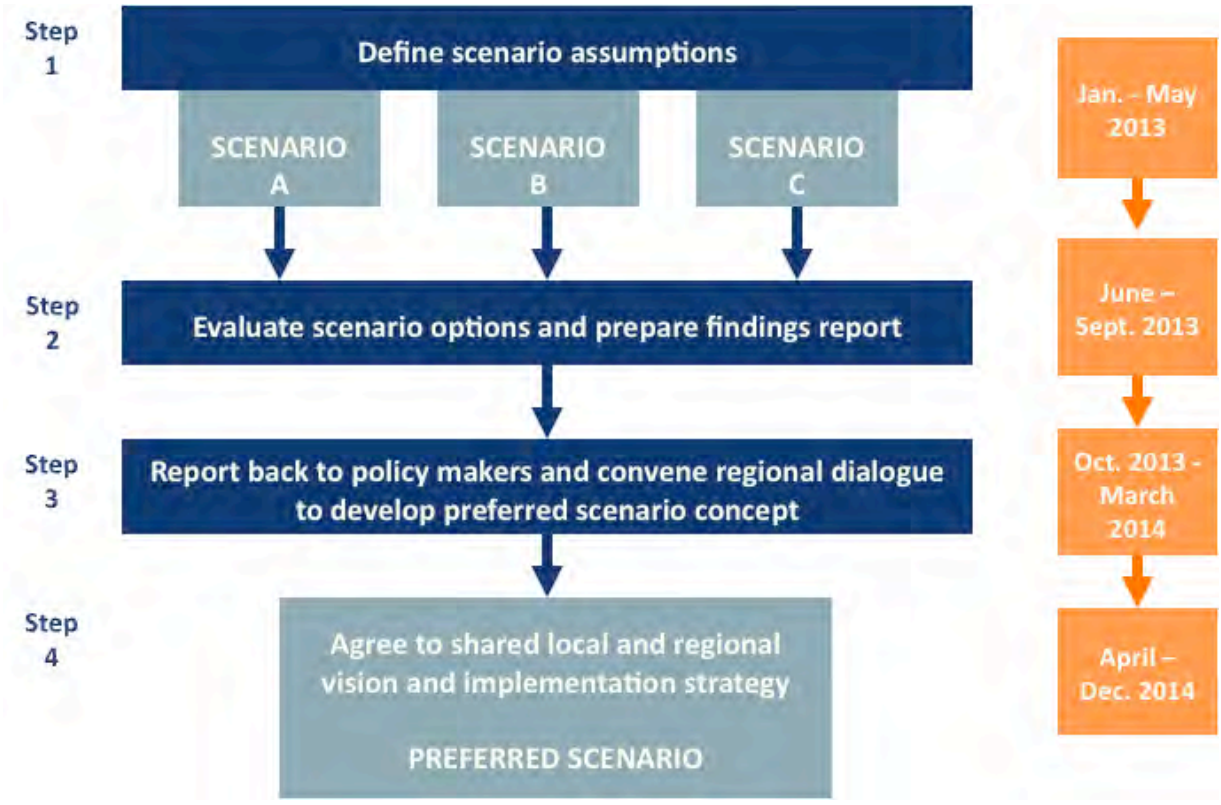
- How will our choices affect where we work and live?
- What will our choices cost and what can we afford?

- How will our choices affect public sector and household budgets, and the economic competitiveness of businesses and industry in the region?
- How will our choices affect how we get around?
- How will our choices affect climate change and energy security?
- How will our choices affect air quality, water supplies and farms, forestland and natural areas?
- How will our choices affect our health?
- Which strategies are most effective for supporting community visions and reducing greenhouse gas emissions?
- What choices are feasible and how do we implement our choices in an equitable and cost-effective manner?
- What are the risks, opportunities and tradeoffs of our choices – considering public health, social equity, environmental, economic, financial, and political implications?

General Construct and Scope

Each of the three scenarios is based on a "What if" policy-theme focus, resulting in a distinct mix and level of transit service, bike, pedestrian, road, system and demand management strategies that are linked to pricing strategies (revenues) assumed within in each scenario. The three scenarios represent what the region could look like in 2035, if various transportation and land use strategies are pursued, and what it could mean for how we live, how we work and how we get around. The adopted land use plans and zoning codes of cities and counties across the region are the foundation for the scenarios to be tested. **Figure 1** shows the general construct and timeline for this analysis.

Figure 1. Climate Smart Communities Investment Scenarios Construct and Timeline



Each scenario is initiated by a "what if" question:

- **Scenario A (Recent Trends) – What if we implement adopted plans to the extent possible with existing revenues?**

  Purpose: This scenario follows the recent funding trends and shows the results of implementing adopted plans to the extent possible with existing revenues.

  Scenario A represents what the future could look like if recent trends continue and we implement adopted plans with existing revenues (e.g., gas tax, payroll tax and existing local sources like urban renewal district (URD), SDCs, TIFs that have been used to fund transportation investments). Scenario A assumes the region continues to rely on existing revenues, which continue to decline in their purchasing power over time due to rising costs, inflation and improved fuel economy of vehicles. In addition, some URD are set to expire between now and 2035. This future would reflect maintaining existing TriMet service with small increases targeted to address overcrowding, delays due to congestion giving priority to routes serve the region's most vulnerable communities – children, seniors, low-income and communities of color. Transit service growth is tied to the forecasted rate of job growth in the region, which reflects that the payroll tax continues to be the primary source of funding for transit service. Other transportation investments would also be limited as an increasing share of the revenues available are spent on maintaining the transportation system in place today. Bicycle and pedestrian investments are focused on improving access to transit, and providing safe routes to schools.

  An implication of limited community investment is that cities and counties are not able to achieve their adopted plans and the region falls short of goals for maintaining an adequate supply of shovel-ready industrial lands that attract new employers, and most employment growth occurs in existing employment areas that currently have good transportation access. *This scenario is not expected to meet the greenhouse gas emissions target.*

- **Scenario B (Adopted Plans)** - What if we raise additional revenues - as called for in the adopted Regional Transportation Plan – to allow us to make more progress toward implementing adopted plans?

  Purpose: This scenario counters recent funding trends and shows the results of raising additional revenues - as called for in the adopted Regional Transportation Plan – to allow the region to make more progress toward implementing adopted plans.

  Scenario B represents what the future could look like if we counter recent trends and are successful implementing adopted plans with additional revenues assumed in the 2035 Regional Transportation Plan. The scenario would assume the adopted RTP levels of transit, road, operations and bike/pedestrian investment, current adopted local land use plans and planned funding as adopted in the RTP (e.g., 1 cent per year gas tax increase, increases to vehicle registration fees, some increase in the payroll tax for transit). In this scenario, TriMet is able to restore and expand frequent bus service in priority corridors and to serve the region's most vulnerable communities, consistent with Service Enhancement Plans. Scenario B assumes the 2035 RTP Financially Constrained System of projects and programs adopted by JPACT and the Metro Council in June 2010.

  An implication of this scenario is that with significantly more community investment, cities and counties are better able to achieve their adopted plans and attract new employers – as reflected in the regionally-reviewed 2035 growth distribution adopted by the Metro Council in November 2012. The region is better able to maintain its competitive advantage by helping local companies access global markets and grow local jobs. More job opportunities are likely to be available throughout the region in downtowns, existing employment areas and other

locations with good transportation access. *This scenario may meet the greenhouse gas emissions target.*[4]

- **Scenario C (New Plans and Policies)** - What if we pursue new policies and revenue sources to more fully achieve adopted and emerging plans?

  Purpose: This scenario shows the results of pursuing new policies, more investment and new revenue sources to more fully achieving adopted and emerging plans.

  Scenario C represents what the future could look like if we are able to fully implement adopted plans (including the full RTP) and additional transit, bike, pedestrian and road investments needed to support new plans such as the Southwest Corridor Plan, East Metro Connections Plan, and the Regional Active Transportation Plan. In this scenario, TriMet is able to further expand frequent and local bus service to more parts of the region with supporting land use and better serve the region's most vulnerable communities. The State of Oregon implements a comprehensive intercity transit system, which includes extending WES commuter rail service from Wilsonville to Salem and Cascadia high-speed rail that connects the region to Salem and Eugene as well as other major west coast cities, including Seattle and Vancouver, B.C. More services, shopping opportunities and job opportunities are located near transit and where people live and work. Scenario C assumes the 2035 RTP State System of projects and programs adopted by JPACT and the Metro Council in June 2010. Most major employers and commercial destinations in the region in the region have electric vehicle charging stations available for visitors and employees.

  Scenario C also reflects a policy area (transportation pricing) that Metro and the region have not examined in great detail and more work is needed to understand the effectiveness and the potential benefits and impacts pricing policies bring, including effects on low-income households and businesses. This scenario tests new revenue mechanisms - a mileage-based fee and a carbon fee to maintain and operate the transportation system and fund needed investments and market incentives. This scenario is designed to explore using the carbon fee and mileage-based fee to test the effect of transitioning from the gas tax, as is currently being explored at the national and state levels.

  An implication of this scenario is that cities and counties are better able to achieve their adopted plans, attract new employers, and expand local companies' access to global markets to further grow local jobs because more sustainable transportation funding mechanisms are developed to fund needed investments. Incentives and market-oriented reform are linked with investments in information and green technology to further expand access to housing, economic and educational opportunities for everyone. *This scenario is expected to meet or exceed the greenhouse gas emissions target.*

The scenarios are cumulative and for research purposes. The scenarios do not represent future Metro Council, Oregon Transportation Commission (OTC), local government or TriMet policy intentions.

[4] The regionally-reviewed growth distribution will be used in this analysis. A draft growth distribution was used in Phase 1. In addition, the RTP financially constrained system state gas tax increase assumption of 1 cent per year increase was not fully evaluated in Phase 1. The state gas tax was assumed in the Level 2 pricing assumptions as a mileage-based fee. Many of the Phase 1 scenarios with Level 2 pricing met or exceed the state greenhouse gas emissions target.

Phase 2 Scenarios Evaluation Framework

Adopted in 2010, the region's six desired outcomes will continue to be used as the framework guiding the evaluation. For the CSC scenarios project, social equity will be addressed as a lens across all desired outcomes. The six regional outcomes are:

- Vibrant Communities
- Economic Prosperity
- Safe and Reliable Transportation
- Leadership on Climate Change
- Clean Air and Water
- Equity

The Phase 2 scenarios evaluation will measure the GHG emissions reduction potential of the three scenarios and provide policy makers with information about the implications, benefits and drawbacks of different land use and transportation policy and investment choices, relative to the region's shared social equity, economic, environmental and community goals.

Metro is creating a "scorecard" to report how well the three scenarios work to advance the region's desired outcomes. Performance of each scenario will be reported using a set of key evaluation criteria that reflects input provided by the Metro Council, MPAC and JPACT in 2011, business and community leaders in 2012 and early 2013, and the public through an Opt-In opinion survey. [5] During the workshops and focus groups in 2012-13, the community leaders identified priority outcomes to be considered, and in some cases, potential evaluation measures. Feedback was clear that measurable outcomes are vital to the success of the scenarios evaluation and monitoring future implementation of a preferred scenario. Priority outcomes included transportation system safety and reliability, the cost of motor vehicle and freight delay, neighborhood stability, access to education, resiliency of the natural environment, environmental justice and equity, attracting new businesses to the region and protection of farms, forestlands and natural areas. These outcomes are reflected in the evaluation criteria. Metro Council and advisory committee discussions in 2013 informed additional refinements. [6]

Staff will use a combination of MetroScope, Metropolitan GreenSTEP, ArcGIS analysis and engagement activities to conduct the analysis. Planning-level cost estimates for each scenario will be developed by Metro, in partnership with ODOT and TriMet. For reference, the transportation investments assumed in Scenario B reflects the adopted financially constrained Regional Transportation Plan (RTP), which includes approximately $14 billion (2005 dollars) in multi-modal transportation investments and programs. The adopted State RTP projects assumed in Scenario C includes approximately $20 billion in multi-modal transportation investments and programs. Scenario C assumes more bike, pedestrian and transit investments and programs than the State RTP to reflect the Regional Active Transportation Plan and transit service enhancements identified by TriMet and SMART.

Several evaluation measures have been identified to look at the impacts on vulnerable populations, including low-income households and to the extent possible, communities of color, children, older

[5] A series of Public Health, Equity/Environmental Justice and Environmental workshops, Business focus groups and an Opt-In survey the evaluation measures. More information is available on the project website at www.oregonmetro.gov/climatescenarios.

[6] Memo to MPAC, JPACT and interested parties on Climate Smart Communities: Summary of Changes Reflected in Recommended Phase 2 Scenario Assumptions and Evaluation Criteria (May 2, 2013).

adults, people with disabilities and households with limited English proficiency. The analysis tools have limitations in that GreenSTEP and MetroScope do not forecast the future population by race or ethnicity, and the results cannot be reported at a community or neighborhood level. GreenSTEP and MetroScope account for household income, which will be a focus of the social equity evaluation. Staff will use a methodology developed for the Regional Flexible Funds process to support the analysis.

Neighborhood stability was identified in the Equity and Environmental justice Workshop as a priority outcome to measure, particularly as it relates to increased gentrification and displacement pressure on low-income households and communities of color. Gentrification and displacement pressure can occur as housing values increase in a neighborhood in response to public policies and investments. A detailed analysis of neighborhood stability is not possible due to time and resource constraints, and limitations of the Phase 2 analysis tools. However, the evaluation will include collaborating with community leaders working to advance social equity in the region. To the extent possible, this collaboration will help identify areas of potential risk for gentrification and displacement and best practices policies/tools that, if implemented, could limit gentrification and displacement pressure and help reduce existing community disparities.

Evaluation activities will also scope implementation feasibility - including political or public acceptability, legal, legislative or regulatory barriers and institutional capacity – and identify short-term and long-term actions needed to implement the scenarios being evaluated.

More detailed documentation of the assumptions and analysis methodologies will be prepared during the evaluation process. A Phase 2 Findings Report will be developed that includes a scorecard and a narrative describing the methodology, analysis and outcome for each evaluation measure for each scenario and summarize results using info-graphics and other visual tools. No weighting of the evaluation measures is proposed. Decision-makers are encouraged to determine the measures that are important to them and to include that in their decision-making.

The findings report will communicate which combination of strategies will achieve the state GHG targets and how different levels of investment and policy implementation could affect the cost of moving freight, air quality, household and business expenditures, public health, infrastructure costs, travel behavior, and other outcomes. The report will be brought forward for discussion by the region's decision-makers and community and business leaders in Fall 2013. The information is expected to assist in the identification of the preferred scenario by March 2014.

OVERVIEW OF PHASE 3 - DEVELOPMENT AND SELECTION OF A PREFERRED LAND USE AND TRANSPORTATION SCENARIO

Phase 3, the final phase of the process, will begin in Fall 2013 with release of the scenarios analysis results. Release of the findings will kick-off a broader regional discussion aimed at identifying which policies, investments and actions should be included in a preferred scenario - likely drawing elements from each of the three scenarios tested in Phase 2. Policy recommendations that result from this discussion will provide direction to Metro, ODOT, TriMet and local agency staff on the draft preferred scenario to be analyzed in Spring 2014. A draft preferred scenario concept is anticipated by March 2014 to allow sufficient time to meet state timeline and scenario selection requirements.

