

# MAKING A GREAT PLACE



## Public Engagement Guide

Public Review DRAFT  
August 2013



This guide is for community members who want to engage with Metro, staff seeking best practices and federal agencies verifying compliance.

## About Metro

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

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

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## TABLE OF CONTENTS

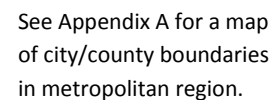
<b>Introduction .....</b>	<b>5</b>
Guiding principles – Public Engagement Guide purpose – Public Engagement Guide development – Requirements addressed by Metro through the practices in this guide – Updating the Public Engagement Guide – Evaluation of the Public Engagement Guide	
<b>Governing structure.....</b>	<b>10</b>
Metro Council – Office of the Auditor – Metro Exposition and Recreation Commission – Metro's Chief Operating Officer –Office of Citizen Involvement – Metro budget – Advisory committees and regional partners	
<b>Services .....</b>	<b>16</b>
Parks and venues – Tools for living – Planning, development and research	
<b>Public meetings and events .....</b>	<b>18</b>
Convenient times, locations and accessibility – Regularly scheduled meetings – Ongoing program meetings and events – Access to information –Visualization techniques – Metro's website: <a href="http://www.oregonmetro.gov">www.oregonmetro.gov</a> – Metro newsfeed – Connect with Metro	
<b>Public engagement in regional land use and transportation planning.....</b>	<b>23</b>
Metro’s approach to regional land use and transportation planning –Introduction to the region’s six desired outcomes – Introduction to regional land use planning – Introduction to regional transportation planning –Public engagement activities for key decisions – Procedures for local public engagement for project sponsors	
<b>Best practices for inclusive public engagement and outreach.....</b>	<b>29</b>
Purposes of the process – Level(s) of participation – Identifying participants –Building and strengthening relationships – Risk analysis – Identifying tools and techniques – Resource allocation – Demonstrating results – Public engagement evaluation criteria	

- Appendix A – Map of city/county boundaries in metropolitan region
- Appendix B – Requirements for Metro's process
- Appendix C – The National Environmental Policy Act
- Appendix D – 2040 Growth Concept Map
- Appendix E – Land use planning decision making structure (*Growth Management*)
- Appendix F – Regional transportation planning decision making structure (*Regional Transportation Plan, Regional Flexible Funding Allocation/Metropolitan Transportation Improvement Program, Air Quality and Conformity Determination, Regional Travel Options, Transportation System Management and Operation, Corridor planning, Transit Oriented Development*)
- Appendix G – Local engagement and non-discrimination checklist
- Appendix H – Project purpose articulation
- Appendix I – Title VI event form
- Appendix J – Tools and techniques matrix
- Appendix K – Acronyms used in the Public Engagement Guide

## INTRODUCTION

Few metropolitan areas can boast the combined advantages found in the Portland metropolitan region. Thriving communities, cultural amenities, economic vitality, scenic beauty and healthy natural ecosystems make this a great place. For the region's leaders and residents alike, nurturing this livability is a constant quest. Metro plays a unique and leading role in that effort.

Metro crosses city limits and county lines to make communities safe, livable and ready for tomorrow. From protecting our region's air, water and natural beauty to supporting neighborhoods, businesses and farms that thrive, Metro makes this a great place. Metro serves more than 1.7 million residents in Clackamas, Multnomah and Washington counties, and in the 25 cities in the Portland, Oregon metropolitan area. Metro, the only directly elected regional governing body in the United States, is governed by a president, elected region wide, and six councilors elected by district. Its home rule charter, approved by the voters in 1992 and amended in 2000, grants broad powers, primarily for regional land use and transportation planning, but also for other issues of metropolitan concern. The charter also ensures that the Metro Council be elected, visible and accountable.



See Appendix A for a map of city/county boundaries in metropolitan region.

Metro's charter is at the heart of the agency's strong commitment to public participation. The agency has always and will continue to provide a broad range of public information and participation opportunities, including dissemination of proposals and alternatives, process for written comments, public meetings after effective notice, settings for open discussion, online engagement, information services and consideration of and response to public comments.

Metro embodies the region's commitment to maintain and enhance the livability and sustainability of our communities and natural resources. A regional approach makes sense when it comes to protecting natural areas, caring for parks, planning for the future of our neighborhoods, managing garbage disposal and increasing recycling. Metro manages world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center which benefits the region's economy.

### **Public Engagement Guide purpose**

Metro is committed to transparency and participation by everyone throughout the region. Through the active participation of the community, the quality of plans and policies are better tuned to meet people's needs today and into the future. Metro strives to be responsive to the people of the region, provide clear and concise informational materials and address the ideas and concerns raised by the community. Public engagement activities for decision-making processes are documented and given full consideration.

This Public Engagement Guide establishes consistent guidelines to ensure people have meaningful opportunities to be involved in the regional planning process. The guide also provides examples of the tools and techniques that may be used to communicate with and receive input from the public.

This Public Engagement Guide serves as Metro's documented "*process for providing citizens, affected public agencies, representatives of public transportation employees, freight shippers, providers of freight transportation services, private providers of transportation, representatives of users of public transportation, representatives of users of pedestrian walkways and bicycle transportation facilities, representatives of the disabled, and other interested parties with reasonable opportunities to be involved in the metropolitan transportation planning process*" in accordance with the 23 CFR 450.316(a).

*In accordance with FTA C 4702.1B, "an outreach plan to engage minority and limited English proficient populations, as well as a summary of outreach efforts made since the last Title VI Program submission. A recipient's targeted public participation plan for minority populations may be part of efforts that extend more broadly to include other constituencies that are traditionally underserved, such as people with disabilities, low-income populations, and others."*

## **Guiding principles for Metro's public engagement**

Metro's public engagement practice is built on guiding principles adopted by the Metro Council in 1997 and updated in 2013. Metro believes that effective public engagement is essential to good government and the future of the region. Public officials and agency staff, businesses and community members all play important roles in governing the region. Cooperation among Metro, cities, counties, public agencies, community organizations, businesses and interested residents results in the kind of collaboration and input that can be balanced with analysis and expertise to create thoughtful, proactive policy decisions. Therefore, Metro commits to promote and sustain engagement and seeks to:

- seek input from diverse perspectives from across the region
- facilitate engagement of those potentially affected by or interested in an outcome
- define engagement opportunities clearly to promote participation
- respond to public ideas and concerns in a timely manner and demonstrate how public input influenced decisions
- consistently evaluate the effectiveness of public engagement
- build and strengthen relationships with residents, community organizations, businesses, interest groups and public agencies
- provide accessible, timely and broadly distributed communications to encourage public engagement in Metro decision-making
- provide the public with an opportunity to be engaged early in development, planning and implementation of policies, programs and projects
- coordinate public engagement to make the best use of public time and effort.

## **Public Engagement Guide development**

Metro worked with its advisory committees, stakeholder groups, interested parties and the public to develop its public engagement practices. Metro adopted its first Public Engagement Guide (formerly known as Public Involvement Policy for Transportation Planning) in 1995 and updated it in 2004 and 2009. It was update through public processes, by incorporating

new outreach strategies that proved effective in involving the public during specific studies, and to address new federal and state guidance. The 2013 Public Engagement Guide documents Metro's updated practices for public engagement, and consultation with government and community partners.

The draft Public Engagement Guide underwent a 45-day public comment period from [REDACTED].

Notice of the comment period was provided to:

community organizations, communities of color, disabled community, low-income community, elderly community, Metro advisory committees, the Metro project and program interested parties lists, community-based organizations that serve communities who have a limited ability to speak English, the Opt In online panel, tribes and federal, state and local agencies. A total of [REDACTED] comments were received from (types of sources) reflecting these key themes:

- Theme 1
- Theme 2
- Etc.

Following the 45-day public comment, Metro made the following changes to the Public Engagement Guide to address public comments:

- Change 1
- Change 2
- Etc.

The primary goal of the Public Engagement Guide is to articulate how the agency approaches public engagement, especially related to these focus areas:

- ensuring notification and participation of all populations, including people of color, low-income and any groups with special needs
- ensuring early, continuous and open public engagement in major actions and decisions to facilitate and encourage long-term interaction with Metro
- ensuring meaningful opportunities for the public to participate in the decision-making process.

#### **Desired outcomes for public engagement**

- provide access to and information about key decisions in the regional planning process
- disseminate clear, concise and timely information to affected agencies, the public and interested parties
- receive meaningful public input to inform the decision-making process
- build relationships, trust and community capacity to engage with Metro
- ensure planning decisions consider the concerns, needs and visions of the region.

## Requirements addressed by Metro through the practice in this guide

Metro’s public engagement activities address a wide variety of federal, state and regional requirements. The list below provides an overview of the basic laws, regulations and regional policies Metro operates within and public outreach provisions Metro must comply with. (See *Appendix B for links to each requirement*).

### Federal requirements

- **Moving Ahead for Progress in the 21<sup>st</sup> Century Act (MAP-21)**, public Law 112-141 as passed by Congress and signed by President Barack Obama on July 6, 2012.
- **The National Environmental Policy Act of 1969 (NEPA)**, (*see Appendix C for more information on the NEPA process*).
- **Title VI of the 1964 Civil Rights Act**, 23 USC 140, 23 CFR 200, and 49 CFR 21.
- **Executive Order 12898 – Federal Actions to Address Environmental Justice in Minority Populations and Low-income Populations**, signed Feb. 11, 1994 by President Bill Clinton.
- **Executive Order 13166 – Improving Access to Services for Persons with Limited English Proficiency**, signed Aug. 11, 2000 by President Bill Clinton.
- **Americans with Disabilities Act (ADA) of 1990**, 42 USC 126 and 49 CFR 27.19.
- **Age Discrimination Act of 1975**, 42 USC. Sections 6101-6107
- **Clean Air Act of 1960 and Clean Air Act Amendments**, 42 USC sections 7401

### Oregon state requirements

- **Administrative Rules of the Oregon Department of Land Conservation and Development Commission, Oregon Statewide Goal 1 - Citizen Involvement**, OAR 660.
- **Oregon Revised Statute Comprehensive Land Use Planning Coordination**, ORS 197.
- **Oregon Revised Statute Local Government Planning Coordination; Coordination Agreements**, ORS 195.020 to 195.040.
- **Oregon Revised Statute Opportunity for Public Comment on New Fee or Fee Increase**, ORS 294.160.
- **Oregon Revised Statute Wetland Conservation Plans**, ORS 196.662 to 196.668.
- **Oregon Transportation Plan Public Involvement Policy (2009)**.
- **Public Records Act**, ORS 192.410 to 192.505.
- **Public Meetings Law**, ORS 192.610 to 192.690.

### Metro

- **Metro Charter, Office of Citizen Involvement**.
- **Resolution No. 97-2433 Metro Citizen Involvement Principles**.
- **Ordinance No. 12-1275A Establishing the Metro Public Engagement Review Committee**.



## Updating the Public Engagement Guide

Metro's Public Engagement Guide is periodically reviewed and updated based on experience, changing circumstances and to reflect diverse regional opinions.

The Public Engagement Guide will be reviewed at least once every four years and revised to reflect changes and meet federal or other regulations and guidance. Upon review, a 45-day comment period will be held prior to adoption and will engage various organizations, and individuals.

The 45-day public comment period will include:

- public review and comment opportunity on the engagement guide, available on Metro's website, [www.oregonmetro.gov](http://www.oregonmetro.gov)
- an email campaign to interested parties including Metro advisory committees as well as program and project specific lists
- targeted outreach to community newspapers and news outlets serving culturally diverse audiences
- leveraging Metro, community organization, city and county social media accounts to increase participation (i.e. Twitter, Facebook, etc.)
- Survey to Opt In online opinion panel, which currently has over 21,000 members
- outreach to community organizations that serve underrepresented communities such as those with limited English proficiency, diverse cultural backgrounds, low-income and disabilities and senior and youth communities
- outreach to business, faith-based and civic organizations
- discussion groups with communities who have a limited ability to speak English, as needed
- targeted written requests for feedback from tribes as well as federal, state and local agencies
- leveraging Metro and partner events to share opportunity for public comment.

## Evaluation of the Public Engagement Guide

Metro will continuously evaluate the effectiveness of the Public Engagement Guide by reviewing the following sources of information:

- feedback or suggestions received about the guide specifically from the public, staff or other sources between updates
- feedback received in Metro's annual Opt In online engagement survey regarding public engagement and what it indicates about Metro's provision of a variety of meaningful opportunities to engage, adequate notice, clarity and usefulness of materials, transparency, engagement of diverse interests and responsiveness to ideas and concerns raised by interested parties
- feedback received from Metro's annual Opt In online engagement survey and annual stakeholder summit and what it indicates about Metro's success in building relationships with and participation capacity among stakeholders and community, business and civic organizations.

## GOVERNING STRUCTURE

### Metro Council

Metro is the only regional government agency in the U.S. whose governing body is directly elected by the region's voters. Metro is governed by a council president elected region-wide, and six councilors who are elected by district. The Metro Council provides leadership from a regional perspective, focusing on issues that cross local boundaries and require collaborative solutions. The council oversees the operation of Metro's programs, develops long range plans and fiscally responsible annual budgets and establishes fees and other revenue measures.



Metro Council as of Aug. 2013, from left: Sam Chase, District 5; Bob Stacey, District 6; Kathryn Harrington, District 4; Tom Hughes, Council President; Carlotta Collette, District 2; Craig Dirksen, District 3; Shirley Craddick, District 1.

### Metro Council districts

The region is divided into six districts by natural communities of interest and comparable populations.



### Metro Charter

The charter states that Metro's primary responsibility is regional land-use and transportation planning. To that end, Metro has completed a number of tasks required by charter, including passage of the following:

- Regional Urban Growth Goals and Objectives (1991)
- 2040 Growth Concept (1994)
- The Future Vision (1995)
- Regional Framework Plan (last updated 2011)
- Urban Growth Management Functional Plan (last updated June 2013)
- Regional Transportation Plan (last updated 2010)
- Regional Transportation Functional Plan.

The charter also recognizes the significant role Metro has played and will continue to play in other regional issues, including:

- operation of a solid waste disposal system
- operation of regional facilities such as the Oregon Zoo, the Oregon Convention Center and other trade and spectator buildings
- acquisition and management of a system of parks and open spaces
- planning and response coordination for natural disasters
- development and marketing of population, land use and transportation data.

In addition, the charter grants Metro authority to assume responsibility for issues of "metropolitan concern." This authority allows Metro to work with cities and counties, as needed, to develop common solutions to problems that are difficult to address at the local level because they cross city and county boundaries.

### **Office of the Auditor**

The Metro Auditor, elected region-wide, is responsible for conducting performance audits and oversight of Metro's annual financial statements. The Metro Auditor operates independently of the Metro Council and is another link between the public and Metro. It is in Metro's interest to be fully accountable to the public and achieve the public's trust and support.

### **Metro Exposition and Recreation Commission**

Made up of seven business and civic leaders committed to the region's cultural and economic vitality, the Metro Exposition and Recreation Commission works to protect the public investment in Metro's visitor venues.

Commissioners are appointed by the Metro Council President upon recommendation from local area governments. The commission includes seven members representing the City of Portland (two), Metro (two) and one each for Clackamas, Multnomah and Washington counties.

### **Metro's Chief Operating Officer**

The Metro Council appoints a chief operating officer to carry out council policies and manage Metro operations. The chief operating officer oversees a diverse workforce of more than 1,600 employees, including specialists such as park rangers, economists, teachers, scientists, designers, planners, zookeepers, stage hands and cartographers.

### **Office of Citizen Involvement**

Metro's Office of Citizen Involvement recently developed a new public engagement review process designed to ensure that Metro's public involvement is effective, reaches diverse audiences and harnesses emerging best practices. The new process includes a semi-annual meeting of professional public involvement peers, an annual stakeholder summit and the establishment of a new standing public committee, the Public Engagement Review Committee.

The process has been in development since 2010 and Metro has engaged community stakeholders, including local government public involvement staff, former MCCI members, and the International Association of Public Participation Cascade Chapter, to create a multi-track public engagement review process.

### **Public Engagement Review Committee**

PERC meets at least twice a year and serves as a key component of Metro's efforts to develop successful public engagement processes. The committee includes at least three at-large community members, at least three staff or board members from local community organizations and a public involvement staff member from Clackamas, Multnomah and Washington counties.

Criteria for membership selection includes:

- community service: demonstrated commitment to community involvement
- experience: demonstrated skills, knowledge or experience valuable to support Metro's public engagement principles
- diversity: collectively representative of the geographic and demographic diversity of the region.

