A G E N D A

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METRO

Agenda

MEETING: METRO COUNCIL WORK SESSION MEETING
DATE: January 13, 2004
DAY: Tuesday
TIME: 1:00 PM
PLACE: Metro Council Chamber

CALL TO ORDER AND ROLL CALL

1:00 PM	**1.**	**DISCUSSION OF AGENDA FOR COUNCIL REGULAR MEETING, JANUARY 15, 2004**	
1:15 PM	**2.**	**GOAL 5 PUBLIC OUTREACH**	Deffebach
1:30 PM	**3.**	**REGIONAL TRAVEL OPTIONS 5 YEAR STRATEGIC PLAN**	Barber
1:50 PM	**4.**	**TRANSFER STATION REQUEST FOR PROPOSAL**	Hoglund & Watkins
2:35 PM	**5.**	**POLICY DRIVERS FOR INDUSTRIAL LAND DECISION TASK 3/TITLE 4**	Benner & Neill
3:35 PM	**5.**	**CITIZEN COMMUNICATION**	
3:45 PM	**6.**	**CHIEF OPERATING OFFICER COMMUNICATION**	
3:55 PM	**7.**	**COUNCILOR COMMUNICATION**	

ADJOURN

Agenda Item Number 2.0

PUBLIC OUTREACH FOR FISH AND WILDLIFE HABITAT PROTECTION PROGRAM ESEE ANALYSIS

Metro Council Work Session
Tuesday, January 13, 2004
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: 1/13/04 Time:1:15 PM Length: 15 minutes

Presentation Title: Public Outreach for Fish and Wildlife Habitat Protection Program ESEE Analys

Department: Planning

Presenters: Chris Deffebach, Andy Cotugno, Karen Withrow

ISSUE & BACKGROUND

In March and April 2004, several workshops and hearings are scheduled for the fish and wildlife habitat protection program. These events will lead up to Council consideration in May of a resolution and a map for where development should be allowed, limited or prohibited on regionally significant fish and wildlife lands. Council reviewed the general outreach plan in a previous work session.

In March 2004, Metro will hold seven workshops to share the results of the Phase 2 Economic Social, Environmental and Energy analysis for the Fish and Wildlife Habitat Protection Program with the public and seek comment on the optional regulatory and non-regulatory protection and restoration approaches for the region. The ESEE results will illustrate trade-offs for the different regulatory and non-regulatory approaches that were defined by Council Resolution 03-3376B.

In April, Metro will hold public hearings on a recommendation for where and to what extent development should be limited on regionally significant fish and wildlife habitat lands and the role of non-regulatory tools in habitat protection and restoration.

To announce these events, Metro will send a notice to property owners of regionally significant fish and wildlife habitat land and to other interested parties. This notice will be mailed in the first week of February and will be received by residents by February 17.

The notice for the Tualatin Basin will be sent jointly from Metro and Tualatin Basin Partners. A separate but similar Metro notice will be sent to the rest of the region. The purpose of this presentation is to review the notice and schedule for public events. The Tualatin Basin Natural Resource Coordinating Committee is scheduled to approve the Tualatin Basin/Metro notice on January 12. Text for both notices is attached.

OPTIONS AVAILABLE

Metro Councilors can propose edits to the notice if there is a major concern. Metro councilors can also suggest other opportunities to partner and advertise the workshops and suggest other outreach events.

IMPLICATIONS AND SUGGESTIONS

This is the time for Metro Councilor review of the property owner /interested party notice. The notices will be sent for printing and mailing by February 1. The workshop dates and locations will be included in the notice.

QUESTION(S) PRESENTED FOR CONSIDERATION

Staff request that Councilors review the notice and the time for the public outreach events and plan to attend.

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION __Yes __No
DRAFT IS ATTACHED ___Yes ___No

SCHEDULE FOR WORK SESSION

Department Director/Head Approval _____________
Chief Operating Officer Approval _________________

February 2004 Public Notice

Attention:
- **Property owners: this may affect your property**
- **Interested residents**

Natural resource protection analysis underway

Ten Washington County cities have joined with the County, Clean Water Services and the Tualatin Hills Park and Recreation District to develop a fish and wildlife habitat protection plan for the Tualatin River Basin. This collaborative effort, known as the *Partners for Natural Places*, is being completed in cooperation with Metro. The *Partners'* recommendation to protect habitat land in the Tualatin Basin will be forwarded to Metro for final approval as part of a regional habitat protection plan.

Why did I receive this notice?

You received this notice for one of two reasons:
- Your property is located in or near the regional habitat inventory
- You have expressed an interest in being informed about fish and wildlife habitat protection

If your property is located *outside* the Urban Growth Boundary (UGB), then it falls within one of two categories. Properties generally within one mile of the UGB are part of Metro's natural resources inventory and are being included in the Tualatin Basin's Goal 5 work. For properties outside the Metro inventory area, a parallel program to encourage streamside protection strategies will be implemented for improving water quality. Call 503-846-3519 for more information.

Background

In 2001 Metro undertook a fish and wildlife habitat protection process to ensure a coordinated program for resource protection and enhancement, since fish and wildlife habitat does not fit neatly into city and county boundaries. The work is guided by statewide planning Goal 5 and the federal Clean Water and Endangered Species acts. In 2002 Metro adopted an inventory of regionally significant fish and wildlife habitat.

During 2003 Metro identified the economic, social, environmental and energy (ESEE) consequences of protecting - or not protecting - habitat on a regional scale. The Tualatin Basin *Partners* are using Metro's inventory to conduct a more site-specific local ESEE analysis.

Next Steps
In 2004 the *Partners* will complete the local ESEE analysis and recommend areas where to limit development in order to protect fish and wildlife habitat. Metro will also complete the regional ESEE analysis and adopt a map showing where development will and will not be affected around the region.

The final step is to develop a program to protect regionally significant natural habitat. Tools such as education, incentives, acquisition and regulation will be considered and additional public notice will be sent as required by law.

Invitation
You are invited to attend an open house where you can learn more about the Tualatin Basin and Metro's ESEE analyses and recommendations on which fish and wildlife habitat should be subject to some level of limitation on development. The Basin Partners will also host a *public hearing* where you can offer testimony on the recommendations.

Open Houses:

DATE	MONDAY MARCH 1, 4 TO 8 PM	THURSDAY MARCH 4, 4 TO 8 PM
Place	Public Services Building 155 N. First Avenue Hillsboro Cafeteria and Room 140	Police Department City of Tualatin 8650 SW Tualatin Road Community Room

Public Hearing:

DATE	MONDAY EVENING MARCH 29
Place	Beaverton Library Meeting Rooms A&B – Information displays open from 4 pm to 7:30 pm Auditorium – Hearing 6 to 8 pm

If you cannot attend the public hearing but would like to provide comments, you may fill out and submit a card at one of the open houses or write to the Tualatin Basin Natural Resources Coordinating Committee at the address below. If you want more information about Metro's work, you can attend an open house in another part of the region. In addition, Metro will hold public hearings in late spring 2004.

(List of additional metro open houses here)

(Map of region with TB area "blown up" to show TB ALP)

Partner contacts:

- **Beaverton**, Barbara Fryer, 503-526-3718, bfryer@ci.beaverton.or.us
- **Clean Water Services**, Sheri Wantland, 503-681-5111, wantlands@cleanwaterservices.org
- **Forest Grove**, Jeff Beiswenger, 503-992-3226, jbeiswenger@ci.forest-grove.or.us
- **Hillsboro**, Jennifer Wells, 503-681-6214, jenniferw@ci.hillsboro.or.us
- **Metro**, 24-hour hotline, 503-797-1888, option 2; also check www.metro-region.org
- **Sherwood,** Dave Wechner, 503-625-4205, wechnerd@sherwood.or.us
- **Tigard**, Julia Hajduk, 503-639-4171, JULIA@ci.tigard.or.us
  On maternity leave??

- **Tualatin**, Stacy Hopkins, 503-691-3028, shopkins@ci.tualatin.or.us
- **Tualatin Hills Park and Recreation District**, David Endres, 503-645-6433, dendres@thprd.com
- **Washington County**, 503-846-3519 or lutplan@co.washington.or.us
- Cities not listed, call Washington County

Thank you for your interest in the Tualatin Basin watershed.

http://www.co.washington.or.us/goal5

Washington County's Department of Land Use and Transportation
Planning Division, 155 N. 1st Avenue, Suite 350-14
Hillsboro, OR 97124

Draft 3
01/05/04

METRO

February 2004 Public Notice

Attention:
- **Property owners: this may affect your property**
- **Interested residents**

Fish and wildlife habitat protection analysis underway

Metro is working with the cities and counties in your area to develop a regional fish and wildlife habitat protection plan. After final approval by Metro, cities and counties will implement the plan as they update their comprehensive land use plans.

Why did I receive this notice?

You received this notice for one of two reasons:
- Your property is located in or near the regional habitat inventory
- You have expressed an interest in being informed about fish and wildlife habitat protection

Properties generally within one mile of the UGB are part of Metro's natural resources inventory.

Background

In 2001 Metro undertook a fish and wildlife habitat protection process to ensure a coordinated program for resource protection and enhancement, since fish and wildlife habitat does not fit neatly into city and county boundaries. The work is guided by statewide planning Goal 5 and the federal Clean Water and Endangered Species acts. In 2002 Metro adopted an inventory of regionally significant fish and wildlife habitat.

During 2003 Metro identified the economic, social, environmental and energy (ESEE) consequences of protecting - or not protecting - habitat on a regional scale.

Next Steps

In 2004, Metro will complete a regional ESEE analysis and recommend where to limit development in order to protect fish and wildlife habitat. Metro will adopt a map showing where development will and will not be affected around the region.

The final step is to develop a program to protect regionally significant habitat. Tools such as education, incentives, acquisition and regulation will be considered and additional public notice will be sent as required by law.

Invitation
You are invited to attend an open house where you can learn more about the Metro's ESEE analyses and recommendations on which fish and wildlife habitat should be subject to some level of limitation on development. Metro will also host public hearings where you can offer testimony on the recommendations.

Open Houses:

DATE	____DAY MARCH _, 4 TO 8 PM	____DAY MARCH _, 4 TO 8 PM
Place	building address city room	building address city room
DATE	____DAY MARCH _, 4 TO 8 PM	____DAY MARCH _, 4 TO 8 PM
Place	building address city room	building address city room
DATE	____DAY MARCH _, 4 TO 8 PM	____DAY MARCH _, 4 TO 8 PM
Place	building address city room	building address city room

Public Hearings:

DATE	___DAY MARCH __, _ TO _ PM

Place	Building Address City rooms A&B

If you cannot attend the public hearing but would like to provide comments, you may fill out and submit a card at one of the open houses or send email to habitat @metro-region.org. For more information or to leave recorded comments, call Metro's planning hotline at (503) 797-1888, option 2. For more information, please visit Metro's web site at metro-region.org/habitat

(Inventory map of region)

Thank you for your interest in fish and wildlife habitat protection.

Metro boilerplate here

Draft 1
01/05/04

Agenda Item Number 3.0

REGIONAL TRAVEL OPTIONS 5 YEAR STRATEGIC PLAN

Metro Council Work Session
Tuesday, January 13, 2004
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: **1/13/04** Time: **2pm** Length: **20min**

Presentation Title: **1. Regional Travel Options 5 Year Strategic Plan (RES 04-3400); 2. It's Cool to Carpool campaign (RES 04-XXXX)**

Department: **Planning**

Presenters: **Bill Barber and Kelley Webb**

ISSUE & BACKGROUND

1. RTO 5 Year Strategic Plan

The mission of the RTO program is: "The regional partners will work collaboratively to provide and actively market a range of travel options for all residents of the region." Because of this change of focus staff recommends changing the name of the Transportation Demand Management (TDM) Subcommittee of TPAC to the Regional Travel Options (RTO) Subcommittee of TPAC.

The Plan is attached to this staff report and includes the following:

- Attachment 1: Regional Travel Options Program 5-Year Strategic Plan (December 2003) + Appendix A (Funding/Budget Scenarios)
- Attachment 2: Appendix B (Detailed Program Work Plans) and Appendix C (Past Program Expenditures)

The Strategic Plan is the result of a six-month process by the TDM Subcommittee at large, and a number of working groups, including transportation management associations (TMAs), marketing, performance measures and rideshare groups. The working groups completed the detailed program work plans in Appendix B of the plan. In addition, a Senior Management group with representatives from Metro, ODOT, Portland and TriMet participated in the process in an advisory capacity.

2. *It's Cool to Carpool* campaign

Companies around the region are realizing that convenient, stress-free options for commuting to work can provide tremendous employee benefits and help improve the economy and the environment. By reducing the number of people driving alone carpooling reduces traffic congestion, improves air quality and freight movement, encourages employees to be on time, and is a more relaxing way to get to work.

OPTIONS AVAILABLE

1. RTO 5 Year Strategic Plan

One key component of the strategic plan are the alternative budget/funding scenarios described in Appendix A, including two financially constrained funding scenarios and a preferred funding scenario for the Regional Transportation Options (RTO) program. The three funding scenarios are summarized as follows:

Scenario A. This is a financially constrained scenario based on funding allocated through three MTIP cycles. It assumes that $100,000 in RTO funding that is currently in an MTIP reserve fund pending completion of the strategic plan would be retained, and $400,000 would go to TriMet's Frequent Bus Program. RTO funding would be further adjusted in order to implement Scenario A.

- $103,888 in unspent funds from Regional Vanpool Program would be used to cover RTO program expenditures for the Region 2040, TMA and Rideshare Programs through June 2006 as per Scenario A using unspent vanpool funding from FY 2002 and 2003.

- $206,756 unspent funds in TriMet Employer Outreach is returned to the RTO program and reallocated to the Collaborative Marketing Program, with BETC used as the local match. Metro and Oregon Department of Energy staff are exploring the feasibility of using the Business Energy Tax Credit (BETC) Program as a mechanism for providing local match of $23,600, with a decision expected in mid-December 2003.

- TriMet would no longer be responsible for the match for Regional TMA, Region 2040 Initiatives and Rideshare Programs, freeing up $109,642 per year beginning in July 2006 or when the programs are transferred.

Marketing funds are divided between the TriMet employer program to support employee outreach and transit pass marketing, and a proposed collaborative marketing program that integrates marketing efforts of all regional partners. A regional rideshare program that combines regional vanpool, CarpoolMatchNW and an integrated marketing program is proposed. Scenario A is recommended as the financially constrained budget, based on current levels of funding allocated through the Metropolitan Transportation Improvement Program (MTIP) through FY 2007/08.

Scenario B. This scenario assumes that $500,000 in RTO funding (federal Congestion Mitigation Air Quality (CMAQ) funds, not including local match) would be transferred to TriMet's frequent bus program in 2006 and 2007. Funding is cut from the TriMet employer program and the collaborative marketing program. The rest of the RTO Program remains the same as Scenario A.

Scenario B is not recommended due to adverse impacts to the current TriMet employer program and the proposed collaborative marketing program. Cutting other RTO core programs would have adverse effects as well. Also, the Regional TMA and Region 2040 Initiatives Components of what was then called the Regional TDM Program were cut by about $500,000 during the 2002 MTIP process, and that funding was not replaced during the 2004 MTIP process.

Scenario B was developed to describe the impact of cutting $500,000 in federal funds from the program. A more agreeable solution (as described above in Scenario A) was reached through Metro and TriMet staff discussion and endorsed by the RTO Senior Management Team.

Scenario C: Preferred RTO Collaborative Program. This scenario shows what a fully funded transportation options program would look like for the region. Additional funds outside of MTIP programming would need to be secured. Scenario C assumes growth in the TriMet Employer Program and Collaborative Marketing Program. The preferred program also assumes new and expanded RTO program elements, including targeted travel training and a targeted pedestrian safety campaign. In order to implement Scenario C, staff recommends pursuing funding beyond MTIP.

2. *It's Cool to Carpool* campaign

Support the *It's Cool to Carpool* campaign by signing a letter to business leaders from around the region encouraging their employees to carpool to work.

IMPLICATIONS AND SUGGESTIONS

1. RTO 5 Year Strategic Plan

The restructured RTO program will become more collaborative at marketing, implementing and evaluating transportation demand management programs funded through the Metropolitan Transportation Improvement Program (MTIP). RTO is the newly envisioned program for transportation demand management because it more clearly articulates the intention of the program – to provide travel options to all residents of the region.

There may be future impacts to Metro's budget in order to implement the preferred funding scenario C, dependent upon how local matching funds are calculated. Future Metro planning staff full time equivalency (FTE) and RTO program match issues will be addressed through the annual Unified Work Program for Transportation Planning in the Portland/Vancouver area.

Staff recommends adoption of the mission, goals, strategies and actions in the Regional Travel Options (RTO) Program 5-Year Strategic Plan. The recommendation includes a financially constrained funding scenario that retains $100,000 in Metropolitan Transportation Improvement Program (MTIP) reserve funds as described in Appendix A of the Plan. In addition, the preferred funding scenario described in Appendix A is the basis for seeking future additional funds for the RTO Program, including the MTIP, a portion of the Oregon Department of Transportation (ODOT) $1.5 million Transportation Demand Management (TDM) funding recently approved by the Oregon legislature, and other funding sources.

2. *It's Cool to Carpool* campaign
Staff recommends supporting the *It's Cool to Carpool* Campaign.

QUESTION(S) PRESENTED FOR CONSIDERATION

(1) Does the RTO 5 year Strategic Plan meet the council's expectations for the program?
(2) Does the council support the strategic direction set out by the RTO program and support the transition of the program to Metro by 2006?
(3) Are there any changes or additions that the council would like to see in the strategic plan?
(4) Does the council support the *It's Cool to Carpool* campaign as a way to encourage business leaders to help reduce drive alone trips throughout the region?

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION _X_Yes __No
DRAFT IS ATTACHED __X_Yes ___No

SCHEDULE FOR WORK SESSION

Department Director/Head Approval _Alehrpn_
Chief Operating Officer Approval ________________

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE REGIONAL TRAVEL OPTIONS PROGRAM 5-YEAR STRATEGIC PLAN	)))	RESOLUTION NO. 04- 3400 Introduced by Councilor Park

WHEREAS, Metro adopted the 2000 Regional Transportation Plan on August 10, 2000; and

WHEREAS, Policy 19.0. Regional Transportation Demand Management (TDM) calls for enhances mobility and supports the use of alternative transportation modes by improving regional accessibility to public transportation, carpooling, telecommuting, bicycling and walking options; and

WHEREAS, the TDM Subcommittee of the Transportation Policy Alternatives Committee (TPAC) that provides oversight for the development and evaluation of TDM strategies has gone through a strategic planning process and has developed a Regional Travel Options (RTO) 5-year Strategic Plan; and,

WHEREAS, the TDM Subcommittee has developed funding scenarios for the Regional Travel Options program through FY 2007/08; and

WHEREAS, Funding Scenario A describes a financially constrained budget for the RTO program, that has been given preliminary approval by the TDM Subcommittee; and

WHEREAS, The Regional Travel Options Senior Management Team has endorsed an agreement developed by Metro and TriMet staff that $100,000 in Metropolitan Transportation Improvement Program (MTIP) reserve funds will go to the RTO Program and $400,000 in MTIP reserve funds will go to the TriMet Frequent Bus Program; and

WHEREAS, Scenario C describes a preferred program budget for the RTO program and is the basis for seeking future additional funds for the RTO program, including the MTIP, a portion of the Oregon Department of Transportation (ODOT) $1.5 million TDM funding and other funding sources: now therefore

BE IT RESOLVED by the Metro Council

1. Approve the mission, goals, strategies and actions in the Regional Travel Options Program 5-Year Strategic Plan.
2. Approve the Scenario A Financially Constrained Program described in Appendix A of the RTO Program 5-Year Strategic Plan.
3. Seek additional funds in the future to implement Scenario C, the Preferred Collaborative RTO Program described in Appendix A of the RTO Program 5-Year Strategic Plan.