A final preferred scenario is required to be selected by the end of 2014 after public review and consultation with local governments and state and regional partners. The preferred scenario will not result in a one-size fits all vision or implementation strategy. It will allow for local flexibility to support the differences among the region's cities and counties and seek to advance achievement of their of their unique goals and visions. The preferred scenario will also include regional and state

implementation actions.

The preferred scenario will initially be implemented through amendments to Metro's Regional Framework Plan and 2040 Growth Concept in December 2014. Implementation through Metro's functional plans, local comprehensive plans, land use regulations and transportation system plans will occur through future actions as defined by Oregon Administrative Rules adopted by the Land Conservation and Development Commission.[7]

NEXT STEPS

The Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC) recommend moving forward with the Phase 2 evaluation (as set forth in this memo and Attachments 1 and 2) on April 26 and May 1, respectively.

A summary of the process for moving forward with the scenarios analysis and final adoption of a preferred scenario to meet OAR 660-044-0040 is provided for reference.

May 8 and 9	MPAC and JPACT action on recommended Phase 2 Investment choices and evaluation criteria.
May 16	Metro Council work session on MPAC and JPACT recommendations.
June 6	Metro Council action on recommended Phase 2 investment choices and evaluation criteria (by Metro Resolution).
June-August 2013	Project staff and technical work group analyze investment scenarios using MetroScope, Metropolitan GreenSTEP and ArcGIS.
	Convene workshops to support social equity evaluation and identify feasibility and actions likely to be necessary to implement scenarios.
August-September 2013	Project staff and technical work group prepare Phase 2 CSCS Investment Choices Findings Report and other communication materials.
October 2013	Staff release CSCS Investment Choices Findings Report for regional discussion; begin phase 3.
Oct. 2013 – March 2014	Report back to communities, decision-makers and regional partners on the results and decide which elements should be included in a preferred scenario.
March/April 2014	MPAC, JPACT and Metro Council confirm draft preferred scenario concept.
April-July 2014	Consult with local governments, and state and regional partners on draft preferred scenario concept and implementation strategies.
	Analyze draft preferred scenario using the regional travel demand model and Metropolitan GreenSTEP.
Summer 2014	Project staff prepare adoption package for public comment period.
Fall 2014	45-day public comment period on adoption package.

[7] OAR 660-044-0040 and OAR 660-044-0045.

December 2014

MPAC and JPACT recommendation to the Metro Council on the preferred land use and transportation scenario

Metro Council takes action on recommended preferred land use and transportation scenario.

CLIMATE SMART COMMUNITIES SCENARIOS PROJECT

Technical Work Group Members

April 22, 2013

	Name	Affiliation	Membership
1.	Tom Armstrong	City of Portland	MTAC alternate
2.	Chris Deffebach	Washington County	TPAC & MTAC member
3.	Chuck Beasley	Multnomah County	MTAC member
4.	Lynda David	Regional Transportation Council	TPAC member
5.	Jennifer Donnelly	DLCD	MTAC member
6.	Denny Egner	City of Lake Oswego	MTAC member
7.	Karen Buehrig	Clackamas County	TPAC member
8.	Steve Butler	City of Milwaukie	Local government staff
9.	Jon Holan	City of Forest Grove	MTAC alternate
10.	Katherine Kelly/ Jonathan Harker/Stacey Humphrey	City of Gresham	TPAC member/MTAC member
11.	Nancy Kraushaar	City of Wilsonville	TPAC member
12.	Alan Lehto/ Eric Hesse	TriMet	TPAC/MTAC member TPAC/MTAC alternate
13.	Mary Kyle McCurdy	MTAC citizen/community group	MTAC member
14.	Ben Bryant	City of Tualatin	Local government staff
15.	Barbara Fryer	City of Beaverton	MTAC alternate
16.	Margaret Middleton	City of Beaverton	TPAC member
17.	Lainie Smith	ODOT	TPAC alternate and MTAC member
18.	Dan Rutzick/ Peter Brandom	City of Hillsboro	Local government staff
19.	Mara Gross	Coalition for a Livable Future	Community member

Attachment 1

Recommended Phase 2 Scenario Assumptions

May 2, 2013

CLIMATE SMART COMMUNITIES SCENARIOS PROJECT

Shaping our choices for the future

A scenario is an example of what the future might look like based on the choices we make today. The three scenarios presented will be tested in summer 2013. More detailed documentation of the assumptions and analysis methodologies will be prepared during the evaluation process.

The results of the analysis will be used to stimulate a discussion about our choices for the future and the possible impacts they may have on how we live, travel, work and invest in our communities. Working together, cities, counties and regional partners will decide which elements from each of the three scenarios should go forward into one preferred scenario for the region to adopt in December 2014. Considerations for developing a preferred scenario will include: costs and benefits across public health, environmental, economic and social equity outcomes, financial implications, public support and political will.

The Oregon Legislature has required the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 2035.

NOTE: The scenarios are cumulative and for research purposes. The scenarios do not represent future Metro Council, Oregon Transportation Commission, TriMet or local government policy intentions.

WHAT THE FUTURE MIGHT LOOK LIKE IN 2035

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Purpose	This scenario follows recent funding trends and shows the results of implementing adopted plans to the extent possible with existing revenues.	This scenario counters recent funding trends and shows the results of raising additional revenues - as called for in the adopted Regional Transportation Plan – to allow the region to make more progress toward implementing adopted plans.	This scenario shows the results of pursuing new policies, more investment and new revenue sources to more fully achieve adopted and emerging plans.

LESS INVESTMENT AND POLICIES MORE

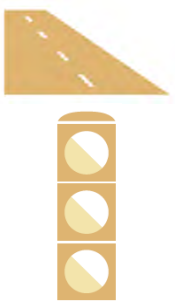
LAND USE ASSUMPTIONS

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Land use plans and zoning	Local land use plans and zoning as adopted by cities and counties for downtowns, main streets and employment areas will be the same for all three scenarios. The Southwest Corridor Plan land use vision will be incorporated into Scenario C.		

EDUCATION AND INCENTIVES ASSUMPTIONS

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Education and incentives 	▪ 30% of households practice ecodriving and participate in travel options programs ▪ 20% of employees participate in commute programs ▪ 4% of households participate in car-sharing ▪ 20% of vehicle owners use pay-as-you-drive insurance	▪ 30% of households practice ecodriving and participate in travel options programs ▪ 20% of employees participate in commute programs ▪ 4% of households participate in car-sharing ▪ 40% of vehicle owners use pay-as-you-drive insurance	▪ 60% of households practice ecodriving and participate in travel options programs ▪ 40% of employees participate in commute programs ▪ 4% of households participate in car-sharing ▪ 100% of vehicle owners use pay-as-you-drive insurance

TRANSPORTATION ASSUMPTIONS

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Streets and highways 	**Operations and maintenance** ▪ Fall behind on fixing potholes and making repairs and implement 50% of regional TSMO strategic plan to achieve 10% delay reduction **Capital** ▪ I-5 Bridge Replacement ▪ 2016-18 STIP and MTIP projects	**Operations and maintenance** ▪ Keep up with fixing potholes and making repairs and implement full regional TSMO strategic plan to achieve 20% delay reduction **Capital** ▪ Adopted Financially Constrained RTP including: I-5 Bridge Replacement, Sunrise Project from I-205 to 172nd Avenue, US 26 widened to 6 through lanes to Cornelius Pass Road and interchange improvements at US 26, OR 217, I-205, and Troutdale/I-84	**Operations and maintenance** ▪ Keep up with fixing potholes and making repairs and implement expanded TSMO strategic plan to achieve 35% delay reduction **Capital** ▪ State RTP project list, including interchange improvements at I-5/OR 217 interchange (Phase 2) and I-84/I-5
Bike and pedestrian 	▪ Complete 2016-18 STIP and MTIP projects, as investments are limited to improving access to transit with no dedicated funding	▪ Complete adopted RTP bike and pedestrian projects	▪ Complete 100% of regional bike and pedestrian networks as identified in the Regional Active Transportation Plan, including regional trails, further targeting short trips and access to transit and centers

See reverse for more information

NOTE: The scenarios are cumulative and for research purposes. The scenarios do not represent future Metro Council, Oregon Transportation Commission, TriMet or local government policy intentions.

Attachment 1

Recommended Phase 2 Scenario Assumptions

May 2, 2013

WHAT THE FUTURE MIGHT LOOK LIKE IN 2035

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Purpose	This scenario follows recent funding trends and shows the results of implementing adopted plans to the extent possible with existing revenues.	This scenario counters recent funding trends and shows the results of raising additional revenues - as called for in the adopted Regional Transportation Plan – to allow the region to make more progress toward implementing adopted plans.	This scenario shows the results of pursuing new policies, more investment and new revenue sources to more fully achieve adopted and emerging plans.

TRANSPORTATION ASSUMPTIONS (CONTINUED)

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Transit 	**Operations and maintenance** ▪ Maintain existing TriMet service with small increases targeted to address overcrowding and delays due to congestion ▪ Implement SMART and C-TRAN plans **Capital** ▪ Extend MAX to Milwaukie ▪ Extend MAX to Vancouver, WA ▪ Complete Portland streetcar loop	**Operations and maintenance** ▪ Restore and expand frequent bus service in priority corridors, consistent with Service Enhancement Plans **Capital** ▪ Streetcar extension along priority corridors ▪ Additional transit priority and pedestrian/bike access to transit projects	**Operations and maintenance** ▪ Expand frequent bus service coverage to all major arterials with supporting land use connecting regional and town centers, consistent with TriMet Service Enhancement Plans ▪ Expand local bus service coverage and connections to frequent bus service and high capacity transit, consistent with TriMet Service Enhancement Plans **Capital** ▪ Cascadia rail connections to Eugene, Salem and Vancouver B.C. ▪ High capacity transit: Southwest Corridor, AmberGlen and Oregon City ▪ WES service frequency improvements and extension to Salem ▪ Bus rapid transit serving Powell/Division, I-205 and Tualatin-Valley Highway corridors ▪ Other Portland streetcar extensions ▪ Additional transit priority and pedestrian/bike access to transit projects

PRICING ASSUMPTIONS

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Pricing 	**Existing revenues at 2012 levels** **Fuel use and emissions fees** ▪ Federal gas tax = 18 cents/gallon ▪ State gas tax = 30 cents/gallon ▪ Local gas tax = 1-2 cents/gallon Vehicle travel fees ▪ I-5 Bridge toll **Other transportation fees** ▪ Payroll tax and farebox recovery ▪ Parking fees in downtown Portland, OHSU campus and the Lloyd district ▪ Other federal, state and local revenues at existing levels	**Revenues assumed to fund adopted RTP** **Fuel use and emissions fees** ▪ Federal gas tax = 18 cents/gallon ▪ State gas tax = 55 cents/gallon ▪ Local gas tax = 1-2 cents/gallon Vehicle travel fees ▪ I-5 Bridge toll **Other transportation fees** ▪ Payroll tax and farebox recovery ▪ Parking fees in more locations served by high capacity transit ▪ Other federal, state and local revenues at RTP levels	**New and expanded revenues at levels needed to fund investments** **Fuel use and emissions fees** ▪ Federal gas tax = 18 cents/gallon ▪ Carbon fee = $20-50/ton ▪ Local gas tax = 1-2 cents/gallon **Vehicle travel fees** ▪ I-5 Bridge toll ▪ VMT fee = $.03-.15/mile **Other transportation fees** ▪ Payroll tax and farebox recovery ▪ Parking fees in new locations served by high capacity transit and frequent bus service ▪ Other federal, state and local revenues at RTP levels

FLEET AND TECHNOLOGY ASSUMPTIONS GIVEN TO THE REGION BY THE STATE

	Scenario A RECENT TRENDS	Scenario B ADOPTED PLANS	Scenario C NEW PLANS AND POLICIES
Fleet and technology 	The vehicle and fuel assumptions for the year 2035 will be the same for all three scenarios. The assumptions were developed by three state agencies (ODOT, ODEQ and ODOE), and assumed by the Land Conservation and Development Commission when setting the region's per capita GHG emissions reduction target in 2011. The assumptions were developed based on the best available information and current estimates about improvements in technologies and fuels.		

Metro

CLIMATE SMART COMMUNITIES SCENARIOS PROJECT

Recommended Phase 2 Evaluation Criteria

Evaluation criteria	Questions to answer	Evaluation measure	Estimation Method/Tool
Social equity	*How will our choices affect the region's most vulnerable populations?*	Highlighted evaluation measures will be measured across population groups (e.g., income, age and ethnicity) to identify whether disproportionate impacts may occur to vulnerable populations in the region. Vulnerable populations are defined to include: low-income households, communities of color, older adults, children, households with limited english proficiency and people with disabilities.	
Jobs and housing	*How will our choices affect where we work and live?*	Number and distribution of housing (by type, cost and location)	MetroScope output
		Number and distribution of jobs (by type and location)	MetroScope output
		Housing and job growth captured inside urban growth boundary compared to growth captured in nearby areas	MetroScope output
		Employment access and proximity to labor markets	MetroScope output and ArcGIS
		Employment land in proximity to key transportation corridors (Land zoned for employment use in proximity to major transportation corridors)	MetroScope output and ArcGIS
		Access to destinations (households within .5-mile distance of large employment centers, colleges and high schools, libraries, regional shopping centers, airports, hospitals, major medical centers, parks, and major social service sites by income group, race and ethnicity, and age)	MetroScope output and ArcGIS
Cost and the Economy	*What will our choices cost and how will they affect public sector and household budgets, and the economic competitiveness of businesses and industry in the region?*	Transportation infrastructure costs (capital and operations)	GreenSTEP output
		Other public/private infrastructure costs	GreenSTEP/MetroScope output
		Social costs per capita and by income group (e.g., combined cost of travel delay, climate change damage and adaptation, energy security, air and noise pollution, crash costs to non-drivers and other environmental impacts)	GreenSTEP output
		Household cost burden - Housing and transportation costs combined per household by income group (total and as a percent of income by income group)	MetroScope and GreenSTEP outputs
		Freight truck travel delay costs	GreenSTEP output
		Transportation revenues per capita and by income group	GreenSTEP output
Travel	*How will our choices affect how we get around?*	Vehicle miles traveled per capita	GreenSTEP output
		Vehicle delay per capita	GreenSTEP output
		Transit service per capita (revenue miles)	GreenSTEP output
		Access to transit (households and jobs within .5-mile distance of high capacity transit stations/stops and .25-mile distance of frequent bus stops by income group, race and ethnicity, and age)	MetroScope output and ArcGIS
		Average commute trip length	MetroScope output
Energy consumption and GHG emissions	*How will our choices affect climate change and energy security?*	GHG emissions per capita	GreenSTEP output
		Fuel consumption (region-wide) (petroleum-based, liquid and gaseous fuels consumed in light vehicle engines)	GreenSTEP output
Natural resources	*How will our choices affect air quality, water supplies and farms, forestland and natural areas?*	Criteria pollutant emissions	GreenSTEP output
		Land consumed for development	MetroScope output
		Residential water consumption	GreenSTEP output
Public health	*How will our choices affect our health?*	Physical activity per capita (walk trips and bike miles)	GreenSTEP and public health model output
		Chronic illness (obesity, diabetes, asthma)	Public health model output
		Traffic safety (change in fatalities and injuries)	Public health model
Feasibility	*What choices can we afford, what choices are feasible and how do we implement our choices in an equitable and cost-effective manner?*	Financial, legal, legislative or regulatory barriers for implementation	Qualitative assessment
		Political or public acceptability	Qualitative assessment
		Institutional capacity for implementation and long-term "ownership"	Qualitative assessment
		Policy tools to support neighborhood stability and reduce existing community disparities during implementation	Qualitative assessment and ArcGIS

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Metro | *Memo*

Date: May 2, 2013

To: MPAC, JPACT and interested parties

From: Kim Ellis, Principal Transportation Planner
Grace Cho, Assistant Transportation Planner

Re: Climate Smart Communities Scenarios Project: Summary of Changes Reflected in Recommended Phase 2 Scenario Assumptions and Evaluation Criteria

PURPOSE

This memorandum summarizes comments received on the draft Phase 2 scenario assumptions (dated February 27, 2013) and draft evaluation criteria (dated March 27, 2013). Comments were provided by members of the Metro Policy Advisory Committee (MPAC), the Metro Technical Advisory Committee (MTAC), the Joint Policy Advisory Committee on Transportation (JPACT), the Transportation Policy Alternatives Committee (TPAC) and the project technical work group.