Member recruitment occurs annually for one-third of the community member and community organization positions in order to ensure continuity on the committee. Local government representatives are reappointed as desired by the sponsoring county.

### **Peer group**

The peer group convenes public engagement staff and professionals from the Portland metropolitan area to pool professional knowledge in the region by sharing best practices, emerging tools and case studies.


### **Annual public engagement survey and report**

An annual Opt In online panel public survey and public engagement report supplements the PERC, peer group and Community Summit activities and provides further opportunity to evaluate Metro's public involvement efforts.

### **Annual Community Summit**

The Community Summit is a public event that brings together stakeholders representing the diverse perspectives of the region to evaluate Metro's public engagement practices from the previous year, share local community information and advise on priorities and engagement strategies for upcoming policy initiatives.



 <b>MAKING A GREAT PLACE</b> Metro		<b>Metro Public Engagement Review calendar   2013</b>		<b>DRAFT</b>
JANUARY	New member orientation	JULY	Publish annual report	
FEBRUARY		AUGUST		
MARCH		SEPTEMBER	Community Summit	
APRIL	PEER group meeting Opt In survey	OCTOBER	PERC recruitment PEER group meeting	
MAY	PERC spring meeting <ul style="list-style-type: none"> <li>• Advise on annual report</li> <li>• Review Opt In survey</li> <li>• Input on Community Summit</li> </ul>	NOVEMBER	PERC fall meeting <ul style="list-style-type: none"> <li>• Debrief Community Summit</li> </ul> Review and select new PERC members	
JUNE		DECEMBER	New PERC member appointments	

## Metro budget

Metro's budget process is a strategy-focused discussion of council goals, programs, outcomes and spending priorities within resource constraints.

The budget includes all major operating functions of Metro: Metro Exposition Recreation Commission, Oregon Zoo, Planning, Research Center, Parks and Environmental Services and Sustainability Center. Also included are elected and administrative functions of the Office of the Metro Council, Office of the Auditor, Office of Metro Attorney, Finance and Regulatory Services, Human Resources and Communications.

Metro's annual operating revenues are more diversified than those of many local governments. Almost half of the revenue comes from solid waste disposal fees, admissions to visitor facilities and sales (enterprise revenue). Property taxes are used primarily for bond payments authorized by the voters for the convention center, the zoo and for buying and maintaining natural areas. General government activities, including land use planning, are funded by a small tax base and an excise tax paid on Metro facilities, services and regional waste disposal. Grants support transportation planning and some capital building projects in parks.

## **Advisory committees and regional partners**

Metro's regional partners participate in the various committees listed in the next section. Committees made up of everyone from mayors to neighbors and business owners to bike advocates reflect the diverse perspectives of the region and advise the Metro Council, Auditor and staff. Membership on these committees is varied, based on the purpose of each committee.



### **Policy committees**

Policy committees directly advise the Metro Council on key policy decisions. Committees generally include elected officials appointed by city or counties.

#### **Joint Policy Advisory Committee on Transportation**

JPACT is a 17-member committee that provides a forum of elected officials and representatives of agencies involved in transportation needs in the region. The committee makes recommendations to the Metro Council related to transportation policy and funding. The committee meets at 7:30 a.m. on the second Thursday of the month.

#### **Metro Policy Advisory Committee**

MPAC is a 28-member charter-mandated committee of local government representatives and community members who consult on policy issues, especially those related to services provided by local governments. There are three community members and the committee meets at 5 p.m. on the second and fourth Wednesdays of the month.

### **Technical committees**

Technical committees may advise policy committees, Metro's Chief Operation Officer or staff on programs or projects topics. Committees generally include technical experts, community members and local government staff.

#### **Metro Technical Advisory Committee**

MTAC is a 37-member committee of planners, citizens and business representatives that provide detailed technical support to MPAC. There are three community members and the committee meets at 10:00 a.m., on the first and third Wednesdays of the month.

#### **Transportation Policy Alternatives Committee**

TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives. There are six community members and the committee meets at 9:30 a.m. on the last Friday of the month.

### **Metro Solid Waste Advisory Committee**

SWAC develops policy options for the Metro Council that reduce the amount and toxicity of waste generated and disposed by the region, and enhance the effectiveness and sustainability of the region's solid waste system. This 13-member committee meets as needed

### **Smith and Bybee Wetlands Management Committee**

This 10-member committee represents neighborhoods, "friends" groups and resource agencies to provide management guidance for the 2,000-acre natural area. There is includes one community member and the committee meets at 5:30 p.m. on the fourth Tuesday of the month.

### **Metro Audit Committee**

The committee assists the Metro Council in reviewing accounting policies and reporting practices as they relate to Metro's Comprehensive Annual Financial Report. It is council's agent in assuring the independence of the external auditors, the integrity of management and the adequacy of disclosures to the public. This eight-member committee has four community members and meets at least twice annually, or as necessary.

### **Public Engagement Review Committee**

PERC convenes to review and help guide Metro's public engagement activities. The committee consists of public involvement staff from Clackamas, Multnomah and Washington counties, at-large community members and representatives of community organizations. Members are committed to community involvement and collectively represent the geographic and demographic diversity of the region. The committee meets twice each year.

### **The Oregon Zoo Bond Citizens' Oversight Committee**

The Oregon Zoo Bond Citizens' Oversight Committee is group of independent citizens charged with reviewing the zoo's \$125 million bond program. The 18-member committee meets four times per year.

### **Equity Strategy Program Advisory Committee**

The Equity Strategy Advisory Committee supports the development of Metro's agency-specific equity strategy that aims to advance the region's six desired outcomes. The 14-member committee meets monthly.

### **Natural Areas Program Performance Oversight Committee**

The Metro Council included a requirement for an independent oversight committee as part of the natural areas bond measure voters approved in November 2006. This 17-member committee but meets as needed.



## SERVICES

Metro crosses city limits and county lines to work with communities to create a vibrant and sustainable region for all. From managing parks to planning for the region's future, discover what Metro does.

### Parks and venues

Thanks to voters, Metro protects 16,000 acres of regional parks, trails and natural areas across the Portland metropolitan area. Metro offers nature classes and provides volunteer opportunities to take care of these special places. More than one million visitors enjoy Metro parks each year.



Metro manages public places for the region and its visitors to enjoy, including the Oregon Zoo, the Portland Center for the Performing Arts, the Oregon Convention Center and the Portland Expo Center.

### Tools for living

Metro offers tools for living that help residents and businesses in the Portland metropolitan area get around to work and play, use fewer toxic products, reuse and recycle more stuff and prevent waste altogether. Metro provides information on how to find a recycler, garbage hauler or place to take hazardous waste and provides tips and resources to help reduce the use of toxic products in the home or reduce the use of pesticides in the yard.



Metro offers tips for how to properly dispose of old paint cans, motor oil and pesticides at area drop-off centers.

Between 1992 and 2013, Metro has collected and recycled more than 1.5 million gallons of latex paint, helping the environment and keeping reusable resources out of the landfill. Metro oversees the region's recycling and garbage services, helping prevent, reuse, recycle or compost 59 percent of the region's waste in 2011.

In 2008, Metro Council approved the 2008–18 Regional Solid Waste Management Plan – a long-range plan that provides a framework for coordinating solid waste and recycling programs in the region. The plan includes a state-required waste reduction program and reflects a long-term commitment to reduce the amount and toxicity of waste generated and disposed in the region.

### Planning, development and research

Metro invests in transportation projects and expands travel options for getting around the region by bike, transit and a comprehensive trail system.





The Metro Council is forging new strategies and innovative partnerships to build vibrant communities, promote economic growth and protect fish and wildlife habitat.

Metro's Data Resource Center offers state-of-the-art mapping and analysis that can be used for everything from locating businesses to planning new transportation projects.

Metro brings together community leaders to discuss issues and develop solutions that balance shared regional goals with local aspirations, and foster a collaborative atmosphere for creating a vibrant and sustainable region for all.

The Planning, Development and Research Centers facilitate the creation of great places in downtowns, main streets and employment areas and throughout the region by managing the regional urban growth boundary, preparing the Regional Transportation Plan, securing and allocating federal highway and transit funds for the region and conducting all regional transit and light rail planning in coordination with TriMet, the regional transit agency.

### **Metro grants**

In our region, there is no shortage of innovative and compelling ideas to help make this a great place. Metro is proud to inspire real change by awarding grants to support hundreds of improvement projects – large and small – around the region. Metro seeks grant proposals from local residents, governments, community organizations, schools, community groups and others who want to make a difference in their communities.

Metro is a pass-through grantmaker, managing the flow of all federal transportation planning funds into the region and allocating funds for priority projects. Metro also distributes millions of dollars from the region's natural areas bond measure to innovative projects that enhance nature in urban areas.

Learn more about Metro's grant programs, visit [www.oregonmetro.gov/grants](http://www.oregonmetro.gov/grants).

## PUBLIC MEETINGS AND EVENTS

Metro convenes a regional roundtable where leaders, experts and the people of the region come together to shape the future. Metro regularly holds meetings and the following section describes what the public can expect in terms of notification, agendas, meeting summaries, testimony, public comment and types of visualization used at these meetings.

### Convenient times, locations and accessibility

Metro's public meetings, including meetings of the Metro Council, committee meetings, open houses and other events, are conducted in facilities that are accessible to persons with disabilities and/or to people who rely on public transportation.

Metro provides services or accommodations upon request to persons with disabilities and people who need a sign language interpreter at public meetings. Metro also provides in-person language translation services or language assistance over the phone for people who have a limited ability to speak English. To make requests for a sign language interpreter, communication aid or language translation assistance, the public may call 503-797-1536 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) seven business days in advance of the meeting to accommodate their request.



### Regularly scheduled meetings

Metro Council meetings, work sessions and advisory committee meetings are held at Metro Regional Center, 600 NE Grand Ave., Portland, OR, 97232-2736, unless otherwise noted (see committee descriptions under Governing Structure.)

### How to access Metro Council meetings

Metro Council generally meets at 2 p.m. on Tuesdays for work sessions and at 2 p.m. on Thursdays for council meetings. Metro Council work sessions and meetings are held in the council chamber at Metro Regional Center, unless otherwise noted. The Metro Council typically takes summer and winter recess in late Aug. and Dec. Thursday council meetings are broadcast live and are repeated on Community Access Network, Portland Community Media, Metro East Community Media, Tualatin Valley Television and Willamette Falls Television at various times throughout the week. Metro will provide on-demand video streaming of council meetings on Thursdays, starting fall 2013. Videos will be accessible via Metro's website [www.oregonmetro.gov](http://www.oregonmetro.gov).

Meeting summaries for council work sessions are not formally adopted. Meeting summaries for regular council and JPACT, MPAC and TPAC are formally approved at the following meeting and posted after Metro Council or committee approval. All meeting summaries include an index of attachments provided during the meeting. Audio of regular council meetings are available, and work session digital audio can be provided upon request.

## Public notification and agendas

Agendas with supporting materials are posted on Metro’s website and mailed or sent electronically to councilors, advisory committee members and interested parties at least seven days in advance of all regularly scheduled meetings. To join an interested parties email list, visit [www.oregonmetro.gov/subscribe](http://www.oregonmetro.gov/subscribe). Changes to the agenda may be made up to the day of the meeting; however, no major action or decision items may be added within three days of the meeting.

Meeting packets contain materials pertaining to agenda items, a summary of the last meeting, when required, and a date and time of the next meeting. Information is also included on how to receive of meeting materials in alternative formats, including the TDD number and instructions on how to request a language interpreter. If the public has difficulty accessing meeting materials electronically, printed versions are available upon request.

All public meetings are posted to the Metro online calendar found at: [www.oregonmetro.gov/calendar](http://www.oregonmetro.gov/calendar)

## Testimony and public comment at meetings and public hearings

There are many opportunities to provide comments, recommendations and testimony to the Metro Council and advisory committees. Public input is carefully considered to inform policy decisions for the region. It also becomes part of the permanent record and may be used in future research.

All Metro Council ordinances are required by law to be open for a public hearing where public can offer testimony prior to any legislative action by the Metro Council. Council resolutions are open to public testimony at the discretion of the Council President. Every council meeting includes a public communications agenda item to provide an opportunity for comments on topics (three minutes allocated on agenda per comment) that are not on the agenda.

Written testimony to the Metro Council or advisory committees is always welcome. In some cases, there may be a deadline to submit written testimony on a particular subject. To verify testimony deadlines, people may email or call the Metro Council Office at [council@oregonmetro.gov](mailto:council@oregonmetro.gov) or 503-797-1540 and reference the agenda item or topic.

### Ordinance

An ordinance is a law adopted by Metro Council. Ordinances usually amend, repeal or supplement the Metro Code. Changes to the Metro Code or authoritative actions by the Metro Council that will have a significant impact for an extended period of time will typically require an ordinance. An ordinance must be introduced at one Council meeting and adopted at a subsequent meeting. Ordinances always require a public hearing.

### Resolution

A resolution is a formal expression of opinion or intention of the Metro Council. Resolutions usually become effective upon their adoption. Policy directions, position statements, committee appointments and other similar matters are usually handled by resolution. A resolution can be adopted at the same meeting where it is introduced and includes a public hearing at the discretion of the Metro Council President.

Written testimony may be submitted by mail to Metro Regional Center, 600 NE Grand Ave. in Portland, OR, 97232-2736, by email or fax 503-797-1793.

## **Ongoing program meetings and events**

Metro holds ongoing program meetings and events at a variety of times throughout the year. Dates and times are dependent on the program or project being shared with the public. Event locations vary and are dependent on the project area. Locations may include community centers, libraries or other public spaces. The public can expect to be notified at least 15 days prior to the upcoming meeting with meeting information listed on Metro's website, or a notification sent via email or by mail. Metro welcomes public interaction and comment at meetings and events. During a formal public comment opportunity, people may submit comments by mail, or email and orally or in writing at a public meeting. Depending on program and project requirements, formal public testimony may be heard by decision-makers prior to and/or at the time of final adoption.

## **Visualization techniques**

Metro uses visualization techniques such as interactive maps, photo enhancements, posters, charts, graphs, illustrations, presentations, handouts and videos, to explain concepts and ideas and information to engage the public, community members and local city and county partners in decision-making. *(For more information see Appendix J.)*

## **Access to information**

Metro is committed to transparency and customer service in its policy and practice regarding public records requests. The right of the public to inspect or receive copies of public records is long established in the tradition and law of the United States. Metro is committed to both the spirit and letter of the law.

### **How to make a request**

- Complete a public records request form (available online) and send it by email to [records@oregonmetro.gov](mailto:records@oregonmetro.gov) or mail to: Metro, Attn: Records Officer, 600 NE Grand Ave., Portland, OR 97232.
- Call Metro's Records Officer at 503-797-1740.
- Directly access frequently requested records, such as meeting minutes, ordinances, and resolution with WebDrawer, Metro's searchable database. [Visit WebDrawer at http://rim.oregonmetro.gov/help.htm](http://rim.oregonmetro.gov/help.htm)

### **Metro respects civil rights**

Title VI of the Civil Rights Act of 1964 is a federal statute declaring that no person shall be discriminated against or denied benefits on the basis of race, color, or national origin, in programs and services that receive federal financial assistance.

To ensure the civil rights of residents in the region are protected, Metro follows Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, Executive Order 12898 on Environmental Justice and related statutes and regulations in all programs and activities. Federal and state laws and Metro policies ensure that the agency's activities respect the rights of all residents and that access to transportation options and other public facilities is shared equally among all communities in the region.

Title VI and Executive Order 12898 also requires Metro to reduce language barriers that may impede access to engagement activities by people who may not be proficient in English as well as ensuring low-income communities and communities of color are engaged.

For more information on Metro's civil rights program and/or the procedures to file a complaint, visit [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights) or call 503-797-1536.

### **Accessibility**

In order to meet federal requirements for providing assistance to disabled populations and compliance with the Americans with Disabilities Act of 1990 (ADA), Metro provides reasonable accommodations and services for persons who require special assistance to participate in engagement activities. Services are available, with reasonable notices for requests, for persons with hearing or speech loss, who have a physical disability or who are visually disabled. Access to participation is fundamental to the outcomes stated in this guide.

### **Metro's website: [www.oregonmetro.gov](http://www.oregonmetro.gov)**

The Metro website:

- promotes and provides access to Metro's services, products and public information
- promotes and provides opportunities for public involvement in Metro projects
- informs and engages Metro's government partners, business and community leaders and interested citizens about regional issues and policies.