4. Direct Regional Travel Options Staff to work with ODOT in developing performance measures and distribution plan for a regional percentage of the ODOT $1.5 million TDM budget approved by the Oregon Legislature.
5. Rename the Transportation Demand Management Subcommittee of TPAC to the Regional Travel Options Subcommittee of TPAC to reflect the updated mission of the program.
6. Retroactive to June 30, 2003, unspent RTO funds in any RTO program category at the end of a fiscal year may be carried over to the next fiscal year or reallocated to other RTO program categories in the RTO Strategic Plan, as determined by the RTO Subcommittee of TPAC and subject to the resolution process through TPAC, JPACT and Metro Council.
7. Approve *Exhibit A: Metro / TriMet Agreement on MTIP Reserve Funds*, in regard to recommending that $100,000 in MTIP reserve funds set aside in Resolution No. 03 – 3335 will go to the RTO Program and $400,000 will go to the TriMet Frequent Bus Program.

ADOPTED by the Metro Council this 15th day of January, 2004

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 04 - 3400, FOR THE PURPOSE OF ADOPTING THE REGIONAL TRAVEL OPTIONS PROGRAM 5-YEAR STRATEGIC PLAN

Date: December 4, 2003 Prepared by: Bill Barber

Staff recommends adoption of the mission, goals, strategies and actions in the Regional Travel Options (RTO) Program 5-Year Strategic Plan. The recommendation includes a financially constrained funding scenario that retains $100,000 in Metropolitan Transportation Improvement Program (MTIP) reserve funds as described in Appendix A of the Plan. In addition, the preferred funding scenario described in Appendix A is the basis for seeking future additional funds for the RTO Program, including the MTIP, a portion of the Oregon Department of Transportation (ODOT) $1.5 million Transportation Demand Management (TDM) funding recently approved by the Oregon legislature, and other funding sources.

The Strategic Plan is the result of a six-month process by the TDM Subcommittee at large, and a number of working groups, including transportation management associations (TMAs), marketing, performance measures and rideshare groups. The working groups completed the detailed program work plans in Appendix B of the plan. In addition, a Senior Management group with representatives from Metro, ODOT, Portland and TriMet participated in the process in an advisory capacity.

What has emerged from the strategic planning process is a bold new vision and proposed direction for the Regional Travel Options program. The new vision emphasizes working more collaboratively to implement a highly integrated program that has measurable results and tangible impacts on the environment, the economy and the quality of life of all people in the region. The strategic plan represents an exciting move toward greater regional cooperation when it comes to delivering a wide range of travel options to residents of the region. The program is becoming increasingly connected with related regional planning efforts such as 2040 Centers, transit-oriented development, corridor planning and community health.

The mission of the RTO program is: "The regional partners will work collaboratively to provide and actively market a range of travel options for all residents of the region." Because of this change of focus staff recommends changing the name of the Transportation Demand Management (TDM) Subcommittee of TPAC to the Regional Travel Options (RTO) Subcommittee of TPAC.

The Plan is attached to this staff report and includes the following:

- Attachment 1: Regional Travel Options Program 5-Year Strategic Plan (December 2003) + Appendix A (Funding/Budget Scenarios)
- Attachment 2: Appendix B (Detailed Program Work Plans) and Appendix C (Past Program Expenditures)

One key component of the strategic plan are the alternative budget/funding scenarios described in Appendix A, including two financially constrained funding scenarios and a preferred funding scenario for the Regional Transportation Options (RTO) program. The three funding scenarios are summarized as follows:

Scenario A. This is a financially constrained scenario based on funding allocated through three MTIP cycles. It assumes that $100,000 in RTO funding that is currently in an MTIP reserve fund pending completion of the strategic plan would be retained, and $400,000 would go to TriMet's Frequent Bus Program. RTO funding would be further adjusted in order to implement Scenario A.

- $103,888 in unspent funds from Regional Vanpool Program would be used to cover RTO program expenditures for the Region 2040, TMA and Rideshare Programs through June 2006 as per Scenario A using unspent vanpool funding from FY 2002 and 2003.

- $206,756 unspent funds in TriMet Employer Outreach is returned to the RTO program and reallocated to the Collaborative Marketing Program, with BETC used as the local match. Metro and Oregon Department of Energy staff are exploring the feasibility of using the Business Energy Tax Credit (BETC) Program as a mechanism for providing local match of $23,600, with a decision expected in mid-December 2003.

- TriMet would no longer be responsible for the match for Regional TMA, Region 2040 Initiatives and Rideshare Programs, freeing up $109,642 per year beginning in July 2006 or when the programs are transferred.

Marketing funds are divided between the TriMet employer program to support employee outreach and transit pass marketing, and a proposed collaborative marketing program that integrates marketing efforts of all regional partners. A regional rideshare program that combines regional vanpool, CarpoolMatchNW and an integrated marketing program is proposed. Scenario A is recommended as the financially constrained budget, based on current levels of funding allocated through the Metropolitan Transportation Improvement Program (MTIP) through FY 2007/08.

Scenario B. This scenario assumes that $500,000 in RTO funding (federal Congestion Mitigation Air Quality (CMAQ) funds, not including local match) would be transferred to TriMet's frequent bus program in 2006 and 2007. Funding is cut from the TriMet employer program and the collaborative marketing program. The rest of the RTO Program remains the same as Scenario A.

Scenario B is not recommended due to adverse impacts to the current TriMet employer program and the proposed collaborative marketing program. Cutting other RTO core programs would have adverse effects as well. Also, the Regional TMA and Region 2040 Initiatives Components of what was then called the Regional TDM Program were cut by about $500,000 during the 2002 MTIP process, and that funding was not replaced during the 2004 MTIP process.

Scenario B was developed to describe the impact of cutting $500,000 in federal funds from the program. A more agreeable solution (as described above in Scenario A) was reached through Metro and TriMet staff discussion and endorsed by the RTO Senior Management Team.

Scenario C: Preferred RTO Collaborative Program. This scenario shows what a fully funded transportation options program would look like for the region. Additional funds outside of MTIP programming would need to be secured. Scenario C assumes growth in the TriMet Employer Program and Collaborative Marketing Program. The preferred program also assumes new and expanded RTO program elements, including targeted travel training and a targeted pedestrian safety campaign. In order to implement Scenario C, staff recommends pursuing funding beyond MTIP.

BACKGROUND

The purpose of the Regional Travel Options Program includes guiding implementation of regional transportation demand management (TDM) policies in the Regional Transportation Plan (RTP). These policies, in turn, are the RTP strategy for leveraging the development of compact centers with transportation investments. The program provides for analysis and recommendation of TDM techniques and strategies within the Portland region. Metro chairs the TDM Subcommittee of TPAC and works with TriMet, ODOT, Oregon Department of Environmental Quality (DEQ) and other state agencies; local jurisdictions and private employers to plan fund and implement TDM strategies. Target groups served or affected include local cities and counties, state and regional agencies and the public at-large. The program relates to Metro's mission and value statement by ensuring that people have the ability to get around the region using a variety of transportation options.

During the past 10 years the regional TDM program has advanced from a policy and planning program towards a regionally coordinated implementation program. In 1992, the TPAC Transportation Demand Management (TDM) Subcommittee was established by Metro Resolution to develop project selection criteria and oversee program implementation activities for the first two rounds of Congestion Mitigation and Air Quality (CMAQ) projects in the region. The mission of the TDM Subcommittee is to reduce the need to drive by advocating for TDM in the region, developing funding and policy recommendations to TPAC and coordinating regional TDM programs. In order to achieve this mission, the TDM program at TriMet was expanded to include regional marketing and technical assistance to employers that faced local transportation and parking concerns.

In 1997, TriMet and DEQ became the region's key partners in providing compliance assistance to employers and local jurisdictions for regulatory requirements such as the Employee Commute Option (ECO) Rule. In 1999, the TDM program became more coordinated with the addition of an Employee Commute Options (ECO) clearinghouse, a regional telecommuting program, a local TDM program in Wilsonville, a TMA Assistance Program, and a Region 2040 Initiatives program. Also in 1999, the City of Portland restructured its Transportation Bureau to include a Transportation Options Division, and other counties and cities in the region began actively working with businesses and communities to address the need for transportation options.

ANALYSIS/INFORMATION

1. Known Opposition

No known opposition.

2. Legal Antecedents

Legislation related to the proposed legislation, including federal, state, or local law and Metro resolution numbers, include the following:

<u>1991 Federal Clean Air Act Amendments.</u> The need for a comprehensive regional TDM program was addressed in Metro Resolution No. 91 – 1474, amending the FY1992 Unified Work Program to include air quality planning activities, in response to the Oregon Transportation Planning Rule and the Federal Clean Air Act Amendments of 1990.

<u>TDM Subcommittee.</u> The TPAC TDM Subcommittee was established by Metro Resolution 92 – 1610, establishing the TPAC Transportation Demand Management Subcommittee. Oversight for the development and evaluation of TDM strategies, and formation of final recommendations to TPAC, the

Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council concerning TDM planning, programming and implementation activities were assigned to the Subcommittee.

TDM Relationship to DEQ's Ozone Maintenance Plan (Governor's Task Force on Motor Vehicle Emissions Reduction (HB 2214). The task force recommended a base plan focused on specific strategies to maximize air quality benefits. The air quality strategies selected by the region formed the base for a 10-year air quality maintenance plan for the Portland area. The primary TDM transportation control measures (TCMs) in the maintenance plan are the employee commute options program (ECO) and the regional parking ratio program.

Transportation Management Association (TMA) Policy. The policy basis and funding strategy for TMAs was adopted through Metro Resolution No. 98 – 2676, establishing a policy basis and funding strategy for Transportation Management Associations (TMAs) through the MTIP/STIP development process. Metro Resolution No. 99- 2864, selection and funding allocation of $1 million to Transportation Management Associations for FY 2000 to FY 2003, allocated $1 million in regional funding to existing and new TMAs for FY 2000 to 2003. Metro Resolution No. 02 – 3183, revising regional Transportation Management Association (TMA) policy to provide additional regional funding options for TMAs, revised TMA policy by calling for balanced support of existing TMAs with the start-up of new TMAs, and for funding new and innovative TMA programs.

2000 Regional Transportation Plan. The RTP establishes regional TDM policy and objectives to help reduce vehicle trips and vehicle miles traveled. Chapter 1 (Ordinance 00 – 869A and Resolution 00 – 2968B), adopting the 2000 Regional Transportation Plan, provides TDM policies and objectives that direct the region's planning and investment in the regional TDM program.

3. Anticipated Effects

The restructured RTO program will become more collaborative at marketing, implementing and evaluating transportation demand management programs funded through the Metropolitan Transportation Improvement Program (MTIP). RTO is the newly envisioned program for transportation demand management because it more clearly articulates the intention of the program – to provide travel options to all residents of the region.

4. Budget Impacts

There may be future impacts to Metro's budget in order to implement the preferred funding scenario C, dependent upon how local matching funds are calculated. Future Metro planning staff full time equivalency (FTE) and RTO program match issues will be addressed through the annual Unified Work Program for Transportation Planning in the Portland/Vancouver area.

RECOMMENDED ACTION

Approve Resolution No. 04 – 3400.

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF SUPPORTING THE *IT'S COOL TO CARPOOL* CAMPAIGN.	)))	RESOLUTION NO. Introduced by Councilor Park

WHEREAS, Metro adopted the 2000 Regional Transportation Plan on August 10, 2000; and

WHEREAS, Policy 19.0. Regional Transportation Demand Management (TDM) calls for enhances mobility and supports the use of alternative transportation modes by improving regional accessibility to public transportation, carpooling, telecommuting, bicycling and walking options; and

WHEREAS, the TDM Subcommittee of the Transportation Policy Alternatives Committee (TPAC) that provides oversight for the development and evaluation of TDM strategies has gone through a strategic planning process and has developed a Regional Travel Options (RTO) 5-year Strategic Plan; and,

WHEREAS, the Regional Travel Options program will be investing $270,000 of program funding in the carpoolmatchNW.org program over the next two fiscal years.

BE IT RESOLVED by the Metro Council

1. Support the *It's Cool to Carpool* campaign, February 23 – March 5, 2004, by signing a letter to business leader throughout the region asking them to encourage their employees to participate in the campaign.

ADOPTED by the Metro Council this 15th day of January, 2004

____
David Bragdon, Council President

Approved as to Form:

____
Daniel B. Cooper, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 04 - XXXX, FOR THE PURPOSE OF SUPPORTING THE *IT'S COOL TO CARPOOL* CAMPAIGN.

Date: January 9, 2004 Prepared by: Bill Barber

Staff recommends support of the *It's Cool to Carpool Campaign* from February 23 – March 5, 2004. Resolution No.04-XXXX

BACKGROUND

The purpose of the Regional Travel Options Program includes guiding implementation of regional transportation demand management (TDM) policies in the Regional Transportation Plan (RTP). These policies, in turn, are the RTP strategy for leveraging the development of compact centers with transportation investments. The program provides for analysis and recommendation of TDM techniques and strategies within the Portland region. Metro chairs the TDM Subcommittee of TPAC and works with TriMet, ODOT, Oregon Department of Environmental Quality (DEQ) and other state agencies; local jurisdictions and private employers to plan fund and implement TDM strategies. Target groups served or affected include local cities and counties, state and regional agencies and the public at-large. The program relates to Metro's mission and value statement by ensuring that people have the ability to get around the region using a variety of transportation options.

Companies around the region are realizing that convenient, stress-free options for commuting to work can provide tremendous employee benefits and help improve the economy and the environment. By reducing the number of people driving alone carpooling reduces traffic congestion, improves air quality and freight movement, encourages employees to be on time, and is a more relaxing way to get to work.

ANALYSIS/INFORMATION

1. **Known Opposition**

No known opposition.

2. **Legal Antecedents**

Legislation related to the proposed legislation, including federal, state, or local law and Metro resolution numbers, include the following:

1991 Federal Clean Air Act Amendments. The need for a comprehensive regional TDM program was addressed in Metro Resolution No. 91 – 1474, amending the FY1992 Unified Work Program to include air quality planning activities, in response to the Oregon Transportation Planning Rule and the Federal Clean Air Act Amendments of 1990.

TDM Subcommittee. The TPAC TDM Subcommittee was established by Metro Resolution 92 – 1610, establishing the TPAC Transportation Demand Management Subcommittee. Oversight for the development and evaluation of TDM strategies, and formation of final recommendations to TPAC, the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council concerning TDM planning, programming and implementation activities were assigned to the Subcommittee.

TDM Relationship to DEQ's Ozone Maintenance Plan (Governor's Task Force on Motor Vehicle Emissions Reduction (HB 2214). The task force recommended a base plan focused on specific strategies to maximize air quality benefits. The air quality strategies selected by the region formed the base for a 10-year air quality maintenance plan for the Portland area. The primary TDM transportation control measures (TCMs) in the maintenance plan are the employee commute options program (ECO) and the regional parking ratio program.

Transportation Management Association (TMA) Policy. The policy basis and funding strategy for TMAs was adopted through Metro Resolution No. 98 – 2676, establishing a policy basis and funding strategy for Transportation Management Associations (TMAs) through the MTIP/STIP development process. Metro Resolution No. 99- 2864, selection and funding allocation of $1 million to Transportation Management Associations for FY 2000 to FY 2003, allocated $1 million in regional funding to existing and new TMAs for FY 2000 to 2003. Metro Resolution No. 02 – 3183, revising regional Transportation Management Association (TMA) policy to provide additional regional funding options for TMAs, revised TMA policy by calling for balanced support of existing TMAs with the start-up of new TMAs, and for funding new and innovative TMA programs.

2000 Regional Transportation Plan. The RTP establishes regional TDM policy and objectives to help reduce vehicle trips and vehicle miles traveled. Chapter 1 (Ordinance 00 – 869A and Resolution 00 – 2968B), adopting the 2000 Regional Transportation Plan, provides TDM policies and objectives that direct the region's planning and investment in the regional TDM program.

3. Anticipated Effects

The campaign will result in an increase in the number of people carpooling throughout the region. The effectiveness of the campaign will be measured with the carpoolmathcNW.org online database.

4. **Budget Impacts**

None.

RECOMMENDED ACTION

Approve Resolution No. 04 – XXXX.

600 NORTHEAST GRAND AVENUE PORTLAND, OREGON 97232 2736
TEL 503 797 1700 FAX 503 797 1794

METRO

Dear Business Leader,

Metro is asking for your support for CarpoolMatchNW, an innovative online tool for reducing drive alone trips throughout our region. You are cordially invited to join us at one of the kick-off events for the Portland/Vancouver Metropolitan Region's *It's Cool to Carpool* Campaign (dates and locations listed in the attached invitation).

Companies around the region are realizing that convenient, stress-free options for commuting to work can provide tremendous employee benefits and help improve the economy and the environment. By reducing the number of people driving alone carpooling reduces traffic congestion, improves air quality and freight movement, encourages employees to be on time, and is a more relaxing way to get to work.

It's Cool to Carpool is a two week promotion sponsored by Metro, TriMet, C-TRAN, SMART, and the City of Portland. The campaign goal is to encourage commuters to take advantage of the successful online carpool matching tool, www.CarpoolMatchNW.org, and focus attention on sharing the ride to work and other trips made throughout the day from work. You can support www.CarpoolMatchNW.org and our region's air quality by endorsing the frosty fun promotions during the two week *It's Cool to Carpool* campaign.

During the *It's Cool to Carpool* campaign employees who carpool for at least one day will be eligible for fabulous prizes. Your company's Transportation Coordinator will soon receive their invitation to the kick-off event where they can pick up a complete set of *It's Cool to Carpool* promotional materials. We hope you will encourage your employees to carpool during this two week period and support your Transportation Coordinator in their efforts.