The recommendations are reflected in the recommended scenario assumptions and evaluation criteria (dated May 2, 2013). More detailed documentation of the assumptions and analysis methodologies will be prepared during the evaluation process.

SUMMARY OF COMMENTS ON PHASE 2 SCENARIO ASSUMPTIONS

Comments on the draft Phase 2 scenario assumptions are organized by assumption category.

Fleet and Technology Assumptions

Comment	Recommendation
The fleet and technology assumptions seem overly ambitious and unrealistic for the 2035 timeframe.	No change to the assumptions recommended as they were provided to Metro by the state, and will assumed in each of the three scenarios to be tested. Staff added a note to explain that the fleet and technology assumptions were set by three state agencies (ODOT, ODEQ and ODOE) and were assumed when setting the region's per capita greenhouse gas emissions reduction target in 2011. The note also states that the assumptions were based on available information and current estimates about improvements in vehicle technologies and fuels.

Land Use Assumptions

Comment	Recommendation
More information is needed about the land use assumptions for Scenario A and Scenario C (beyond incorporating the Southwest Corridor work).	No change needed. The land use assumptions will be further developed and documented as part of the evaluation process. Scenario B will assume the 2035 growth distribution adopted by the Metro Council in November 2012. Staff will prepare alternative growth distributions, using MetroScope, that respond to the different levels of investment and transportation access assumed in Scenario A and Scenario C. Scenario C will also assume land use changes defined in the Southwest Corridor Land Use Vision consistent with the SW Corridor project. The amount of land in urban reserves consumed is an output of the
More information is needed about the amount of UGB expansion to be assumed in Scenario A and Scenario C.	

	MetroScope model, and will be reported as part of the evaluation process.

Streets and Highways Assumptions

Comment	Recommendation
The I-84/I-5 interchange project should be listed in Scenario C.	Change as requested. Only preliminary engineering and right-of-way is included in the financially constrained RTP project list. Construction of the project is assumed in the State RTP project list.

Transit Assumptions

Comment	Recommendation
The Powell-Division BRT capital project should not be included in the Scenario A assumptions when Southwest Corridor is in Scenario C.	Change recommended. Both projects are included in the State RTP project list, but not the Financially Constrained RTP project list. As a result, both projects are recommended to be included in Scenario C to be consistent with investment choices framework and the State RTP project list.
The Division Powell BRT should remain in Scenario A.	
Add remaining Tier 2 HCT corridors to Scenario C.	Change as requested. HCT to Oregon City has been added, consistent with the High Capacity Transit Plan that was adopted as part of the Regional Transportation Plan in June 2010.
Add an extension of WES commuter rail to Salem to Scenario C.	Change as requested.

Bike and Pedestrian Assumptions

Comment	Recommendation
Add reference to completing 100% of the regional bike and pedestrian networks as identified in the Regional Active Transportation Plan to Scenario C.	Change as requested.

Education and Incentives Assumptions

Comment	Recommendation
Increase the pay-as-you-drive insurance (PAYD) participation rate in Scenario C to reflect that it is a low-cost and effective strategy.	Change as requested. PAYD insurance is allowed in Oregon and other states today, although participation levels are currently low. The Statewide Transportation Strategy assumes 20% of drivers will participate in PAYD insurance by 2020 and 100% of drivers will participate in PAYD insurance by 2035. A graduated participation rate assumption is proposed for Scenarios A, B and C, with Scenario A having a 20% participation rate, Scenario B having a 40% participation rate and Scenario C having a 100% participation rate.
The eco-driving participation rate in Scenario C should be consistent with participation rates in the statewide transportation strategy as this will	Change recommended. Scenarios A and B are recommended to assume 30% of drivers will participate and Scenario C is recommended to assume 60% of drivers will participate. The Statewide Transportation Strategy assumes 30% of drivers will

Comment	Recommendation
likely be the result of changes to vehicle technology and state education programs.	participate in eco-driving by 2020 and 60% of drivers will participate in eco-driving by 2035, recognizing the combined impact of newer technology that provides real-time feedback to drivers and traditional public education and marketing programs that encourage drivers to conserve fuel as they drive by eliminating rapid stops/starts, reducing idling, properly servicing their vehicle and keeping tires inflated to proper to pressure.
Participation in carsharing programs is growing in the region and other metropolitan areas with targeted deployment of Car2Go and ZipCar in areas with significant mixed-use development; participation rates should be higher reflecting this trend.	Change recommended. All scenarios are recommended to assume 4% of households region-wide participate in carsharing by 2035, consistent with the Statewide Transportation Strategy assumptions for 2035.

Pricing Assumptions

Comment	Recommendation
Expand the parking fee assumptions in Scenario C to apply to frequent bus corridors.	Change as requested. Parking fees serve as a proxy for assessing the impact of both the cost of parking and the supply of parking in GreenSTEP. The Regional Transportation Functional Plan identifies reduced parking requirements for areas that are served with 20-minute or better transit service, which includes areas within .5-mile of High Capacity Transit stops and .25-mile of Frequent Bus stops.
Add Interstate 205 tolling to Scenario C	No change recommended due to model limitations. Upon further consultation with the Oregon Department of Transportation (ODOT), staff found that the GreenSTEP model does not meaningfully account for the impact of tolling on specific facilities. A tolling analysis would be more appropriately addressed using the regional travel model. Assessment of the revenue impact of the I-5 bridge toll will use the tolling financial analysis prepared for the project. The regional travel demand model will be used in the final analysis of the preferred scenario in Phase 3 in 2014; this could be included at that time.
Convert fuel use and emissions fees to cost/gallon equivalent or some other common measure.	Change as requested. This will be addressed during the evaluation when the assumptions and analysis methodologies are finalized.

SUMMARY OF COMMENTS ON PHASE 2 EVALUATION CRITERIA

Comments on the draft Phase 2 evaluation criteria are organized by evaluation category.

Jobs and Housing Evaluation

Comment	Recommendation
Measure the number of jobs by different job types.	Change as requested. The MetroScope output for distribution of jobs will be able to calculate the number of jobs by NAICS type.
Measure employment land proximity to key transportation corridors.	Change as requested. A detailed employment lands analysis is not possible due to time and resource constraints and limitations of the Phase 2 analysis tools. Staff will develop an assessment methodology as part of the job and housing distribution evaluation using ArcGIS and MetroScope outputs.
Measure access and proximity to labor markets.	
Growth captured in UGB should be included as evaluation measure; it is not an input.	Change as requested. Job and housing growth captured in the UGB compared to growth in nearby areas will be reported as part of the job and housing distribution evaluation, and has been added to the evaluation measures.
Add housing affordability as an evaluation measure.	Change recommended. A detailed housing affordability analysis is not possible due to time and resource constraints and limitations of the Phase 2 analysis tools. However, housing cost burden by income group has been added to the evaluation measures to address this comment.

Cost and Economy Evaluation

Comment	Recommendation
The evaluation should measure how much each scenario will cost.	Planning-level cost estimates will be developed for each scenario as part of the analysis. For reference, the transportation investments assumed in Scenario B reflects the adopted financially constrained Regional Transportation Plan (RTP), which includes approximately $14 billion (2005 dollars) in multi-modal transportation investments and programs. The adopted State RTP projects assumed in Scenario C includes approximately $20 billion in multi-modal transportation investments and programs. Scenario C assumes more bike, pedestrian and transit investments and programs than the State RTP to reflect the Regional Active Transportation Plan and transit service enhancements identified by TriMet and SMART.
Add a measure that reflects the share of household budget spent on housing and transportation combined.	Change as requested.
The evaluation should report who will be responsible for paying for different implementation costs.	A detailed analysis of “who pays” is not possible due to time and resource constraints, and limitations of the Phase 2 analysis tools. However, the evaluation will be able to report household housing and transportation costs by income group, and public and private sector costs at a regional level as called for in the evaluation criteria. In addition, the evaluation will also identify who is responsible for implementation at a broad level – e.g.,

	local actions (individuals, local governments, businesses), regional actions (Metro, transit providers), state actions (Legislature, State Commissions and Agencies), and federal actions.

Travel evaluation

Comment	Recommendation
Add transit access to jobs as an evaluation measure.	Change as requested.
Define how the "change in metropolitan travel patterns," will be evaluated as required in OAR 660-044-0040, which defines changes in metropolitan development and travel patterns as whether proposed policies will cause change in development or increased light vehicle travel between the metropolitan area and surrounding communities compared to reference case).	Change recommended. Average commute trip length has been added as an evaluation measure. The housing and job distribution evaluation will support an analysis of how development patterns might change in each scenario. A detailed analysis of changes in travel patterns is not possible due to time and resource constraints, and limitations of the Phase 2 analysis tools. The regional travel demand model will be used for the final analysis of the preferred scenario in Phase 3 in 2014 and will provide better information on potential changes in travel patterns.
Define what is included in travel costs.	No change needed. When possible, the GreenSTEP method of calculating outputs will be used. The Technical Appendix 2 to the Statewide Transportation Strategy describes the methods in more detail. Out-of-pocket household costs for vehicle ownership and use include vehicle cost, depreciation, energy costs (fuel and/or electricity), and taxes/fees.
Add mode share as an evaluation measure.	No change recommended due to model limitations. While GreenSTEP does not estimate mode share, it does provide amount of non-motorized travel as reflected in the physical activity evaluation measure (e.g., number of household walk trips and miles of bicycle travel per capita). Mode share will be an evaluation measure in the preferred scenario analysis.
Define what is included in the fuel consumption measure.	This measure includes petroleum-based, liquid and gaseous fuels consumed in light vehicle engines (e.g., gasoline, ultra low-sulfur diesel, ethanol, biodiesel, and compressed natural gas).
Explain how the public health model calculates change in fatalities and injuries.	The Oregon Health Authority model uses VMT data from GreenSTEP and ODOT safety data for the region as reported in the Metro State of Safety Report (April 2012).
Define what is included in the "access to destinations" measure, and include schools in the definition.	No change needed. Metro will use the same categories of destinations included in the Active Transportation Plan. These include: large employers, colleges and high schools, libraries, regional shopping centers, airports, hospitals and major medical centers, regional parks, and major social service sites.
Clarify what is included in the measure "access to transit," e.g., stations or stops versus any part of a transit corridor.	Change as requested. Proximity to HCT stations/stops and Frequent Service bus stops will be used.

Social Equity Evaluation

Comment	Recommendation
Define how the evaluation will measure potential impacts on disadvantaged communities.	Several evaluation measures have been identified to look at the impacts on vulnerable populations, including low-income households and to the extent possible, communities of color, children, older adults, people with disabilities and households with limited English proficiency. The analysis tools have limitations in that GreenSTEP and MetroScope do not forecast the future population by race or ethnicity, and the results cannot be reported at a community or neighborhood level. GreenSTEP and MetroScope account for household income, which will be a focus of the social equity evaluation. Staff will use a methodology developed for the Regional Flexible Funds process to support the analysis.
Clarify what is meant by neighborhood stability and how it will be addressed in the evaluation.	Neighborhood stability was identified in the Equity and Environmental justice Workshop as a priority outcome to measure, particularly as it relates to increased gentrification and displacement pressure on low-income households and communities of color. Gentrification and displacement pressure can occur as housing values increase in a neighborhood in response to public policies and investments. A detailed analysis of neighborhood stability is not possible due to time and resource constraints, and limitations of the Phase 2 analysis tools. However, the evaluation will include collaborating with community leaders working to advance social equity in the region. To the extent possible, this collaboration will help identify areas of potential risk for gentrification and displacement and best practices policies/tools that, if implemented, could limit gentrification and displacement pressure and help reduce existing community disparities.

NEXT STEPS

The recommendations are reflected in the recommended Phase 2 scenario assumptions and evaluation criteria (dated May 2, 2013).

Metro staff will request the Metro Policy Advisory Committee (MPAC), Joint Policy Advisory Committee on Transportation (JPACT) to support moving forward with the evaluation on May 8 and 9, respectively. The Metro Council will discuss the recommendations from MPAC and JPACT on May 16 and take action on the recommendations on June 6.

SPRING 2013

CLIMATE SMART COMMUNITIES SCENARIOS PROJECT

COMMUNITY CASE STUDY SERIES

This case study showcases actions that communities in the Portland metropolitan region are already taking to help reduce greenhouse gas emissions from cars and small trucks.

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- Hillsboro
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- Employer-based commuter programs
- Neighborhood-based travel options

Strategies

- **Mixed-use development**
- **Active transportation**
- **Traffic management**

Beaverton
Community case study

Beaverton builds economic opportunity

Beaverton is revitalizing its downtown with targeted investments and partnerships to create jobs and civic destinations, increase housing choices, provide access to nature and expand travel options for residents and visitors. These actions are helping the city grow in a sustainable manner, create a healthy, livable community and reduce greenhouse gas emissions from transportation.

Downtown Beaverton is served by three state highways, one commuter rail line, two light rail lines and one freight rail line that connect Beaverton to other communities in the region. Since opening in 1998, TriMet's MAX light rail stations have attracted housing, employment and retail development to the area. A project known as The Round, featuring a mix of office and housing, was built around the Beaverton Central station surrounding a circular plaza that includes the MAX station.

Old Town, south of Farmington Road, offers a well connected street grid and historic buildings with small businesses and pedestrian-oriented retail. The Beaverton Central Library, Beaverton City Park and the Beaverton Farmers Market are gathering places that serve nearby neighborhoods and visitors from across the region.

The city has built strong public support for and remains committed to expanding housing and transportation choices, creating parks and natural areas, and supporting local businesses to spur downtown revitalization.

Key challenges

- Major transportation corridors divide the north and south parts of downtown Beaverton.
- An incomplete street network, high traffic volumes, long blocks and inadequate bike and pedestrian crossings limit access and mobility.
- The Round remains incomplete, contributing to the lack of downtown housing choices and job opportunities.
- Aging infrastructure and empty or underutilized development sites limit the vibrancy of the area.