The website provides content and tools to meet the distinct needs of Metro's diverse audiences – from visitors and customers to news media to development partners.

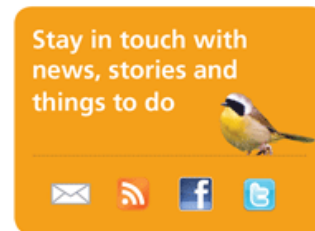
### **Metro newsfeed**

The Metro newsfeed shares updates and information about the agency's programs and goals, and sheds light on issues and discussions behind Metro programs and policymaking.

Metro produces content for the newsfeed that features informational items about opportunities for engagement and also produces bylined news stories, which step back and take a deeper look at the perspectives and motivations of Metro, its regional partners and its constituents.

## Connect with Metro

Metro Regional Center is located at 600 NE Grand Ave. in Northeast Portland's Lloyd District. Metro Regional Center is open Monday through Friday, 8 a.m. to 5 p.m. Metro Regional Center is closed on federal or state holidays and the day after Thanksgiving. To contact Metro, visit [www.oregonmetro.gov](http://www.oregonmetro.gov), call 503-797-1700/TDD 503-797-1804 or email [metro.council@oregonmetro.gov](mailto:metro.council@oregonmetro.gov).



Metro Regional Center is on TriMet bus line 6 and the Eastside streetcar and just a few blocks from the Rose Quarter Transit Center, two MAX stations and several other bus lines. Metro offers electronic vehicle charging stations. Google and TriMet offer trip planning tools that provide directions for bikers, walkers, transit riders and drivers.

Follow, share and connect with Metro on Twitter and Facebook. Shape the future of the region and join Metro's online opinion panel, Opt In, or subscribe to monthly newsletters, RSS feeds of Metro news digests, join an interested parties list or find upcoming events by visiting [www.oregonmetro.gov/connect](http://www.oregonmetro.gov/connect).

## PUBLIC ENGAGEMENT IN REGIONAL LAND USE AND TRANSPORTATION PLANNING

This section outlines Metro's approach to regional land use and transportation planning and describes common approaches to engaging the public based on past experience, new ways of communicating and new people to engage or new interests and relationships in the community.

### Metro's approach to regional land use and transportation planning

The quality of life enjoyed by the region is the result of conscious decisions and hard choices made by community leaders, business owners and elected officials. In recent decades, the people of this region have joined together to protect farms and forests, preserve the character of single-family neighborhoods, revitalize commercial districts, invest in transportation options and safeguard clean air, clean water and healthy ecosystems.

As our region continues to grow, the Metro Council is committed to charting a wise course for the future by bringing people together to protect the things we love about this.

### Introduction to the region's six desired outcomes

In 2008, regional leaders agreed on six desired outcomes for communities throughout the region. By embracing measurable outcomes, leaders shifted from talking about abstract concepts like "compact urban form" to focusing on things that really matter in residents' everyday lives. Identifying regional values ensures decisions are guided by a clear focus.

### Introduction to regional land use planning

This region is admired across the nation for its innovative approach to planning for the future. Our enviable quality of life can be attributed in no small measure to a stubborn belief in the importance of thinking ahead.

### 2040 Growth Concept

One example of regional foresight was the Metro Council's adoption of the 2040 Growth Concept, a long-range plan designed with the participation of thousands of people in the 1990s. This innovative blueprint for the future, intended to guide growth and development over 50 years, is based on a set of shared values that continue to

#### Region's six desired outcomes

##### Vibrant communities

People live, work and play in vibrant communities where their everyday needs are easily accessible.

##### Economic prosperity

Current and future residents benefit from the region's sustained economic competitiveness and prosperity.

##### Safe and reliable transportation

People have safe and reliable transportation choices that enhance their quality of life.

##### Leadership on climate change

The region is a leader in minimizing contributions to global warming.

##### Clean air and water

Current and future generations enjoy clean air, clean water and healthy ecosystems.

##### Equity

The benefits and burdens of growth and change are distributed equitably.



resonate throughout the region: thriving neighborhoods and communities, abundant economic opportunity, clean air and water, protecting streams and rivers, preserving farms and forestland, access to nature, and a sense of place. These are the reason people love to live here.

See *Appendix D* to view the 2040 Growth Concept Map.

Policies in the region's long-range plan encourage:

- safe and stable neighborhoods for families
- compact development, using both land and money more efficiently
- a healthy economy that generates jobs and business opportunities
- protection of farms, forests, rivers, streams and natural areas
- a balanced transportation system to move people and goods
- housing for people of all incomes in every community.

See *Appendix E*, to learn more about Metro's decision-making process as it pertains to growth management.

## Introduction to regional transportation planning

Metro is the metropolitan planning organization designated for the Oregon portion of the Portland/Vancouver urbanized area, covering 25 cities and three counties. It is Metro's responsibility to meet federal, state and Metro Charter transportation planning requirements for this metropolitan area (see p. 8 for list of requirements). In combination, these requirements call for development of a multi-modal transportation system plan that is integrated with the region's land use plans and meets federal and state planning requirements. To do this, Metro considers the needs of pedestrians, bicyclists, commuters, freight as well as projects and programs that improve how the existing transportation system and functions.

See *Appendix F*, to learn more about Metro's decision-making process as it pertains to transportation planning projects:

- Regional Transportation Plan
- Metropolitan Transportation Improvement Program/Regional Flexible Funding Allocation
- Air Quality and Conformity Determination
- Regional Travel Options
- Transportation System Management and Operation
- Corridor planning
- Transit Oriented Development

### Metro's role as a metropolitan planning organization

As the MPO for the Portland region, Metro is authorized by Congress and the State of Oregon to coordinate and plan investments in the transportation system for the three-county area. About 1.7 million people live in the urban portions of Clackamas, Multnomah and Washington counties, the area covered by the Metro MPO. Metro uses this authority to expand transportation options and make the most of existing infrastructure. Metro plans for the future by building agreement around priorities for investing limited public dollars.

Congress created MPOs in the early 1960s to help address the unique transportation needs of urban areas. As a MPO, Metro works collaboratively with cities, counties and transportation agencies to decide how to



invest federal highway and public transit funds within its service area. It maintains a long range transportation plan that is updated at least every four years, leads efforts to expand the public transit system and helps make strategic use of a small subset of transportation funding that Congress sends directly to MPOs.

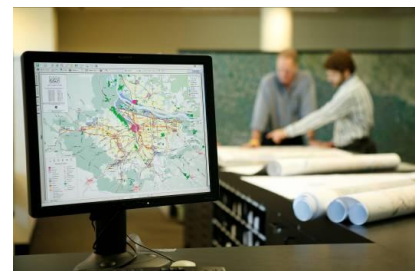
Unlike most MPOs, Metro also has land use authority across the urban area, giving it the ability to coordinate land use and transportation investments in a more efficient, effective way than many regions across the country.

### **Unified Planning Work Program**

The Unified Planning Work Program is developed annually by Metro as the MPO for the Portland metropolitan area. It is a federally-required document that serves as a guide for transportation planning activities to be conducted over the course of each fiscal year, beginning on July 1. Included in the UPWP are detailed descriptions of the transportation planning tasks, and activities, and a summary of the amount and source of state and federal funds to be used for each one. The UPWP is developed by Metro with input from local governments, TriMet, Oregon Department of Transportation, Federal Highway Administration and the Federal Transit Administration. Additionally, Metro must annually undergo a process known as self-certification to demonstrate that the region's planning process is being conducted in accordance with all the applicable federal transportation planning requirements. Self- certification is conducted in conjunction with annual adoption of the UPWP.

### **The Research Center**

The Research Center supports Metro projects and programs, external clients and the public by providing information, mapping and demographic information and analytical tools for decision-making. The center coordinates data and research activities with government partners, academic institutions and the private sector. In addition, the regional economic and travel forecasts provided by the Research Center meet federal and state requirements for consistent, accurate and reliable data and forecasting tools. The Research Center also collects census-data, which enables Metro to better understand the community.



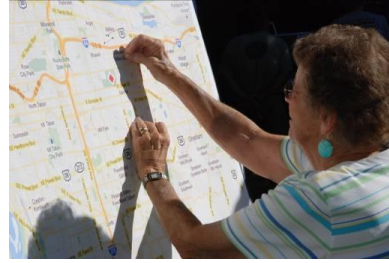
## **Public engagement activities for key decisions**

### **Early and continuous public engagement**

Metro engages the public early and continuously throughout the regional planning process when developing and updating major plans and programs, including land use plans, the Regional Transportation Plan, the Metropolitan Transportation Improvement Program, corridor plans. Metro engages early with the public to increase the opportunity for community members to shape the choices being considered and to inform the choices of decision-makers.

### **Early contact with stakeholders and the community**

Stakeholders are identified at the beginning and notified of key decision points or opportunities to provide input. Stakeholders provide community expertise that influences the engagement process and planning work. Stakeholders also help Metro reach more and broader networks.



### **Timely notice and access to information**

Timely information about regional land use and transportation issues and processes are provided to the public, including communities who don't speak English well, affected public agencies, and representatives of transportation agency employees, private providers of transportation, other interested parties and segments of the community affected by transportation plans, programs and projects.

### **Public access to information used in the development of the plans and projects**

The public is provided access to technical information, and public information is made available in accessible formats. Efforts are made to engage communities of color, non-English-speaking and elderly communities, persons with disabilities, and low-income households.

### **Adequate public notice of public engagement activities**

Notice of public engagement opportunities is provided at least 15 days prior to the opening of the public comment period and in advance of key decisions. This includes the notice of the public comment period for the Regional Transportation Plan, Regional Flexible Funds Allocation/Metropolitan Transportation Improvement Program and Draft Environmental Impact Statement. Metro staff takes steps to notify populations such as those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth of comment opportunities. Notices describe how to request a translator or interpreters for those who need it.

### **Time for public review and comment at key decision points**

Public comment will be sought prior to adoption of a final RTP, the allocation of funding to projects in the MTIP process and public engagement policies and on major changes or amendments to these plans and policies.

**Public engagement policies:** The public comment period on new or revised public engagement policies shall be at least 45 days.

**RTP and MTIP:** The public comment period on a draft RTP or MTIP and major amendments to the RTP or MTIP shall be at least 30 days for transportation plans and 45 days for those that involve land-use actions that trigger requirements for local plan updates. If the final plan or project differs significantly from the review draft, a second public comment opportunity must be offered.

**RTP and MTIP Air-quality conformity:** The draft conformity determination of the RTP and MTIP and supporting documentation shall be made available for a 30-day public comment period. Written notice shall be made of the availability of this material, and the material shall be provided to anyone who requests it. Comments made during the comment period shall be made part of the final decision record.

**DEIS:** The lead agency must involve participating agencies and the public in developing the DEIS purpose and need statement. Timing of the engagement is flexible,--i.e., it may take place early in the process before the statement is adopted or during the environmental review. The completed DEIS must offer a public comment opportunity. Unless the lead agency and all participating agencies agree to a longer comment period, the length of the comment period will be at least 45 days and may not exceed 60 days beginning on the day the document is published in the *Federal Register*.

**A process for demonstrating explicit consideration and response to public input**

Formal public comment is sought prior to adoption of a final RTP, the allocation of funding to a project in the RFFA/MTIP process, publication of environmental impact statements and public involvement policies on major changes or amendments to these plans or policies. Metro compiles and responds to or summarizes, as appropriate, substantive comments submitted on the draft, RTP, RFFA/MTIP and environmental impact statements. Public input provides Metro with community insight that can be balanced with expert opinions and technical analysis to reach an informed decision.

**A process for seeking out and considering the needs of those traditionally underserved by existing transportation systems, and those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth.**

See Appendix J for tools and techniques engaging those traditionally underserved.

The needs of populations traditionally underserved in the transportation systems, and those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth are explicitly considered in the process. Metro will identify key communities by conducting demographic and stakeholder analysis. (For further information on identifying stakeholders, see p. 30.) Metro seeks input from these groups when developing major land use and transportation plans and programs, including proactive recruitment for the PERC and for technical or policy advisory committees that are integral to the planning process. As needed to reduce barriers to participation, Metro provides services for people with hearing impairments or limited English proficiency including alternative formats or communication aids at public meetings.

**Periodic review of the effectiveness of the public engagement process**

The specific public engagement program associated with each major plan, program or project is evaluated for effectiveness and includes an evaluation of the outreach to underrepresented populations defined by Title VI and Executive Order 12898 on

Environmental Justice. Metro's public engagement procedures are reviewed by the Federal Highway Administration and Federal Transit Administration during certification reviews. Metro shall collect demographic information for major comment opportunities and public events and analyze the results at least annually.

See *Appendix G* for local engagement and non-discrimination checklist.

### **Procedures for local public engagement for project sponsors**

Before a transportation project initiated by a local government can be included in a Metro plan or program, the sponsoring agency must demonstrate that the transportation plan or program development process incorporated adequate, non-discriminating public engagement by completing the public engagement checklist. This policy seeks to ensure the integrity of local decisions regarding projects submitted for regional funding or other action for inclusion.

Discussion and review of projects, for possible inclusion in Metro's plans and programs, focuses on regional issues only. Metro expects that project sponsors will resolve local issues during local planning and programming, prior to the time projects are forwarded to Metro for inclusion in the Regional Transportation Plan or RFFA/MTIP.

## BEST PRACTICES FOR INCLUSIVE PUBLIC ENGAGEMENT AND OUTREACH

Effective public engagement takes careful planning. Metro works to build meaningful relationships with a variety of audiences throughout the region, and uses a variety of tools and techniques to gather input from the public.

This section of the guide should be used by Metro staff when a program or project is initiated to make sure the appropriate engagement tools and techniques are identified and used. This section provides the public with insight into considerations that are part of Metro's planning for public engagement.

Following the approval of a scope and budget for public engagement, a program- or project-specific public engagement plan will be created. Based on the desired project outcome and identified key audiences, the specific engagement plan will identify appropriate tools and techniques to achieve the desired outcome, describe how follow-up with audiences and participants will occur and identify success measures for each outreach tool.

### Purpose of the process

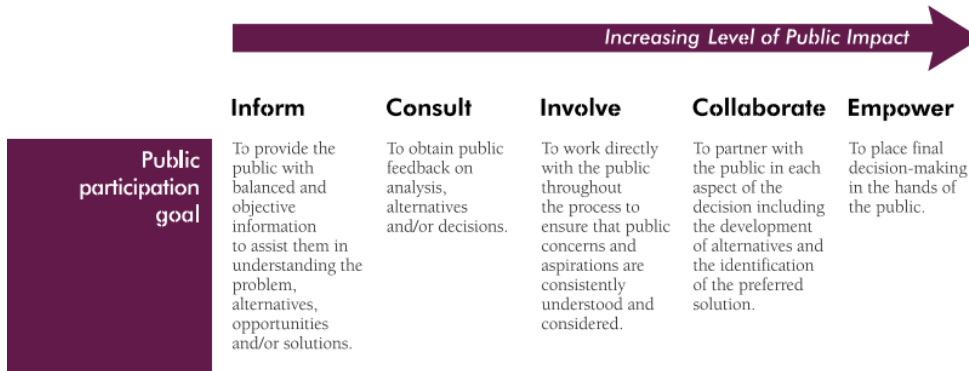
The first step of developing a public engagement plan is to identify the purpose of the program or project and the anticipated level of public engagement. A well-defined objective for each phase of the program or project is important to identify the appropriate engagement tools and activities. If project objectives are not clearly identified, it will be difficult for the public to understand the goals and expected outcomes. Project purpose statements include:

See *Appendix H* for a template and complete project purpose articulation example.

- *The purpose of this project is...*
- *This project will result in...*
- *The purpose of public engagement for this project is to...*
- *Members of the public who should be engaged are...*
- *The public engagement will be successful if...*
- *The project will be successful if...*

## Level(s) of participation

# IAP2 Spectrum of Public Participation



Source: © International Association for Public Participation [www.iap2.org](http://www.iap2.org)

These levels of participation were developed by the International Association for Public Participation. On the far end of the participation spectrum (collaborate, empower) stakeholders will have a more direct role in decision-making. These levels are typically used when there are a limited number of affected stakeholders. The near end of the participation spectrum (inform, consult) reflects the participation levels most often seen in public processes. Participation opportunities in a given project may incorporate multiple levels to achieve a community-supported outcome.