Sincerely,

David Bragdon

Rex Burkholder

Rod Park

Brian Newman

Susan McClain

Rod Monroe

Carl Hostika

Agenda Item Number 4.0

TRANSFER STATION REQUEST FOR PROPOSALS

Metro Council Work Session
Tuesday, January 13, 2004
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: January 13, 2003 Time: Length: 30 minutes

Presentation Title: Sustainability Elements for Metro's Transfer Station RFP, Part II

Department: Solid Waste & Recycling

Presenters: Michael Hoglund and Jim Watkins

ISSUE & BACKGROUND

At the December 9th Council Work Session, the SW&R Department presented three sustainability elements that the Council may want to consider incorporating into the next RFP for operation of Metro's transfer stations. At that meeting Council indicated that staff should proceed with incorporating both the Renewable Energy (at a 15% level) and Clean Exhaust Program elements into the draft RFP. Council also asked staff to research additional issues related to the Material Recovery and Clean Exhaust Program elements.

The additional Material Recovery information requested concerned:

- An example of how a firm operating the transfer station would decide to direct loads given the bonus and guarantee structure of the proposed material recovery sustainability element; and,
- The effect on tonnage coming to Metro facilities if the tip fee increased to incorporate the cost of the sustainable elements.

Council also requested an estimate of the impact of the Clean Exhaust Program's potential impact relative to the emissions of customers using the site.

Responses to these three information requests are attached.

OPTIONS AVAILABLE

Options remain as in the December 9th Work Session, i.e., Council should make a final determination as to whether or not to incorporate the Material Recovery and/or Clean Wind and/or Clean Exhaust sustainability elements into the transfer stations RFP.

IMPLICATIONS AND SUGGESTIONS

Implications remain as stated in the December 9th Work Session. The implications of pursuing each sustainability element are as follows:

Material recovery – Staff estimates that the proposed approach would cost approximately \$100,000 per year or an additional \$11.50 per recovered ton or \$0.18 per incoming ton for bonus payments. The benefit would be the estimated recovery of up to an additional 9,000 tons per year, an increase of about 25% over current recovery levels.*

The SW&R Department recommends incorporation of this sustainability element into the RFP. Additional analysis is attached.

Renewable Energy – The implications of participating in the utilities Clean Wind Program are a reduction in the emission of green house gases and increased costs for electricity. Costs range from $1,000 annually for minimum participation to $50,000 if 100% wind power.

Council has recommended that 15% of the electrical use at the sites come from wind power.

Clean Exhaust Program – Improvement in air quality is the expected result of including this element in the RFP. Cost estimates range from $20,000 to $100,000.

Council has recommended including this element. Additional analysis is attached.

QUESTION(S) PRESENTED FOR CONSIDERATION

Should staff incorporate these elements into the request for proposals to operate Metro's transfer stations?

NOTE: On December 10th, the SW&R Director met with representatives of the current transfer station operator. The current operator requested an extension of its existing agreement and presented materials justifying an extension. Staff will discuss the possible merits of an extension at the January 13th Work Session, with Council discussion and direction likely carrying over to the January 27th Work Session.

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION __Yes _x_ No
DRAFT IS ATTACHED ___Yes ___No

SCHEDULE FOR WORK SESSION

Department Director/Head Approval Michael Hoglund

Chief Operating Officer Approval ____________________

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* Current recovery levels average about 15% between Metro Central and Metro South Transfer Stations. The potential increase would bring the recovery rate to 20%. Metro staff estimates this rate is achievable based on the 2002 waste composition study and the additional space available for recovery due to the recent expansion at Metro South.

Probable Cost Increases at Metro Transfer Stations
Due to Sustainability Elements

Background

At the Council Work Session of December 9, 2003, the SW&R Department presented three sustainability elements that could be incorporated into the RFP for operation of Metro's transfer stations. The presentation by staff included associated costs for each element.

The Metro Council asked staff to explore cost impacts due to adopting sustainable practices. The *total annual* and *per ton* cost impacts from each proposed element is contained in the following table.

Element	Annual Cost	Per Ton Cost (incoming ton)	Effect
Material Recovery Bonus	$100,000 (estimated)	$0.18	25% increase in total recovery at stations
Clean Wind (15%)	$10,000	$0.02	1,800 less tons of greenhouse gases
Clean Exhaust Program	$20,000 to $100,000[1]	$0.04 to $0.20	7.5% to 45% reduction in PM, CO and HC on sites
Total	$130,000 to $210,000	$0.37	

The maximum per ton increase of $0.37 would be less than a 1% increase in the Metro tip fee.

Potential Impacts on MSS/MCS Tonnage
Due to Sustainability Elements

Background

The Metro Council asked staff to explore tonnage impacts at Metro facilities due to adopting sustainable practices.

Conclusion

Staff review of research materials regarding the elasticity of demand for waste disposal lead to the conclusion that incorporating the sustainability elements into the RFP would have little to no impact on the use of the stations.

The demand for waste disposal services generally is inelastic. Studies indicate that even the $4/ton (6%) tip fee increase at Metro's facilities in 2002 had little impact on usage of the facilities. This is in part due to the fact that other transfer facilities mirrored Metro's price increases. Instead of keeping prices below Metro, other facilities tended to follow Metro's prices and retain the increased revenues. Independent haulers therefore have no economic incentive to

[1] The cost range estimate for the Clean Exhaust Program of $20,000 to $100,000 annually reflects the use of 20% to 100% biodiesel. There may be other ways of reducing emissions such as through the use of diesel particulate filters, which though the initial cost may approach $100,000, it would be a one-time expenditure. Such details will be part of the final contract negotiations.

change transfer station choices. Vertically integrated haulers maximize use of their own transfer facilities, particularly for dry waste where the economic incentive from avoiding Metro taxes and fees for recovered material overshadows small tip fee adjustments.

This inelasticity is also partly due to the fact that the tip fee is only a portion of costs associated with the collection and disposal of waste. A $1 per ton increase in the Metro tip fee translates to an increase of only about 6 cents in the average residential monthly trash bill.

Metro transfer station tonnage is impacted by competition from private transfer facilities more than from changes in tip fees. Private facilities maximize the amount of waste they are permitted to take therefore, raising a private facilities tonnage cap or non-system license amount affects Metro tonnage on a one to one basis (i.e. for each ton increase in the cap/license amount, Metro or other facilities will lose that same ton).

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Economic Incentives
Related to the Recovery Guarantee in the Proposed Transfer Station RFP

A vertically integrated operator of Metro's transfer station could manipulate loads delivered by affiliated haulers to influence the recovery rate at Metro's facility; however, it is unlikely that it would be in their best economic interests to do so.

Summary
Certain stakeholders have expressed concern that the recovery incentives as proposed in the transfer station RFP could inadvertently encourage "gaming" of the system by a bidder who controls haulers. Namely, a bidder might inflate his recovery guarantee in an attempt to win the bid, then subsequently reroute highly recoverable loads to Metro in order to buoy the actual recovery rate. Metro staff conclude that the reward/penalty system as proposed in the RFP does not offer adequate economic incentive for such gaming.

Background
The proposed RFP incorporates waste reduction incentives in which the operator receives a financial reward for each recyclable ton counted toward achieving a promised recovery rate, the "recovery guarantee." In the event that the guaranteed recovery rate is not met, the operator would *pay Metro* that same per-ton amount in the form of a penalty for each ton that the operator falls short of the recovery guarantee.

The question at hand centers around whether a bidder who owns a private facility and controls haulers in the region could inflate the recovery guarantee in order to win the bid, then during operations manipulate hauler deliveries in such a way as to buoy Metro's recovery rate through the diversion of highly recoverable loads away from the operator's private facility to Metro's facility. This analysis concludes that such behavior is unlikely in response to Metro's incentives.

Current Economic Incentives
By far the largest economic incentives for private facility recovery are: 1) the avoided costs of disposal, and 2) sales of recovered materials. For each ton of waste recovered, a private facility avoids the costs associated with landfilling, including transportation, disposal, and government fees. In addition, the facility operator has the opportunity to sell the recyclables at market rates (see Table A for typical avoided costs and recyclable values) and receive Metro fee & tax credits.

These avoided costs—and revenue from material sales—translate into real profits when a private facility accepts a load of highly recoverable solid waste at a private MRF. For every ton recovered, a private operator can avoid nearly $50 in costs, plus he can sell the recovered materials for about $25 and receive an average of about $20 per ton in Metro fee & tax credits, netting around $100 revenue before expenses (see assumptions and calculations in Tables A & B). Therefore, the proposed penalty payment at Metro's transfer station would probably not undermine these market forces and cause a vertically integrated operator to manipulate solid waste deliveries.

Opportunity Cost
One can compare the net operating revenue available from recoverable loads at Metro's transfer station with the net revenue described above to better understand the market drivers. Assuming that the private facility tip fee mimics Metro's, the private-facility net revenue will exceed the

net revenue of an operator of a Metro transfer station, mainly because of the additional avoided costs discussed above, some of which are not available to Metro's contract operator (see Tables A & B for amounts). Figures 1 and 2 demonstrate this relationship, based on a single four-ton load (e.g., a standard dry waste drop box).[1]

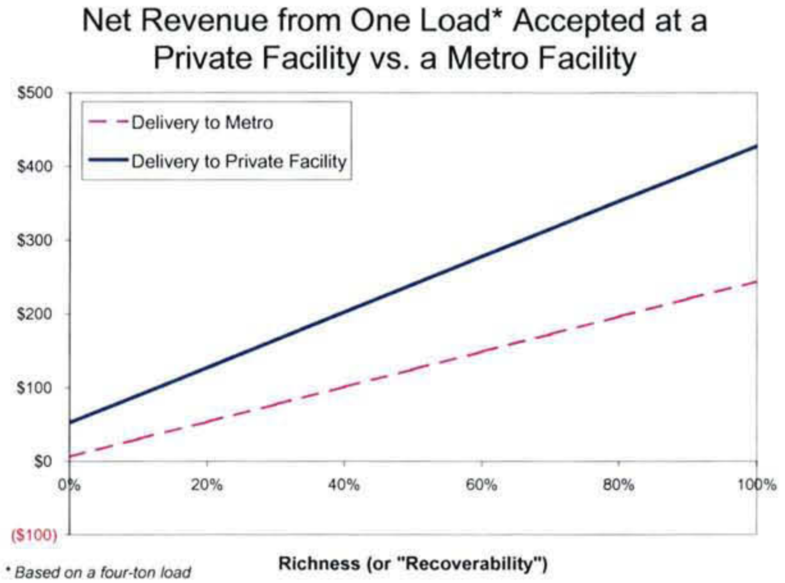
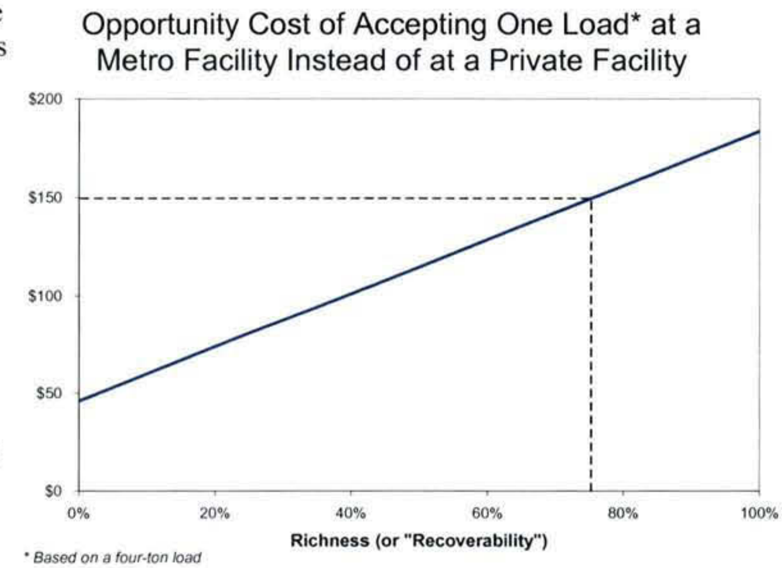


Figure 1. A private company's net operating revenue for a load delivered to Metro vs. the same load delivered to the company's own private facility. Figures are based on a single 4-ton load. For example, a 4-ton load with 75% recoverables is worth $335 at a private facility, but only $185 if it comes to Metro's transfer station, a difference of $150. The private facility net is higher because of avoided government fees, lower operating costs, and Metro fee & tax credits.

Figure 2. Net opportunity cost of diverting one four-ton load to Metro's transfer station. This line represents the difference between the net revenue lines in Figure 1 above, essentially the net revenue foregone (opportunity cost) if a single load is diverted to Metro's facility. For example, for a 4-ton load from which three tons (75%) will be recovered, the private company will be $150 better off to recover those tons at its own facility rather than at Metro's transfer station. In terms of the proposed penalty: even if Metro's operator needed the three tons of recoverables in order to avoid a $100 penalty at Metro's transfer station (3 tons x $33.50), it is still in the company's economic interest to deliver the load to its own facility.



Conclusion

Current economic incentives (primarily avoided costs) available to private facility operators—but not available to Metro's contract operator—exceed the economic disincentive of the proposed penalty payment. Given the assumptions of this analysis, it would not be in the operator's economic interest to routinely reroute highly recoverable loads to Metro's transfer stations in order to avoid the penalty for missing his recovery guarantee.[1]

[1] This analysis assumes current regulatory and fee structures. Generally, if the costs at private facilities increase relative to those at Metro's transfer stations—or, equivalently, if the private facility tip fee is reduced—then the opportunity cost will shrink, making load manipulation more economical.

Table A.
Simplifying Assumptions for the Analysis

	Per-ton Costs & Revenues	
	Delivered to Metro	Delivered to Private Facility
Marginal Costs		
Operations		
Processing	\$7.00	\$4.00 §
Transport & Landfill	\$33.50	\$25.00*
Other Costs		
RSF	\$16.57	\$16.57*
Excise Tax	\$6.32	\$6.32 *
Revenue		
Operations		
Processing	\$8.50	\$8.50
Transport & Landfill	\$33.50	\$33.50
Other Revenues		
RSF	\$16.57	\$16.57
Excise Tax	\$6.32	\$6.32
Material Sales	\$26.00[R]	\$26.00[R]
Metro Incentives	\$33.50[R]	\$20.00[R]

§ The marginal cost of processing a ton at the private facility is assumed to be lower than that at Metro's transfer stations due to such operating standards as fewer hours of operation, limited or no small "self-haul" loads, and no overtime pay on weekends at the private facility.

* Indicates costs whose incidence is on disposed tons only. So-called "back door" costs can be recovered by a private facility operator at the "front door," but avoided as costs on every ton recovered. At Metro's facilities, the contract operator neither collects nor pays government fees & taxes, and receives only the value of avoided transport & disposal plus material sales as economic incentives for material recovery (see Table B. for a simple example).

[R] Indicates revenues received for recovered materials only.

Table B.
A Private Company's Net Operating Revenue from One Recovered Ton

	Per-ton Marginal Costs & Revenues		
	Delivered to Metro	Delivered to Private Facility	
Costs			Avoided Costs
Operations			
Processing	$ 7.00	$ 4.00	$25.00 disposal
Transport & Landfill	-	-	$16.57 RSF
Other Costs			$6.32 Excise Tax
RSF	-	-	$47.89 TOTAL
Excise Tax	-	-	
Subtotal Costs	$7.00	$4.00	
Revenue			
Operations			
Processing	$ 8.50	$ 8.50	
Transport & Landfill	-	$ 33.50	
Other Revenues			Additional Revenue on Recovered Tons
RSF	-	$ 16.57	
Excise Tax	-	$ 6.32	
Material Sales	$ 26.00 [R]	$ 26.00 [R]	$26.00 disposal
Metro Incentives	$ 33.50 [R]	$ 20.00 [R]	$20.00 Metro Credits
Subtotal Revenue	$ 68.00	$110.89	$46.00 TOTAL
Net Revenue	*$ 61.00*	*$ 106.89*	

[R] Indicates revenues received for recovered tons only.

Comparison of Diesel Consumption at Metro Transfer Stations Between Metro's Contractor and Customers

At the Council Work Session of December 9, 2003, the SW&R Department presented a Clean Exhaust Program element to the Council for possible incorporation into the transfer station RFP. The Council asked staff how the program would affect emissions as compared to emissions from station customers.

To make the comparison, staff calculated the consumption of diesel fuel by MSS & MCS customers while at the transfer stations and compared it to diesel fuel consumption by the transfer station contractor. Staff focused on diesel fuel consumption because reducing these emissions, especially the toxic particulate component, is the focus of the proposed Clean Exhaust Program[1]. Total diesel consumption on the two sites, by transfer station customers was computed as follows:

Total Commercial Customer Trips x gallons per minute of diesel consumed x minutes onsite

99,371 trips/year x .1 gal./minute consumed onsite x 8.94 minutes onsite for commercial customers = 88,856 gallons of diesel consumed onsite by customers

The Metro contractor consumes approximately 100,000 gallons of diesel per year or slightly more than half the total diesel fuel consumed onsite.

It should be noted that the health impact of emissions is probably far greater from the transfer station equipment than customers for two reasons. First, the transfer station equipment is not outfitted with the emission control technology since it is off-road and not required (although we now require they burn the same low sulfur fuel) and secondly, the onsite equipment consumes most of its fuel inside buildings. Customers burn much of their fuel outside while waiting to tip their waste.

The Clean Exhaust Program, as proposed, should result in emission reductions of at least 50% from onsite equipment. Staff concludes that this would be a significant reduction in major air pollutants released at the site.

As for cost-effectiveness, DEQ analysis indicates that health impact costs (essentially long term reductions in health-related medical costs) from burning a gallon of diesel fuel is at least $2 per gallon. The Clean Exhaust Program being proposed is estimated to cost an additional $1 per gallon at most[2]. For some approaches, most of the $1 per gallon ($100,000 annually) may be a one-time expenditure for emission control technology such a diesel particulate filters[3].

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[1] The genesis of the Clean Exhaust Program was the research done in conjunction with installing diesel particulate filters on CSU vehicles as part of DEQ/ EPA's Voluntary Diesel Retrofit Program

[2] Economic benefits in the form of long-term reductions in health care costs appear to accrue up to the full $100,000 expenditure level.

[3] The cost range estimate for the Clean Exhaust Program of $20,000 to $100,000 annually reflects the use of 20% to 100% biodiesel. There may be other ways of reducing emissions such as through the use of diesel particulate filters, which though the initial cost may approach $100,000, it would be a one time expenditure. Such details will be part of the final contract negotiations.

Agenda Item Number 5.0

POLICY DRIVERS FOR INDUSTRIAL LAND DECISION TASK 3
TITLE 4

Metro Council Work Session
Tuesday, January 13, 2004
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: January 13, 2004 Time: _____ Length: 30 minutes

Department: Planning

Presenters: Dick Benner, Lydia Neill

ISSUES AND BACKGROUND

What regional policies or criteria apply to the upcoming Council decision to expand the UGB to meet the need for industrial land? How do these policies or criteria relate to state law and to regional aspirations expressed in other documents? How and when (in relation to completion of technical analysis) does the Council interpret and apply regional policies to its choices of land to add to the UGB for industrial use?