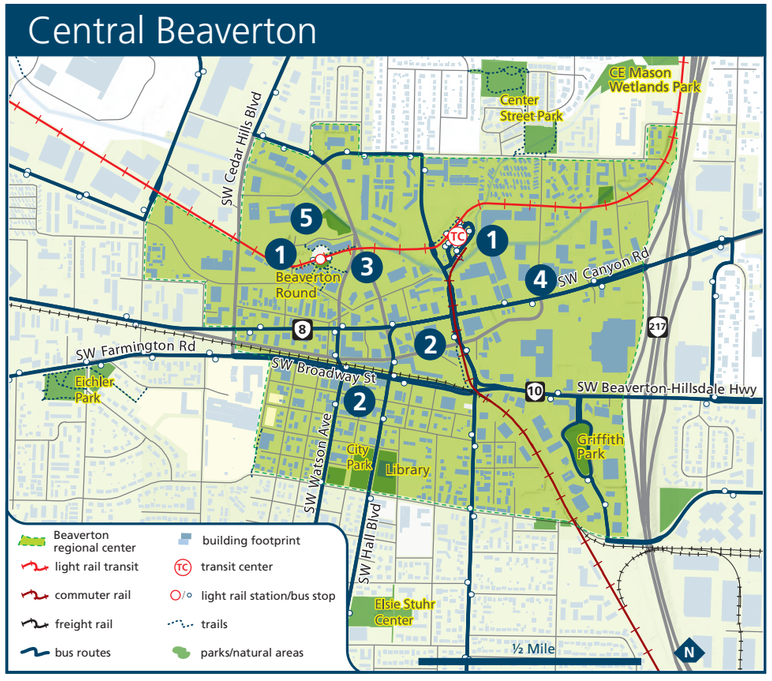
The Oregon Legislature has required the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 2035.

Metro

www.oregonmetro.gov/climatescenarios

Investments and partnerships revitalize downtown Beaverton

The City of Beaverton is leveraging its existing transportation system, infrastructure, land and financial resources to build a prosperous and vibrant community that will also help reduce greenhouse gas emissions, especially from transportation. The city has targeted policies, financial incentives and investments to support local businesses, grow local jobs, encourage more people to live and work in downtown, manage parking, make the area safer and more convenient to walk and bike, improve traffic operations, and transform Canyon Road to be more pleasant and attractive. Hosting activities such as the Beaverton Farmer's Market, regular arts and culture events like the expanded Old Town Festival, the annual International Festival, Flicks by the Fountain, and painting downtown murals attracts residents and customers to the area. The city's actions leverage local, regional, state and federal partnerships and resources that further catalyze downtown revitalization efforts.



1 Growing the economy with jobs, housing and transit

Nearly 1,100 businesses and more than 14,000 jobs exist within one mile of downtown Beaverton. The Beaverton Transit Center serves as the primary transit hub of Washington County and has one of the highest ridership rates in the TriMet system with two light rail lines, a WES commuter line, and eleven bus lines. While housing options in the downtown area are limited, the city is leveraging public and private investments and innovative tools to encourage people to live and work in the downtown core and attract new restaurants, shops and services that people want to visit.

Community and economic development efforts currently underway include:

- policies and investments that encourage new housing and businesses to locate downtown near transit
- an inventory of brownfield sites for potential redevelopment
- business programs and incentives for microenterprises, start-ups and target industries, including tax credits, storefront improvement grants and workforce development assistance
- financial incentives and partnerships with nonprofit organizations to build affordable housing choices
- allowing businesses to share parking spaces and removing minimum parking requirements in designated areas, including areas located near transit, to encourage efficient use of available parking
- installing electric vehicle charging stations downtown.

2 Making way for biking and walking

The city has prioritized investments to:

- implement a wayfinding system that provides directional guidance to area destinations for biking, walking and taking transit
- create bicycle boulevards on low-traffic streets, add east-west bike corridors that parallel Canyon Road, increase bicycle parking, and fill gaps in the bicycle network
- improve pedestrian access to area businesses and transit service by making street crossings safer, filling sidewalk gaps, and adding curb ramps, benches and lighting to make walking safer, more convenient and pleasant.

3 Improving traffic operations

Congestion along major travel corridors causes delays that increase vehicle idling and emissions. To address this, the city:

- constructed multi-modal streets that parallel state highways to provide an alternative for local traffic
- installed adaptive traffic signals that are synchronized to optimize traffic flow.

4 Transforming Canyon Road

Canyon Road emerged as a high priority during Beaverton's Community Vision and Civic Plan process. It is a noisy and intimidating place to walk with few crossings and heavy traffic. Beaverton is collaborating with the Oregon Department of Transportation to redesign Canyon Road to be pedestrian-friendly and more attractive for development. Key investments identified to transform the corridor include:

- safer pedestrian and bicycle crossings at key intersections
- sidewalk improvements, landscaping, transit stop improvements, pedestrian-scale lighting and stormwater treatment facilities
- an off-Canyon Road bicycle boulevard network, providing parallel routes for biking
- new street connections to provide multiple routes for travel.

5 Connecting people with nature

The Beaverton Creekside District, comprising nearly 50 acres in the downtown area, is located near Beaverton's downtown creeks. It sits at the core of the area's transit system, providing a focal point for revitalization efforts.

Restoring and enhancing the downtown creeks will improve water quality and provide places for residents and visitors to enjoy the natural environment.

Timeline

2010	2011	2012	2015-2020	2020-2040
Beaverton Community Vision calls for creating a vibrant downtown and improving mobility	Beaverton Civic Plan emphasizes greater connectivity, economic opportunity, and environmental sustainability Voters adopt $150 million Beaverton Urban Renewal Plan	$1 million HUD Sustainable Communities Challenge Grant awarded to help implement Beaverton Civic Plan	Improvements made to Canyon Road streetscape and downtown creek, park and plaza Off-Canyon Road bicycle boulevard network launched	Completion of the Beaverton Urban Renewal Plan projects attracts business and housing, improves traffic flow and public safety, and spurs private investment

Climate benefits

Mixed-use development	★ ★ ★ ★ ★
Active transportation	★ ★ ☆ ☆ ☆
Traffic management	★ ★ ★ ☆ ☆

These greenhouse gas emissions reduction strategies are an important part of what the City of Beaverton is already doing to realize its vision for the future, and provide a strong foundation for meeting state climate goals for 2035. The climate benefits shown represent the relative effectiveness of each strategy.

For more information on greenhouse gas emissions reduction strategies, refer to the Climate Smart Communities Scenarios Project website at **www.oregonmetro.gov/climatescenarios**.

Keys to success

Develop a broad strategy for revitalization
In addition to promoting a mix of new housing and businesses within a well-connected street, bicycle and sidewalk network, revitalization efforts should also provide opportunities for recreation and enjoying art. Marketing and economic development are enhanced by projects that improve storefronts and signage.

Combine community investment tools
Beaverton continues to build its toolbox of policies and investments to grow local jobs and expand downtown housing choices, provide needed infrastructure, and demonstrate the city's commitment to sustainability and revitalization efforts.

Leverage partnerships and resources
Downtown revitalization requires the cooperation of public agencies, chambers of commerce, local businesses and civic organizations, as well as leveraging local, regional, state and federal resources to build needed investments.

Build community and business champions
The ideas borne out of the Beaverton Community Vision and refined through the Beaverton Civic Plan have helped achieve successes with residents and businesses.

Regional partner

Working together to help meet Oregon's target for reducing greenhouse gas emissions from cars and trucks

Beaverton OREGON
The Best of Oregon

About Metro

Metro crosses city limits and county lines to build a resilient economy, keep nature close by and respond to a changing climate. Representing a diverse population of 1.5 million people in 25 cities and three counties, Metro's directly elected council gives voters a voice in decisions about how the region grows and communities prosper. Metro works with communities, businesses and residents to make the Portland metropolitan area a great place to live, work and shape the future.

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SPRING 2013

CLIMATE SMART COMMUNITIES SCENARIOS PROJECT

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- Employer-based commuter programs
- Neighborhood-based travel options

Strategies

- **Vehicle technologies and fuels**
- **Fleet mix**
- **Traffic management**

Hillsboro

Community case study

Addressing greenhouse gas emissions with 21st century technology

Home to more than 90,000 residents, host to dozens of high tech firms, and an employment area supporting 55,000 jobs, Hillsboro attracts more than 40,000 commuters to the city every weekday. To create a healthy, livable community where residents, visitors and employees have access to everyday needs, area attractions, and employers, the City of Hillsboro has invested in new technologies to accomplish these goals and reduce greenhouse gas emissions.

Building on a strong history of community, collaboration and leadership, Hillsboro has installed electric vehicle charging stations around the city, incorporated alternative fuel vehicles in its fleet mix, and invested in traffic signal coordination and other traffic management systems. The City of Hillsboro is using these and other new technology strategies to meet its aggressive, long-term (2030) operational sustainability goals, including an 80 percent reduction in GHG emissions and 100 percent fossil fuel-free city fleet vehicles (except for those vehicles with no fossil fuel alternative).

This case study highlights accomplishments and challenges to be addressed as new technologies, such as charging station networks, continue to grow in Hillsboro and throughout the region.

Key challenges

- The cost of new technology such as traffic signal coordination and system management is high.
- The expense of electric vehicle infrastructure relative to the number of electric vehicles in use is difficult to justify.
- There's insufficient funding for widespread electric vehicle infrastructure such as charging stations.
- There's a hesitancy to assume the risks that come with early adoption of new electric vehicle technology.

The Oregon Legislature has required the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 2035.

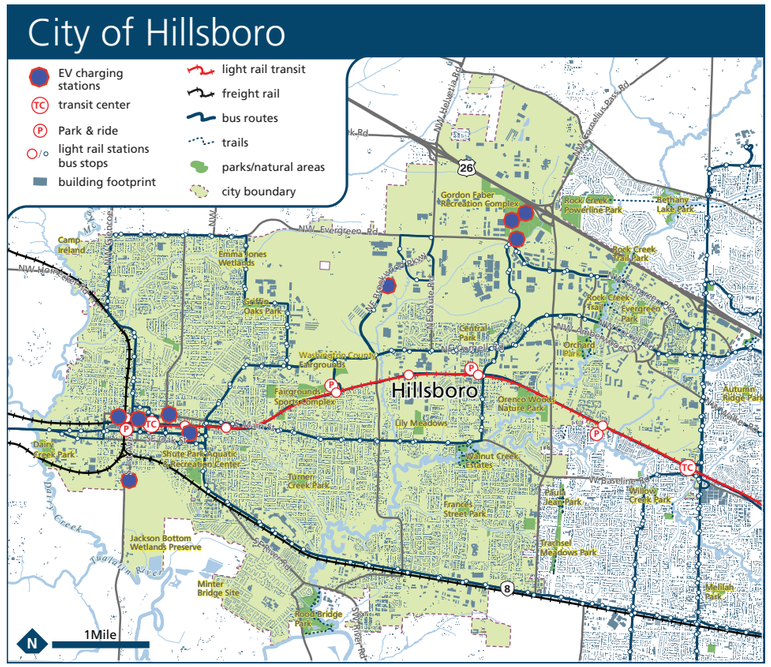
Metro

www.oregonmetro.gov/climatescenarios

Leading the way through installation of new technologies

The City of Hillsboro has made sustainability a high priority, demonstrated by the Hillsboro 2020 Vision and Action Plan, the city's sustainability plan and a five-year organizational strategic plan that supports these initiatives.

Since 2000, the Hillsboro 2020 Vision and Action Plan has engaged the broader community in developing and implementing projects that strengthen the community, create economic opportunity and protect the environment. In 2010, a 10-year review of this plan resulted in two new strategies and ten new actions for protecting the environment. This same year, the city completed its first comprehensive greenhouse gas inventory, which provided a critical baseline to measure how effective the city is in reducing greenhouse gas emissions over time. Below are three examples that help support the city's sustainability policies.



1 Installing electric vehicle charging stations

Electric vehicle (EV) charging stations are necessary to support what is expected to be a growing fleet of EVs throughout Oregon. But their popularity will only increase to the degree that there are charging stations available for owners to re-charge their cars. The charging stations must be conveniently located to ensure that EV owners have the confidence to travel around the region without the fear of being stranded with no power. Hillsboro's commitment to achieving the goals set out in its guiding documents can be seen in its EV charging infrastructure, the largest in the state.

In 2009, Hillsboro installed the first of its 35 electric vehicle charging stations in the downtown area to support existing EV users, encourage the widespread use of EVs, and spur economic development. Since then, the city has installed many more units, including the first Level III Fast Charger in Washington County which can charge an electric vehicle to 80 percent battery capacity within 30 minutes. Located near major employers and civic destinations, most of the stations are available to the public. Recently, Washington County, Clean Water Services, and several businesses have installed EV charging stations at their sites, with over 50 available in Hillsboro.

In 2012, Hillsboro's Electric Vehicle Program was one of 27 programs nationwide recognized for their innovative practices at the National League of Cities conference in Boston.

2 Diversifying fleet mix

Over a ten year period beginning in 2000, Hillsboro maintained a substantial fleet of natural gas powered vehicles. One of the city's sustainability goals is to achieve a fleet of 100 percent fossil fuel-free vehicles by 2030. With EV charging stations installed at the Civic Center, two electric vehicles were purchased for the city fleet in 2011 and 2012. Hillsboro will continue to work toward this sustainability goal by adding EVs and other alternative fuel vehicles to its fleet.

3 Installing traffic signal coordination/system management

Hillsboro has made a strong commitment to improving the efficiency of traffic flow within the city by installing street signal timing technology. These improvements benefit operations and have a positive impact on reducing traffic delay, idling, fuel consumption and greenhouse gas emissions.

Funded in part with U.S. Department of Energy grant funds, in 2011 the city completed several traffic signal upgrades including the first use of the InSync adaptive signal system on the West Coast. The InSync system consists of coordinated traffic signals and video detection to optimize real time traffic flow through nine intersections on a major arterial. Also completed was the retiming of all 28 city intersection signals and a comprehensive re-work of the 185th Avenue and Baseline Road intersection. The results of these measures include an annual savings of 26,400 gallons of fuel, a reduction of carbon dioxide by 232 metric tons per year, a 10 percent reduction in traffic delays and a significant cost savings.

Next Steps

In 2012, the City of Hillsboro hosted a New Energy Cities Community Partners workshop with Climate Solutions to map the flow of energy and emissions in the community and identifying action areas for reducing fuel consumption and greenhouse gas emissions. The outcome included a community energy map and Climate Action Plan Opportunities Framework. These tools will be used in conjunction with an energy sector analysis to identify opportunities for implementation. In 2013, a Hillsboro Sustainability Task Force will be convened to take this work forward.

Timeline

2009

Hillsboro installed the first of 35 electric vehicle charging stations in the downtown area next to the Civic Center

2010

Hillsboro's award-winning intermodal transit facility opened with 13 electric vehicle charging stations and solar panel energy production

2011

Major traffic signal timing upgrades are completed throughout the city

Additional Level II electric vehicle chargers installed

Hillsboro purchased its first electric vehicle complementing the city's existing fleet of alternative fuel vehicles

2012

The first Level III Fast Charger in Washington County is installed at the Hillsboro Civic Center

2013

As a finalist for the national Bloomberg Philanthropies Mayors Challenge, Hillsboro proposed a GoPoint Mobility Hub concept at light rail stations which included installation of EV charging stations to better connect neighborhoods and employment centers with more travel choices

Climate benefits

Vehicle technologies and fuels	★ ★ ★ ★ ★
Fleet mix	★ ★ ★ ★ ★
Traffic management	★ ★ ★ ★ ★

These greenhouse gas emissions reduction strategies are an important part of what the City of Hillsboro is already doing to realize its vision for the future, and provide a strong foundation for meeting state climate goals for 2035. The climate benefits shown represent the relative effectiveness of each strategy.