## Identifying participants

Before a program or project-specific engagement plan is developed, a stakeholder analysis is conducted to identify the viewpoints and interests of those impacted by the project. This includes identifying a broad range of participants including business leaders, community organizations, neighborhood associations, civic organizations or underrepresented populations such as those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth.

To identify business leaders, community organizations, neighborhood associations and civic organizations, review the project area to determine:

- major employers, local business associations and local chambers of commerce
- community service providers such as schools, health providers, public safety departments and non-profit community organizations
- neighborhood boundaries and resident participation organizations for affected neighborhoods
- other civic organizations active with potentially affected populations.

To identify populations with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth:

- compile and map data from the U.S. Census Bureau, school districts and other available sources
- field check and determine gaps in data by reviewing results with local cities and counties, community organizations, neighborhood associations and civic organizations.

To identify the potential translation needs of a particular project area, apply the Department of Justice four-factor analysis to ensure communities that have a limited ability to speak English are able to engage:

See Appendix I, Metro's event form to track Title VI and language proficiency needs.

- number or proportion of limited English proficiency (LEP) persons eligible to be served or likely to be encountered by a program, project or service
- frequency with which LEP individuals come in contact with the program, project or service
- nature and importance of any proposed changes to people's lives
- program, project or service resources available for language assistance and costs of language assistance.

## **Building and strengthening relationships**

Once the full range of interests that need to be engaged have been identified, as well as specific groups and individuals that are representative of those interests, it is important to get to know the communities and interests.

An effective engagement process includes learning about and developing relationships with the stakeholders that will be engaged. Meeting with stakeholders at the beginning of a project helps the project team get to know the community and design an engagement plan that responds to their needs and concerns. This includes reaching out to community and business organizations, faith-based organizations and community leaders, keeping them informed throughout the project and measuring effectiveness at the end of the process.

There is no substitute for face-to-face conversations when establishing relationships. Budget time during project initiation to make these connections. Community members will help you understand the lay of the land, who else you should be engaging and if there are recent good or bad examples of public engagement in the community to learn from. Community members are important to understanding how to best share relevant information and identifying the most effective methods or tools to deliver that information.



## Risk analysis

As the project begins, it is also important to create a list of risks identified to date and those that might occur in the future as well as an assessment of the probability of risks occurring, the potential impact of those risks, a response strategy and mitigation costs if applicable. (See chart below for further explanation.)

For any risks that are determined to have a medium or high probability and a medium or high impact on the project, a risk response strategy should be developed and assigned to a risk owner. The project manager will continually monitor all risks and evaluate new risks to ensure that they are managed successfully. The risk owner will track that particular issue in detail.

### Project risk analysis

Key to high, medium and low (H/M/L) ranking:	
<b>Probability</b>	<b>Impact</b>
<b>High:</b> This happened recently. This always happens to some extent with these projects.	<b>High:</b> If this happens the budget and/or schedule and/or scope will have to be adjusted. This risk will cost money to mitigate.
<b>Medium:</b> This happened once before and may happen again.	<b>Medium:</b> If this happens, adjust the schedule. Recovery should be quick and cost should be minimal.
<b>Low:</b> This could possibly happen and should be on the watch list.	<b>Low:</b> This will not cause an adjustment to the budget, schedule or scope, but would require to extra effort to mitigate.

## Identifying techniques and tools

There are many methods to engage people of all kinds in Metro's work – everything from written information to booths at farmer's markets and online surveys to listening posts. Most tools can be adapted to the needs of specific populations and some can provide feedback about whether a population is being adequately engaged. Choose tools that correspond with your goals (inform, consult, involve, collaborate, empower) and that are best suited to the audiences you are seeking to engage. Do not choose tools that offer more input than will be considered. (Appendix J lists tools and techniques that Metro uses to engage the public in existing and new programs and projects.)





Incorporating feedback mechanisms into tools wherever possible is important for determining their effectiveness and the extent to which they are reaching the desired populations. For example, although online surveys may not adequately reach populations with limited computer access, gathering demographic information from those who do respond can help reveal who is missing. Such feedback helps focus one-on-one contact or small group outreach in the most effective way possible.

#### Examples of tools and techniques Metro uses to engage the public:

- interactive web pages with surveys
- diagrams and graphic illustrations
- open houses
- good neighbor letters
- e-newsletters
- social media

For a detailed list of tools and techniques see *Appendix J*.

## Resource allocation

Once the tools that could be applied to your process are identified, the list can be narrowed based on additional constraints:

- Does the schedule allow sufficient time to use these tools or techniques effectively?
- Are there sufficient resources (personnel, time and funding) to make proper use of all these tools?

## Demonstrating results

Participants want to know what happens to their input. They wonder: does it make a difference for them to be involved? What happened in the project or process as a result of public engagement?

Community members who have participated in conversations surrounding issues that remain unsolved may become discouraged and might be less likely to want to participate in the future. To prevent this, set clear expectations about how input will affect decision-making and, wherever possible, demonstrate how input was used. It is also important to consider whether participants were satisfied with the different opportunities to provide feedback or input. Consider adding a question at the end of an online survey or event comment form that asks how to improve the process.

## Public engagement evaluation criteria

In order to identify issues, measure success and adjust plans accordingly, it is important to monitor and evaluate a project throughout the entire process. Key findings identified in the evaluation process should be shared with the public and decision-makers to better inform the project and improve future engagement. Consider the criteria listed in the chart below as a guide to measure effectiveness.

Evaluation criteria	Evaluation
<b>Gather input by providing meaningful opportunities to participate</b>	<ul style="list-style-type: none"> <li>✓ Were efforts made to engage those most affected by the program, project or service?</li> <li>✓ Were community organizations engaged and offered materials to share with their networks?</li> <li>✓ If a decision-making process, were people invited to share input in advance of each decision-making milestone? And, was that input shared directly with decision-makers at meetings?</li> <li>✓ How many people visited the project website?</li> <li>✓ Were website referrals received from partners, stakeholders or community organizations?</li> <li>✓ How many people subscribed to the newsletter?</li> <li>✓ How many people unsubscribed to the newsletter?</li> <li>✓ Did your interested parties' database grow after the public engagement period?</li> <li>✓ How many people clicked through the email to the website or survey?</li> <li>✓ How many people opened the email or survey?</li> <li>✓ How many @replies, mentions or comments on social media were received?</li> <li>✓ How many people attended a public meeting or open house?</li> <li>✓ Were online opportunities to participate also available in other formats?</li> <li>✓ Were in-person opportunities to participate held at accessible locations? At various times? And supplemented by online opportunities?</li> <li>✓ How many comments were received?</li> <li>✓ What types of comments were made?</li> <li>✓ What was the demographic make-up of participants?</li> <li>✓ Did public involvement activities help build the capacity of people to participate in future public processes?</li> <li>✓ Would people provide input in the future?</li> </ul>
<b>Involve underrepresented communities such as those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth.</b>	<ul style="list-style-type: none"> <li>✓ Was a demographic analysis of the program, project or service area completed in order to identify race, language proficiency, income levels?</li> <li>✓ Was a four-factor LEP analysis completed to assist in determining an approach to language assistance?</li> <li>✓ Was material translated and/ or provided to communities that have a limited ability to speak English?</li> <li>✓ Were translation services made available upon request?</li> <li>✓ Was project information made available at accessible locations such as health care clinics, local and ethnic markets, community centers and schools?</li> <li>✓ How many comments were received in languages other than English?</li> <li>✓ Did meeting materials include Metro's non-discrimination and language assistance and notice?</li> <li>✓ Did meeting materials include Metro's ADA notice?</li> <li>✓ Was material provided in alternative formats upon request? (<i>i.e. Braille, communication aid or sign-language interpreter</i>)</li> <li>✓ Was the meeting location accessible and barrier free?</li> </ul>

Evaluation criteria	Evaluation
(Involve underrepresented communities continued)	<ul style="list-style-type: none"> <li>✓ Were community organizations that serve low-income communities, communities of color, people with limited English proficiency, youth or persons with disabilities engaged?</li> </ul>
Communicate complete, accurate, understandable and timely information	<ul style="list-style-type: none"> <li>✓ Was the information to be shared tested for clarity by people not involved in the program, project or service?</li> <li>✓ Was the information reviewed for accuracy?</li> <li>✓ Was the information deemed a vital document and therefore translated into other languages?</li> <li>✓ Were people made aware of the availability of information through email, web or partner networks?</li> <li>✓ Were meetings, workshops, surveys and other opportunities to participate clearly advertised on the project website and emailed to the interested persons list?</li> <li>✓ Were project-sponsored meetings advertised on the project website at least two weeks in advance?</li> <li>✓ Were people given advance notice of project briefings at community meetings such as neighborhood associations?</li> <li>✓ Was the formal public comment period advertised per federal requirements?</li> <li>✓ Did people feel their involvement was considered/acted upon?</li> <li>✓ Was information clearly advertised on Twitter, Facebook and other social media sites?</li> <li>✓ What type of news or media coverage did the project receive?</li> <li>✓ Was information available at least one week in advance of any decisions based on that information?</li> </ul>

## **APPENDIX A –MAP OF CITIES AND COUNTIES IN METROPOLITAN REGION**





## APPENDIX B - REQUIREMENTS FOR METRO'S PROCESS

### Federal Requirements

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**Moving Ahead for Progress in the 21<sup>st</sup> Century Act (MAP-21)**

<http://www.fmcsa.dot.gov/about/what-we-do/MAP-21/Map21.aspx>

**The National Environmental Policy Act of 1969 (NEPA)**

<http://www.epa.gov/compliance/nepa/>

**Title VI of the 1964 Civil Rights Act**, 23 USC 140, 23 CFR 200, and 49 CFR 21.

<http://www.justice.gov/crt/about/cor/coord/titlevi.php>

**Executive Order 12898 - Federal Actions to Address Environmental Justice in Minority Populations and Low-income Populations**, signed February 11, 1994 by President Bill Clinton.

<http://www2.epa.gov/laws-regulations/summary-executive-order-12898-federal-actions-address-environmental-justice>

**Executive Order 13166 - Improving Access to Services for Persons with Limited English Proficiency**, signed August 11, 2000 by President Bill Clinton.

<http://www.lep.gov/13166/eo13166.html>

**Americans with Disabilities Act (ADA) of 1990**, 42 USC 126 and 49 CFR 27.19.

[http://www.ada.gov/2010\\_regs.htm](http://www.ada.gov/2010_regs.htm)

**Age Discrimination Act of 1975**, 42 USC sections 6101-6107

[http://www.dol.gov/oasam/regs/statutes/age\\_act.htm](http://www.dol.gov/oasam/regs/statutes/age_act.htm)

**Clean Air Act of 1960**, 42 USC sections 7401

<http://www.epa.gov/air/caa/>

### Oregon state requirements

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**Administrative Rules of the Oregon Department of Land Conservation and Development Commission, Oregon Statewide Goal 1 - Citizen Involvement**, OAR 660.

[www.oregon.gov/LCD/pages/goals.aspx](http://www.oregon.gov/LCD/pages/goals.aspx)

**Oregon Revised Statute Comprehensive Land Use Planning Coordination**, ORS 197

<http://www.oregonlaws.org/ors/chapter/197>

**Oregon Revised Statute Local Government Planning Coordination; Coordination Agreements** ORS 195.020 to 195.040

<http://www.oregonlaws.org/ors/chapter/195>

**Oregon Revised Statute Opportunity for Public Comment on New Fee or Fee Increase** ORS 294.160

<http://www.oregonlaws.org/ors/chapter/294>

**Oregon Revised Statute Wetland Conservation Plans** ORS 196.662 to 196.668

<http://www.oregonlaws.org/ors/196.668>

**Oregon Transportation Plan Public Involvement Policy (2009)**

[http://www.oregon.gov/ODOT/COMM/docs/otcpolicy11\\_pip.pdf](http://www.oregon.gov/ODOT/COMM/docs/otcpolicy11_pip.pdf)

**Public Records Act**, ORS 192.410 to 192.505

<http://www.oregonlaws.org/ors/chapter/192>

**Public Meetings Law** ORS 192.610 to 192.690

<http://www.oregonlaws.org/ors/chapter/192>

**Metro**

.....

**Metro Charter Office of Citizen Involvement**

<http://www.oregonmetro.gov/index.cfm/go/by.web/id=629>

**[Resolution No. 97-2433](#) Metro Citizen Involvement Principles**

**[Ordinance No. 12-1275A](#) Establishing the Metro Public Engagement Review Committee**

## APPENDIX C – THE NATIONAL ENVIRONMENTAL POLICY ACT



## HELP SHAPE THE FUTURE OF THE REGION

# The National Environmental Policy Act

Understanding the environmental impact assessment process helps your voice be heard.

Jurisdictions plan for transportation projects and must adhere to NEPA when using federal dollars.

When a major transit project is being considered within the Portland metropolitan area, Metro is the lead agency during planning, and TriMet takes the lead on engineering and construction.

Learn about the many layers of NEPA and about the opportunities to be involved in projects that affect you and the future of the region.

## NEPA

The National Environmental Policy Act was signed into law on Jan. 1, 1970. NEPA established a process to assess the environmental effects of proposed government-funded projects. If federal funds are likely to be used, this assessment must be undertaken before decisions are made in order to ensure citizen involvement and to make better informed decisions.

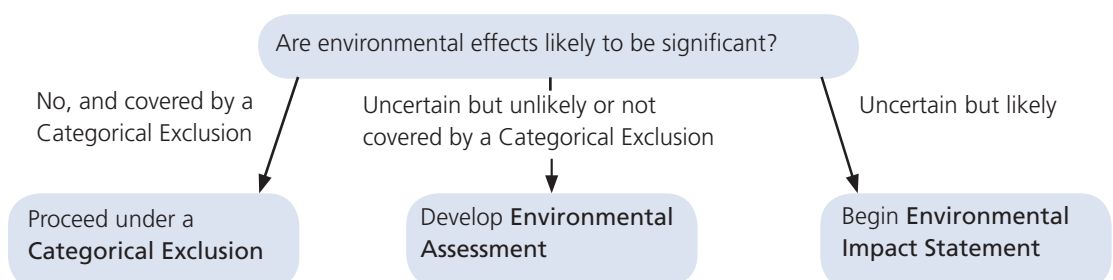
The environmental impact assessment process required by NEPA also serves as a framework to ensure compliance with environmental requirements such as the Endangered Species Act, the National Historic Preservation Act, the Environmental Justice Executive Order, and other federal, tribal, state and local laws and regulations. For this reason, the assessment process covers not only effects to the natural environment but also the effects to all aspects of the human environment, including aesthetic, historic, cultural, economic, social and health effects, whether adverse or beneficial.

NEPA does not require the selection of the environmentally preferable alternative, nor does it prohibit adverse environmental effects, but it does require decision-makers and the public to be informed of the environmental consequences of a proposed project. Possible steps to mitigate any environmental effects are also identified and defined during the assessment process.

## The NEPA process

Once a government agency identifies a need for action and develops a proposal for a solution, it must determine if the action would create significant environmental effects. If the agency determines that the actions would not have a significant effect on the quality of the human environment, then it may proceed with the action under an existing Categorical Exclusion. If the agency is uncertain but finds it unlikely that the action would have significant effect on environmental quality, or if the action is not covered by a Categorical Exclusion, it can complete an Environmental Assessment. If the agency is aware that the action may cause significant environmental effects, the agency would proceed to prepare for an Environmental Impact Statement.

### Determining the right NEPA process



## Categorical Exclusion

A Categorical Exclusion is based on an agency's previous experience with the environmental effects of a type of action; examples include making minor renovations to facilities and reconstructing trails on public lands. Previous Environmental Assessments (see below) may have shown no significant negative impact to the environment, so the agency may amend their regulations to include the action as a Categorical Exclusion to streamline the process of repeating the action.

Federal rules specify what can be a Categorical Exclusion and what must follow another NEPA process. Additionally, the agency must ensure there are no extraordinary circumstances that may cause the action to have significant environmental effects in order to proceed with a proposed action under a Categorical Exclusion.

**Public input.** For an agency to create a Categorical Exclusion, a draft of the procedure or procedures is published in the Federal Register (accessible at [www.gpoaccess.gov/fr](http://www.gpoaccess.gov/fr)), and a public comment period is required.