There are regional policies and criteria in the Regional Framework Plan (RFP) , the Regional Transportation Plan (RTP) and the Metro Code (MC) that apply, or can be applied, to the UGB decision. These policies are listed and quoted on the attached sheets. The first set applies because the RFP or the Code expressly state that they apply. The Council had some discretion to determine which policies in the second set may apply.

The Council must apply these policies in the context of state law. State statute specifies a priority for inclusion among lands being considered. With several specific exceptions, the Council must follow this priority. As the Council moves down through the priorities, if there is more land under consideration in a priority, Statewide Planning Goal 14 and regional policies guide (but do not dictate) the choice of lands within the priority. Goal 14 establishes a set of factors the Council must weigh as it considers choices among available lands. As the Council weighs Goal 14's "locational factors", it may apply regional policies to support the weight it gives to the Goal 14 factors. In some instances (see notes), regional policies relate to the Goal 14 factors.

Note that the regional policies are generally not clear or objective standards, so the Council will interpret the policies when it applies them to the facts about the optional sites before the Council.

OPTIONS AVAILABLE

The Council has some discretion to determine that some regional policies do not apply to this UGB expansion decision. The Council may also revise or repeal a regional policy. Finally, the Council can adopt new policy for the RFP (as it did in December, 2002) to apply to the UGB expansion decision.

IMPLICATIONS AND SUGGESTIONS

The Council should consider which policies from the second set on the attached sheets should apply to this UGB decision.

QUESTIONS FOR CONSIDERATION

Which policies should apply to the upcoming decision to expand the UGB? How should the policies be interpreted? How and when should the Council apply them?

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION ___ Yes _X_ No

SCHEDULE FOR WORK SESSION

Department Director/Head Approval: _________

Chief Operating Officer Approval: _________

REGIONAL POLICIES AND CRITERIA FOR UGB EXPANSION

I. Policies that Expressly/Implicitly Apply to UGB Expansion
Regional Framework Plan
1.4 Economic Opportunity (need for land; efficient use of land; jobs/housing balance within subregions)
1.4.1 Industrial Land (efficient use of land)
1.4.2 Industrial Land (efficient use of land)
1.6 Growth Management (efficient use of land)
1.7.1 Urban/Rural Transition
1.8 Developed Urban Land (efficient use of land)
1.9 Urban Growth Boundaries (enhance role of centers)
1.12 Protection of Agriculture and Forest Resource Lands
1.13 Participation of Citizens

Metro Code
3.01.020(b) through (e) (Criteria based upon Goal 14 "factors")

II. Policies that May Apply to UGB Expansion
Regional Framework Plan
1.1 Urban Form (efficient use of land)
1.2 Built Environment (need for land; efficient use of land; equitable distribution of jobs, income, investment, tax capacity)
1.3.1 Housing and Affordable Housing (efficient use of land; "fair share" strategy that provides for jobs/housing balance)
1.7.2 Sense of Place (defining cultural features)
1.11 Neighbor Cities (separation of communities)

Regional Transportation Plan
2.0 Intergovernmental Coordination: "Coordinate among the local, regional and state jurisdictions that own and operate the region's transportation system to better provide for state and regional transportation needs."
3.0 Urban Form: "Facilitate implementation of the 2040 Growth Concept with specific strategies that address mobility and accessibility needs and use transportation investments to leverage the 2040 Growth Concept."

Land Use

Chapter 1 Land Use

Overview

This chapter of the Framework Plan addresses regional land use policies, including those relating to the following Charter-mandated Regional Framework Plan components:

1. Management and amendment of the Urban Growth Boundary;

2. Protection of lands outside the Urban Growth Boundary for natural resources, future urban or other uses;

3. Housing densities; and

4. Urban design and settlement patterns.

This chapter contains specific goals and objectives adopted to guide Metro in future growth management land use planning. Following the goals and objectives, this chapter refers to specific legal requirements for cities and counties as well as for Metro that are adopted in Chapter 8. These provisions are implemented in the acknowledged Metro Code section governing Urban Growth Boundary Amendments and in the adopted Urban Growth Management Functional Plan.
The Metro Code provisions, Urban Growth Management Functional Plan, and a background discussion and policy analysis for this chapter are all included in the Appendices of this Plan.

Policies (Goals and Objectives)

Following are Regional Framework Plan policies for land use:

1.1 Urban Form

The quality of life and the urban form of our region are closely linked. The Growth Concept is based on the belief that we can continue to grow and enhance livability by making the right choices for how we grow. The region's growth will be balanced by:

1. Maintaining a compact urban form, with easy access to nature;

2. Preserving existing stable and distinct neighborhoods by focusing commercial and residential growth in mixed-use centers and corridors at a pedestrian scale;

3. Assuring affordability and maintaining a variety of housing choices with good access to jobs and assuring that market-based preferences are not eliminated by regulation; and

4. Targeting public investments to reinforce a compact urban form.

1.2 Built Environment

Development in the region should occur in a coordinated and balanced fashion as evidenced by:

1. A regional "fair-share" approach to meeting the housing needs of the urban population.

2. The provision of infrastructure and critical public services concurrent with the pace of urban growth and that supports the 2040 Growth Concept.

3. The continued growth of regional economic opportunity, balanced so as to provide an equitable distribution of jobs, income, investment and tax capacity throughout the region and to support other regional goals and objectives.

4. The coordination of public investment with local comprehensive and regional functional plans.

5. The creation of a balanced transportation system, less dependent on the private automobile, supported by both the use of emerging technology and the location of jobs, housing, commercial activity, parks and open space.

1.3 Housing and Affordable Housing

1.3.1. Purpose

The Metro Council, with the advice and consultation of the Metro Policy Advisory Committee (MPAC), determined that affordable housing is a growth management and land use planning matter of metropolitan concern and will benefit from regional planning. Metro will develop Affordable Housing Production Goals as part of a Regional Affordable Housing Strategy for meeting the housing needs of the urban population in cities and counties in the Metro region.

The purpose of this Section 1.3 of the Regional Framework Plan is to address the need for a regional affordable housing strategy, in order to provide affordable housing opportunities throughout the region. This purpose will be achieved through:

1. A diverse range of housing types available within the region and within the cities and counties inside;

2. Metro's urban growth boundary;

3. Sufficient and affordable housing opportunities available to households of all income levels that live or have a member working in each jurisdiction and subregion;

4. An appropriate balance of jobs and housing of all types within subregions;

5. Addressing current and future need for and supply of affordable housing in the process used to determine affordable housing production goals; and

6. Minimizing any concentration of poverty.

1.3.2. Background

In December 1997, the Metro Council adopted the Regional Framework Plan (Ordinance No. 97.715B) including policies related to housing and affordable housing. An appeal to the Oregon Land Use Board of Appeal (LUBA) challenged the validity of the Housing and Affordable Housing policies. Subsequent mediation resulted in the agreement that the Metro Council should adopt a revised Section 1.3.

In September 1998, the Metro Council amended Section 1.3 of the Regional Framework Plan (Ordinance No. 98.769), and added a chapter to the Metro Code (3.07) creating an Affordable Housing Technical Advisory Committee. The Affordable Housing Technical Advisory Committee (H-TAC) was constituted with 28 representatives from local governments, nonprofit and for-profit developers, the business and financial community, affordable housing advocates, and representatives from the Governor's Commission on Aging, Oregon Housing and Community Services Department, and the U.S. Department of Housing and Urban Development.

H-TAC developed a series of recommendations in a report (Regional Affordable Housing Strategy, RAHS) including suggestions for affordable housing production goals for the region and each jurisdiction, and land use tools and strategies to be considered by local governments to be adopted in the Urban Growth Management Functional Plan. The RAHS also contains other strategies and tools to attain the affordable housing production goals as well as suggested amendments to the Urban Growth Management Functional Plan concerning comprehensive plans and zoning regulations. After consultation with MPAC and public hearing, the RAHS was presented to the Metro Council on June 22, 2000. The Metro Council accepted the RAHS from H-TAC (Resolution No. 00-2956B). The RAHS is not a regulatory document. This Section 1.3 of the Regional Framework Plan adopts the current Metro policies for affordable housing based on consideration of all available information, particularly the RAHS.

1.3.3. Approach

The policies in this Regional Framework Plan were developed through a process that:

1. Defined affordable housing as housing costing no more than 30% of a household's income;

2. Based on this definition and household groups in most need of affordable housing, the estimated total amount of needed affordable housing was for about 90,000 additional affordable units for the period 1997-2017 for households with incomes at or below 50% of the median household income;

3. Determined that a productive approach would be to establish voluntary affordable housing production goals for each jurisdiction in the region;

4. Established a set of five-year voluntary affordable housing goals for all jurisdictions based on a production goal for the region that represents 10% of the total need or about 9,000 units;

5. Developed land use and non-land use affordable housing tools and strategies that could be used to achieve the goals;

6. Crafted a set of policies that would increase affordable housing for consideration by local governments;

7. Designed a reporting schedule to monitor local governments' progress; and

8. Created a set of actions for Metro to address in order to coordinate and encourage an increase in the supply of affordable housing in the region.

1.3.4. Affordable Housing Need

The Metro Council adopted a Housing Needs Analysis Report in December 1997 that was the preliminary factual basis for the determination that there was a need for a Regional Affordable Housing Strategy. This analysis was updated in the year 2000 and the need for affordable housing was reaffirmed and found consistent with the 1997 analysis. The RAHS contains the most current estimates of total need or "benchmark need" for affordable Housing. The benchmark need was based on providing affordable housing for all low and moderate income households so that they pay no more than 30% of their income on housing costs. For renters "housing costs" includes rent and utilities. For homeowners, it includes principle, interest, taxes, property insurance, and if applicable, mortgage insurance.

Sometimes the region suffers from a misunderstanding of who needs affordable housing. The shortage of housing affects a wide variety of residents in our region – particularly families or households earning 50% ($26,850 in 2000) or less of the region's current annual median household income. Examples of households that fall into this category include case manager at a nonprofit public defender's office, special education teacher, cashier for a department store, dental assistant, school bus driver, hair dresser, pharmacy assistant and many retired persons.

Estimation of the benchmark need for affordable housing was also based on Metro's 20-year planning horizon, and takes into consideration Metro's 2017 household projection, regional distribution of households in four income groups (less than 30%, 31-50%, 51-80%, 81-120%), and existing jurisdictional proportions of affordable housing supply to the four income groups.

The RAHS estimates that if all households with incomes at or below 50% of median household incomes paid no more than 30% of their income for housing, there will be a need for about 90,000 additional affordable housing units in the region for the period 1997-2017 including those poorly-housed.

1.3.5. Affordable Housing Production Goals

Recognizing the limited resources available to address the total need for affordable housing, efforts were made to develop a more realistic production goal that could be implemented in the region. Setting production goals took into consideration past (1992 to 1997) annual average production rate for rental units for households earning 80% of median household income and less, the estimated cost of meeting the goals, and the current resources available in the region. In addition, the expectation is that local governments and other entities will consider implementing available affordable housing tools and strategies, including those in the RAHS.

The region's total affordable housing production goal should be based on a five-year affordable housing production goal equivalent to 10% of the 20 year benchmark need. The focus of this goal is households earning 50% or less of median household income. This initial goal is established with the understanding that a new regional funding source or other financial resources are necessary to attain this goal. Progress towards this initial goal will be assessed as described in Section 1.3.6.B. using local data and the 2000 U.S Census data.

The region's affordable housing production goal for local governments shall be expressed as voluntary affordable housing production goals for each city and county in the region. An affordable housing distribution method should be established in the Urban Growth Management Functional Plan that sets voluntary goals for each jurisdiction to encourage working towards a similar distribution of household incomes within each Metro jurisdiction that reflects the regional income distribution as a whole (see

Appendix K: Description of Process for Determining the Benchmark Need for Affordable Housing). Local jurisdictions should adopt the voluntary affordable housing production goals established by Urban Growth Management Functional Plan to serve as a guide to measure progress toward meeting the affordable housing needs of households with incomes between 0% and 50% of median household income.

Local jurisdictions are encouraged to continue their efforts to promote housing affordable to households with incomes 50% to 80% and 80% to 120% of median household income. The voluntary affordable housing production goals in the Urban Growth Management Functional Plan will serve as a guide to measure progress toward meeting the affordable housing needs of the region.

1.3.6. Increasing and Preserving the Supply of Affordable Housing

A wide variety of measures will be needed in order to achieve the purposes of the regional affordable housing strategy. Metro's legal authority to require cities and counties to amend their comprehensive plans and implementing ordinances is only one of the mechanisms that may be used.

Some land use planning tools will be helpful if used in comprehensive plan amendments to encourage the development and retention of some types of affordable housing. However, land use planning requirements may have limited effect in encouraging some types of affordable housing. Non-land use tools that are not suitable for inclusion in the Functional Plan or in local comprehensive land use plans can encourage the development and retention of some types of affordable housing. These non-land use tools can be designed and implemented by voluntary, cooperative efforts. Metro has additional powers, including financing authority, that may be used. Other governmental agencies and non-profit entities will need to be partners in achieving the goals of the RAHS. Special district service providers, public housing agencies, urban renewal agencies and others will play significant roles. An estimate has been made that the cost of meeting the region's affordable housing production goal could be as much as $124 million per year. As only about $27 million of currently available annual resources have been identified, as much as $97 million of additional resources per year may be needed.

The H-TAC addressed and recommended in the RAHS Land use planning strategies and tools together with other non-land use tools and strategies that are needed to attain the affordable housing production goals. The H-TAC also recommended in the RAHS those organizations that could take the lead in the development and implementation of these non-land use tools and strategies.

1.3.6.A. Metro Actions

In order to address the region's affordable housing challenges, Metro will consider the following actions:

1. Develop a best practices handbook; hold forums and explore other methods of increasing affordable housing as noted in the RAHS.

2. Assist local governments in setting up a regional administrative infrastructure for the administration of a regional housing fund as available.

3. Consider voluntary inclusionary housing requirements when amending the Urban Growth Boundary.

4. Consider the cost of providing infrastructure to land within the urban growth boundary when expanding the boundary.

5. Consider using a cost/benefit analysis to determine the impact of new regulations on local housing activities related to housing production.

6. Address stormwater detention/runoff on a watershed basis so as to reduce the cost impact of on site stormwater detention requirement.

7. Consider affordable housing when developing regional natural resource protection programs.

8. Review its goals for consistency in its overall regional planning policies and their impact on local planning and zoning activities.

9. Provide a legal opinion on Metro's authority on the implementation of system development charges, permit fees, and off-site improvement strategies.

10. Include consideration of job wage levels to the cost of housing in a jurisdiction or subregion when conducting an analysis of jobs/housing balance.

11. Implement land use policies in the context of other regional policies in this Regional Framework Plan designed to create livable communities, by supporting the regional transportation system, town centers and corridors, and helping to create a jobs housing balance.

12. In 2003, use local information and the 2000 U.S. Census data to analyze and update the region's affordable housing needs, and conduct a periodic survey to determine which strategies are working and not working, including why a strategy might work well in one place and not others.

13. Create, when appropriate an RAHS Implementation Committee to advise Metro and help to review the effectiveness of the strategies and appropriateness of the regional affordable housing production goals. If necessary, the Committee could recommend changes to both the strategies and the affordable housing production goals. The RAHS Implementation Committee shall seek and provide advice and consultation from the MPAC. The structure and composition of the Committee, method of appointment of Committee members, minimum number of times the Committee shall meet, and timelines for the Committee to report on the matters assigned to it shall be specified by Metro.

1.3.6.B. Local Jurisdictions' Action

Metro shall amend the Urban Growth Management Functional Plan to include the following recommendations and requirements:

a. Cities and counties within the region should:

   1. Adopt the affordable housing production goals in Table 1 to serve as a guide to measure progress toward meeting the affordable housing needs of households with incomes at or below 50% of median household income.

   2. Analyze, adopt and apply non-land use tools as a means to make progress toward the Affordable Housing Production Goals.

   3. Report on the analysis, adoption and application of non-land use tools at the same intervals that they are reporting on land use tools.

b. Cities and counties within the region shall ensure that their comprehensive plans and implementing ordinances:

1. Include strategies to ensure a diverse range of housing types within their jurisdictional boundaries.

2. Include in their plans actions and implementation measures designed to maintain the existing supply of affordable housing as well as increase the opportunities for new dispersed affordable housing within their boundaries.

3. Include plan policies, actions, and implementation measures aimed at increasing opportunities for households of all income levels to live within their individual jurisdictions in affordable housing.

c. Cities and counties within the Metro region shall consider amendment of their comprehensive plans and implementing ordinances with the following affordable housing land use tools and strategies:

1. **Density Bonus**. A density bonus is an incentive to facilitate the development of affordable housing. Local jurisdictions could consider tying the amount of bonus to the targeted income group to encourage the development of affordable units to meet affordable housing production goals.

2. **Replacement Housing**. No-Net-Loss housing policies for local jurisdictional review of requested quasi-judicial Comprehensive Plan Map amendments with approval criteria that would require the replacement of existing housing that would be lost through the Plan Map amendment.

3. **Inclusionary Housing**

   a) Implement voluntary inclusionary housing programs tied to the provision of incentives such as Density Bonus incentives to facilitate the development of affordable housing.

   b) Develop housing design requirements for housing components such as single-car garages and maximum square footage that tend to result in affordable housing.

   c) Consider impacts on affordable housing as a criterion for any legislative or quasi-judicial zone change.

4. **Transfer of Development Rights**

   a) Implement TDR programs tailored to the specific conditions of a local jurisdiction.

   b) Implement TDR programs in Main Street or Town Center areas that involve upzoning.

5. **Elderly and People with Disabilities**. Examine zoning codes for conflicts in meeting locational needs of these populations

6. **Local Regulatory Constraints; Discrepancies in Planning and Zoning Codes; Local Permitting or Approval Process**

1. Revise the permitting process (conditional use permits, etc.)

2. Review development and design standards for impact on affordable housing

3. Consider using a cost/benefit analysis to determine impact of new regulations on housing production

4. Regularly review existing codes for usefulness and conflicts

5. Reduce number of land use appeal opportunities

6. Allow fast tracking of affordable housing

7. **Parking**

a) Review parking requirements to ensure they meet the needs of residents of all types of housing

b) Coordinate strategies with developers, transportation planners and other regional efforts so as to reduce the cost of providing parking in affordable housing developments

d. Cities and counties within the region shall report progress towards increasing the supply of affordable housing 12, 24, and 36 months from the adoption of affordable housing functional plan amendments.

1.3.7. Funding for Affordable Housing

Funding for affordable housing has been an issue for many years. Historically the federal government has provided a substantial portion of funds for the provision of affordable housing. However, long term federal commitments for lower income housing are declining, introducing uncertainties for tenants, owners, communities and lenders. Based on this uncertainty and H-TAC's estimates of the additional subsidy needed to meet the region's affordable housing production goals, the need to create a housing fund available regionwide that to leverage other affordable housing resources can not be overemphasized.

If the region is to be successful in increasing the amount of affordable housing, a housing fund would need the support of a wide range of interests including local governments, the state and business groups. Work to create such funding should be initiated as soon as possible.