For more information on greenhouse gas emissions reduction strategies, refer to the Climate Smart Communities Scenarios Project website at **www.oregonmetro.gov/climatescenarios**.

Keys to success

Demonstrate innovation Test the barriers and opportunities of cutting edge technologies to influence similar investment by other public entities, the private sector, and residents.

Promote public education Help make cutting edge technologies more accessible to the public through education about their locations, operations and efficiencies.

Form partnerships Public-private partnerships encourage widespread use of cutting edge technologies.

Build community champions Base goals and policies on community visions that make it more politically feasible to create financing mechanisms for investments and facilitate community action.

Regional partner

Working together to help meet Oregon's target for reducing greenhouse gas emissions from cars and trucks

Hillsboro OREGON

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Strategies

- **Transit**
- **Active transportation**
- **Employer-based commuter programs**
- **Public education and marketing**

Wilsonville
Community case study

A vision for a connected community

Wilsonville's transportation system has been shaped by the vision of city and business leaders over the last twenty-four years to create a healthy community where people have easy access to transportation to meet everyday needs. The development of SMART (South Metro Area Regional Transit) in 1989, and TriMet's WES (Westside Express Service) Commuter Rail service in 2009 are examples of transportation investments that support this vision.

Over the years, SMART has evolved into a full service, dependable transit system offering a safe and convenient way to travel within Wilsonville and to other areas, including Canby and Salem. At SMART Central Station, TriMet's WES Commuter Rail offers train service to Tualatin, Tigard and Beaverton where it connects with other bus lines and the MAX light rail system. The city also made important investments to improve community walking and biking connections to transit and expand the information available to residents, visitors and businesses about their travel choices. These investments help reduce the number of vehicle miles traveled by the more than 18,000 commuters who come to Wilsonville from other communities every day to work.

As a result, people of all ages choose SMART for travel to work, the grocery store, appointments, and nearby parks and natural areas. These choices help support sustainable development in the region and meet the state mandate to reduce greenhouse gas emissions for cars and small trucks.

Key challenges

- Increasing congestion and frequent traffic backups on I-5 hamper freight movement and access to Wilsonville jobs and impacts the city's economy.
- I-5 and the Willamette River are major barriers to developing connected walking and biking networks within the community.
- Ninety percent of the employees working in the city live in other communities.

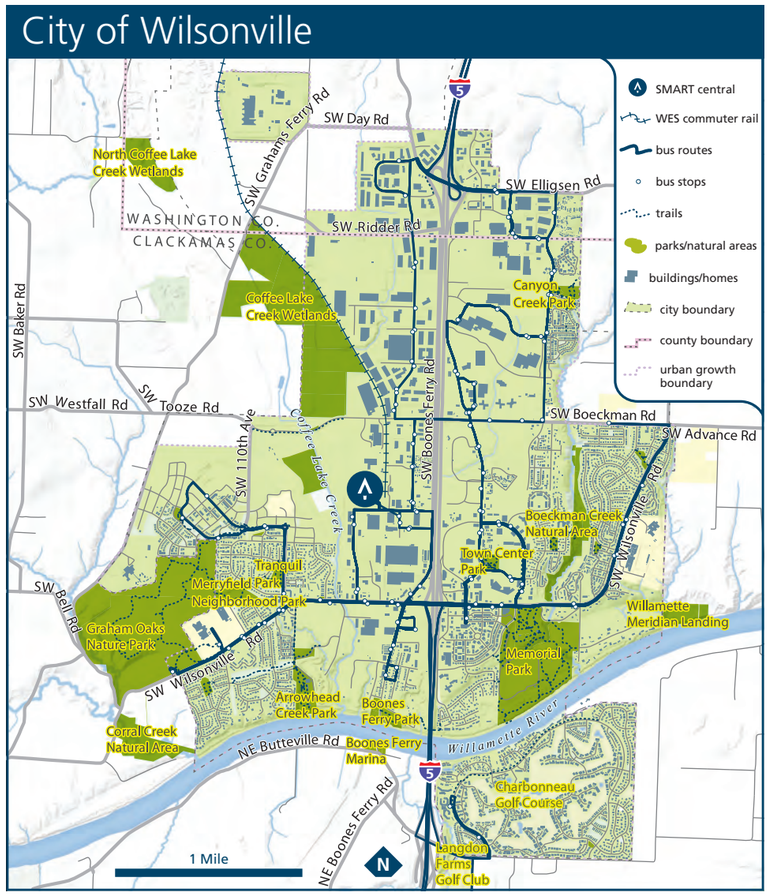
The Oregon Legislature has required the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 2035.

Metro

www.oregonmetro.gov/climatescenarios

Investing in smart travel options and public education

The community vision for city-operated SMART is to provide convenient, safe and reliable transportation services to meet the needs of Wilsonville residents, commuters, and visitors of all ages, income levels, and points of travel origin. SMART is dedicated to providing mobility for those who do not drive and creating a viable, attractive transportation option for those who do.



1 Connecting SMART and TriMet mobility options

SMART provides a variety of services with its fleet of over thirty-five vehicles ranging from 40-foot buses to minivans and a trolley-bus. The services are free within Wilsonville, but a fee is charged for service between Wilsonville and other cities. SMART also operates a Dial-a-Ride program that provides door-to-door service within Wilsonville, and medical transport services to Portland and other nearby cities for the elderly and disabled.

In February 2009, TriMet's Westside Express Service Commuter Rail, a self-propelled diesel rail line servicing five stations from Beaverton to Wilsonville, began operation. Wilsonville leverages this service by having SMART buses take WES commuters to businesses and neighborhoods throughout the city as well as offering transfers to Salem and Canby.

2 Expanding commuter information

The SMART Options program promotes alternatives to driving alone such as taking the bus or commuter train, car/vanpooling, walking, biking or telecommuting. The program provides free assistance to employers for setting up employee commuter programs. This includes help with compliance with state commuter laws and providing bus service from the WES station to businesses throughout the city. SMART also provides buses for special city-sponsored events and pre-scheduled senior lunches, shopping, and other trips.

3 Expanding resident and visitor information

SMART provides information to help area residents get around in healthy, fun ways and to promote its creative education programs for students. These include Bike Smart, Walk Smart and Wilsonville Sunday Streets.

Bike Smart Bike Smart is a one-stop shop for information about biking in and around the Wilsonville area. It helps residents and visitors plan commute and recreational trips, and provides maps and other information to make biking more convenient and fun.

Walk Smart Walk Smart is a free program that encourages participants to walk more by providing tools and inspiration. It provides maps, educational resources, "walk to lunch" group walks, and monthly rewards for participants.

Wilsonville Sunday Streets This event helps connect neighborhoods, parks, and people. Adults, children and seniors who bike, walk and run enjoy traffic-free streets filled with fun and interactive entertainment, music, physical activities and food.

4 Connecting art with transportation

SMARTArt works with Wilsonville students to link artistic creativity and transportation. Students are asked to depict a Wilsonville road with heavy congestion and how that road looks when other travel options are used. This project helps student artists see the connection of transportation choices to their health, the environment, their community, and traffic. The winning projects are displayed on the outside of a SMART bus and other entries are displayed on the interior of buses.

Beauty and the Bridge When the Wilsonville Road interchange area was expanded to increase vehicle capacity, walking and biking also benefited from better east-west crossings under I-5. In 2012, Wilsonville's student artists created tile art that was installed as part of the project to make it an inviting, comfortable, and aesthetically pleasing environment with the goal of improving mobility and encouraging biking and walking.

5 Financing SMART services and programs

The city's public transportation system is funded by a payroll tax paid by Wilsonville businesses and based on total payroll or self-employment income. The tax rate is currently .5 percent (.005) of gross wages. Despite the closure of high-profile businesses in Wilsonville during the recession that resulted in the loss of nearly 1,000 jobs, a number of other businesses have either expanded or announced plans to increase employment, which has helped keep SMART ridership numbers and revenue relatively steady over the last few years.

Intergovernmental grants help pay for special transportation programs, bus operations and bus purchases. The amount of grants received varies from year to year based upon grant awards. Over the past decade, SMART has successfully competed for more than $10 million in federal and state grants. The primary funding sources are supplemented by fare-box revenues and sale of surplus properties.

Timeline

1988
Wilsonville Innovative Transportation Association creates independent city-owned transit system and begins service in 1989 as Wilsonville Area Rapid Transit (WART)

1997
Now operating as SMART, the transit agency begins offering express service to Salem

2002
The SMART Options program begins helping employers promote commuter benefits to employees

2009
SMART changes bus routes and expands service for WES commuter rail; all routes now transfer at the SMART Central Station

2013
SMART moves into brand new operations and fleet facility located near SMART Central Station

Climate benefits

Transit	★ ★ ★ ★ ★
Active transportation	★ ★ ☆ ☆ ☆
Employer-based commuter programs	★ ★ ☆ ☆ ☆
Public education and marketing	★ ★ ★ ☆ ☆

These greenhouse gas emissions reduction strategies are an important part of what the City of Wilsonville is already doing to realize its vision for the future, and provide a strong foundation for meeting state climate goals for 2035. The climate benefits shown represent the relative effectiveness of each strategy.

For more information on greenhouse gas emissions reduction strategies, refer to the Climate Smart Communities Scenarios Project website at **www.oregonmetro.gov/climatescenarios**.

Keys to success

Cultivate community involvement and support A community should develop a vision in partnership with government agencies, residents and businesses. Wilsonville's Parks and Recreation, Bicycle and Pedestrian, and Transit master plans were all created under the umbrella of one advisory committee.

Develop and foster public-private partnerships Many Wilsonville businesses are proud sponsors of public programs such as Walk Smart, Movies in the Park, and Wilsonville Sunday Streets.

Support local businesses with transportation options Wilsonville businesses employ a skilled, diverse workforce from throughout the Portland metropolitan and North Willamette Valley regions. SMART provides a crucial service for many of the 9 out of 10 Wilsonville workers commuting from elsewhere to jobs in Wilsonville.

Leverage location within the region The southern-most city in the region, Wilsonville is located halfway between Portland, Oregon's largest city, and Salem, the state capital. With ongoing planning and investment in its transportation system, the city can continue to serve its residents, businesses and the northern Willamette Valley.

Regional partners

Working together to help meet Oregon's target for reducing greenhouse gas emissions from cars and trucks

City of WILSONVILLE OREGON

SMART SOUTH METRO AREA REGIONAL TRANSIT

About Metro

Metro crosses city limits and county lines to build a resilient economy, keep nature close by and respond to a changing climate. Representing a diverse population of 1.5 million people in 25 cities and three counties, Metro's directly elected council gives voters a voice in decisions about how the region grows and communities prosper. Metro works with communities, businesses and residents to make the Portland metropolitan area a great place to live, work and shape the future.

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MPAC Worksheet

Agenda Item Title: The Community Investment Initiative (CII) Regional Infrastructure Enterprise (RIE)

Presenter(s): Tom Imeson, CII Co-Chair and Adam Davis, DHM Research, Facilitator

Contact for this worksheet/presentation: Maria Ellis 503-797-1732

Date of MPAC Meeting: May 8, 2013

Purpose/Objective
MPAC's last discussion on the Regional Infrastructure Enterprise was on April 24th, 2013. The purpose of that work session was to present a phased development approach for establishing the Regional Infrastructure Enterprise including what services are provided, how projects are selected and implemented, and how it is governed.

The purpose of the May 8th presentation is to gather feedback from MPAC members on this proposed concept. This input will inform how MPAC will advise Metro to proceed regarding the CII's Regional Infrastructure Enterprise (RIE) business plan.

Action Requested/Outcome
Provide feedback on the draft Regional Infrastructure Enterprise concept.

How does this issue affect local governments or citizens in the region?
It is estimated that even without the 625,000 new residents expected in the region within the next 20 years, we will still need approximately $10 billion just to repair and rebuild existing infrastructure. The cost of building needed public and private facilities to support our growing population in Clackamas, Multnomah, and Washington counties within the urban growth boundary is estimated to be $27-41 billion. Yet traditional funding sources are expected to cover only half that amount.

Widening the gap between what we need and our ability to address it is the diminishing availability of federal and state funds for improvements, rendering the model for 100 percent public investment obsolete. A lack of industrial land needed to attract companies that bring traded-sector jobs to the region is compounded by a workforce unprepared to respond to the demand if they do.

The Community Investment Initiative (CII) Leadership Council is a volunteer coalition of private and community leaders committed to building the region's economy by investing in infrastructure to create living-wage jobs. The Leadership Council of the CII has no official authority as a group, but can use their extensive network of professional relationships to problem-solve issues of regional importance with public sector partners and advocate with them for action.

To facilitate and encourage a broad range of infrastructure projects across the Portland metropolitan region, the Community Investment Initiative Leadership Council adopted a strategic plan with the following strategies:

- Invest in infrastructure to catalyze jobs and economic prosperity;
- Foster conditions that support development ready communities;
- Ensure the reliable and efficient movement of goods and people;
- Protect and enhance our communities' investment in school facilities and properties.

Key to the success of this approach is a Regional Infrastructure Enterprise, a draft concept proposed by the CII Leadership Council to identify a set of financing tools to invest in community visions, make the most of available dollars, and provide incentives for private investment that will help narrow the gap and support existing and anticipated needs.

Using the feedback received through the Catalytic Infrastructure Survey and from a focus group of mayors regarding development assistance needs (summarized in ECONorthwest's memo, "PRELIMINARY RECOMMENDATIONS: FUNCTIONS FOR A REGIONAL INFRASTRUCTURE ENTERPRISE), the following functions have been proposed for the Regional Infrastructure Enterprise:

- Pre-development technical assistance (due diligence, feasibility, remediation, mitigation, regulatory, permitting, etc.)
- Developing public private partnerships for projects, including finance packaging
- Direct funding including patient capital

In order for the RIE to provide such functions, the proposed recommendation is to establish an organization to seek new public funding and private resources to invest in infrastructure that catalyzes jobs. We cannot solve the general lack of resources to address the infrastructure funding gap but should focus on economic prosperity that will lead to the conditions that allow the various public service providers to afford the facilities and services needed by the public.

Further information regarding the draft RIE concept can be found in the attachments and will be briefly summarized on May 8th.

The RIE concept will be further defined with input from elected officials throughout the region via an elected official focus group on May 23rd, 2013. Additional engagements are being scheduled.

What has changed since MPAC last considered this issue/item?
Nothing has changed since MPAC's last discussion regarding the Regional Infrastructure Enterprise on April 24th 2013.

What packet material do you plan to include?

- Attachment A: Regional Infrastructure Enterprise Development Proposal
- Attachment B: Draft Regional Infrastructure Enterprise Principles of Governance
- Attachment C: Phase 2 Regional Infrastructure Enterprise Project Evaluation Proposal
- Attachment D: MPAC's April 24th 2013 PowerPoint presentation on the Regional Infrastructure Enterprise

ATTACHMENT A: DRAFT Regional Infrastructure Enterprise Development Proposal

RIE Mission

Facilitate infrastructure investment that catalyzes living-wage job creation, private investment, and economic development.