## Environmental Assessment

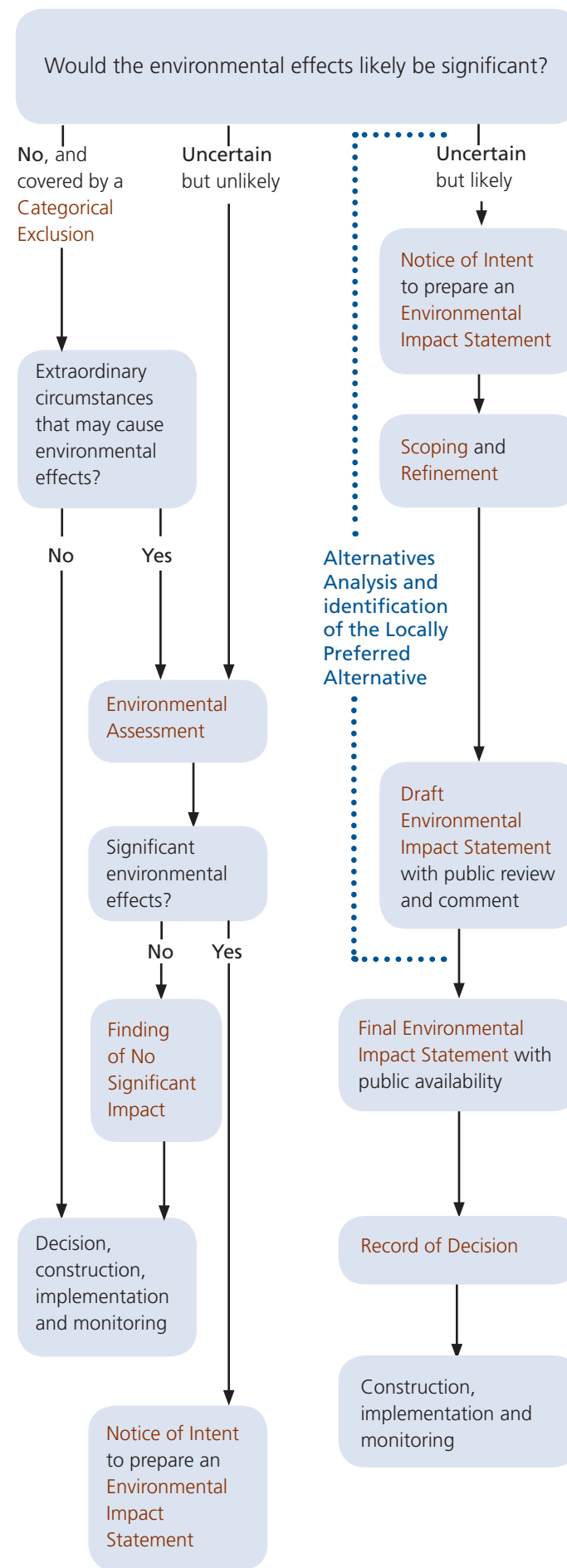
The agency develops an Environmental Assessment under any of the following conditions:

- the agency does not have a Categorical Exclusion that covers the proposed action
- there would be extraordinary circumstances that may cause the action to have environmental effects beyond would be covered by the Categorical Exclusion
- the agency is uncertain of the environmental effects of the proposed action.

The Environmental Assessment determines the significance of the environmental effects of the proposed action and examines alternative means to meet the need for action. The assessment provides evidence and analysis to determine whether or not to prepare an Environmental Impact Statement is needed.

**Finding of No Significant Impact** The Environmental Assessment concludes with either a Finding of No Significant Impact or a determination to prepare an EIS. A Finding of No Significant Impact gives the reasons why it was determined that there would be no significant environmental impacts in the implementation of the action. Examples include an urban streetcar project that travels in existing roadways or a short light rail extension through vacant land that is not environmentally sensitive.

**Public input.** In preparing the Environmental Assessment, the agency is required to involve regulatory agencies and the public to the extent practicable. An agency may choose to mirror the Scoping and/or Environmental Impact Statement public input processes (see next page), notify identified interested parties on the status of the assessment, or make available the assessment and a draft Finding of No Significant Impact to interested members of the public. If the type of proposed action hasn't been done before by a particular agency or if the action is something that would typically require an Environmental Impact Statement, the agency is required to make the draft Finding of No Significant Impact available for public review and comment for 30 days.



## Environmental Impact Statement

If the proposed action will, or even may, significantly affect the human or natural environment, the agency must prepare an Environmental Impact Statement. The EIS process is more detailed than a Categorical Exclusion or Environmental Assessment, with specific stages that have their own requirements.

**Notice of Intent** The EIS process begins with the publication of a Notice of Intent to prepare an EIS for the proposed action. The notice is published in the Federal Register and gives a brief description of the action as well as possible alternatives. It also describes the scoping process and how the public can participate.

**Stage 1: Scoping** Scoping defines the purpose of and need for the project and the alternatives being considered for additional study. During Scoping, the agency determines the range and extent of issues to be addressed in the analyses, identifying issues, project contacts, interested parties and recommendations for the potential solution. Scoping also works to identify issues that will not be significant, or those that have been adequately covered in prior environmental review, and eliminates them from detailed review in the EIS.

**Public input** As part of the 30-day Scoping process, the agency identifies interested persons and invites them to participate in the EIS process. Public participation helps identify a fuller range of issues and reasonable alternatives that the agency can evaluate through the EIS process. The agency may conduct public meetings or hearings and will request comments from federal, tribal, state and local agencies that may have interests in the matter.

**Stage 2 (if needed): Refinement** The Alternatives Analysis and Scoping processes are intended to explore and narrow the potential solutions and range of issues to be addressed in the EIS. The agency may choose to continue to refine the results of or resolve issues raised during those processes with a Refinement study.

**Public input** During the Refinement study, the agency may choose to mirror or expand the public input process used during the Scoping process.

### Alternatives Analysis

Though not directly a part of NEPA, major transit projects include an Alternatives Analysis under Federal Transit Administration guidelines, either as a separate step or in conjunction with one or more NEPA phases. The Federal Transit Administration's New Starts program is the main source of federal funding for major transit projects. As part of the New Starts project development process, the Alternatives Analysis evaluates the costs, benefits and impacts of a range of transportation alternatives designed to address mobility problems and other objectives in a transportation corridor.

Because it is not a requirement of NEPA, the agency may choose to perform the Alternatives Analysis before filing a Notice of Intent to prepare an EIS or combine it with one or more processes leading to the identification of the Locally Preferred Alternative. The Locally Preferred Alternative is the solution selected to advance for more focused study and development.

**Public input** During the Alternative Analysis study, the agency involves a wide range of stakeholders, including the general public.

**Stage 3: Draft Environmental Impact Statement** A Draft Environmental Impact Statement includes a Purpose and Need Statement that articulates the problem that the proposed action is meant to resolve. The DEIS objectively evaluates the alternatives and addresses the reasons for eliminating alternatives that are not included for detailed study. All reasonable alternatives that meet the purpose and need of the project and including a no-action alternative, are evaluated in enough detail that a reader can compare and contrast the environmental effects of the alternatives. The analysis includes the full range of direct, indirect and cumulative effects of the alternatives.

**Public input** A notice in the Federal Register and other local and regional public notices announce the availability of the DEIS for review and comment. The comment period for a DEIS is anywhere from 45 to 60 days. During the comment period, the agency may conduct public meetings or hearings and will request comments from federal, tribal, state and local agencies that may have an interest in the matter. The agency analyzes all comments and conducts further environmental analysis as necessary in order to prepare the Final Environmental Impact Statement.

**Stage 4: Final Environmental Impact Statement** The Final Environmental Impact Statement responds to the comments received from the public and other government agencies during the DEIS public comment period as well as defines and commits the agency to specific mitigation of specific impacts. The responses can be in the form of changes from the Draft to the Final EIS, factual corrections, modifications to the analyses or alternatives or consideration of new alternatives. A copy or summary of the comments and their responses are included in the FEIS.

**Public input** When the agency publishes the FEIS, the Environmental Protection Agency publishes a notice in the Federal Register. The notice begins the waiting period of at least 30 days, during which decision-makers consider the Purpose and Need, weigh the alternatives, balance objectives and make a decision. During the 30-day period, the FEIS is available for public review.

**Record of Decision** The final step in the process is the Record of Decision, which:

- documents the final decision
- identifies alternatives considered, including the environmentally preferred alternative
- discusses mitigation plans, including enforcement and monitoring commitments
- addresses all factors that were contemplated in reaching the decision
- defines how to proceed with the proposed action
- serves as the decision from the federal government that the project is allowed under NEPA.

### Supplemental statements

An agency may be required to prepare a Supplemental Draft Environmental Impact Statement or Supplemental Final Environmental Impact Statement. These may be used to address a substantial change in the proposed action, new circumstances or information relevant to environmental concerns, or specific environmental concerns that may have not been fully realized in the DEIS or FEIS. The comment process and time periods for an SDEIS or Supplemental FEIS would be same as those of the DEIS or FEIS, respectively.

### BUILDING THE PROJECT

#### Preliminary engineering

Concurrent with the FEIS, preliminary engineering advances the project's design from approximately 5 percent to 30 percent engineering in order to establish the cost for the final project.

### BUILDING THE PROJECT

#### Final design

After the Record of Decision is issued, final design work brings design from 30 percent to 100 percent complete, finalizes the finance plan, purchases property, and begins advance construction (the relocation of utilities in conflict with construction areas, etc.). Final construction follows, and then operations can begin.

*This information is mainly compiled from A Citizen's Guide to the NEPA from the Council on Environmental Quality. For more detailed information, visit [ceq.hss.doe.gov](http://ceq.hss.doe.gov).*

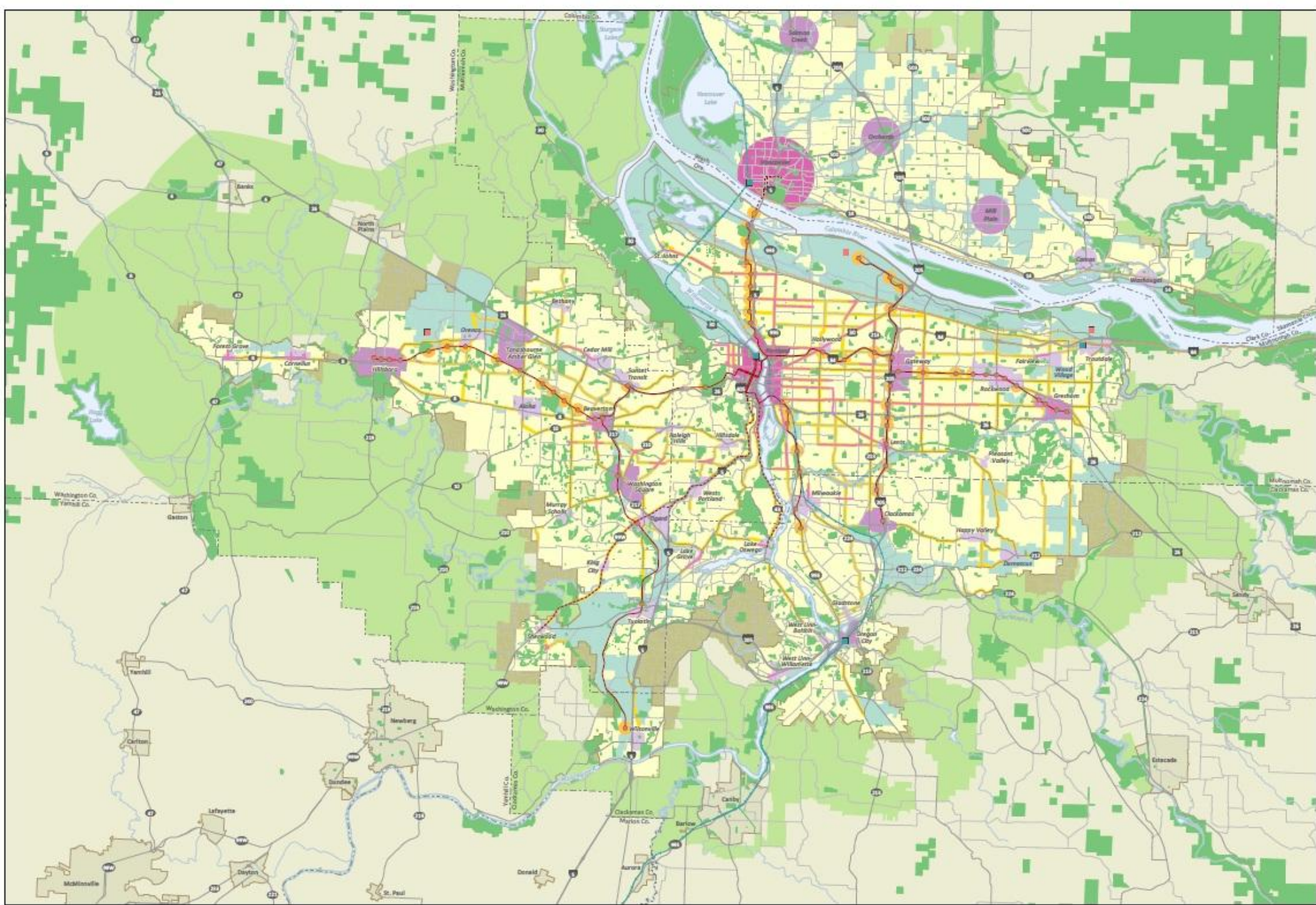
Learn about transit projects or sign up for notifications on Metro's website.

[www.oregonmetro.gov](http://www.oregonmetro.gov)

Updated May 2011

## APPENDIX D | 2040 GROWTH CONCEPT MAP





# 2040 Growth Concept Map

January 2013



The information on this map was derived from digital databases on Metro's GIS. Users may notice some variations in the appearance of the map. Metro cannot accept any responsibility for errors, omissions, or outdated information. There are no warranties, expressed or implied, including the accuracy or completeness of the information presented on this map. Metro disclaims any liability for any damages, including consequential, arising from the use of this map.

The Metro 2040 Growth Concept defines the form of regional growth and development for the Fort Worth metropolitan region. The Growth Concept was adopted in December 1995 through the Region 2040 planning and public involvement process. This concept is intended to provide long-term growth management of the region.

The map highlights elements of parallel planning

efforts including: the 2035 Regional Transportation Plan that outlines investments in multiple modes of transportation, and a commitment to local policies and investments that will help the region better accommodate growth within its centers, corridors and employment areas.

For more information on these initiatives, visit <http://www.ongrowthmetro.gov/2040>

- Central city
- Regional center
- Town center
- Station communities
- Main streets
- Corridors
- Employment land
- Parks and natural areas
- Neighborhood
- Rural reserve
- Urban reserve
- Urban growth boundaries
- Existing high capacity transit
- Planned high capacity transit
- Proposed high capacity transit tier 1
- Mainline freight
- High speed rail
- County boundaries
- Neighboring cities
- Airports
- Inter-city rail terminal



## APPENDIX E | GROWTH MANAGEMENT

### Introduction

Metro is responsible, under state granted authority, for managing the region's urban growth boundary that separates urban land from rural land. Land inside the urban growth boundary supports urban services such as roads, water and sewer systems, parks and schools that create thriving places to live, work and play. The urban growth boundary is one of the tools used to protect farms and forests from urban development and to promote the efficient use of land, public facilities and services inside the boundary. Other benefits of the boundary include:

- motivation to develop and redevelop land and buildings in the urban core, helping keep core "downtowns" in business
- assurance for service districts and local governments about where to place infrastructure (such as roads and sewers), needed for future development
- efficiency for businesses and local governments in terms of how infrastructure is built - instead of building roads further and further out as happens in areas without an urban growth boundary, limited money can be spent to make existing roads, transit service and other services more efficient

The Oregon Legislature also granted Metro other land use planning powers, including:

- coordinating between regional and local comprehensive plans in adopting a regional urban growth boundary
- requiring consistency of local comprehensive plans with statewide and regional planning goals
- planning for activities of metropolitan significance including (but not limited to) transportation, water quality, air quality and solid waste.

### Urban Growth Report

Oregon land use law requires that, every five years, Metro assess the region's capacity to accommodate the numbers of people anticipated to live or work inside the Metro urban growth boundary (UGB) over the next 20 years. To make this determination:

- Metro forecasts population and employment growth over a 20-year timeframe
- conducts an inventory of vacant, buildable land inside the UGB
- assesses the capacity of the current UGB to accommodate population and employment growth either on vacant land or through redevelopment and infill
- determines whether additional capacity is needed;
- documents the results of these analyses in an urban growth report (UGR).



## People

### **Key agency stakeholders:**

Department of Land Conservation and Development, Oregon Department of Transportation (ODOT), TriMet, cities and counties, special service districts (*i.e. sanitary sewer and clean water resources, water providers parks and recreation*).