1.4 Economic Opportunity

Metro should support public policy that maintains a strong economic climate through encouraging the development of a diverse and sufficient supply of jobs, especially family wage jobs, in appropriate locations throughout the region.

In weighing and balancing various values, goals and objectives, the values, needs, choices and desires of consumers should also be taken into account. The values, needs and desires of consumers include:

1. Low costs for goods and services;

2. Convenience, including nearby and easily accessible stores; quick, safe, and readily available transportation by all modes;

3. A wide and deep selection of goods and services;

4. Quality service;

5. Safety and security; and

6. Comfort, enjoyment and entertainment.

Expansions of the UGB for industrial or commercial purposes shall occur in locations consistent with this plan and where, consistent with state statutes and statewide goals an assessment of the type, mix and wages of existing and anticipated jobs within subregions justifies such expansion. The number and wage level of jobs within each subregion should be balanced with housing cost and availability within that subregion. Strategies should be developed to coordinate the planning and implementation activities of this element with Policy 1.3, Housing and Affordable Housing, and Policy 1.8, Developed Urban Land.

According to the Regional Industrial Land Study, economic expansion of the 1990s diminished the region's inventory of land suitable for industries that offer the best opportunities for new family-wage jobs. Sites suitable for these industries should be identified and protected from incompatible uses.

1.4.1 Metro, with the aid of leaders in the business and development community and local governments in the region, shall designate as Regionally Significant Industrial Areas those areas with site characteristics that make them especially suitable for the particular requirements of industries that offer the best opportunities for family-wage jobs.

1.4.2 Metro, through the Urban Growth Management Functional Plan, and local governments shall exercise their comprehensive planning and zoning authorities to protect Regionally Significant Industrial Areas from incompatible uses.

1.5 Economic Vitality

The region's economy is a single dynamic system including the urbanized part of the Portland area and lands beyond the Urban Growth Boundary. The economic welfare of residents throughout the region directly impacts the ability of all citizens in the region to create economic vitality for themselves and their communities.

The region's economic development must include all parts of the region, including areas and neighborhoods which have been experiencing increasing poverty and social needs, even during periods of a booming regional economy. To allow the kinds of social and economic decay in older suburbs and the central city that has occurred in other larger and older metro regions is a threat to our quality of life and the health of the regional economy. All neighborhoods and all people should have access to opportunity and share the benefits, as well as the burdens, of economic and population growth in the region.

To support economic vitality throughout the entire region, Metro shall undertake the following steps, beginning in 1998:

1. Monitor regional and subregional indicators of economic vitality, such as the balance of jobs, job compensation and housing availability.

2. If Metro's monitoring finds that existing efforts to promote and support economic vitality in all parts of the region are inadequate, Metro shall facilitate collaborative regional approaches which better support economic vitality for all parts of the region.

In cooperation with local governments and community residents, Metro shall promote revitalization of existing city and neighbor hood centers that have experienced disinvestment and/or are currently underutilized and/or populated by a disproportionately high percentage of people living at or below 80% of the region's median income.

1.6 Growth Management

The management of the urban land supply shall occur in a manner consistent with state law that:

1. Encourages the evolution of an efficient urban growth form;
2. Provides a clear distinction between urban and rural lands;
3. Supports interconnected but distinct communities in the urban region;
4. Recognizes the inter-relationship between development of vacant land and redevelopment objectives in all parts of the urban region; and
5. Is consistent with the 2040 Growth Concept and helps attain the region's objectives.

1.7 Urban/Rural Transition

There should be a clear transition between urban and rural land that makes best use of natural and built landscape features and that recognizes the likely long-term prospects for regional urban growth.

1.7.1 Boundary Features

The Metro UGB should be located using natural and built features, including roads, rivers, creeks, streams, drainage basin boundaries, floodplains, power lines, major topographic features and historic patterns of land use or settlement.

1.7.2 Sense of Place

Historic, cultural, topographic and biological features of the regional landscape that contribute significantly to this region's identity and "sense of place" shall be identified. Management of the total urban land supply should occur in a manner that supports the preservation of those features, when designated, as growth occurs.

1.7.3 Urban Reserves

"Urban reserve areas," may be designated by Metro consistent with state law. Urban reserve designations shall be consistent with the Regional Framework Plan policies and shall be reviewed by Metro at least every 15 years after adoption.

a. The priority for inclusion of land within an urban reserve area shall generally be based upon the locational factors of Goal 14. Lands adjacent to the UGB shall be studied for suitability for inclusion within urban reserves as measured by factors 3 through 7 of Goal

14 and by the requirements of OAR 660-04-010. (Copies of Goal 14 and OAR 660-04010 are included in the Appendices for informational purposes.)

b. Lands of lower priority in the LCDC rule priorities may be included in urban reserves if specific types of land needs cannot be reasonably accommodated on higher priority lands, after options inside the UGB have been considered, such as land needed to bring jobs and housing into close proximity to each other.

c. Lands of lower priority in the LCDC rule priorities may be included in urban reserves if higher priority land is needed for physical separation of communities inside or outside the UGB to preserve separate community identities, but only when documented by reasons that comply with state statutes governing urban growth boundary amendments and that balance the competing values among statewide land use Goals.

d. Expansion of the UGB shall occur consistent with the urban/rural transition, developed urban land, UGB and neighbor city objectives. Where urban land is adjacent to rural lands outside of an urban reserve, Metro will work with affected cities and counties to ensure that urban uses do not significantly affect the use or condition of the rural land. Where urban land is adjacent to lands within an urban reserve that may someday be included within the UGB, Metro will work with affected cities and counties to ensure that rural development does not create obstacles to efficient urbanization in the future.

1.8 Developed Urban Land

Opportunities for and obstacles to the continued development and redevelopment of existing urban land shall be identified and actively addressed. A combination of regulations and incentives shall be employed to ensure that the prospect of living, working and doing business in those locations remains attractive to a wide range of households and employers. In coordination with affected agencies, Metro should encourage the redevelopment and reuse of lands used in the past or already used for commercial or industrial purposes wherever economically viable and environmentally sound.

Redevelopment and Infill – When Metro examines whether additional urban land is needed within the UGB, it shall assess redevelopment and infill potential in the region. The potential for redevelopment and infill on existing urban land will be included as an element when calculating the buildable land supply in the region, where it can be demonstrated that the infill and redevelopment can be reasonably expected to occur during the next 20 years.

Metro will work with jurisdictions in the region to determine the extent to which redevelopment and infill can be relied on to meet the identified need for additional urban land. After this analysis and review, Metro will initiate an amendment of the UGB to meet that portion of the identified need for land not met through commitments for redevelopment and infill.

1.9 Urban Growth Boundary

It is the policy of Metro to ensure that expansions of the UGB help achieve the objectives of the 2040 Growth Concept. When Metro expands the boundary, it shall determine whether the expansion will enhance the roles of Centers and, to the extent practicable, ensure that it does.

The regional UGB, a long-term planning tool, shall separate urbanizable from rural land and be based in aggregate on the region's 20-year projected need for urban land. The UGB shall be located consistent with statewide planning goals and these RUGGOs and adopted Metro Council procedures for UGB amendment. In the location, amendment and management of the regional UGB, Metro shall seek to improve the functional value of the boundary through:

1.9.1 Expansion into any Urban Reserves

Upon demonstrating a need for additional urban land, major and legislative UGB amendments shall occur first within any adopted urban reserves, to the extent consistent with ORS 197.298 and Metro's acknowledged urban growth amendment process, unless urban reserves are found to be inadequate to accommodate the amount of land needed for one or more of the following reasons:

1. Specific types of identified land needs cannot be reasonably accommodated on urban reserve lands

2. Future urban services could not reasonably be provided to urban reserves due to topographical or other physical constraints

3. Maximum efficiency of land uses within a proposed UGB requires inclusion of lower priority lands other than urban reserves in order to include or provide services to urban reserves.

1.9.2 Urban Growth Boundary Amendment Process

Criteria for amending the UGB shall be adopted based on applicable state planning goals and relevant portions of the RUGGOs and this Plan:

1. **Major Amendments.**
   Amendments of the UGB may be made through a quasi-judicial or a legislative process. Metro will initiate the legislative amendment process when it determines there is need to add land to the UGB following the analysis of buildable land supply required every five years by ORS 197.299(1). The process shall involve local governments, special districts, citizens and other interests. A local government, a special district or a property owner may initiate a quasi-judicial amendment process to add land to the UGB for public facilities, public schools, natural areas and those nonhousing needs that (a) were not accommodated in the most recent five-year analysis of land supply pursuant to ORS 197.299(1) and (b) must be addressed prior to the next five-year analysis.

2. **Minor Adjustments.**
   Minor adjustments of the UGB may be brought to Metro by a local government, a special district or a property owner for siting public facility lines and roads, for land trades and to make the UGB coterminous with nearby property lines or natural or built features in order to make the UGB function more efficiently and effectively.

1.9.3 Urban Reserve Plans

A conceptual land use plan and concept map coordinated among affected jurisdictions shall be required for all quasi-judicial and legislative amendments of the Urban Growth Boundary which add more than twenty net acres to the UGB. The Metro Council shall establish criteria for urban reserve plans coordinated among affected local governments and districts which shall address the following issues:

1. Annexation to a city prior to development whenever feasible.

2. Establishment of a minimum average residential density to ensure efficient use of land.

3. Requirements to ensure a diversity of housing stock and meet needs for affordable housing.

4. Ensure sufficient commercial and industrial land to meet the needs of the area to be developed and the needs of adjacent land inside the Urban Growth Boundary consistent with 2040 Growth Concept design types.

5. A conceptual transportation plan to identify large scale problems and establish performance standards for city and county comprehensive plans.

6. Identification of natural resource areas for protection from development.

7. A conceptual public facilities and services plan including rough cost estimates and a financing strategy for the provision of sewer, water, storm drainage, parks, transportation, fire and police protection.

8. A conceptual plan estimating the amount of land and improvements needed for school facilities.

9. A concept map showing the general locations of major roadways, unbuildable lands, commercial and industrial lands, single and multi-family housing, open space and established or alternative locations for any needed school, park and fire hall sites.

The actual specific criteria will be adopted as part of the Metro Code.

Implementation of Measure 26-29[2]

Report on Effects of Proposed Urban Growth Boundary Amendment. Prior to approving any amendment or amendments of the urban growth boundary in excess of 100 acres the Council shall prepare a report on the effect of the proposed amendment on existing residential neighborhoods. Copies of the completed report shall be provided to all households located within one mile of the proposed urban growth boundary amendment area and to all cities and counties within the district. The report shall address:

1. Traffic patterns and any resulting increase in traffic congestion, commute times and air quality;

2. Whether parks and open space protection in the area to be added will benefit existing residents of the district as well as future residents of the added territory; and

3. The cost impacts on existing residents of providing needed public services and public infrastructure to the area to be added.

1.10 Urban Design

The identity and functioning of communities in the region shall be supported through:

[2] Measure 26-29 was adopted by voters of the region on May 21, 2002. Measure 26-29 added requirements to the Metro Charter to prepare a report on the effects of any proposed addition of 100 acres or more to the UGB and to send the report to households within one mile of the territory to be added.

1. The recognition and protection of critical open space features in the region.

2. Public policies that encourage diversity and excellence in the design and development of settlement patterns, landscapes and structures.

3. Ensuring that incentives and regulations guiding the development and redevelopment of the urban area promote a settlement pattern that:

    1. Link any public incentives to a commensurate public benefit received or expected and evidence of private needs;

    2. Is pedestrian "friendly," encourages transit use and reduces auto dependence;

    3. Provides access to neighborhood and community parks, trails and walkways, and other recreation and cultural areas and public facilities;

    4. Reinforces nodal, mixed-use, neighborhood-oriented design;

    5. Includes concentrated, high-density, mixed-use urban centers developed in relation to the region's transit system;

    6. Is responsive to needs for privacy, community, sense of place and personal safety in an urban setting; and

    7. Facilitates the development and preservation of affordable mixed-income neighborhoods.

Pedestrian- and transit-supportive building patterns will be encouraged in order to minimize the need for auto trips and to create a development pattern conducive to face-to-face community interaction.

1.11 Neighbor Cities

Growth in cities outside the Metro UGB, occurring in conjunction with the overall population and employment growth in the region, should be coordinated with Metro's growth management activities through cooperative agreements which provide for:

1.11.1 Separation

The communities within the Metro UGB, in neighbor cities and in the rural areas in between will all benefit from maintaining the separation between these places as growth occurs. Coordination between neighboring cities, counties and Metro about the location of rural reserves and policies to maintain separation should be pursued.

1.11.2 Jobs Housing Balance

To minimize the generation of new automobile trips, a balance of sufficient number of jobs at wages consistent with housing prices in communities both within the Metro UGB and in neighboring cities should be pursued.

1.11.3 Green Corridors

The "green corridor" is a transportation facility through a rural reserve that serves as a link between the metropolitan area and a neighbor city which also limits access to the farms and forests of the rural reserve. The intent is to keep urban to urban accessibility high, but limit any adverse effect on the surrounding rural areas.

1.12 Protection of Agriculture and Forest Resource Lands

Agricultural and forest resource land outside the UGB shall be protected from urbanization, and accounted for in regional economic and development plans, consistent with this Plan. However, Metro recognizes that all the statewide goals, including Statewide Goal 10, Housing and Goal 14, Urbanization, are of equal importance to Goals 3 and 4 which protect agriculture and forest resource lands. These goals represent competing and, some times, conflicting policy interests which need to be balanced.

1.12.1 Rural Resource Lands

Rural resource lands outside the UGB that have significant resource value should actively be protected from urbanization. However, not all land zoned for exclusive farm use is of equal agricultural value.

1.12.2 Urban Expansion

Expansion of the UGB shall occur in urban reserves, established consistent with the urban rural transition objective. All urban reserves should be planned for future urbanization even if they contain resource lands.

1.12.3 Farm and Forest Practices

Protect and support the ability for farm and forest practices to continue. The designation and management of rural reserves by the Metro Council may help establish this support, consistent with the Growth Concept. Agriculture and forestry require long term certainty of protection from adverse impacts of urbanization in order to promote needed investments.

1.13 Participation of Citizens

The following policies relate to participation of Citizens:

1.13.1 Metro will encourage public participation in Metro land use planning.

1.13.2 Metro will follow and promote the citizen participation values inherent in RUGGO Goal 1, Objective 1 and the Metro Citizen Involvement Principles.

1.13.3 Local governments are encouraged to provide opportunities for public involvement in land use planning and delivery of recreational facilities and services.

1.14 School Siting

1.14.1 School and Local Government Plan and Policy Coordination

Metro shall coordinate plans among local governments, including cities, counties, special districts and school districts for adequate school facilities for already developed and urbanizing areas.

1.14.2 Metro Review of Public Facility Plans to Include Schools

Metro, in its review of city and county comprehensive plans for compliance with the Regional Framework Plan, shall consider school facilities to be "public facilities." Metro shall work with local governments and school districts on school facility plans to ensure that the Urban Growth Boundary contains a sufficient supply of land for school facility needs.

1.14.3 Resolution of School Facility Funding in the Region

Metro will use the appropriate means, including, but not limited to, public forums, open houses, symposiums, dialogues with state and local government officials, school district representatives, and the general public in order to identify funding sources necessary to acquire future school sites and commensurate capital construction to accommodate anticipated growth in school populations.

1.14.4 Functional Plan

A school siting and facilities functional plan shall be prepared with the advice of MPAC to implement the policies of this Plan. Chapter 8, Implementation, lists the issues to be considered in the development of the functional plan.

1.15 Centers

The success of the 2040 Growth Concept depends upon the maintenance and enhancement of the Central City, Regional and Town Centers, Station Communities and Main Streets as the principal centers of urban life in the region. Each Center has its own character and is at a different stage of development. Hence, each needs its own strategy for success.

Metro shall develop a regional strategy for enhancement of Centers, Station Communities and Main Streets in the region. The strategy shall recognize the critical connection between transportation and these design types, and integrate policy direction from the Regional Transportation Plan. The strategy shall place a high priority on investments in Centers by Metro and efforts by Metro to secure complementary investments by others. The strategy shall include measures to encourage the siting of government offices and appropriate facilities in Centers and Station Communities. Metro shall work with local governments, community leaders and state and federal agencies to develop an investment program that recognizes the stage of each Center's development, the readiness of each Center's leadership, and opportunities to combine resources to enhance results. To assist, Metro shall maintain a database of investment and incentive tools and opportunities that may be appropriate for individual Centers.

Metro shall assist local governments and shall seek assistance from the state in the development and implementation of strategies for each of the Centers on the 2040 Growth Concept Map. The strategy for each Center shall be tailored to the needs of the Center and shall include an appropriate mix of investments, incentives, removal of barriers and guidelines aimed to encourage the kinds of development that will add vitality to Centers and improve their functions as the hearts of their communities.

It is the policy of Metro to determine whether strategies for Centers are succeeding. Metro shall measure the success of Centers and report results to the region and the state. Metro shall work with its partners to revise strategies over time to improve their results.

1.16 Residential Neighborhoods

The livability of existing residential neighborhoods is essential to the success of the 2040 Growth Concept. In order to protect and improve the region's existing residential neighborhoods, Metro shall take measures to:

1.16.1 Protect residential neighborhoods from air and water pollution, noise and crime.

1.16.2 Make community services accessible to residents of neighborhoods by walking, bicycle and transit, where possible.

1.16.3 Facilitate the provision of affordable government utilities and services to residential neighborhoods.

Metro shall not require local governments to increase the density of existing single-family neighborhoods identified solely as Inner or Outer Neighborhoods.

Requirements

In order to immediately implement the land use portion of the Regional Framework Plan, Metro has adopted Metro Code Chapter 3.01, Urban Growth Boundary Amendments, and Urban Growth Management Functional Plan. These documents are incorporated as components of the Regional Framework Plan in Chapter 8 and are included in the Appendices. The Urban Growth Management Functional Plan contains requirements for cities and counties. To the extent needed in the future, additional land use planning requirements for cities and counties adopted by Metro shall be incorporated into the Urban Growth Management Functional Plan structure.

Background

Future Vision

As noted above, the Future Vision statement is the broadest set of declarations about our region. The Regional Framework Plan is required to describe its relationship to the Future Vision. With regard to land-use, the Future Vision notes many values including the following:

> "We value natural systems for their intrinsic value, and recognize our responsibility to be stewards of the region's natural resources."
>
> "Widespread land restoration and redevelopment must precede any conversion of land to urban uses to meet our present and future needs."
>
> "We value economic development because of the opportunities it affords us all, but recognize that there can be true economic development only with unimpaired and sustainable natural ecosystems, and suitable social mechanisms to ensure dignity and equity for all and compassion for those in need."
>
> "We value our regional identity, sense of place and unique reputation among metropolitan areas, and celebrate the identity and accomplishments of our urban neighborhoods and suburban and rural communities."
>
> "We value a life close to the beauty and inspiration of nature, incorporated into urban development in a manner that remains a model for metropolitan areas into the next century."
>
> "We value vibrant cites that are both an inspiration and a crucial resource for commerce, cultural activities, politics and community building."