RIE Desired outcomes

- Achieve regional and local development goals
- Catalyze job creation and economic development
- Support disconnected communities
- Leverage private investment

RIE Functions

- Pre-development technical assistance (due diligence, feasibility, remediation, mitigation, regulatory, permitting, etc.)
- Developing public private partnerships for projects, including finance packaging
- Direct funding including patient capital

RIE Target Areas

- Industrial lands
- Urban centers and main streets

RIE Considerations

- Though we know the RIE will need access to a regular stream of public funds for investment, the RIE does not yet have the credentials to ask the public for funding.
- There is limited appetite in the region for a large new bureaucracy.
- The RIE should be lean and leverage existing capacities in the region, not duplicate them.
- The RIE's structure should be nimble enough to allow the RIE to mature with opportunities.

RIE Development Approach

The proposed recommendation for RIE is to establish an organization to seek public funding and private resources to invest in infrastructure that catalyzes jobs. We cannot solve the general lack of resources to address the infrastructure funding gap but should focus on economic prosperity that will lead to the conditions that allow the various public service providers to afford the facilities and services needed by the public.

The development of the Regional Infrastructure Enterprise is broken down into three phases:

- Phase I: Demonstrate the ability to deliver projects
- Phase II: On-going funding to deliver projects
- Phase III: Complete a public-private partnership investment program

Phase I: Demonstrate ability to deliver projects

The Phase I goal is to demonstrate the ability of RIE to deliver projects. The two **key elements of this phase are establishing a RIE Board of Directors comprised of public and private members and executing 1-3 demonstration projects**. The role of the Board of Directors is to use their expertise to **help deliver the demonstration projects** and to **strategically plan for and move RIE into Phase II**.

Because this phase is about proof of concept, it should not require large scale political asks or funding requests, though there could be a role for Metro and the Port of Portland in sponsoring demonstration projects on behalf of the RIE. Benefits to this approach to the RIE are that it:

- Leverages existing expertise to deliver additional projects
- Allows for relatively easy start-up of RIE
- Allows refinement of the role and capabilities of the RIE during Phase I
- Allows for testing without long term commitments

Identifying appropriate demonstration projects is critical. As this concept has been discussed with members of the Leadership Council and implementation group, they have indicated that demonstration projects should:

- Be market ready
- Utilize existing resources
- Be of small scale
- Short-term completion
- Align with RIE goal
- Leverage public and private funding
- Demonstrate RIE functions
- Have political and local support

The RIE implementation group will work to identify a small pool of project options by the May meeting of the Leadership Council.

Phase II: On-going funding to deliver projects

The goal of this phase is to demonstrate the ability of the RIE Board of Directors to make wise investments of public resources by:

1. Making investments that support economic development and job creation
2. Leveraging private capital in the delivery of investments whenever possible

In order for the RIE to truly achieve its goal of "facilitating infrastructure investment that catalyzes job creation, economic development, and private investment," it needs access to an ongoing stream of revenue from which to make investments. **A key characteristic of Phase II is accessing these on-going public investment funds and investing them wisely**. In this phase *private* capital would come to projects through project-specific financing, not through RIE. The RIE Board of Directors would need to strategically guide the RIE into this phase by developing a revenue plan that includes a variety of public and non-profit resources like state lottery funds, grants (foundations or federal), allocation of existing funds, as well as new public revenue resources.

Developing a new funding source would likely require a political campaign and a regional vote, thus the importance of proving the concept in Phase I. If a campaign is needed, the RIE Board of Directors will need to develop a package of regional projects to attach to a public funding request, similar to what Oklahoma City has done with its MAPS program.

Phase III: Complete public-private investment program

If implementation of Phase II can be achieved, it would be an indicator of success in helping to chip away at the region's investment challenges. After some considerable time of executing successful investments, the RIE could consider evolving into Phase III.

A differentiating characteristic of **Phase III is for RIE to gain direct access to private resources for investment**. Resources could include EB-5, pension funds, or other sovereign investment funds. These resources are not suitable for capitalizing RIE in Phase II due to the fiscal returns and guarantees associated with them.

ATTACHMENT B: DRAFT Regional Infrastructure Enterprise Principles of Governance

Based upon the review of local and national models of governance, the RIE Implementation Group defined the following principles for establishing the governance of a Regional Infrastructure Enterprise:

- **RIE should not be created as a new, independent government agency.**

- **Technically – not politically – driven.** Projects should be technically rather than politically driven and demonstrate the greatest regional benefit**.**

- **The Board should include the expertise needed to be successful,** including technical expertise in project due diligence, public and private financing, regional economic development, market conditions, regional policy making, civic leadership and marketing and public relations.

- **A mixed governing Board is important.** A public-private model holds the greatest credibility with the public. The public sector is essential for voter accountability and the private sector is necessary for expertise.

- **A bold governing body is needed.** Investments must be recognized by the public as having merit as good investments and the Board needs to be capable of standing by and communicating the evaluation.

- **Funding sources impact governance.** Ultimately, the RIE Board is intended to make public investment decisions that catalyze and attract private investments that lead to jobs and economic prosperity for the region. The governance structure should be structured to provide the accountability to the voters needed for public funds dedicated to the RIE. Private investments need to be sound in the marketplace to ensure a return on investment.

- **Elected officials have approval responsibility.** To ensure transparency in decision-making by the RIE Board, the slate of selected projects should be subject to ratification by the public agency providing the funding.

- **It is important to balance action with the participatory process.** There needs to be a balance between the need to streamline the work of the RIE and sufficient opportunity for people to have their voices heard during the evaluation and selection process.

- **The Board is not responsible for regional or local prioritization.** The Board should not substitute its judgment for that of local and regional governing bodies. Rather, it should draw upon priorities brought forward by local governments and the private sector that are consistent with regional and local policies that best meet the selection criteria established for RIE.

- **The Board should be appointed.** The Board membership should be confirmed by an elected body and not directly elected to their position.

ATTACHMENT C: DRAFT Phase 2 Regional Infrastructure Enterprise Project Evaluation Proposal

Purpose

The Regional Infrastructure Enterprise (RIE) will be a tool to support living-wage job creation and economic development. A subcommittee of the RIE and Performance and Equity Measurement (PEM) implementation groups convened to propose a process for RIE project selection in **Phase II**. The outcome of the selection process, as proposed, would be a portfolio of projects that would capitalize economic development opportunities, contribute to the environmental sustainability of the region, and reduce economic, political, geographic, and social disparities. This proposal aims to avoid a political prioritization of projects by focusing on projects that fit within the RIE/CII goals and mission as determined by their ability to meet the objective criteria of the process.

Considerations

1. At this time it is not known who will operate and manage RIE. The operators will have the ultimate responsibility for formalizing a RIE project evaluation process and finalizing the criteria for projection selection. Thus, the RIE Business Plan should include a framework recommendation for a project evaluation that RIE operators can use to build upon.
2. The goal of the selection process is to reward/incent projects that achieve multiple outcomes while not making it overly arduous and/or discouraging to applicants.
3. Though a process and potential criteria is proposed at this time, this does *not* include a weighting or ranking system. These details may need to be left to the RIE operators to finalize.
4. Because infrastructure needs will always outpace RIE's capacity for assistance, this proposal is meant to help RIE narrow the pool of investment options at each step in order identify projects with most opportunity and that fit within RIE's resource capacities.

The kind of services (functions) RIE will provide

A set of preliminary functions has been identified for RIE and include:

- Pre-development technical assistance (due diligence, feasibility, remediation, mitigation, regulatory, permitting, etc)
- Developing public private partnerships for projects, including finance packaging
- Direct funding including patient capital

The kinds of projects RIE will invest in

It is anticipated that applications for assistance for RIE will be for the following types of projects:

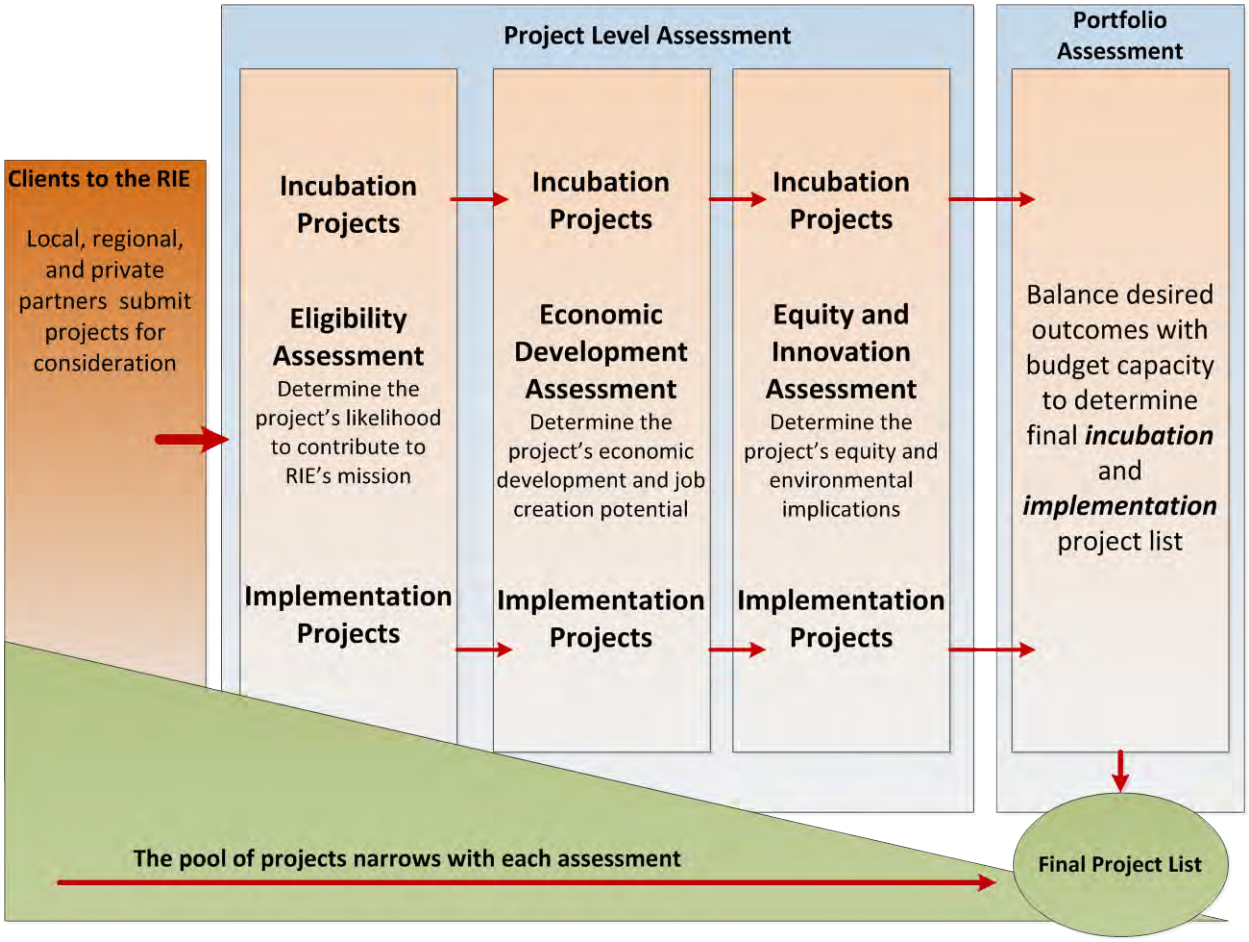
- **Patient Public Investment** are for projects that are more typical infrastructure projects needed to get a site "shovel-ready for development. Infrastructure investments could include roads, sewer, water, power, brownfield remediation, environmental mitigation or any other element of infrastructure allowing a future permitting process for a new business or development to be implemented on an accelerated schedule in the future.
- **Public-Private Partnerships** are those joint public private ventures using public funds and private investment funds to jointly complete any needed infrastructure and construct the building needed to house the development or new/expanding business. In this case, there is a specific project or business and known costs and benefits for both the public sector and the private sector.

It is anticipated that RIE assistance through one of two tracks as shown in the figure below:

- **Incubation projects** are those that have a long-term outlook. These are projects that are still at a conceptual stage and need the full project pre-development technical assistance of the RIE to carry out market feasibility studies, design and cost-estimating, identification of potential impacts and mitigation, obtain permits and public and private financial packaging. Evaluation of these projects will be based upon more conceptual information since the project has not been fully developed yet. Projects will be accepted for RIE assistance in order to fully develop them in anticipation of becoming implementation projects once fully developed. While there is an expectation that Incubation Projects will become implementation projects, the information generated through the pre-development process will be needed to support implementation.
- **Implementation projects** are those that are already fully developed, nearly ready to begin construction and are seeking the final gap financing needed to complete the project. In this case, the project is fully developed and can be evaluated based upon more complete information with greater certainty and rigor than Incubation Projects.

About the Evaluation Process

The evaluation process reflects how projects come into the RIE and the different evaluation assessments projects will be weighed against. The evaluation process includes four assessments: Eligibility, Economic Development, Equity and Innovation, and overall Portfolio.



1. **How projects come to RIE**. Consistent with the principle that **RIE will not make prioritization decisions for local communities**, it is envisioned that RIE will accept applications from both public and private applicants interested in delivering projects in partnership with RIE.

2. **Eligibility Assessment**. The first step in the project evaluation process is the Eligibility Assessment, which has two sections: minimum requirements and additional information.
    a. **Minimum requirements**. This section of the Eligibility Assessment determines whether the project meet the minimum requirements such as alignment with RIE mission, having a distinct role for RIE, etc. Because these are minimum requirements, **projects that don't meet this criterion will not move forward in the evaluation process**.
    b. **Additional Information**. This section of the Eligibility Assessment allows for qualitative responses that paint a fuller picture for the evaluators regarding the project's additional benefits before diving deeper into the analysis. Questions in this section must include listing potential positive and negative equity and environmental impacts or benefits of the project, whether the project is in the *incubation* or *implementation* phase. **There is no right or wrong answer for these questions**. The answers simply add additional context to the project proposal.

    The RIE should clearly communicate application expectations and parameters. As such, only a small proportion of projects would be eliminated from consideration at this stage.

3. **Economic Development Assessment**. The second step in the evaluation process is an economic development assessment which includes an assessment of all projects remaining after the Eligibility screening and should include assessments specific to both incubation projects and implementation projects. The main goal of this assessment is to measure the project's ability to create jobs and economic activity for the region.
    a. **General screening**. This screening measures a project's ability to create sustained living-wage jobs, support emerging industries clusters, leverage private investment, advance regional economic development strategies and achieve positive ROI.
    b. **Incubation project screening.** Because incubation projects have a longer-term outlook, the goal of this screening is to understand the status of a project's due diligence needs, including risks and mitigation strategies, and if such investment creates opportunities for job creation and economic development in the future.
    c. **Implementation project screening.** Implementation projects should be nearer to actual development than the incubation projects. As such, this assessment focuses more on the leveraging, sourcing and procurement aspects of the project.

    A weighting or ranking method to gauge how projects measure against this criterion has not been developed and will need to be created and finalized by RIE operators. Once a method is in place, the result of this assessment will be a ranked list of projects prioritized by their ability to deliver economic development. **Projects with the best ranking in this section will move onto the Equity and Innovation Impact Assessment**.

4. **Equity and Innovation Impact Assessment**. In this third step of the evaluation, projects that advance from the Economic Development Assessment are measured for their equity and innovation impacts. Applicants will need to detail such things as their project's impact on social, economic, political and geographic disparities, the use of civic and environmental innovation in the projects, and impacts on immediate surrounding communities.
    A weighting or ranking method to gauge how projects measure against this criterion has not been developed and will need to be created and finalized by RIE operators. Once a method is in

place, **the result of this assessment will be a ranked list of projects prioritized by their ability to deliver equity and environmental outcomes**.