### **Key community partners:**

Commercial and industrial businesses, retail businesses, realtors, homebuilders, environmental groups, business and neighborhood associations.

## **Decision making** *process for land use planning*

Metro is required by state law to have a 20-year supply of land for future residential development inside the boundary. Every five years, the Metro Council reviews the land supply as outlined in the UGR process and, if necessary, expands the boundary to meet that requirement. When undertaking this review, Metro considers needs for future jobs in the region during this same 20-year period. The Metro Council makes the final decision regarding UGB expansions, after considering input from Metro staff, advisory committees, cities and counties, agencies, stakeholders and the residents of the region.

## **Advisory bodies**

### **Metro Technical Advisory Committee**

MTAC is a 37-member committee of planners, citizens and business representatives that provide detailed technical support to MPAC. There are three community members and the committee meets at 10:00 a.m., on the first and third Wednesdays of the month.

## **Decision-making bodies**

### **Metro Policy Advisory Committee**

MPAC is a 28-member charter-mandated committee of local government representatives and community members who consult on policy issues, especially those related to services provided by local governments. There are three community members and the committee meets at 5 p.m. on the second and fourth Wednesdays of the month.

### **Metro Council**

The Metro Council consists of a president who is elected regionwide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.



## Growth management typical process

- staff completes a preliminary analysis of the urban reserve areas to meet Statewide Planning Goals and Metro Code requirements
- local jurisdictions complete concept planning requirements for urban reserve areas, or portions thereof, that they support being added to the UGB
- with information from cities and counties, staff refines the preliminary analysis to determine which urban reserves area(s) best meet the need identified in the UGR while meeting Statewide Planning Goals and Metro Code requirements
- Metro Chief Operating Officer (COO) presents a recommendation to the Metro Council
- COO recommendation is reviewed by MTAC and MPAC and the public, with MPAC making a recommendation to the Metro Council
- Metro Council makes final decision on the UGB expansion
- UGB expansion submitted to State Department of Land Conservation and Development for approval

## Growth management typical engagement key steps

- review by MTAC and MPAC and other interested groups who request information
- information available on Metro's website
- public open house(s) in general location of proposed expansion areas
- Opt In survey
- required notice for expansion area adjacent land owners
- public comment period.

# APPENDIX F | REGIONAL TRANSPORTATION PLAN

## Introduction

The Regional Transportation Plan (RTP) presents the region's overarching transportation policies and goals, system concepts for all modes of travel, funding strategies and local implementation requirements. The plan recommends how to invest more than \$20 billion in anticipated federal, state and local transportation funding in the Portland metropolitan area during the next 25 years.

The most recent RTP update (completed in 2010) was shaped by looking ahead to 2035 to anticipate 21st century needs and to advance these desired outcomes for the region:

- promote jobs and create wealth in the economy
- reduce greenhouse gas emissions
- improve safety throughout the transportation system
- promote healthy, active living by making walking and bicycling safe and convenient
- move freight reliably and make transportation accessible, affordable and reliable for commuting and everyday life
- promote vibrant communities while preserving farm and forest land

The Regional Transportation Plan is the blueprint that guides investments in the region's transportation system to reduce congestion, build new sidewalks and bicycle facilities, improve transit service and access to transit and maintain freight access. Every other RTP update is typically an expansive update that reopens the discussion of the RTP on a more fundamental level. Interim updates are more housekeeping efforts focused on meeting state and federal requirements and include "friendly amendments" from recently adopted city and county transportation system plans and corridor plans.

## People

### Key agency stakeholders:

Cities and counties, Oregon Department of Transportation (ODOT), Oregon Department of Environmental Quality, Port of Portland, SMART, TriMet, Oregon Department of Land Conservation and Development (DLCD), Federal Highway Administration (FHWA), Federal Transit Administration (FTA). Metro also coordinates with the City of Vancouver, Clark County Washington, the Port of Vancouver, the Southwest Washington Regional Transportation Council (RTC), C-Tran, the Washington Department of Transportation, the Southwest Washington Air Pollution Control Authority and other Clark County governments on bi-state issues.

### Key community partners:

- land use and transportation advocacy organizations
- business groups and associations
- freight advocacy groups
- active living / health groups
- transportation, social equity and environmental justice groups
- tribes
- general public.

## Decision-making

All transportation-related actions are recommended by JPACT to the Metro Council. The Metro Council can approve the recommendations or refer them back to JPACT with a specific concern for reconsideration. Final approval of each item, therefore, requires the concurrence of both JPACT and Metro Council. Under state law, the RTP serves as the region's transportation system plan. As a result, the Metro Policy Advisory Committee (MPAC) also has a role in approving the regional transportation plan as a land use action, consistent with statewide planning goals and the Metro Charter.

## Advisory bodies

### **Metro Technical Advisory Committee**

MTAC is a 37-member committee of planners, citizens and business representatives that provide detailed technical support to MPAC. There are three community members and the committee meets at 10:00 a.m., on the first and third Wednesdays of the month.

### **Transportation Policy Alternatives Committee**

TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives.

## Decision-making bodies

### **Metro Policy Advisory Committee**

MPAC is a 28-member charter-mandated committee of local government representatives and community members who consult on policy issues, especially those related to services provided by local governments. There are three community members and the committee meets at 5 p.m. on the second and fourth Wednesdays of the month.

### **The Joint Policy Advisory Committee on Transportation**

JPACT is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs for the Portland metropolitan area.

### **Metro Council**

The Metro Council consists of a president who is elected regionwide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.

## RTP typical process

The Regional Transportation Plan (RTP) establishes a comprehensive policy direction for the regional transportation system and recommends a balanced program of transportation investments (projects) to implement that policy direction. The RTP is updated every four years, as required by federal law. In between full updates to the RTP, it may be necessary to amend the plan in response to changing local conditions and newly adopted plans. To be eligible to build a project with federal funds the project must be included in the RTP. The typical RTP process includes: (\*Specific steps to the typical RTP Amendment process.)

- develop a detailed scope of work that will guide technical work, policy development and public participation planning
- identify the existing regional transportation issues, needs and deficiencies
- investigate financial, transportation, land use, economic and demographic trends that influence regional development and the performance of the regional transportation system
- identify public priorities for transportation and willingness to pay for desired transportation services and programs
- receive local partners' updates to RTP project list
- local partners submit proposed amendments (projects and/or policies) for the RTP\*
- Metro determines if the proposed amendments meet the definition of "major amendment", which means it "involves additions or deletions of projects or a significant change in scope of the project location or function." If so, a 30-day public comment period is required. Additionally, if an amendment includes changes to policy, state laws are triggered that require a 45-day public comment period.\*
- model project list for system performance\*
- provide opportunities for interested parties to express ideas and concerns about the discussion draft plan policies, projects and implementation strategies
- Metro provides opportunities for interested parties to express ideas and concerns about the proposed RTP amendments\*
- public comment period covers RTP changes plus comments on the air quality modeling\*
- adjustment to RTP project list and policies based on public comments\*
- complete air quality conformity modeling and documentation \*
- hold final public comment period
- adopt with regional committees – MTAC, TPAC, MPAC, JPACT – and the Metro Council.\*

## RTP typical engagement process

- the typical engagement process may include opinion surveys, focus groups, stakeholder workshops, regional forums, web site, media outreach, interested parties mailing list, public hearings, or technical topic workshops
- the public can submit comments online or provide testimony in-person at public meetings
- feedback and comments collected during the comment period are compiled and responded to a Public Comment Report
- the Public Comment Report is provided to MTAC, TPAC, MPAC, JPACT and the Metro Council for review.

# APPENDIX F | METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM/REGIONAL FLEXIBLE FUNDING ALLOCATION

## Introduction

The Metropolitan Transportation Improvement Program (MTIP) includes all federally funded transportation projects in the Portland Metropolitan area, including projects planned by TriMet, SMART, the Oregon Department of Transportation and local agencies receiving federal funds allocated by Metro. After adoption by the Metro Council, the MTIP is incorporated into the Statewide Transportation Improvement Program (STIP), which identifies the state’s four-year transportation capital improvements. The MTIP process operates on a rolling, two-year cycle to allocate funds to projects.

The Regional Flexible Funds Allocation (RFFA) is the competitive process Metro uses to allocate federal transportation funds to projects throughout the region. Regional flexible funds come from three different federal grant programs: the Surface Transportation Program, the Congestion Mitigation/Air Quality Program, and the Transportation Alternatives Program.

During each RFFA process, the Metro Council and JPACT select transportation programs and projects eligible to receive federal flexible funds out of those projects that are already listed in the Regional Transportation Plan. Though they comprise only about 4 percent of the transportation investment in our region, flexible funds attract considerable interest because they may be spent on a greater variety of transportation projects than can most federal transportation funds.

## People

### Key agency stakeholders:

Cities and counties, TriMet, the Oregon Department of Transportation, Port of Portland, Oregon Department of Environmental Quality, Southwest Washington Regional Transportation Council, Federal Highway Administration, C-TRAN and SMART.

### Key community partners:

Community and environmental justice organizations, freight interests, businesses, business associations, cycling and pedestrian organizations and general public.

## Decision-making

Every two years the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council decide how to spend federal transportation money known locally as the Regional Flexible Funds.

This process allocates money to both regional programs such as the Transit Oriented Development program and to individual projects planned and built by cities, counties and local transportation agencies.

## Advisory bodies

### **Transportation Policy Alternatives Committee**

TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives.

## Decision-making bodies

### **The Joint Policy Advisory Committee on Transportation**

JPACT is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs for the Portland metropolitan area.

### **Metro Council**

The Metro Council consists of a president who is elected regionwide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.



## MTIP typical process

- conduct retrospective on last process with agency stakeholders, elected officials and community partners
- develop policy framework
- solicit for Regional Flexible Fund projects to be funded
- coordinate with ODOT and public transit agency funding allocation processes
- review RFFA applications
- hold 30-day public comment period
- select RFFA projects and adopt through JPACT action and Metro Council resolution
- compile full MTIP document outlining all efforts to be federally funded (regional programs, projects of regional significance from cities and counties, ODOT/TriMet and SMART projects) and conduct air quality analysis
- hold minimum 30-day public comment period
- adopt MTIP process through JPACT action and Metro Council resolution
- consider changes to MTIP as requested by implementing agencies
- conduct public engagement for legislative MTIP amendments.

## MTIP typical engagement key steps

- coordinate with agency stakeholders on engaging with communities to ensure public engagement Title VI/nondiscrimination, Limited English Proficiency and Environmental Justice obligations are met
- widely distribute notices of opportunity to comment and provide written notices upon request
- receive comments online or through in-person testimony at public meetings
- share all comments made during the comment period with decision-makers in advance of their decision and made part of the final decision record.

## APPENDIX F | AIR QUALITY AND CONFORMITY DETERMINATION

### Introduction

The Clean Air Act set national air quality standards for carbon monoxide pollution in urban areas throughout the U.S. Federal regulations require that the region assess the air quality consequences of proposed transportation improvements. The region must assess the carbon monoxide emissions from surface transportation sources to ensure they meet the Clean Air Act.

To accomplish this, Metro prepares air quality conformity determinations for the federal component of the Regional Transportation Plan (RTP) and for each Metropolitan Transportation Improvement Program (MTIP) as required by state and federal law. The last violation occurred in the 1970's. Current analyses indicate that the metro area will continue to meet federal and state air-quality standards to the year 2035.

### People

#### Key agency stakeholders:

Environmental Protection Agency, the Federal Transit Administration, the Federal Highway Administration, Oregon Department of Transportation and Department of Environmental Quality.

#### Key community partners:

Key community partners in the development and review of the air quality conformity determination are the 21-members of Transportation Policy Advisory Committee (TPAC). TPAC consist of technical staff from local governments and agencies in the Portland metropolitan region, plus a representative from the Southwest Washington Regional Transportation Council and six community members appointed by the Metro Council. In addition, the Federal Highway Administration and C-TRAN have appointed an associate non-voting member to the committee.

## Decision-making

The Transportation Policy Alternatives Committee (TPAC) is specifically named in the state rule as the standing committee designated for “interagency consultation,” for technical review processes for air quality conformity determinations. However, all air quality conformity determinations, are recommended by TPAC to Joint Policy Advisory Committee on Transportation (JPACT). JPACT makes recommendation for approval to the Metro Council and the Metro Council takes the final action on air quality conformity determinations.

## Advisory bodies

### **Transportation Policy Alternatives Committee**

TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives.

## Decision-making bodies

### **Metro Council**

The Metro Council consists of a president who is elected regionwide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.

### **The Joint Policy Advisory Committee on Transportation**

JPACT is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs for the Portland metropolitan area.

## Air Quality and Conformity Determination typical process

- The air quality conformity determination process begins with an action which requires the RTP or MTIP to re-conform or demonstrate the actions and policies in the RTP and/or MTIP do not cause greater air pollution. The action may be an amendment or an update of an entire plan. An air quality conformity determination must be made every four years
- Metro staff prepares a pre-conformity plan, which outlines the methodology for conducting the regional emissions analysis.
- The pre-conformity plan includes the technical methodology, such as the inputs to the emissions model and assumptions made for certain projects, as well as a schedule for development and public comment for the air quality conformity determination.
- TPAC reviews the pre-conformity plan as part of the technical consultation.
- Metro conducts the air quality analysis using emissions modeling tools and the travel demand model.
- Once the emissions results have been produced, a conformity determination is drafted as part of a draft air quality conformity report and made available for public comment along with the RTP or MTIP.
- At the end of the formal comment period, responses to comments are packaged into a public comment report and provided to decision-makers. TPAC, JPACT, and Metro Council take action on the air quality conformity determination.

## Air Quality and Conformity Determination typical engagement key steps

- Metro provides the opportunity for the public to review and comment on the technical aspects of a conformity determination report.
- The technical consultation for the air quality conformity determination happens through a consultation at a TPAC meeting. TPAC meetings are open to the public with materials provided one week in advance.
- The public comment for the air quality conformity determination usually parallels the public comment period for the RTP and/or MTIP. While federal regulations require a 30-day public comment period for the air quality conformity determination, because the RTP and MTIP public comment period are usually conducted in tandem, the draft conformity determination of the RTP and MTIP and supporting documents are usually made available for a 45-day public comment period per state requirements for public involvement with the RTP and MTIP.
- Written notices will be provided to anyone upon request.
- Comments made during the comment period will be made part of the final decision record.

## APPENDIX F | REGIONAL TRAVEL OPTIONS

### Introduction

Metro's Regional Travel Options (RTO) program improves air quality and reduces car traffic by helping people drive less and use travel options, such as walking, biking, transit, vanpooling or carpooling.

Reducing the number of cars on the road cuts vehicle emissions, decreases congestion, extends the life cycle of existing roadways and promotes healthier communities. RTO is guided by a five-year strategic plan developed in partnership with stakeholders. The program is funded primarily by federal grants allocated through the Regional Flexible Funds Program (RFFA).

The Regional Travel Options program includes:

- a coordinated marketing effort to efficiently use public dollars to reach key audiences
- an employer outreach program to save employers and employees money
- a regional rideshare program that makes carpooling safer and easier and helps people with limited transit access have options to get around
- a grant program that funds partner efforts, such as the BTA Bike Commute Challenge, Transportation management associations (TMAs), work with employers, local transportation options projects, TriMet's regional trip planner, to name a few.

### People

#### Key agency and community stakeholders:

C-TRAN, City of Gresham , City of Portland Transportation Options, City of Vancouver , Clackamas County, Lloyd TMA, Multnomah County, Gresham Chamber of Commerce, Oregon Department of Environmental Quality, ODOT, Port of Portland], SMART (Wilsonville), South Waterfront Community Relations (TMA), Swan Island TMA, TriMet , Washington County, Westside Transportation Alliance.

#### Community grantees:

The RTO program makes grants to eligible organizations for the purpose of encouraging and helping residents to use their automobiles less. Eligible grant recipients include government agencies, educational institutions, and qualifying non-profit organizations.

## Decision-making

The RTO program is guided by the 2012-2017 RTO Strategic Plan, adopted by JPACT and the Metro Council. The plan defines the mission, goals, and objectives for the program. Metro manages the primary functions of the program, with input provided from TPAC on the RTO Grantmaking process and other major program elements.

## Advisory bodies

**Transportation Policy Alternatives Committee**  
TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives.

## Decision-making bodies

**The Joint Policy Advisory Committee on Transportation**  
JPACT is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs for the Portland metropolitan area.