011304C-01

A G E N D A

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232 2736
TEL 503 797 1542 | FAX 503 797 1793

METRO

Agenda

MEETING:	METRO COUNCIL REGULAR MEETING
DATE:	January 15, 2004
DAY:	Thursday
TIME:	2:00 PM
PLACE:	Metro Council Chamber

CALL TO ORDER AND ROLL CALL

1. INTRODUCTIONS

2. CITIZEN COMMUNICATIONS

3. CONSENT AGENDA

3.1 Consideration of Minutes for the January 8, 2004 Metro Council Regular Meeting.

3.2 **Resolution No. 04-3404**, For the Purpose of Appointing Edmund B. Ruttledge To the Metro Committee for Citizen Involvement (MCCI).

4. ORDINANCES – SECOND READING

4.1 **Ordinance No. 04-1030**, For the Purpose of Amending Section 2.19.160 of the Metro Code to Establish a Greenspaces Policy Advisory Committee, and Declaring an Emergency. — McLain

4.2 **Ordinance No. 04-1031**, For the Purpose of Amending Metro Code Section 2.01.200 Revising the Time for the Submittal of the Annual Budget to the Council, and Declaring an Emergency. — Newman

5. RESOLUTIONS

5.1 **Resolution No. 04-3403**, For the Purpose of finalizing the decision to add the Portland Mall Alignment to the Locally Preferred alternative for Phase 1 of the South Corridor Light Rail Project. ***(PUBLIC HEARING)*** — Monroe

5.2	**Resolution No. 03-3372,** For the Purpose of Amending the South/North Land Use Final Order, to include the Two Phases of the South Corridor Project Consisting of the Addition of the I-205 Light Rail Transit Project From Gateway to Clackamas Regional Center with the Downtown Portland Transit Mall Alignment, and Modifications of the Proposed Light Rail Between Downtown Portland and Milwaukie, Deletion of Plans to Extend Light Rail from Milwaukie to Clackamas Regional Center, and To Reflect the Final Interstate Max Design. ***(PUBLIC HEARING)***	Newman
5.3	**Resolution No. 03-3382,** For the Purpose of Adopting the Portland Area Air Quality Conformity Determination for the 2004 Regional Transportation Plan and 2004-07 Metropolitan Transportation Improvement Program.	Monroe
5.4	**Resolution No. 04-3400,** For the Purpose of Adopting the Regional Travel Options 5-Year Strategic Plan.	Monroe
5.5	**Resolution No. 04-3401,** For the Purpose of Approving the a Settlement of contested Case No M0394 and authorizing the Chief Operating Office to enter into a settlement agreement with American Compost and Recycling LLC.	McLain
5.6	**Resolution No. 04-3411,** For the Purpose of Confirming the Appointment of Members to the Greenspaces Policy Advisory Committee.	McLain

6. CHIEF OPERATING OFFICER COMMUNICATION

7. COUNCILOR COMMUNICATION

ADJOURN

Television schedule for Jan. 15, 2003 Metro Council meeting

	1/15 Thursday	1/16 Friday	1/17 Saturday	1/18 Sunday	1/19 Monday	1/20 Tuesday	1/21 Wednesday
Clackamas, Multnomah and Washington counties Vancouver, Wash. Channel 11 Community Access Network www.yourtvtv.org (503) 629-8534	Live at 2 p.m.						
Gresham Channel 30 MCTV www.mctv.org (503) 491-7636					2 p.m.		
Lake Oswego, Washington County Channel 30 TVTV www.yourtvtv.org (503) 629-8534			7 p.m.	7 p.m.		6 a.m.	4 p.m.
Oregon City, Gladstone Channel 28 Willamette Falls Television www.wftvaccess.com (503) 650-0275	11:30 a.m.	12:30 p.m.	12:30 p.m.	12:30 p.m.	12:30 p.m.	11:30 a.m.	12:30 p.m.
Portland Channel 30 (CityNet 30) Portland Community Media www.pcatv.org (503) 288-1515				8:30 p.m.			
West Linn Channel 30 Willamette Falls Television www.wftvaccess.com (503) 650-0275	11:30 a.m.	12:00 p.m.	12:30 p.m.	12:30 p.m.	12:30 p.m.	11:30 a.m.	12:30 p.m.

PLEASE NOTE: Show times are tentative and in some cases the entire meeting may not be shown due to length. Call or check your community access station web site to confirm program times.

Agenda items may not be considered in the exact order. For questions about the agenda, call Clerk of the Council, Chris Billington, 797-1542. Public Hearings are held on all ordinances second read and on resolutions upon request of the public. Documents for the record must be submitted to the Clerk of the Council to be considered included in the decision record. Documents can be submitted by email, fax or mail or in person to the Clerk of the Council. For assistance per the American Disabilities Act (ADA), dial TDD 797-1804 or 797-1540 (Council Office).

LUFO Hearing Process Summary
January 15, 2004
Resolution No 03-3372

1. Council President Bragdon states this is continued public hearing on 2004 South/North LUFO and acknowledges special procedures, asks Dan Cooper to go over special LUFO rules.

2. Dan Cooper describes how public testimony can be given, how appeals must be made.

3. President Bragdon recognizes Councilor Newman for opening statement.

4. Councilor Newman provides overall LUFO description and asks for Staff report.

5. Staff provides oral report.

6. Council questions about Staff report.

7. President Bragdon asks for Public Testimony.

8. President Bragdon asks if there are concerns about LUFO documents given Public Testimony.

9. If no concerns, Council action on Resolution.

10. If concerns, Council asks TriMet for rebuttal, staff for any additional information.

11. If concerns remain, continue hearing to January 22.

12. If no concerns, Council action.

011304C-03

Partners for Natural Places
c/o Metro
600 NE Grand Ave.
Portland, OR 97232

DRAFT

Washington County
Department of Land Use and Transportation
Planning Division
155 N. First Ave., Suite 350-14
Hillsboro, OR 97124

www.co.washington.or.us/goal5

Logo here

Metro
600 NE Grand Ave.
Portland, OR 97232

www.metro-region.org

METRO
PEOPLE PLACES
OPEN SPACES

Metro, the regional government that serves 1.3 million people who live in Clackamas, Multnomah and Washington counties and the 24 cities in the Portland metropolitan area, provides planning and services that protect the nature of our region.

www.metro-region.org

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03xxx – Published Feb. 2004

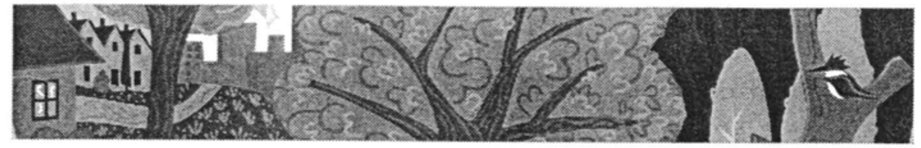
Attention

- **Property owners – this may impact your property**
- **Interested residents**

Public Notice

Fish and wildlife habitat protection analysis under way

We regret any inaccuracies in the listing of your name or address – they were generated from the county assessor's data.



February 2004

Public notice

Fish and wildlife habitat protection analysis under way

Tualatin partners logo here

Attention property owners – this may impact your property and interested residents

WASHINGTON COUNTY, it's cities, Clean Water Services and the Tualatin Hills Park and Recreation District have joined together to develop a fish and wildlife habitat protection plan for the Tualatin River Basin. This collaborative effort, known as the Partners for Natural Places, is being completed in cooperation with Metro. The recommendation developed by the Tualatin Basin Partners for Natural Places will be forwarded to Metro for final approval as part of a regional habitat protection plan.

Background

Metro's habitat protection work is guided by statewide land use planning Goal 5 and is subject to the federal Clean Water and Endangered Species Acts. In 2001, Metro undertook a planning effort to ensure a coordinated program for fish and wildlife habitat protection and enhancement, because habitat does not fit neatly into city and county boundaries. In 2002, Metro adopted an inventory identifying 80,000 acres of regionally significant fish and wildlife habitat.

During 2003, Metro identified the economic, social, environmental and energy (ESEE) consequences of protecting – or not protecting – habitat on a regional scale. The Tualatin River Basin partners are using Metro's inventory to conduct a more detailed local ESEE analysis.

Why did I receive this notice?

- Your property is located in or near the regional habitat inventory
- You have expressed an interest in being informed about fish and wildlife habitat protection.

Next steps

In 2004, the Partners for Natural Places will complete the local ESEE analysis and recom-mend areas where development would be limited in order to protect fish and wildlife habitat. Metro also will complete the regional ESEE analysis and adopt a map showing where development will and will not be affected around the region.

The final step is to develop a program to protect regionally significant natural habitat. Tools such as education, incentives, acquisition and regulation will be considered. Additional public notice will inform property owners and interested citizens of impacts as required by state law.

To learn more

Join us at an open house or public hearing. See inside for complete listing.

Learn more

JOIN US at an open house to learn more about the Tualatin Basin and Metro's ESEE analysis and preliminary recommendations. Share your views and advice on where and how fish and wildlife habitat should be protected.

The Tualatin Basin partners also will host a public hearing where you can comment on the recommendations. Metro will hold public hearings in late spring 2004.

Tualatin Basin open houses March 1 and 4, 2004

Hillsboro
4 to 8 p.m.
Monday, March 1
Public Services Building
cafeteria and room 140
155 N. First Ave.

Tualatin
4 to 8 p.m.
Thursday, March 4
Tualatin Police Department
community room
8650 SW Tualatin Rd.

Metro open houses March 3 to 19, 2004

Columbia Slough and North and Northeast Portland
4 to 8 p.m.
Wednesday, March 3
Kraft/Nabisco Plant
100 NE Columbia Blvd., Portland
Partners: Portland, Multnomah County, Multnomah County Drainage District 1 and Columbia Corridor Association

Gresham and East Multnomah County
4 to 8 p.m.
Thursday, March 11
Gresham City Hall
Oregon and Springwater Trail Rooms
1333 NW Eastman Parkway
Partners: Gresham and Fairview

Oregon City and West Linn
4 to 8 p.m.
Monday, March 15
Pioneer Community Center
615 Fifth Street
Oregon City
Partners: Oregon City, Milwaukie and Clackamas County

Clackamas County, Damascus and Southeast Portland
4 to 8 p.m.
Tuesday March 16
Sunnybrook Service Center
Auditorium
9101 SE Sunnybrook Blvd.
Clackamas
Partners: Clackamas County, Portland and North Clackamas Chamber

West Hills, Willamette and Southwest Portland
4 to 8 p.m.
Thursday, March 18
Mittleman Jewish Community Center auditorium
6651 SW Capitol Hwy.
Partner: Portland

Tualatin Basin public hearing March 29, 2004

Beaverton
Beaverton Library
12375 SW Fifth Ave.

4 to 7:30 p.m
Information displays
reeting rooms A and B

6 to 8 p.m.
Public hearing
auditorium

If you cannot attend the public hearing but would like to comment, you may fill out and submit a card at one of the open houses or write to the Tualatin Basin Natural Resources Steering Committee at the Washington County address on back.

Thank you for your interest in the Tualatin River Basin watershed.

Partners for Natural Places

Tualatin partners logo here

Beaverton
Barbara Fryer
(503) 526-3718
bfryer@ci.beaverton.or.us

Clean Water Services
Sheri Wantland
(503) 681-5111
wantlands@cleanwaterservices.org

Forest Grove
Jeff Beiswenger
(503) 992-3226
jbeiswenger@ci.forest-grove.or.us

Hillsboro
Jennifer Wells
(503) 681-6214
jenniferw@ci.hillsboro.or.us

Metro
24-hour hotline
(503) 797-1888, option 2
www.metro-region.org

Sherwood
Dave Wechner
(503) 625-4205
wechnerd@sherwood.or.us

Tigard
Julia Hajduk
(503) 639-4171
julia@ci.tigard.or.us

Tualatin
Stacy Hopkins
(503) 691-3028
shopkins@ci.tualatin.or.us

Tualatin Hills Park and Recreation District
David Endres
(503) 645-6433
dendres@thprd.com

Washington County
(503) 846-3519
lutplan@co.washington.or.us

If your city is not listed, call Washington County.

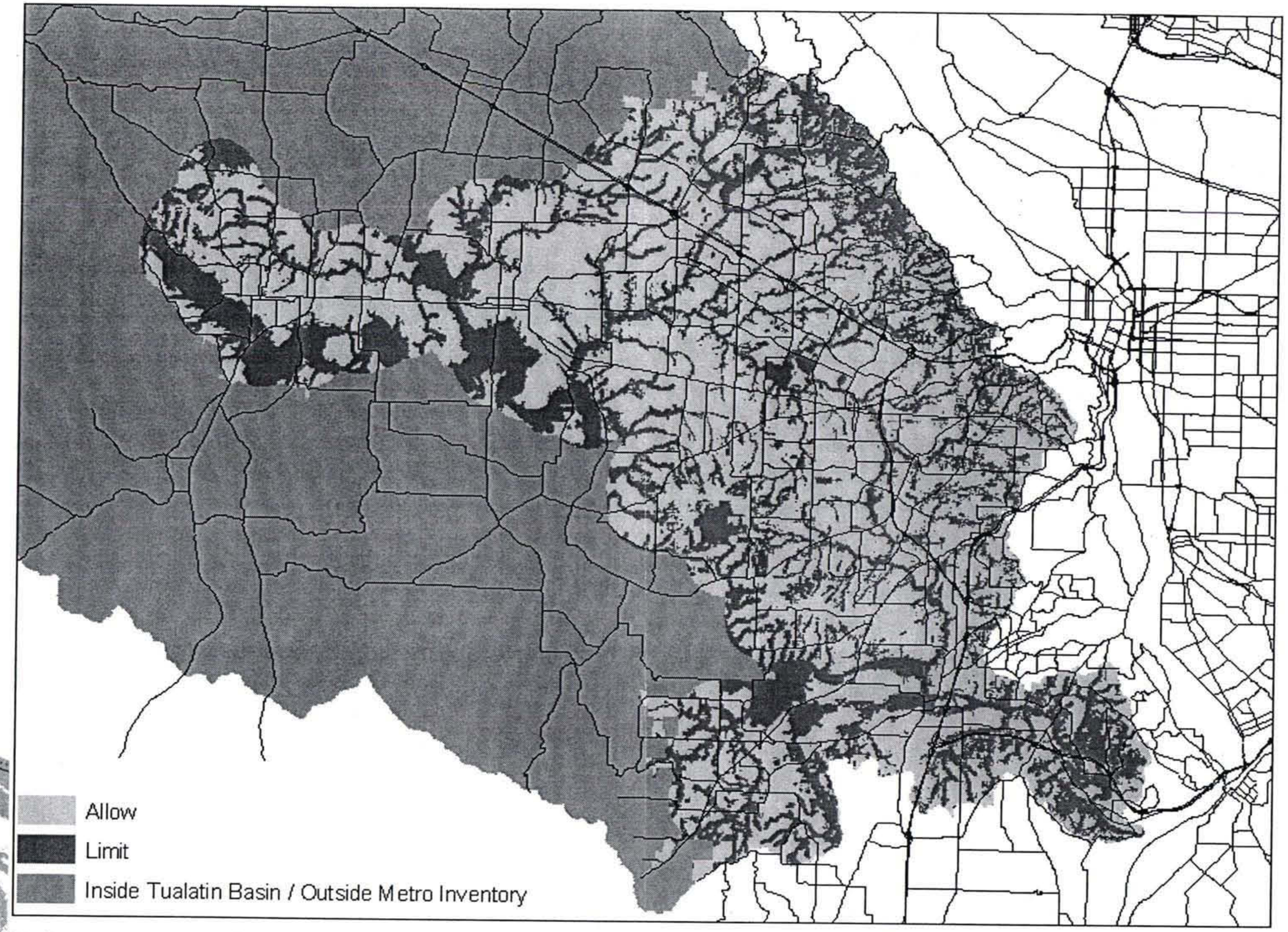
DRAFT

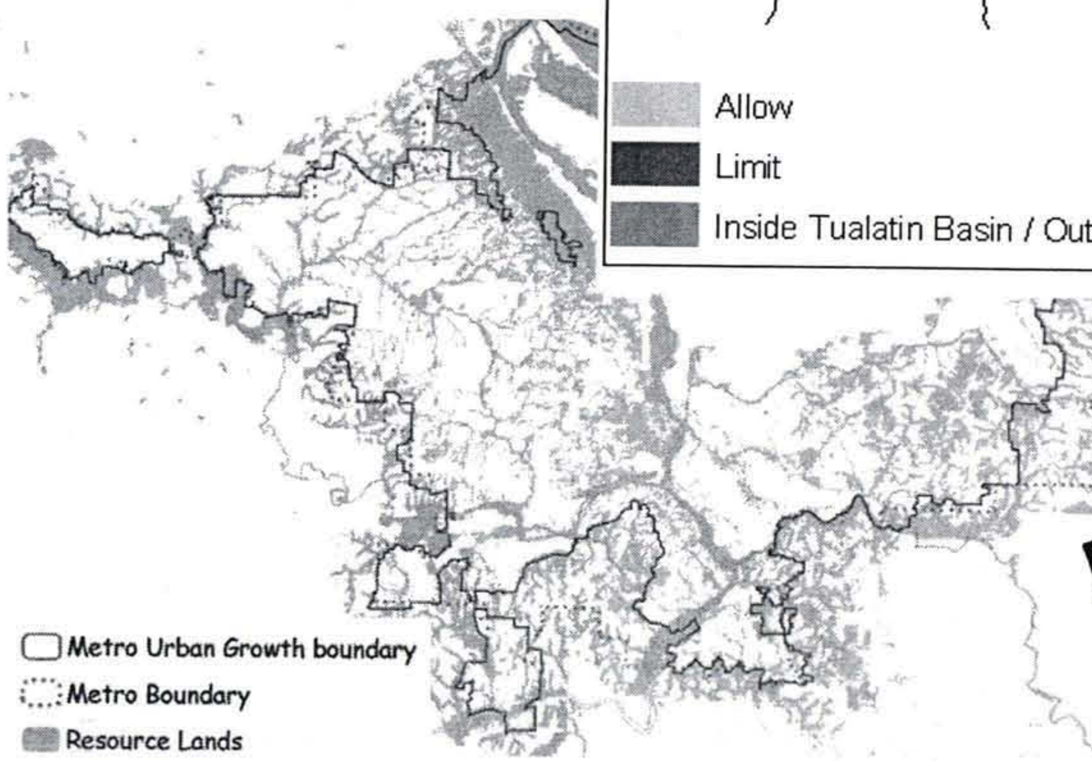
Tualatin Basin Recommendation

Map on right identifies Tualatin Basin preliminary recommendation for areas where development would be allowed or limited.

To look up a specific property, use the interactive map tool at www.metro-region.org/habitat.