5. **Portfolio Assessment for Final Project Selection**. The portfolio includes those projects that collectively accomplish the RIE's mission. A weighting or ranking method will need to be established, and regularly reevaluated, to determine investment priorities given the RIE's budget, capacity, and past projects. Once this method is established, the RIE operators will **use the results of the economic and equity and innovation prioritization analyses to select a final set of projects that best contribute to the CII's mission given the RIE's available capacity**. The outcome of the process is a portfolio of projects that, taken as a whole, will accomplish economic development goals while delivering equity and innovation benefits to the region.

MPAC April 24, 2013

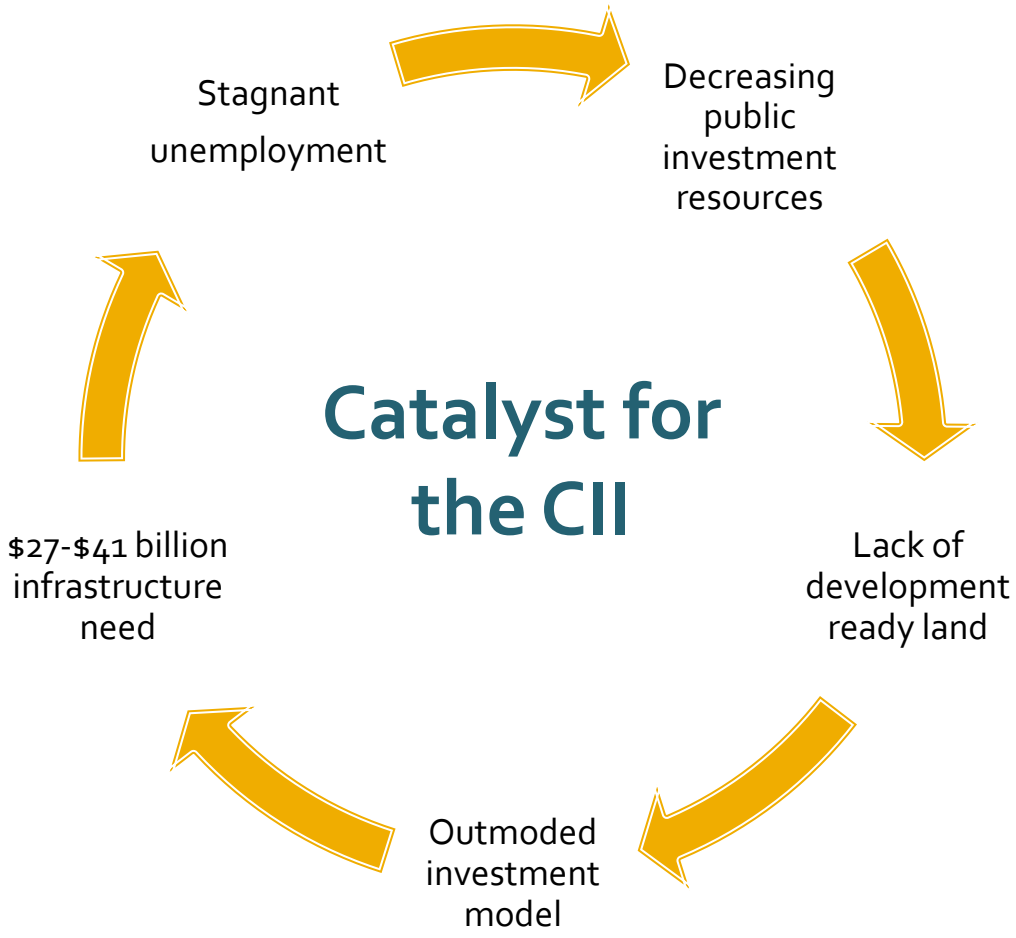
Community Investment Initiative

Tom Imeson

Why are we here?

- Provide information so you may advise Metro on how to proceed regarding the CII's Regional Infrastructure Enterprise (RIE) business plan.

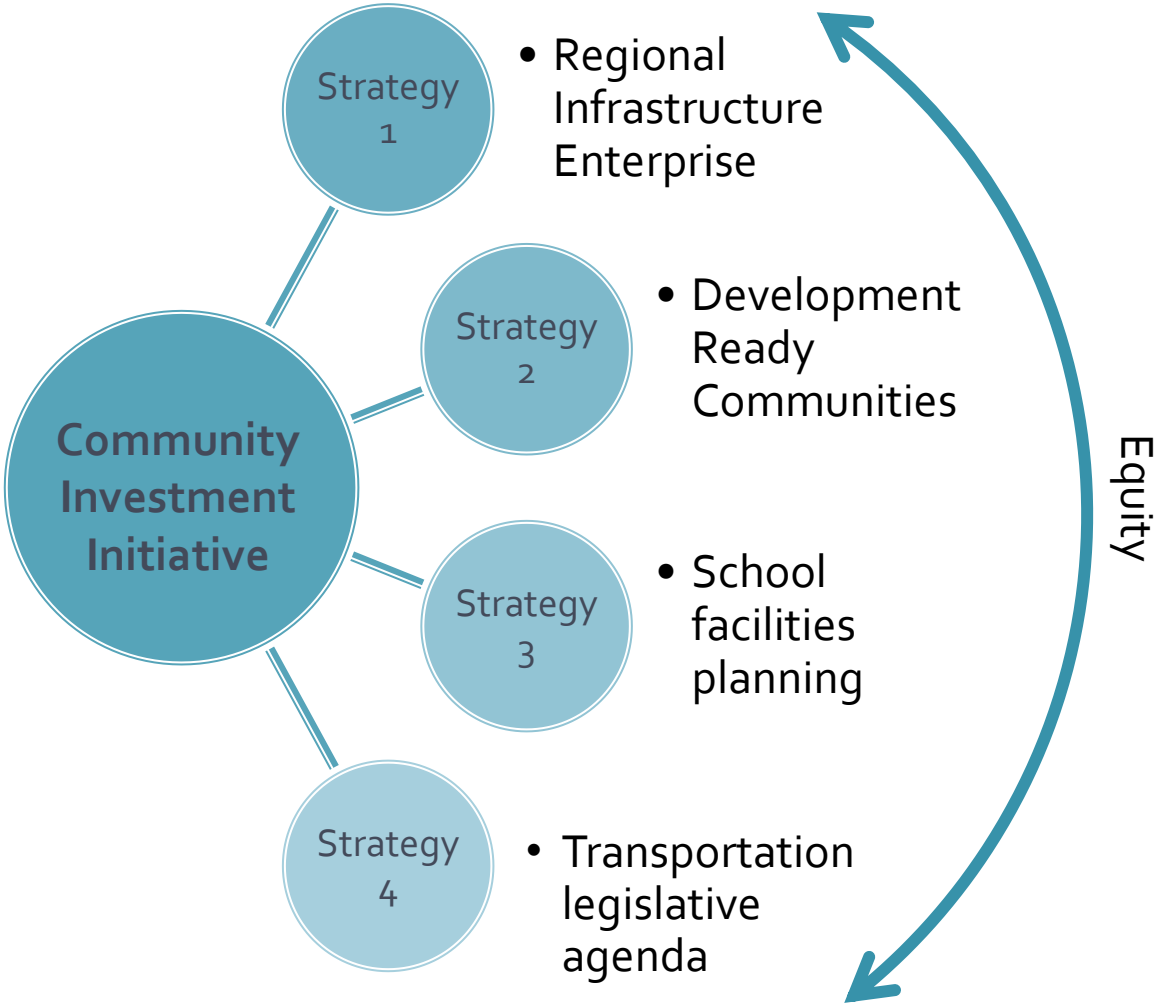
Context: The challenge



Context: Cost of doing nothing

- The quality of life in our region will suffer now and for future generations
- Decreased competitiveness in attracting new businesses and creating jobs
- Ongoing high rates of unemployment and poverty
- The plans we have for our neighborhoods, towns, and cities won't be realized

Context: CII's key strategies



What is the RIE?

RIE Mission: to facilitate infrastructure investment that catalyzes living-wage job creation, private investment, and economic development (as a targeted component of the infrastructure gap)

Focus areas: urban centers, industrial and employment lands

Key questions

- **What** does it do?
- **How** does it do it?
- **Where** does it do it?
- **Who** decides?

What: Functions needed

Pre-development technical assistance	Public-private partnerships assistance	Funding
▪ Due diligence ▪ Feasibility and market analysis ▪ Regulatory and permitting assistance	▪ Coordinate among partners ▪ Negotiate development agreements ▪ Connect private capital	▪ Direct or patient capital ▪ Grants

How: Phased development

Demonstrate ability to deliver projects

- Establish governance
- Deliver 1-3 demonstration projects on shoestring budget
- Strategically plan for and advance to Phase 2

Secure on-going funding for investments

- Secure dedicated public funding
- Implement a regional project package
- Leverage funds to access other public and private funds

Complete public-private investment program

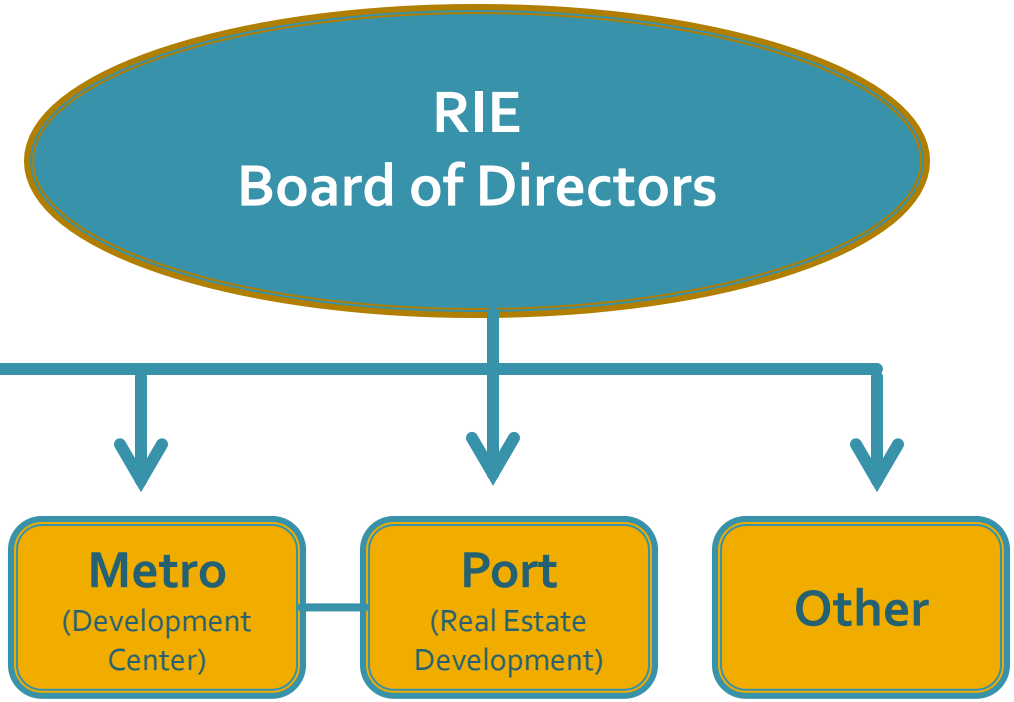
- Establish an investment arm to directly utilize private capital

DRAFT CONCEPT

How: Service delivery

Delivery of services using core competencies and existing capacities:

- Site readiness technical assistance
- Finance packaging technical assistance
- Funding assistance



DRAFT CONCEPT

Where: Phase 1 demo projects

Characteristics

- **Market ready**
- **Utilize existing resources**
- **Small scale**
- **Short-term completion**
- Align with RIE goal
- Leverage public and private funding
- Demonstrate RIE functions
- Political and local support

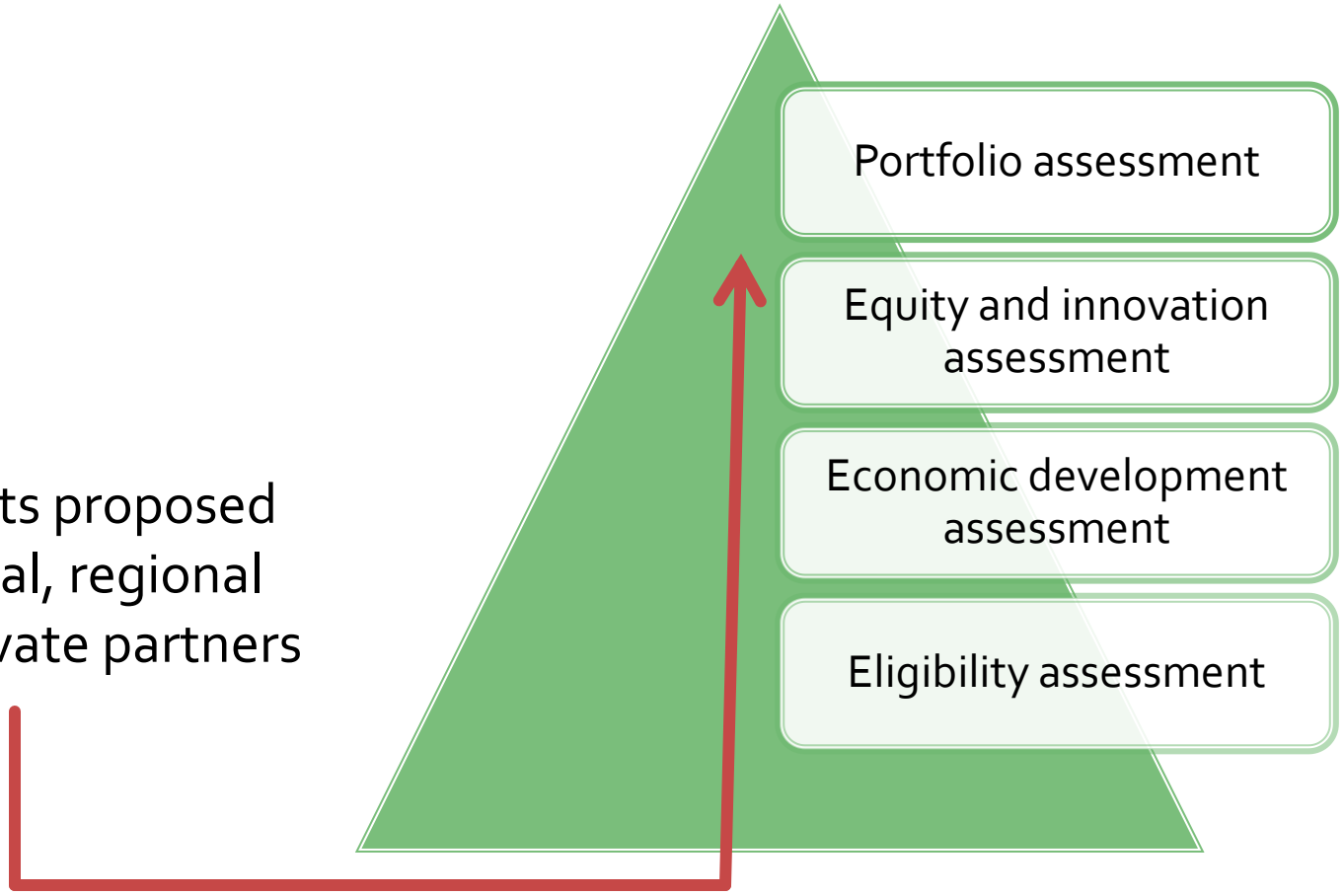
Where: Phase 2 project types

Illustrative examples only

	Public Investment	Public-Private Partnership
Incubation Project	▪ Develop plans for needed improvements to streets and wetland mitigation needed for shovel ready industrial land	▪ Negotiate and structure a development agreement for public investments that leverage private investments
Implementation Projects	▪ Implement and fund improvements to streets and mitigation of wetlands to produce shovel ready industrial land	▪ Implement development agreements that leverage private investments