**Metro Council**  
The Metro Council consists of a president who is elected regionwide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.

## RTO typical process

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

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

## RTO typical engagement key steps

- Outreach about grant opportunities offered through public announcements, news feeds, web posting and emails to past and current community partners.
- Regular meetings with grantees, individual or during and collaborative marketing group bi-monthly gatherings.



# APPENDIX F | TRANSPORTATION SYSTEM MANAGEMENT AND OPERATIONS

## Introduction

Metro’s Transportation System Management and Operations (TSMO) program provides cost effective, solutions for commuters, bicyclists, freight and pedestrians that relieve congestion, increase reliability, lessen crash frequency and severity, save fuel and cut down vehicle missions.

TSMO is guided by a ten-year strategic plan developed in partnership with community, city and county partners. The program is funded primarily by federal grants allocated through the Regional Flexible Funds Program (RFFA).

The Transportation System Management and Operations program includes:

- a grant program focusing investment in region-wide and corridor TSMO strategies such as growing a transportation data archive and installing adaptive traffic signals in key corridors
- dedicated support for regional collaboration efforts including TransPort, the regional TSMO committee.

## People

### Key agency stakeholders:

- Oregon Transportation Research and Education Consortium (OTREC)/ Portland State University
- Federal Highway Administration (FHWA)
- Federal Transit Administration (FTA)
- Oregon Department of Transportation (ODOT)
- TriMet
- Port of Portland
- Counties of Clackamas, Multnomah & Washington
- Cities of Beaverton, Gresham, Hillsboro, Portland, Tigard
- C-TRAN
- SW Regional Transportation Council
- Washington State Department of Transportation

## Decision-making

TSMO funding and program direction is guided by the Regional Flexible Funds Allocation (RFFA) and Metropolitan Transportation Improvement Program (MTIP) funding processes and the Regional Transportation System Management and Operations Plan, all of which are adopted by Metro Council and JPACT with input from TPAC, TSMO stakeholders and other community interest.

## Advisory bodies

### **Transportation Policy Alternatives Committee**

TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives.

### **TransPort**

TransPort is comprised of state, regional and local government agencies working to actively manage the transportation system. TransPort serves as the working committee for implementing the Regional TSMO Plan. Through monthly committee meetings and project specific advisory meetings, TransPort collaborates on policy and funding allocation recommendations as well as project implementation. Metro staff coordinates the committee's activities.

## Decision-making bodies

**The Joint Policy Advisory Committee on Transportation** JPACT is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs for the Portland metropolitan area.

### **Metro Council**

The Metro Council consists of a president who is elected region-wide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.

## TSMO typical process

Metro is the lead agency responsible for the allocating of TSMO funds and overseeing the TSMO program in the Portland Metropolitan region. As the program administrator, Metro supports its partners in implementing the Regional TSMO Plan by:

- leading the development and application of policy that supports TSMO efforts
- creating a forum for partner agencies to share best practices and collaborate on implementation
- overseeing the sub-allocation of MTIP funding dedicated to TSMO consistent with the regional TSMO plans
- managing key regional TSMO planning projects
- monitoring TSMO project delivery and performance.

## TSMO typical engagement key steps

- the program relies on web postings and news feeds to provide general information about current activities
- partner agencies are engaged through regular transport meetings and ad-hoc subcommittee meetings related to specific projects
- the program's bi-annual work program is approved through a public adoption process.

## APPENDIX F | CORRIDOR PLANNING

### Introduction

Metro partners with cities, counties, the state, TriMet and the federal government to plan land use and transportation improvements in corridors connecting the downtowns, main streets and employment areas around the region. Some of these plans result in new high capacity transit like the Green Line MAX to Clackamas Town Center or the MAX being built to connect Portland and Milwaukie, though new service always depends on available funding. Other plans, such as the East Metro Connections Plan, also identify road, bike, and pedestrian investments needed to serve the community

Metro's role in these projects is to lead planning and analysis work, while TriMet is responsible for construction and operation of the transit system.

### People

#### Key agency stakeholders:

Federal Transit Administration, Federal Highway Administration, U.S. Coast Guard, U.S. Army Corps of Engineers, Oregon Department of Transportation (ODOT), Department of Environmental Quality (DEQ), Tribes, State Historic Preservation Office, The Land Conservation and Development Commission, Oregon Parks and Recreation Department, State Historic Preservation Office, Advisory Council on Historic Preservation (ACHP), U.S. Department of Interior, National Parks Service, Oregon Natural Heritage Information Center (ORNHIC), National Marine Fisheries Service (NMFS), TriMet and cities and counties.

#### Key community partners:

Community and environmental justice organizations, freight interests, school districts and higher education institutes, neighborhood associations, businesses and business associations, large landowners, residents, media, environmental organizations and watershed councils, and general public.

## Decision-making

Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) will advance a corridor for potential land use, transportation or high capacity transit investment. Metro identifies potential land use changes and transportation investments and evaluates the potential modes, alignments and station areas to determine the most efficient public investment in transit for the selected project area. Metro works closely with partner cities and counties, stakeholders and community partners to identify potential investments and narrow them based on technical analysis and public input. A steering committee makes a final recommendation on a preferred investment, which then goes to JPACT and the Metro Council and cities along the corridor for adoption. For high-capacity transit investments, the locally preferred alternative is then considered and approved by the Federal Transit Administration, making it eligible for federal funding and further engineering and construction by TriMet.

## Advisory bodies

### **Steering committee**

Steering committees are the most closely tied advisory body to corridor projects. Members include elected leaders from jurisdictions in the planning area and can also include local business and community leaders and representatives from public institutions and community groups. The steering committee uses technical analysis and public input to advance corridor projects through milestones and develop a final recommendation to be considered by local jurisdictions, Metro advisory committees and Metro Council.

### **Transportation Policy Alternatives Committee**

TPAC is a 21-member technical committee that supports JPACT with input on transportation planning priorities and financing alternatives.

## Decision-making bodies

### **The Joint Policy Advisory Committee on Transportation**

JPACT is a 17-member committee of elected officials and representatives of agencies involved in transportation that make recommendations to the Metro Council on transportation needs for the Portland metropolitan area.

### **Metro Policy Advisory Committee**

MPAC is a 28-member charter-mandated committee of local government representatives and community members who consult on policy issues, especially those related to services provided by local governments. There are three community members and the committee meets at 5 p.m. on the second and fourth Wednesdays of the month.

### **Metro Council**

The Metro Council consists of a president who is elected regionwide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions and boards.

## Corridor planning typical process

- Metro identifies key partners and stakeholders and establishes a decision-making process
- Metro determines the project's purpose and goals based on regional and local needs
- Metro works closely with the community city and county partners to assess transportation investments, including high capacity transit and potential roadway, bicycle and pedestrian improvements, that support local community visions
- Metro refines a preferred transit alternative based on public engagement, technical analysis, and feedback from the project steering committee and key stakeholders
- Metro Council adopts the preferred transit alternative and related implementation strategy
- Metro conducts a formal environmental review process dictated by the National Environmental Policy Act to analyze potential transit plans and related investments and shares analysis for public review and decision-making
- The Federal Transit Administration issues a Record of Decision and authorizes TriMet to proceed with design, land acquisition, and construction based on the availability of funds
- regional partners secure local and federal funding to begin construction.

## Corridor planning typical engagement key steps

- early and continuous public engagement involves stakeholders and community partners, informing the process and requesting ideas and feedback related to major milestones
- typical engagement tools and techniques for gathering public input include: online and in-person, open houses, public meetings, community events, Opt In, interactive online commenting tools, e-newsletters and social media engagement
- decision-makers are provided with information about community needs and desires throughout the planning process.

## APPENDIX F | TRANSIT ORIENTED DEVELOPMENT

### Introduction

Metro’s Transit-Oriented Development (TOD) Program has a unique and critical role in implementing the region’s 2040 growth concept of vibrant urban centers and station areas linked by transit. TOD Program activities help to optimize the existing transit system by bringing more people to live, work and shop in areas with easy pedestrian connections to transit.

The core program activity is providing strategic project funding to stimulate construction of higher-density and mixed-use projects near transit, in areas where the real estate market is not yet able to support higher-cost development forms. Related program activities include acquisition of opportunity sites for future development, investment in urban living infrastructure and technical assistance.

### People

#### Key agency stakeholders:

State of Oregon, Oregon Housing and Community Services, Portland Development Commission, Federal Transit Administration, Portland Housing Bureau, TriMet, State of Oregon Housing Department, Home Forward and local cities.

#### Key community partners:

Network for Oregon Affordable Housing, Enterprise Housing Foundation, Community Partners for Affordable Housing, American Campus Communities, affordable housing, private developers and educational institutions.

### Decision-making

TOD Program funding and program direction is guided by the Regional Flexible Funds Allocations and Metropolitan Transportation Improvement Program funding processes and the Transit-Oriented Development Strategic Plan. The TOD Program strategic plan, MTIP, RFFA are adopted by Metro Council and JPACT with input from TPAC, stakeholders and other community interest.

The TOD Program strategic plan investment framework guides the allocation of limited resources by considering transit orientation characteristics and real estate market strength. TOD Program staff team with others to support implementation planning and technical assistance services to communities around the region, working with local jurisdictions to customize services to best respond to local needs.



## Advisory bodies

### **Transit-Oriented Development Steering Committee**

The TOD Steering Committee is composed of one Metro Councilor, one representative each from Oregon Housing and Community Services and TriMet, and four to six additional members, appointed by the COO, to provide expert advice regarding real estate economics and transit-oriented development. The committee provides expert guidance, review and approval of TOD Program investment activities. Project funding and property acquisition or disposition decisions are approved by a majority vote of members present at a duly noticed meeting.

## Decision-making bodies

### **Metro Council**

The Metro Council consists of a president who is elected region-wide and six councilors who are elected by district every four years in non-partisan races. The president presides over the council, sets its policy agenda and appoints all members of Metro committees, commissions, and boards.

## TOD typical process

Metro is the agency responsible for administering TOD Program funds in the Portland metropolitan region. As the program administrator, program staff provide support and grant funding to help “push the envelope” of development in terms of density or building type. These efforts include:

- partnering with local jurisdictions and private developers on TOD projects throughout the region
- staff evaluation and steering committee approval of site-specific project investments which provide compact development of buildings that would not otherwise proceed
- ensuring TOD project investments are distributed throughout the region by defining TOD project typologies and strategic investment framework
- acquisition and ownership of property, alone or in partnership with local jurisdictions or other public agencies, that is expected to support transit-oriented development
- providing education and technical assistance to local jurisdictions and development partners to encourage transit-supportive development.

## TOD typical engagement key steps

Metro's Transit-Oriented Development Program uses various approaches to identify qualified developers interested in partnering with Metro to create compact transit-oriented communities. These approaches include:

- requests for proposal (RFP), requests for qualifications (RFQ), or unsolicited proposal processes used for properties owned by Metro's TOD Program
- developers with site control contacting Metro directly to determine eligibility for funding for compact and mixed-use TOD projects that would not be feasible without public participation.

## APPENDIX G | LOCAL ENGAGEMENT AND NON-DISCRIMINATION CHECKLIST

This checklist defines best practices designed to help local cities and counties meet federal non-discrimination requirements and assure full compliance with the Title VI of the Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, Executive Order 12898 on Environmental Justice and related statutes and regulations in all programs and activities to help ensure effective local engagement.

The checklist, as completed by project sponsors prior to submission of projects to Metro, will aid Metro in its review and evaluation of and action on projects. As part of Metro's ongoing interaction with stakeholders, and as resources allow, Metro will seek feedback from interested and affected parties, diverse communities and environmental justice populations, on engagement conducted by project sponsors.

Project sponsors can use this checklist for local transportation plans and programs from which projects are drawn and submitted to Metro for inclusion in RTP, RFFA/MTIP or other action. If multiple projects are defined as part of the same local transportation plan and/or program, only one checklist need be submitted for those projects. For projects not in the local plan and/or program, a checklist should be completed for each project. Project sponsors should keep engagement records, like those identified below in italics, on file in case of a dispute.

Metro is available as a resource to support cities and counties as they proceed through this process. Metro may provide support for demographic analysis and public engagement recommendations.

### A. Checklist

At the beginning of the transportation plan or program, a public engagement plan was developed to meet the breadth and scope of the plan/program and encourage broad-based, early and continuing opportunity to engage with the public, affected public agencies, representatives of public transportation employees, freight shippers, providers of freight transportation services, private providers of transportation, representatives of users of public transportation, representatives of users of pedestrian walkways and bicycle transportation facilities, representatives of the disabled, and other interested parties. In addition, a demographic analysis was completed to understand the location of communities of color, limited English proficient and low-income populations, disabled, seniors and youth in order to include them in engagement opportunities.

*Records: public engagement plan and/or procedures, summary of or maps illustrating demographic analysis*

*(Continued on next page)*

❑ Throughout the process, appropriate interested and affected groups were identified and contact information was maintained in order to share project information, updates at key decision points and opportunities to engage and comment. Project initiation and requests for input were sent at least 15 days in advance of the project start, engagement activity or input opportunity. Notices included a statement of non-discrimination (Metro can provide a sample).

*Records: list of interested and affected parties, dated copies of communications and notices sent, descriptions of initial efforts to engage the public including strategies used to attract interest and obtain initial input; for announcements sent by mail or email document number of persons/groups on mailing list*

❑ Throughout the process, targeted efforts were made to engage underrepresented populations such as those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth and provide language assistance, as needed. Meetings or events were held in accessible locations with access to transit. Language assistance may take the form of translation of key materials for populations with limited English proficiency, using a telephone language line service to respond to questions or take input in different languages and/or providing translation at meetings or events.

*Records: list of community organizations and/or diverse community members with whom coordination occurred; description of language assistance resources and how they were used, dated copies of communications and notices sent, descriptions of audiences engaged*

❑ Throughout the process, consider benefits and burdens to environmental justice and limited English populations as identified in the demographic analysis through engagement activities, in light of the proposed project.

*Records: description of identified environmental justice and limited English populations and qualitative information about benefits and burdens related to them, in light of the proposed project*

❑ Throughout the process, a forum(s) for timely, accessible input was provided.

*Records: descriptions of opportunities for ongoing engagement (i.e. periodic online polls, project email address, regular presentations or committee briefings, project advisory committee formation and materials), descriptions of opportunities for input at key milestones (i.e. screening and prioritization criteria, recommendations), public meeting records (date, location, attendance), poll information (publication method(s), number of responses received, demographics of respondents)*

*(Continued on next page)*

Public comments were considered throughout the process and comments received on the final staff recommendation were compiled, summarized and responded to, as appropriate.

*Records: description of how public comments were considered throughout the process and how they influenced final staff recommendation, compilation of all comments received on the final staff recommendation as well as a summary of and response to those comments*

Adequate notice was provided regarding final adoption of the plan or program, at least 15 days in advance of adoption, if feasible, and follow-up notice was distributed prior to the adoption to provide more detailed information. Notice included information and instructions for how to testify, if applicable.

*Records: dated copies of the notices; for announcements sent by mail or email document number of persons/groups on mailing list*

### **B. Summary of Non-discriminatory Engagement**

Please attach a summary (maximum 2 pages) of the key elements of the public engagement process, including outreach to communities of color, limited English and low-income populations, for this project or group of projects.

### **C. Certification Statement**

\_\_\_\_\_  
(Project sponsor) certifies adherence to engagement and non-discrimination procedures developed to enhance public participation.

\_\_\_\_\_  
(Signed)

\_\_\_\_\_  
(Date)

## APPENDIX H –PROJECT PURPOSE ARTICULATION

### PROJECT PURPOSE ARTICULATION

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Clarity around project purpose and outcomes is fundamental to crafting an appropriate, meaningful and efficient public engagement strategy. This form must be completed by the project manager and Communications staff and approved by the department director prior to the development of a public involvement and/or communications plan.

<b><i>The purpose of this project is to:</i></b>
<b><i>This project will result in:</i></b>
<b><i>The purpose of public engagement for this project is to:</i></b>
<b><i>Members of the public who should be engaged are:</i></b>
<b><i>The public engagement will be successful if:</i></b>
<b><i>This project will be successful if:</i></b>

## PROJECT PURPOSE ARTICULATION – EXAMPLE

Clarity around project purpose and outcomes is fundamental to crafting an appropriate, meaningful and efficient public engagement strategy. This form must be completed by the project manager and Communications staff and approved by the department director prior to the development of a public involvement and/or communications plan.