Map below shows the Portland metropolitan urban growth boundary, the Metro boundary and the land identified in Metro's 2002 fish and wildlife habitat inventory.





DRAFT

What if my property is outside the urban growth boundary and Metro's habitat inventory?

Properties generally within one mile of the urban growth boundary, which separates urban from rural land, are part of Metro's fish and wildlife habitat inventory and are included in the Tualatin Basin plan.

Rural properties outside the Metro inventory area are not included in the plan but fall under state and federal programs that encourage streamside protection in order to improve water quality. For more information, call (503) 846-3519.

011304c-04

Metro
600 NE Grand Ave.
Portland, OR 97232

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OPEN SPACES

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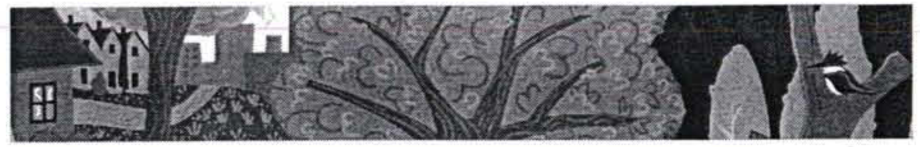

February 2004

Public notice

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DRAFT

Attention property owners – this may impact your property and interested residents

METRO IS WORKING with the cities and counties in your area to develop a regional fish and wildlife habitat protection plan. After final approval by Metro, your city or county will implement a habitat protection plan as part of it's regularly scheduled comprehensive land use planning updates.

Background

Metro's habitat protection work is guided by statewide land use planning Goal 5 and is subject to the federal Clean Water and Endangered Species Acts. In 2002, Metro adopted an inventory of regionally significant fish and wildlife habitat.

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In 2004, Metro will complete a regional ESEE analysis and recommend areas where development would be limited in order to protect fish and wildlife habitat. Metro will adopt a map showing where development will and will not be affected around the region.

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Why did I receive this notice?

- Your property is located in or near the regional habitat inventory
- You have expressed an interest in being informed about fish and wildlife habitat protection.

Properties generally within one mile of the urban growth boundary are part of Metro's natural resources inventory.

To learn more

Join us at an open house or public hearing. See inside for complete listing.

Learn more

JOIN US at an open house to learn more about Metro's ESEE analysis and recommendations. Share your views and advice on where and how fish and wildlife habitat should be protected.

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Thursday, March 18
Mittleman Jewish Community Center
auditorium
6651 SW Capitol Hwy.
Partner: Portland

If you cannot attend an open house but would like to comment, send e-mail to *habitat@metro-region.org*.

To leave recorded comments, call Metro's planning hotline at (503) 797-1888, option 2. For more information, visit Metro's web site at metro-region.org/habitat

Thank you for your interest in fish and wildlife protection.

Metro Council

Council President
David Bragdon
503) 797-1889

Councilor Rod Park
(503) 797-1547
District 1– includes Fairview, Gresham, Happy Valley, Maywood Park, Troutdale, Wood Village and portions of East Portland.

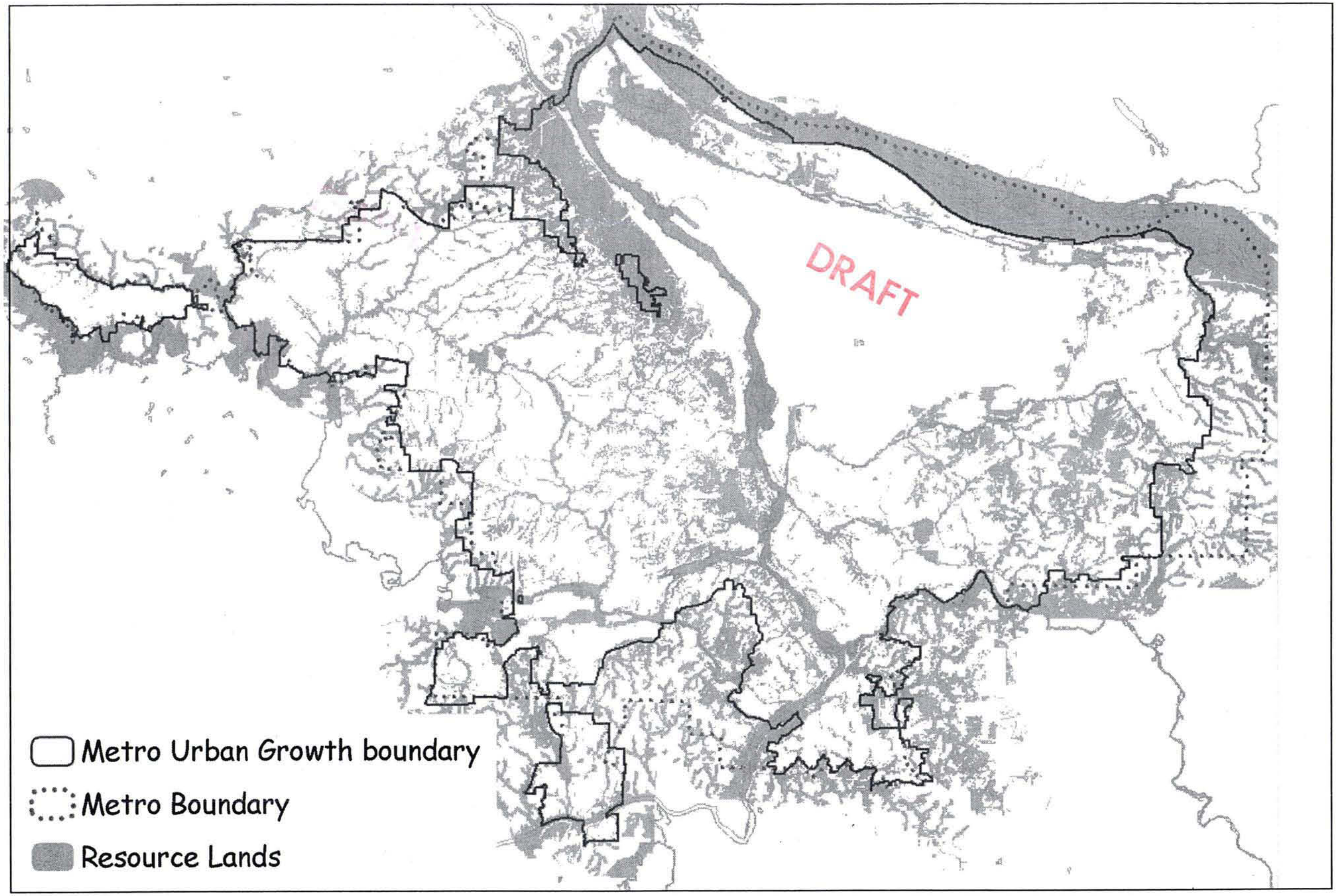
Councilor Brian Newman
(503) 797-1887
District 2 – includes much of urban Clackamas County including Gladstone, Johnson City, Lake Oswego, Milwaukie, Oak Grove, Oregon City, Rivergrove and West Linn.

Councilor Carl Hosticka
(503) 797-1549
District 3 – includes portions of Washington and Clackamas counties and the cities of Beaverton, Durham, King City, Sherwood, Tigard, Tualatin and Wilsonville.

Councilor Susan McLain
(503) 797-1553
District 4 – includes Northern Washington County, Cornelius, Hillsboro, Forest Grove, Northwest Beaverton, Aloha, Bonny Slope, Raleigh Hills, West Slope, Cedar Mill and Cedar Hills.

Councilor Rex Burkholder
(503) 797-1546
District 5– includes Northwest Portland, North Portland, Northeast Portland, downtown Portland, a portion of Southwest Portland and a portion of Southeast Portland.

Councilor Rod Monroe
(503) 797-1552
District 6 – includes portions of Northeast, Southeast Portland and Southwest Portland.

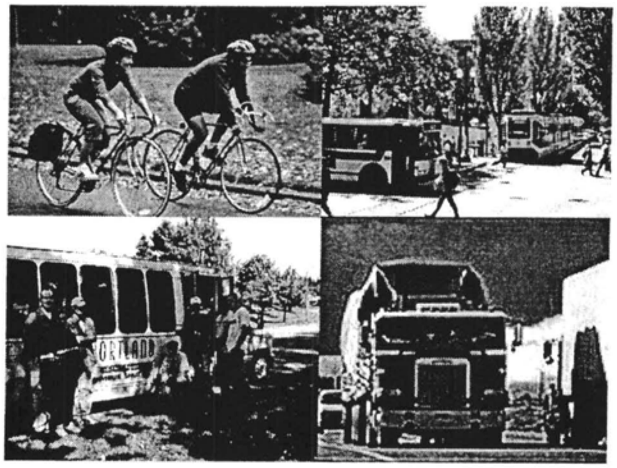


Map shows the Portland metropolitan urban growth boundary, the Metro boundary and the land identified in Metro's 2002 fish and wildlife habitat inventory.

011304C-05

Regional Travel Options Program
5-Year Strategic Plan

Strategic Plan + Appendix A



December 2003

A consensus of the members of the Regional Travel Options Subcommittee

Portland Transportation Options
Clackamas County
C-TRAN
DEQ State of Oregon Department of Environmental Quality
City of Gresham 1905
Metro
Multnomah County
SMART
Oregon Office of Energy
Port of Portland
Oregon Department of Transportation
TRI-MET
Washington County

Table of Contents

I. OVERVIEW AND PURPOSE

After 10 years of experience implementing TDM programs, the TDM Subcommittee sees an opportunity to restructure the regional Transportation Demand Management program to become more collaborative at marketing, implementing and evaluating TDM programs funded through the Metropolitan Transportation Improvement Program (MTIP). The number one priority for the TDM Subcommittee is to create a message and image that increases the impact of the program and allows decision makers and the general public better understand the program.

The Regional Travel Options Program is Metro's newly envisioned program for transportation demand management because it more clearly articulates the intention of the program – to provide travel options to all residents of the region. However, it is still very apparent to the TDM Subcommittee that few people, even those working in the transportation planning field, understand exactly what that means.

Regional travel options include all of the alternatives to driving alone – carpooling, vanpooling, riding transit, bicycling, walking and telecommuting. In order increase the number of people using these travel options, the region needs to

- develop a marketing message and communications plan that supports local program implementation
- develop regional policies that support more people using travel options
- evaluate program impacts that can be used to refine programs and marketing strategies, and
- identify new funding sources that can be used to expand the travel options program over the next five years.

The Regional Travel Options program is primarily a marketing program that works directly with people to find the best option for them for any number of trips they make throughout the day. The focus in the past ten years has been reducing drive alone commute trips, specifically working with ECO employers to reduce commute trips as required by the ECO Rules. The TDM Subcommittee would like to take a new direction to more actively market travel options through a unified regional marketing program.

This strategic plan provides a new vision and proposed direction for the Regional Travel Options program that emphasizes working more collaboratively to implement a highly integrated program that has measurable results and tangible impacts on the environment, the economy and the quality of life of all people in the region.

II. BACKGROUND

During the past 10 years the regional TDM program has advanced from a policy and planning program towards a regionally coordinated implementation program. In 1992, the TPAC Transportation Demand Management (TDM) Subcommittee was established by Metro Resolution to develop project selection criteria and oversee program implementation activities for the first two rounds of Congestion Mitigation and Air Quality (CMAQ) projects in the region. The mission of the TDM Subcommittee is to reduce the need to drive by advocating for TDM in the region, developing funding and policy recommendations to TPAC and coordinating regional TDM programs. In order to achieve this mission, the TDM program at TriMet was expanded to include regional marketing and technical assistance to employers that faced local transportation and parking concerns.

In 1997, TriMet and the Department of Environmental Quality (DEQ) became the region's key partners in providing compliance assistance to employers and local jurisdictions for regulatory requirements such as the Employee Commute Option (ECO) Rule. In 1999, the TDM program became more coordinated with the addition of an Employee Commute Options (ECO) clearinghouse, a regional telecommuting program, a local TDM program in Wilsonville, a TMA Assistance Program, and a Region 2040 Initiatives program. Also in 1999, the City of Portland restructured its Transportation Bureau to include a Transportation Options Division, and other counties and cities in the region began actively working with businesses and communities to address the need for transportation options.

The TDM Subcommittee has identified a need to revise the mission to reflect the new strategic direction to create a more collaborative approach to program development, marketing, implementation and evaluation. This plan details the TDM Subcommittee's strategy for implementing a newly envisioned Regional Travel Options program.

III. 2003 – 2008 PROGRAM PRIORITIES

A. Travel Options 101

Regional Travel Options include transit, vanpools, carpools, bicycling, walking and telecommuting. The newly envisioned Regional Travel Option Program will promote these options through the following programs:

- Collaborative Marketing Program – regional message and identity for program
- Regional Rideshare Program – market carpool and vanpool to employers
- TriMet Employer Outreach Program – markets travel options to employers and schools
- SMART TDM Program – markets travel options to employers and schools
- Regional TMA Program – markets travel options to employers to catalyze economic development in Region 2040 centers
- Region 2040 Initiatives Grant Program – pilots innovative projects
- Regional Telework Program – market telework to employers
- Business Energy Tax Credit Program – provides tax incentives to employers implementing travel option programs

Bicycling and walking are promoted through policies in the Regional Transportation Plan and local Transportation System Plans. The City of Portland Transportation Options program has a fully staffed Transportation Options program that researches, develops and implements innovative projects to local residents. Some of these programs are funded through the Region 2040 Initiatives program to assess their potential implementation in other Region 2040 centers.

B. Connections to other regional land use and transportation goals

The RTO program is becoming increasingly connected with related regional planning efforts such as 2040 Centers, transit-oriented development, corridor planning and community health.

<u>2040 Centers</u>

The Regional Travel Options program is an economic development tool for regional centers and industrial areas. RTO strategies support economic growth in centers by freeing up land currently used for parking for jobs and housing and by increasing the capacity of current transportation infrastructure thereby saving millions of dollars in costly road expansion projects. A study by the Lloyd District TMA found that over $170 million in parking infrastructure costs could be saved using more cost effective RTO strategies. TMA's provide local leadership, which is one of the most critical components of developing successful community centers. TMAs provide a connection between businesses and the community that acts as a catalyst for economic development and add value to infrastructure investments, both of which provide positive community benefits.

Regional centers are intended to be places where people can take transit, walk and bicycle to destinations within the center. The RTO program, specifically TMAs, TravelSmart and land use policies can be used to increase the number of people bicycling and walking in centers. The Region 2040 Initiatives grant program provides funding for innovative programs such as TravelSmart.

Corridors
Major corridor studies are conducted by state or regional agencies working in partnership with local governments to develop appropriate transportation strategies and solutions when safety, mobility and congestion standards are exceeded. The RTO Program will work with each of these corridor studies to identify opportunities to implement strategies that increase the capacity and prevent the unnecessary expansion of roadways. Strategies identified in the I-5 Trade Corridor study completed in 2002 included, enhanced vanpool service, education and outreach, transit pass subsidies, TMAs and promotion of carpoolmatchNW.org. Another tool that is proving to be useful in changing travel behavior is TravelSmart, which is an innovative program that targets those people who are looking for alternatives to driving and provides them with information and incentives to leave their cars at home.

Transit Oriented Development
Transit oriented developments are intended to increase ridership on transit by building housing and jobs in close proximity to transit lines. However, it is not expected that all trips will be made on transit so it is essential to provide other alternatives. TODs typically have reduced parking requirements, which assumes that not all residents will own cars. By providing a wide range of options (e.g., FlexCar, free bicycles or bicycle storage, and information about how to access the various services provided within the community on foot) beyond transit we can work to increase the mobility of residents while reducing the number of car trips within the community.

TriMet's Transit Investment Plan
Fast, reliable and safe transit service is one of the critical components of implementing successful travel option programs. In areas where transit service is not convenient, accessible and safe other strategies such as carpools and vanpools can be used until additional transit service coverage, frequency and availability is provided. TriMet's Transit Investment Plan (TIP) provides a framework for how transit investments will be made over the next five years. The TIP focuses on specific corridors and focus areas in conjunction with regional priorities set out in the Region 2040 Growth Concept and the Regional Transportation Plan. Travel options programs can be used to better leverage and add value to transit investments. The RTO program will work with TriMet to enhance travel options programs in targeted corridors and focus areas.

Community Health
There is renewed interest in physically active modes including walking and bicycling primarily due to the Center for Disease Control and the Robert Wood Johnson Foundation's leadership in addressing the negative health implications of our auto-oriented communities. Regional partners recently received a grant from the Foundation to increase physical activity, including walking and bicycling for everyday needs and activities, in Lents Town Center, Interstate corridor and Damascus. The Regional Travel Options program will work with partners and local leaders to make stronger connections between land use, transportation and health throughout the region and within the 2040 centers.

Air Quality
Motor vehicles are the largest single source of air pollution in the Portland area. Under the Department of Environmental Quality's (DEQ's) ECO program, employers with more than 50 employees at a work site must provide commute alternatives to employees designed to reduce the number of cars driven to work in Portland and surrounding areas. ECO is one of several strategies in a federally-required plan to keep the air clean in the Portland area. This plan was adopted by the Environmental Quality Commission on July 12, 1996 after public comment. The

plan helps the region prevent adverse health impacts, avoid additional industrial growth impediments, avoid sanctions on federal transportation funds and reduce traffic. The RTO program will continue to work with DEQ to monitor progress towards reducing commute trips and the resulting improvement.

Water Quality

By slowing the need for road expansion the RTO program reduces the amount of impervious street surfaces being added to the system. Stormwater runoff from street rights of way is the number one cause of water quality degradation in urban areas. Reducing the number of people driving prevents the expansion of roadways, which in turns prevent the amount of impervious surface being added to watersheds. Metro's Green Streets program addresses water quality and runoff issues associated with existing and new street rights-of-way through innovative street designs. The RTO program will work with the Green Streets program, and other programs that work to improve water quality, to promote alternative street designs that reduce the impact of streets on water quality.

C. Regional Travel Options Program Components

Mission

The regional partners will work collaboratively to provide and actively market a range of travel options for all residents of the region.

Goal 1 Develop a collaborative marketing campaign that is an "umbrella" for all travel options programs being implemented throughout the region.

Goal 2 Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

Goal 3 Develop performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

Goal 4 Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

Goal 5 Develop regional policies that integrate RTO programs into other regional land use and transportation programs including the Centers Program, TOD Program, Corridors program, water quality programs and TriMet's Transit Investment Plan.

Goal 6 Develop a funding plan that helps create a sustainable Regional Travel Options program.

Since each program has a unique way of operating, each has its own strategies and actions that help to achieve overall regional goals listed above. The next section provides more detailed information about program goals, strategies, actions and impact. The strategies and actions are prioritized for each of the program components. The impacts of each program are not cumulative as they all work together to reduce vehicle miles traveled. The number one priority for the evaluation program is to develop a tool or series of tools for measuring the impact and cost effectiveness of each program. The program costs are based on the preferred funding scenario as seen on page 3 of Appendix A.