Where: Phase 2 project evaluation

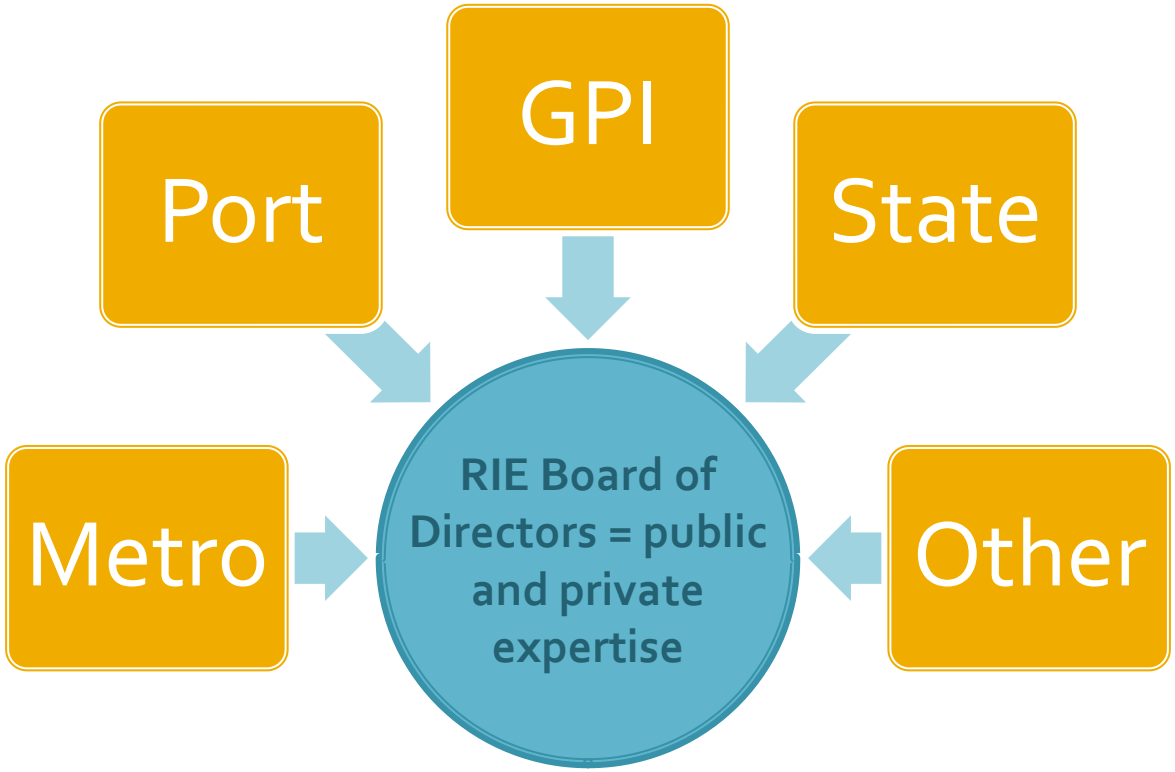
Projects proposed by local, regional and private partners



DRAFT CONCEPT

Who: RIE governance

- Public-private Board appointed by key stakeholders (graphic)
- Expertise to support investment decisions
- Strategically selects projects based on RIE funding allocation and capacity



DRAFT CONCEPT

Discussion questions

- Comments on the proposed approach for the RIE?
  - What: Functions that support project delivery not priority setting
  - How: Phased approach establishing RIE
  - Where: Focus on projects that catalyze jobs
  - Who: Governance composition and skills
- We'll be back in May 8 for a follow-up discussion on this RIE proposal

Tom Imeson – tom.imeson@portofportland.com

Thank you.

Materials following this page were distributed at the meeting.

CLIMATE SMART COMMUNITIES SCENARIOS PROJECT

www.oregonmetro.gov/climatescenarios

Phase 2 Investment Choices Evaluation

Metro Policy Advisory Committee

May 8, 2013

Kim Ellis, project manager

Climate Smart Communities Scenarios Project

- Working together with city, county, state, business and community leaders
- Researching how land use and transportation strategies can be leveraged to
  - meet state targets for reducing carbon emissions
  - create great communities
- Required by Oregon law

Where We've Been and Where We Are Headed

PHASES 1 AND 2

Understand Choices
2011-2012

Shape Choices
Jan.-Sept. 2013

PHASE 3

Shape Preferred Scenario
Oct. 2013-Mar. 2014

Select Preferred Scenario
April-Dec. 2014

WE ARE HERE

Community case studies

- First 3 of 8 in a series
- Showcase actions communities are already taking that reduce GHG emissions
- All to be completed in May

Phase 2 Evaluation Framework

SCENARIOS TO TEST

Recent trends

Adopted plans

New plans and policies

QUESTIONS TO ANSWER

Cost? What can we afford? Most cost-effective? Impact on public health, economy, business, social equity and the environment? Public support? Feasibility?

OUTCOMES TO MEASURE

VMT, physical activity, delay, GHG emissions, air pollution, land consumption, housing and transportation costs by income, infrastructure costs, etc.

Phase 2 investment choices

A

RECENT TRENDS

This scenario follows recent funding trends and will show the results of implementing adopted plans to the extent possible with existing revenue.

B

ADOPTED PLANS

This scenario counters recent funding trends and will show the results of raising additional revenues – as called for in the RTP – to allow the region to make more progress toward implementing adopted plans.

C

NEW PLANS AND POLICIES

This scenario will show the results of pursuing new policies, more investment and new revenue sources to more fully achieve adopted and emerging plans.

Recommended refinements

- Scenario C additions
  - West-side commuter rail extension to Salem
  - I-84/I-5 interchange
  - Powell-Division BRT and high capacity transit to Oregon City
  - Parking management expanded to include frequent bus corridors
  - Regional Active Transportation Plan
- Refined state policies and actions to better align with Statewide Transportation Strategy
  - Eco-driving
  - Pay-as-you-drive insurance

Phase 2 evaluation criteria

Jobs and housing

Economy

Cost

Travel

Energy and GHG emissions

Natural resources

Public health

Feasibility

Social equity

Recommended refinements

- New measures related to jobs:
  - Number of jobs
  - Access to transit
  - Access to labor market
  - Employment land proximity to transportation corridors
- New measure related to housing affordability and housing/transportation cost burden
- New measure related to the amount of growth captured in UGB
- New measure related to commute trip length to address travel patterns

Next steps

MAY 8 & 9

MPAC and JPACT will be asked to provide a recommendation to the Metro Council to move forward with the Phase 2 evaluation and report back in October

MAY 16

Metro Council discussion on recommendations

JUNE 6

Metro Council action on recommendations

Action requested

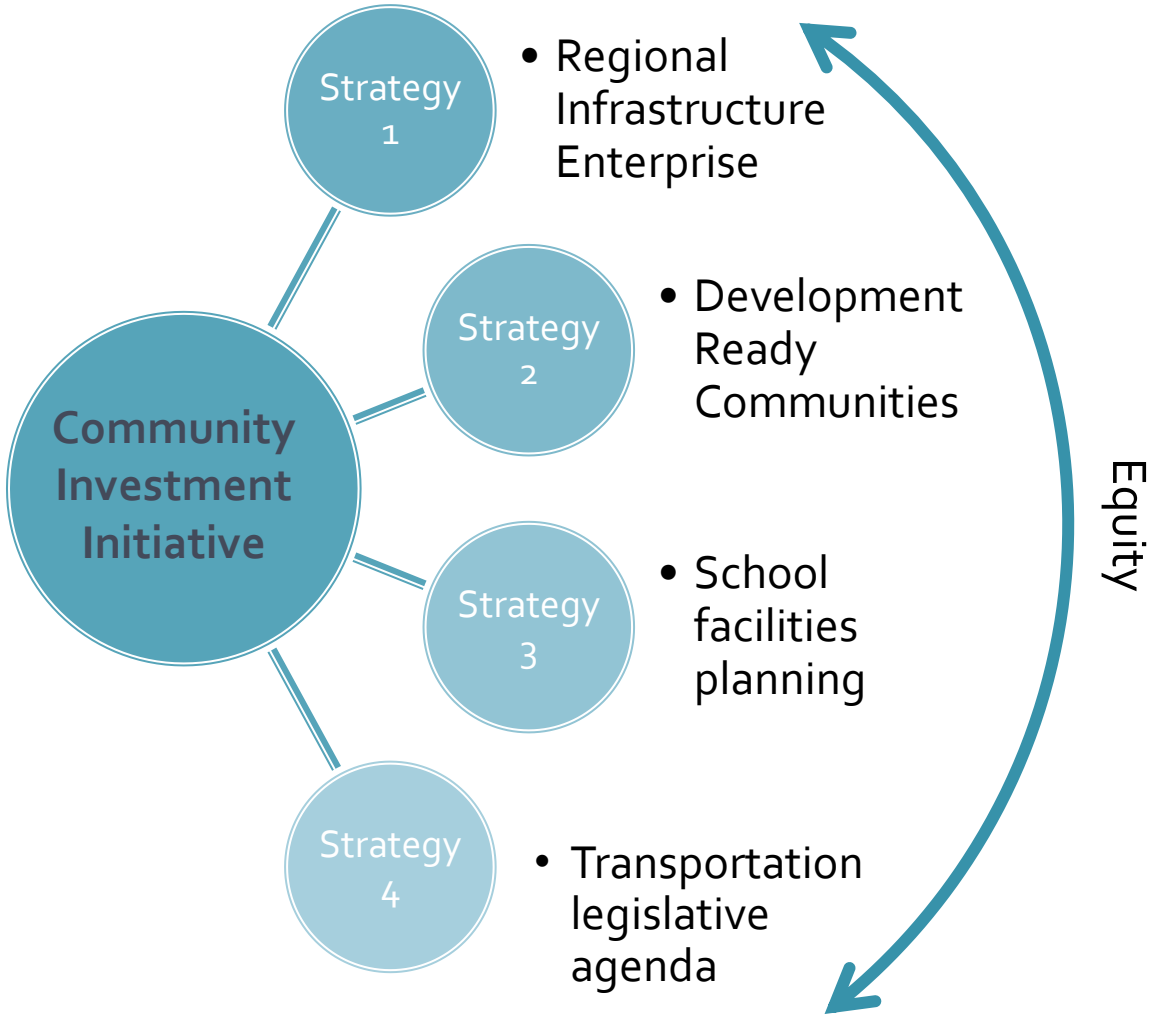
Recommendation to the Metro Council to support moving forward with the Phase 2 evaluation and report back in October

MPAC May 8, 2013

Community Investment Initiative

Tom Imeson

CII strategies



What is the RIE?

RIE Mission: to facilitate infrastructure investment that catalyzes living-wage job creation, private investment, and economic development.

Focus areas: urban centers, industrial and employment lands

Functions needed

Pre-development technical assistance	Public-private partnerships assistance	Funding
▪ Due diligence ▪ Feasibility and market analysis ▪ Regulatory and permitting assistance	▪ Coordinate among partners ▪ Negotiate development agreements ▪ Connect private capital	▪ Direct or patient capital ▪ Grants

Phased development approach

Phase 1
(walk)

Demonstrate ability to deliver projects

- Establish governance
- Deliver 1-3 demonstration projects on shoestring budget
- Strategically plan for and advance to Phase 2

Phase 2
(run)

Secure on-going funding for investments

- Secure dedicated public funding and demonstrate fiscal responsibility
- Implement a regional project package
- Leverage public funds to access other public and private funds

Phase 3
(sprint)

Complete public-private investment program

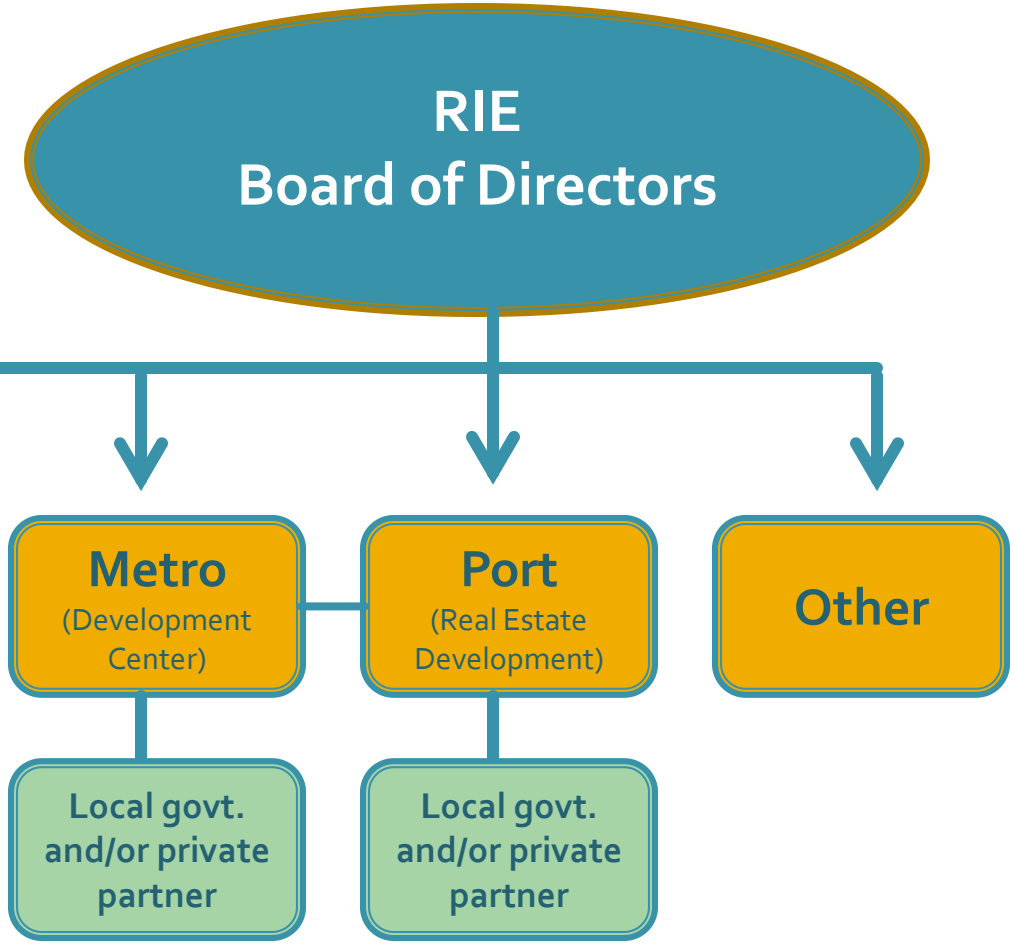
- Establish an investment arm to directly utilize private capital

DRAFT CONCEPT

Service delivery

Delivery of services using core competencies and existing capacities:

- Site readiness technical assistance
- Finance packaging technical assistance
- Funding assistance



DRAFT CONCEPT

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Thank you.