*FOLLOWING IS AN EXAMPLE OF HOW TO COMPLETE THIS FORM.*

<b><i>The purpose of this project is to:</i></b>
Fulfill the final NEPA-related processes for the Portland-Milwaukie Light Rail Project
<b><i>This project will result in:</i></b>
<ul style="list-style-type: none"> <li>• Publication of the Final Environmental Impact Statement</li> <li>• Clearance from federal and state regulatory agencies, such as the State Office of Historical Preservation and the National Oceanographic and Atmospheric Administration</li> <li>• Issuance of the Record of Decision from the Federal Transit Administration</li> <li>• Completion of the South Corridor II project as designated in the Regional Transportation Plan</li> </ul>
<b><i>The purpose of public engagement for this project is to:</i></b>
<ul style="list-style-type: none"> <li>• Inform the public about impacts and resulting mitigation and any changes to the project since the DEIS public engagement phase</li> <li>• Provide visualizations of the light rail infrastructure</li> <li>• Work with property and business owners displaced by the light rail project</li> <li>• Provide resources to partner jurisdictions in their communication with the public</li> </ul>
<b><i>Members of the public who should be engaged are:</i></b>
<ul style="list-style-type: none"> <li>• Elected officials and staff from local governments along the alignment</li> <li>• Citizen advisory groups, business associations and neighborhood associations in areas along the alignment</li> <li>• Environmental justice and organizations serving special needs of local residents</li> <li>• Project partners</li> <li>• Members of the media, especially community newspapers</li> </ul>
<b><i>The public engagement will be successful if:</i></b>
<ul style="list-style-type: none"> <li>• Metro coordinates communication with partner jurisdictions</li> <li>• Residents and interested persons are able to access timely and meaningful information</li> <li>• The public understands how decisions leading up to this phase were made</li> <li>• The public is provided with opportunities to have input in future design phases</li> </ul>
<b><i>This project will be successful if:</i></b>
<ul style="list-style-type: none"> <li>• The aforementioned results are met</li> <li>• Project partners -- TriMet, FTA, City of Portland, City of Milwaukie and Clackamas County -- are able to proceed on schedule at the close of the NEPA phase</li> </ul>



## APPENDIX I: TITLE VI EVENT FORM

Event:

Location:

Time, day, date:

To improve Metro's community outreach and ensure our programs serve everyone in the community, Metro seeks demographic information from the people who participate in agency events. Additionally, Metro is responsible for providing access to people who do not speak English well. Tracking demographic information also helps Metro to comply with federal guidelines associated with Title VI of the Civil Rights Act of 1964 and Executive Order 12898. The identity of individuals is kept confidential. The results are reported as totals only, and used solely to help improve Metro's community engagement.

ZIP Code	Race/Ethnicity (Check all that apply)	Language interpreter needed
_____	<input type="checkbox"/> Black (not of Hispanic origin) <input type="checkbox"/> White (not of Hispanic origin) <input type="checkbox"/> Hispanic <input type="checkbox"/> American Indian or Alaskan Native <input type="checkbox"/> Asian or Pacific Islander <input type="checkbox"/> Do not wish to disclose	<input type="checkbox"/> Chinese (中文) <input type="checkbox"/> Korean (한국어) <input type="checkbox"/> Russian (русский) <input type="checkbox"/> Spanish (español) <input type="checkbox"/> Vietnamese (tiếng Việt) <input type="checkbox"/> Other _____
ZIP Code	Race/Ethnicity (Check all that apply)	Language interpreter needed
_____	<input type="checkbox"/> Black (not of Hispanic origin) <input type="checkbox"/> White (not of Hispanic origin) <input type="checkbox"/> Hispanic <input type="checkbox"/> American Indian or Alaskan Native <input type="checkbox"/> Asian or Pacific Islander <input type="checkbox"/> Do not wish to disclose	<input type="checkbox"/> Chinese (中文) <input type="checkbox"/> Korean (한국어) <input type="checkbox"/> Russian (русский) <input type="checkbox"/> Spanish (español) <input type="checkbox"/> Vietnamese (tiếng Việt) <input type="checkbox"/> Other _____
ZIP Code	Race/Ethnicity (Check all that apply)	Language interpreter needed
_____	<input type="checkbox"/> Black (not of Hispanic origin) <input type="checkbox"/> White (not of Hispanic origin) <input type="checkbox"/> Hispanic <input type="checkbox"/> American Indian or Alaskan Native <input type="checkbox"/> Asian or Pacific Islander <input type="checkbox"/> Do not wish to disclose	<input type="checkbox"/> Chinese (中文) <input type="checkbox"/> Korean (한국어) <input type="checkbox"/> Russian (русский) <input type="checkbox"/> Spanish (español) <input type="checkbox"/> Vietnamese (tiếng Việt) <input type="checkbox"/> Other _____

## APPENDIX J – PUBLIC ENGAGEMENT TOOLS AND TECHNIQUES

The following list includes tools and techniques that Metro uses to engage the public in existing and new programs and projects.

Metro has used all these techniques at least once and, on a project by project basis, will chose different techniques to reach key audiences per project goals. This list is descriptive not exhaustive.

For example, Metro used the following tools and techniques in the Portland-Milwaukie Light Rail Project: *(See Appendix H, for additional detail on the project purpose, audiences and goals.)*

- Project mailing list
- Public meeting notices
- Newsletters
- E-newsletters
- Fact sheets
- Postcards
- Website
- Open houses
- Public meetings
- Community presence
- Speaker bureau or targeted presentations
- Stakeholder engagement
- Maps
- Charts, graphs and tables
- Diagrams and graphic illustrations
- Photographs
- Relationship building
- Press releases
- Display ads
- Public access cable

The levels of participation selected were developed by the International Association for Public Participation (IAP2). Definitions for different levels are as follows:

- Inform (Participation goal: To provide balanced and objective information to assist in understanding the problem, alternatives, opportunities and/ or solutions)
- Consult (Participation goal: To obtain feedback on analysis, alternatives and/ or decisions)
- Involve (Participation goal: To work directly on analysis, alternatives and/or decisions)
- Collaborate (Participation goal: To partner in each aspect of the decision-making process including the development of alternatives and identification of preferred solutions.)

## Public engagement techniques and tools (APPENDIX J)

The following is a menu of communication tools that Metro uses to notify the public of Metro's programs, activities and services.		IAP2 Spectrum of Public Participation			
Technique/Tool	Description	Inform	Consult	Involve	Collaborate
<b>Written and Graphic Information to build awareness and understanding</b>					
<b>Project mailing list</b>	Database to communicate with the interested parties, stakeholders, partners, elected officials, members of committees and boards and the general public	●			
<b>Public meeting notice</b>	Online web calendar for advance notices of council and committee meetings and program or project events. Each meeting agenda includes the date and time of the next meeting as well as nondiscrimination, language assistance and ADA notice as well as TTY/TDD phone number	●			
<b>E-newsletter</b>	Email updates to the project mailing list to announce events or at project milestones, sometimes with a request to provide comments about a program or project	●	●		
<b>Fact sheet</b>	Periodic updates provided to target audiences in written form or posted on the website	●			
<b>Good neighbor letter</b>	Letters to program or project "neighbors" to provide project updates and announcements	●			
<b>Flyer or brochure</b>	Written updates that are handed out or posted in community locations to provide a project overview, project updates, refer people to the project website or highlight project milestones and offer the opportunity to participate or comment	●			
<b>Postcard</b>	Mailed cards used to announce meetings, events or comment periods or offer project updates	●	●		
<b>Promotion through partners</b>	Prepared email or web content that can be forwarded by cities, counties, agencies, community organizations and other project partners in order to increase reach when inviting participation or seeking public comment	●			
<b>Utility bill notices</b>	Coordination with cities and counties to send out a notice of event, public comment opportunity or survey in monthly utility bills	●	●		
<b>Email or agenda tags</b>	Web link or other quick note about an upcoming event, public comment opportunity or survey that can be added to an email signature or the bottom of upcoming agendas	●	●		

Technique/Tool	Description	Inform	Consult	Involve	Collaborate
<b>Online Engagement</b>					
<b>Website</b> <a href="http://www.oregonmetro.gov">www.oregonmetro.gov</a>	Information on programs, projects and services as well as engagement opportunities	●	●		
<b>Social networking site (Facebook, Twitter, etc.)</b>	Twitter (@oregonmetro) and Facebook ( <a href="http://www.facebook.com/metrogreenscene">www.facebook.com/metrogreenscene</a> ) sites to connect with the public, build awareness and share engagement opportunities	●	●		
<b>Cross-link websites</b>	Highlights about an event, comment opportunity or survey on a related page on Metro’s website or websites of cities, counties, agencies, community organizations or other project partners	●	●		
<b>Opt-In</b>	Online opinion panel that provides a way to share views and help shape the future of the region by responding to short surveys about relevant community issues and/or viewing aggregate results to see how others have responded	●	●	●	
<b>In-person Engagement</b>					
<b>Open house</b>	Opportunity to drop in to see program or project information, talk to staff and offer informal or formal feedback at a location that is accessible by transit and to persons with disabilities or online	●	●	●	
<b>Public meeting</b>	Face-to-face interaction and discussion staff to learn about programs, projects or services and provide input at a location that is accessible and a time that is convenient	●	●	●	●
<b>Community presence</b>	Participation in community events at churches, community centers, grocery stores, farmers markets or other gathering places to share information, answer questions and request public input on programs or projects	●	●	●	●
<b>Speakers bureau or targeted presentations</b>	Presentations (always available upon invitation) by staff or elected officials to neighborhood, business and civic groups around the region to share information and obtain input	●	●	●	●
<b>Stakeholder engagement</b>	Targeted opportunities for discussion and feedback from interested parties such as community and environmental organizations, academic advisors, economic development interests, business and community leaders and representatives of other state or local agencies	●	●	●	●
<b>Stakeholder interviews</b>	To improve the baseline understanding of target audiences and inform communication planning, the project team may conduct one-on-one or groups interviews with a broad range of stakeholders	●	●	●	

Technique/Tool	Description	Inform	Consult	Involve	Collaborate
<b>In-person Engagement (continued)</b>					
<b>Focus groups</b>	Facilitated discussions held with randomly selected participants to learn about key issues, understand values and interests or test messages.	●	●	●	
<b>Discussion groups</b>	Are a facilitated forum for individuals to discuss various topics amongst each other.	●	●	●	
<b>Community Summit</b>	A public event that brings together stakeholders representing the diverse perspectives of the region to evaluate Metro's public engagement practices from the previous year, share local community information and advise on priorities and engagement strategies for upcoming policy initiatives.	●	●	●	
<b>Visual Communication</b>					
<b>Maps</b>	Unique access to state-of-the-art mapping, spatial analysis, regional economic analysis and land use/travel forecasting supports Metro's ability to create maps that communicate spatial and other complex information visually (data sources: census, modeling, roadway and transit network, sidewalk/bike/trail network, parks and natural areas locations and more)	●			
<b>Charts, graphs and tables</b>	More than 100 layers of regional geographic-based data make it possible to create charts, graphs or tables to illustrate all kinds of complex information in a way that is easily-understandable to the public and regional decision-makers (data sources: collection through collaboration with cities, counties and other agencies around the region)	●			
<b>Diagrams and graphic illustrations</b>	Diagrams and graphic illustrations visually illustrate timelines, complex process or decision-making structures, proposed choices and their associated tradeoffs and analysis results	●			
<b>Photographs</b>	An extensive photo library offers access to images that clarify meaning and make reports and analysis more visually appealing	●			
<b>Map-based online public comment</b>	Enabling a map with project locations and descriptions to connect to local project information and a form for taking public comments, in English and/or multiple languages	●	●	●	
<b>Envision tool</b>	The tool allows users to “paint the landscape” by allocating different building types across a study area to create a land use scenario. Users can build as many scenarios as they would like and test them against each other. The tool allows real-time evaluation of each scenario’s impact on land use, housing, sustainability, transportation, and economic conditions	●	●	●	

Technique/Tool	Description	Inform	Consult	Involve	Collaborate
<b>Visual Communication (continued)</b>					
<b>Interactive web pages with surveys</b>	Specially-created, web-based interactive tools that ask community members to make choices between different options by visually demonstrating the options' tradeoffs allows for participants to make choices and then explain those choices in a follow-up survey where they can also offer advice for the project or program decision-making	●	●	●	●
<b>Involving Limited English Proficient Populations, Communities of Color, Low-Income Households, Elderly and Persons with Disabilities</b>					
<b>Relationship-building</b>	Partnership with business, civic, faith-based and community organization leadership to reach underrepresented populations, provide targeted translated materials or announce public engagement opportunities	●	●	●	
<b>Technical Assistance Contracts</b>	Technical Assistance Contracts may be awarded to community organizations to conduct engagement activities, reach underrepresented populations or to help better inform a project	●	●	●	●
<b>Audience research and analysis</b>	Demographic and four-factor LEP analysis, community assessment and stakeholder interviews to understand different populations, abilities to speak English and cultural preferences so that engagement tools selected for public outreach are inclusive, accepted and accessible: mobile application, online, word of mouth, radio, etc. (data sources: census, American Community Survey, schools)	●	●	●	
<b>Plain language</b>	Materials clearly written in plain language with a minimum of technical terms to enable people with limited English proficiency or low literacy to participate and comment	●	●	●	
<b>Language assistance</b>	In-person interpreters, a telephone language line or translated materials that communicate with people with limited English proficiency	●	●	●	
<b>Alternative formats</b>	Braille, sign language or communication aids at public meetings, upon request	●	●	●	
<b>Barrier removal</b>	Locations that are easily accessible by transit and accessible for people with disabilities, child care, space for wheelchairs, designated seating for persons with hearing or vision impairments, and other accommodations upon request	●	●	●	
<b>Media Coordination</b>					
<b>Press release</b>	Proactive coordination with TV, radio, newspaper, blogs, community, multicultural media and other media outlets to describe the project, explain its timeline, highlight opportunities for involvement and comment, discuss relevant issues and frame intended outcomes	●	●		
<b>Newsfeed</b>	Story to be shared with newspaper, radio and TV, blogs, social media for the purpose of generating coverage	●			

Technique/Tool	Description	Inform	Consult	Involve	Collaborate
<b>Media Coordination (continued)</b>					
<b>Media calendar listings</b>	Event information sent to newspaper, radio, TV, blogs and social media that have some kind of calendar listing or web calendar to which they can post it to increase visibility	●			
<b>Display ad or legal notice, radio ad or Public Service Announcement (PSA)</b>	Newspaper ads or legal notices, especially in community-based papers, and radio ads or PSAs are used to announce project milestones or request formal public comment and refer recipients to detailed project information online	●	●		
<b>Public access cable</b>	Live broadcast for Metro Council meetings that are repeated on Community Access Network, Portland Community Media, Metro East Community Media (MCTV), Tualatin Valley Television (TVCTV) and Willamette Falls Television at various times throughout the week	●			



## **APPENDIX K: ACRONYMS USED IN THE PUBLIC ENGAGEMENT GUIDE**

**ADA:** Americans with Disabilities Act

**CAA:** Clean Air Act

**CFR:** Code of Federal Regulations

**DEIS:** Draft Environmental Impact Statement

**DEQ:** Department of Environmental Quality

**DLCD:** Department of Land Conservation and Development

**EPA:** Environmental Protection Agency

**FHWA:** Federal Highway Administration

**FTA:** Federal Transit Administration

**JPACT:** Joint Policy Committee on Transportation

**LCDC:** Land Conversation and Development Commission

**LEP:** Limited English Proficiency

**MAP-21:** Moving Ahead for Progress in the 21<sup>st</sup> Century Act

**MERC:** Metropolitan Exposition/Recreation Commission

**MPAC:** Metro Policy Advisory Committee

**MPO:** Metropolitan Planning Organization

**MTAC:** Metro Technical Advisory Committee

**OCC:** Oregon Convention Center

**ODOT:** Oregon Department of Transportation

**PCPA:** Portland Center for the Performing Arts

**RFFA:** Regional Flexible Funds Allocation

**RTO:** Regional Travel Options

**RTP:** Regional Transportation Plan

**MTIP:** Metropolitan Transportation Improvement Program

**TMA:** Transportation Management Association

**TOD:** Transit-Oriented Development

**TPAC:** Transportation Policy Advisory Committee

**TSMO:** Transportation Systems Management and Operations

**UGR:** Urban Growth Report

**UGB:** Urban Growth Boundary

**UPWP:** Unified Planning Work Program

**USDOT:** U.S. Department of Transportation