Goal 1 Develop a collaborative marketing campaign that is an "umbrella" for all travel options programs being implemented throughout the region.

The RTO Collaborative Marketing Campaign is the number one priority for the next three years. The Campaign will work to coordinate all marketing and outreach efforts of the regional partners to create a broader public awareness of the travel options available to people traveling around the region. The regional Campaign will support the projects & messages currently being implemented by the partners and will be a clearinghouse of information that helps people learn about and access the options available to them.

There is an exciting opportunity for the newly envisioned Collaborative Marketing Campaign to work closely with Metro's Community Media Project, "Zig Zag: Real Stories, New Angles," a program that seeks to broaden the discussion of transportation issues through personal stories told by people living in the region. The RTO Campaign will assist in the creation of a resource guide for the Zig Zag community screening events and will provide a venue for ongoing discussions during the two-year awareness campaign that will kickoff in Spring 2004. The impacts of the campaign will be measured by a pre and post campaign survey to determine if there has been a significant change in people's awareness and behavior.

Strategy 1 Initiate a broad based Regional Travel Options Marketing campaign that invites people to think about how they travel around the region resulting in a measurable increase in the use of travel options over a two year period.

Action 1 Create a RTO Marketing manager position at Metro to coordinate RTO marketing efforts, raise awareness about travel options and measure the degree to which awareness is increasing.

Action 2 Develop a region-wide RTO image and message delivery strategy that more actively engages the general public and enhances local and regional program implementation activities.

Action 3 Create a series of position papers that explain the connection between travel options and health, transit, development patterns, air and water quality, and getting to school, work and shopping destinations throughout the region.

Action 4 Develop a unified RTO presence at special events, conferences and school events.

Action 5 Create a regional clearinghouse that includes a staffed informational hotline, an interactive website and a mobile program information unit.

Action 6 Develop a Regional Transportation Education Program over the next five years that works directly in schools throughout the region.

Action 7 Integrate Travel Smart as a one on one home-based marketing program in key regional centers.

Employer Outreach Program

TriMet works with employers in the Portland Region to help them develop successful travel options programs that reduce the number of vehicle miles traveled by reducing drive alone commute trips. TriMet's Employer Outreach program targets the region's ECO affected employers (>50 employees) and provides the same services for employers with fewer employees. The Employer Outreach program includes marketing representatives, a rideshare specialist, employer materials and the emergency ride home program.

Strategy 1 Increase the number of employer programs from 772 to 1,156 over the next 5 years resulting in a reduction of approximately 59,000,000 VMT.

Action 1 TriMet will continue to use a variety of methods to promote TDM to employers including one-on-one communication, direct mailing, transportation fairs, public events, informational materials, website, transit pass programs and the Emergency Ride Home program.

Action 2 Develop and implement a targeted marketing effort for large non-participating employers in key regional centers and TIP target areas.

Program Impact

Year	Number of Employer Programs*	Number of Employees Impacted	Annual VMT Reduction** (miles)	Program Cost	Cost per VMT Reduced
2002-03	676	237,000	38,000,000	$555,073	Base Year
2003-04	96	23,000	5,730,000	$443,164	$0.08
2004-05	96	23,000	6,730,000	$385,649	$0.06
2005-06	96	23,000	6,500,000	$404,929	$0.06
2006-07	96	23,000	6,500,000	$425,175	$0.07
2007-08	96	23,000	7,000,000	$446,433	$0.06

* TriMet works with TDM partners to market transportation programs to employers, regardless of boundaries (for example, with TMAs).

** Average weekday reduction (from aggregate of ECO survey commute mode data) x 261 total weekdays. Because of partnerships, VMT reductions somewhat overlap with estimates found in other partner's three-year plan documents.

Regional Rideshare Program

The Rideshare program includes both vanpool and carpool programs. In the next three years the program will be developed into a bi-state program that coordinates with CTRANs rideshare program. CTRAN recently completed a vanpool market analysis that calls for a doubling of their fleet in the next year. A marketing program will be developed to actively market carpooling and vanpooling in targeted areas throughout the region. These areas will be identified in 2004 through a regional rideshare market analysis. The market analysis will cover an extended geographic area outside the UGB, recognizing that the commute travelshed for the Portland area reaches a radius of 50 miles or more from the central city. This analysis will address the appropriate organizational structure for this program.

Strategy 1 Increase the number of carpools by 1,060 a year and vanpool groups by 30 a year in the next 5 years resulting in an annual VMT reduction of approximately 18 million miles.

Action 1 Establish a baseline number of people carpooling and vanpooling in the region and develop a measuring device that can be used to track progress.

Action 2 Conduct a regional rideshare market analysis that identifies target areas for marketing carpool and vanpool

Action 3 Determine the appropriate structure for the program.

Action 4 Create a new marketing program for Ridesharing that targets audiences in specific locations identified in Action 2.

Action 5 Enhance CarpoolmatchNW.org to better serve vanpool matches.

Program Impact

Fiscal Year	New Carpools	New Vanpools	Reduced Trips/day (Carpool)	Reduced Trips/day (Vanpool)	Reduced Trips/yr (Carpool)	Reduced Trips/yr (Vanpool)	Annual VMT Reduction* (Carpool)	Annual VMT Reduction** (Vanpool)	Annual Funding	Cost/trip reduced
01-02	294	10	500	100	131,000	26,200	3,117,800	2,358,000		
02-03	588	20	1000	200	262,000	52,400	6,235,600	4,716,000	$245,140	$0.78
03-04	882	30	1500	300	393,000	78,600	9,353,400	7,074,000	$206,720	$0.44
04-05	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$715,660	$1.30
05-06	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$646,755	$1.18
06-07	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$436,000	$0.79
07-08	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$436,000	$0.79
08-09	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$436,000	$0.79
09-10	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$436,000	$0.79
10-11	1059	30	1800	300	471,600	78,600	11,224,080	7,074,000	$436,000	$0.79
Totals	**9,176**	**270**	**15,600**	**2,700**	**4,087,200**	**707,400**	**97,275,360**	**63,666,000**		

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 262 workdays per year, 2.7 passengers per carpool=reduction of 1.7 trips per carpool, 90 miles round trip mileage per vanpool, 14 miles round trip mileage per carpool.

SMART/WILSONVILLE Travel Options Program

South Metro Area Rapid Transit (SMART) is operated by the City of Wilsonville and provides five fixed routes with connections to other transit districts. The travel options program works directly with employers to help set up programs to reduce the number of auto commute trips. The travel options program also conducts outreach to residents and schools to encourage great use of travel options.

Strategy 1 Increase the number of people using travel options by 1% a year over the next 5 years.

Action 1 Determine how to measure the impact of outreach efforts over the next year and secure additional funding to perform a program evaluation.

Action 2 Promote travel options to employers through transportation fairs, information packets, training transportation coordinators, new employee packets and at regional events.

Action 3 Promote travel options to the residents of Wilsonville through county fairs, webpage, newspaper, newsletters, and one on one travel planning and informational displays.

Action 4 Promote travel options to schools through the Art on the Bus competition and outreach programs.

Action 5 Work with local planning department to ensure that travel options are supported in local planning processes.

Program Impact

Year	Number of Residents Participating	Number of Employees Participating	Number of Schools Participating	Annual VMT Reduction (miles)	Program Cost	Cost per Ride Reduced
2002-03	Not measured	Not measured	Not measured	Not measured	$55,000	Not measured
2003-04	TBD	TBD	TBD	TBD	$88,400	TBD
2004-05	TBD	TBD	TBD	TBD	$89,700	TBD
2005-06	TBD	TBD	TBD	TBD	$91,400	TBD
2006-07	TBD	TBD	TBD	TBD	$94,194	TBD
2007-08	TBD	TBD	TBD	TBD	$96,966	TBD

Regional TMA Program

The TMA Program operates under the policy direction as provided in Metro Resolutions No.98-2676 and No.02-3183. TMAs are important private/public partnership tools that can be used effectively in the Central City, Regional Centers, Industrial Areas, and some Town Centers. TMAs provide important leadership development in Region 2040 centers that catalyze economic and community development. The TDM Subcommittee recognizes that there may be other mechanisms for promoting TDM in some 2040 centers besides TMAs. These opportunities will be explored with local jurisdictions as a part of the regional evaluation program.

Strategy 1 Reduce the number of people driving alone and catalyze economic development in regional centers and industrial areas by enlisting the business community in creating transportation options for their communities and employees.

Action 1 Work with the TMAs over the next 3 years to develop Region 2040 commute mode split targets and create performance measures that track progress towards these targets.

Action 2 Include Travel Options element in center and industrial area master plans (with cost analysis of projected growth with and without travel options effort).

Action 3 Continue to develop TMAs in regional centers where significant transportation investments are being made. Over the next 3-5 years this will include proposed TMA start-ups in Hillsboro, Washington Square, Gateway and Oregon City (if they are ripe for TMA formation).

Action 4 Develop business plans for each TMA that support the unique character of each regional center and industrial areas. Attached work plans detail the strategies currently being used by each TMA recognizing that they are at different levels of development.

Action 5 Conduct a study to better understand why the Tualatin and Columbia Corridor TMAs were not successful and use the results to create new criteria for the TMA approval process.

Action 6 Identify the appropriate agency to administer the TMA program (a 20% match is needed) as it transitions from TriMet by July 2004.

Program Impact

Year	Number of Existing TMAs	Number of TMAs in Exploratory Phase	Number of TMA member organizations*	Number of Employees Impacted	Annual VMT Reduction** (miles)	Program Cost	Cost per reported VMT reduced
02-03	5	1	Not reported	Not reported	Not measured	$250,000	N/A
03-04	5	1	266	45,317	6,135,450	$181,250	Base year
04-05	6	2	297	49,233	1,071,163	$348,750	$0.37
05-06	8	1	332	54,070	1,070,975	$392,500	$0.47
06-07	9	1	364	58,293	1,081,685	$507,000	$0.47
07-08	10	1	397	62,670	1,092,502	$511,500	$0.33

*based on information submitted by the TMAs. Does not include new TMAs.

** data submitted by Swan Island TMA, Gresham Regional Center TMA and Lloyd District TMA. All TMAs will begin to report these numbers by FY05.

Region 2040 Initiatives Grant Program

The Region 2040 Program is a grant program currently administered by TriMet with oversight by the TDM Subcommittee. It is expected that program administration will transition out of TriMet and into Metro over the next 3 years. The grant funds are allocated annually and fund transportation demand management services and programs. The grant program is funded with federal Congestion Mitigation/Air Quality (CMAQ) program monies that have been allocated through the Transportation Priorities process.

All jurisdictions, transportation management associations and nonprofit organizations with the mission of implementing transportation demand management programs located within Metro's boundary are eligible for the funds.

Projects funded with Region 2040 Program monies must strive to reduce the number of people driving alone and/or daily vehicle miles traveled within a specific geographic location. Examples of past program investments, current programs and future program prioritizing for Region 2040 Initiatives is included in Appendix C.

Program Impact

Year	Number of Programs	Annual VMT Reduction* (miles)	Program Cost**	Cost per VMT Reduced
2002-03	3	575,750	$203,250	$0.35
2003-04	7	1,300,000	$118,000	$0.09
2004-05	5-10	1,300,000	$269,000	$0.21
2005-06	5-10	1,300,000	$269,000	$0.21
2006-07	5-10	1,300,000	$269,000	$0.21
2007-08	5-10	1,300,000	$269,000	$0.21

*Numbers were not provided by all programs in 2002. Projections are based on future program reporting improvements as required in the new grant application.
**Program requires a 20% match

Regional Telework Program

The Oregon Department of Energy (ODOE) works with employers in the Portland metro region to develop successful telework programs. Telework is working at home or at location closer to home instead of traveling to the traditional place of business. Telework reduces the number of vehicle miles traveled by eliminating or reducing commute trips. ODOE provides technical assistance and outreach services including education and training materials, consultations, presentations, training sessions, and an extensive telework website.

Strategy 1 Increase the number of telework programs by 60% in the next year and 20% a year for the next 4 years.

Action 1 Regional Marketing Program will market telework to the 2,000 eligible employers in the region with a target of enrolling 35%.

Action 2 Oregon Department of Energy will continue to provide high quality technical support and outreach services for employers with telework programs, including educational materials, training sessions, consultation and the telework website.

Program Impact

Year	Telework Programs	Number of Teleworkers	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2002-03	340	6,000	7,560,000	$100,000	Base year
2003-04	50	500	630,000	OOE funded*	
2004-05	55	550	693,000	$30,000	$0.04
2005-06	60	605	762,300	$30,000**	$0.04
2006-07	66	665	837,900	$60,000**	$0.07
2007-08	72	731	921,060	$60,000**	$0.07

*Assumes that Collaborative Marketing Program is marketing telework to employers.
** For technical support only. The dollars for marketing are in the Regional Marketing Program.

Business Energy Tax Credits

The BETC Program is a one-of-a-kind in the nation. Oregon employers can get a state tax credit for projects that reduce vehicle miles traveled by employees, students, clients, or customers. Eligible projects include telework, transit passes, commuter pool vehicles, financial incentive programs, bicycles, Transportation Management Association (TMA) dues, parking cash out and FlexCar.

Strategy 1 Increase the number of Oregon employers taking advantage of BETC program by 35% over the next 5 years.

Action 1 Market BETC to all employers in the region through the Employer Outreach Program and the Collaborative Marketing Program.

Action 2 ODOE will continue to provide technical assistance to employers wanting to take advantage of the program including finding pass through partners and submitting applications.

Program Impact:

Year	New BETC Projects Approved	Total Project Implementation Costs (submitted)	Annual VMT Reduction* (miles)	Total Gallons of Gas Saved**	Cost of Program	Cost per VMT reduced***
2002-03	45	$2,700,000	59,000,000	3,000,000	$100,000	N/A
2003-04	27	$1,900,000	35,000,000	1,700,000	ODOE	N/A
2004-05	14	$900,000	18,000,000	900,000	$30,000****	N/A
2005-06	17	$1,100,000	22,000,000	1,100,000	$30,000***	N/A
2006-07	15	$1,400,000	20,000,000	1,300,000	$60,000	N/A
2007-08	16	$1,600,000	20,000,000	1,200,000	$60,000	N/A

*In 2002 59,000,000 VMT reduced x 60% increase in 2003. A 20% increase is assumed for the next three years. 68% of the projects approved are for transit passes. The remaining 32% includes telework, bicycles, commuter pool vehicles, incentives and TMA dues.

** Based on an average gas mileage of 20mpg

***The program itself does not reduce VMT but provides the incentive to businesses to reduce their VMT.

****Assumes Regional Travel Options Marketing program is actively marketing BETC

Goal 2 Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

Strategy 1 Convene senior managers on a bi-monthly basis over the next year in order to solicit their input and provide guidance on RTO programs and activities.

Strategy 2 Convene senior managers quarterly in years 2-5 to stabilize RTO program funding and support.

Goal 3 Refine performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

The RTO evaluation program will continue to improve our method for collecting, analyzing and reporting data for each RTO program. The annual evaluation report will be used to refine program development, marketing and implementation so that we can invest limited program dollars in the most cost effective ways.

Strategy 1 Report annually on RTO program activities and impact. This could result in an evaluation oversight position at Metro.

Strategy 2 Survey all ECO affected employers in the next five years and increase the number of ECO employers that are in compliance with ECO Rules from 50% to 75%.

Action 1 Develop and distribute a set of tools that employers can use to implement the most effective Employee Commute Options (ECO) programs increasing the impact of programs on VMT reduction.

Action 2 Create a central database for the RTO program that can be used in conjunction with other regional travel behavior data to monitor each program component.

Action 3 Process ECO surveys annually and report on compliance with ECO rule.

Action 4 Continue to develop and enhance the ECO survey database so data can be evaluated much faster and with a higher degree of accuracy.

Strategy 3 Evaluate all 38 Region 2040 Centers on an annual basis to determine progress towards non-SOV modal targets.

Action 1 Work with regional partners to establish commute mode split targets for regional centers preparing for TMA development.

Action 2 Identify land use measures that can be monitored and related to travel behavior data.

Action 3 Develop and implement a targeted marketing effort for large non-participating employers in key regional centers.

Strategy 4 Develop a set of prediction factors that would be used to select the most cost-effective RTO programs for implementation.

Action 1 Work with each travel options program to identify survey questions, run stated preference surveys for selected sets, and derive the cost effectiveness of each program.

Action 2 Conduct a survey to derive quality predictors of how people respond to various travel options programs.

Action 3 Develop a set of predictors for the effectiveness range of travel options programs.

Year	Cost of Program	Percent of Total Program*
2002-03	$122,000	9%
2003-04	$113,000	9%
2004-05	$280,281	11%
2005-06	$421,595	15%
2006-07	$270,000	10%
2007-08	$270,000	10%

*based on Preferred funding scenario total budget.

Goal 4 Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

Strategy 1 Create a Regional Travel Options Marketing Program Manager position at Metro to coordinate regional programs.

Strategy 2 Convene senior managers on a bi-monthly basis in the first year and quarterly for the next 5 years to oversee and advise the RTO subcommittee on strategic plan implementation.

Strategy 3 Convene the Regional Travel Options Subcommittee and working groups (e.g., marketing, performance measures, rideshare, policy development, funding) monthly to support stronger partnering and coordination.

Strategy 4 Conduct an annual retreat to review strategic plan (mission, goals, strategies, performance measures) and update work programs accordingly.

Goal 5 Develop regional policies that integrate RTO programs into other land use and transportation programs including Metro's Centers Program, TOD Program, Corridors program and TriMet's Transit Investment Plan.

Strategy 1 Develop a parking policy that could be used to fund the TDM program (e.g., charge for parking to fund TMAs and TDM).

Strategy 2 Develop policies in regional centers and industrial areas that create more travel options for people coming to and traveling within the area.

Strategy 3 Use the results from the SW Portland TravelSmart pilot program to develop a plan for implementing TravelSmart in regional centers over the next 5 years.

Strategy 4 Develop a policy that would require a certain percentage of upfront funding for TDM strategies on all corridor projects. The approach could be similar to TravelSmart where existing travel behavior is assessed and those who are interested in shifting modes would be targeted. A policy is needed to allocate funding for an upfront TDM program that can be used to increase capacity of the corridor and prevent costly roadway expansion.

Strategy 5 Work with Metro's TOD program to develop a Travel Options package to provide to residents and employees living and working in transit oriented developments.

Strategy 6 Work with Metro's Goal 5 and Green Streets programs to help make a stronger policy connection between reducing the amount of roadway expansion and improving water quality.

Strategy 7 Work with local jurisdictions to monitor the implementation of TDM strategies as a part of their development codes. Other strategies include enhancing land use policies, strengthening local incentive programs, and working with Flex Car to reduce parking requirements for developments.

Strategy 8 Research other policy options that help to make RTO programs more effective such as, implementing HOV lanes and bridge tolls, Fannie Mae's Smart Commute program, Metro's Livable Streets program, Motorist Education, and improving freight policies.

Goal 6 **Develop a funding plan that helps create a more sustainable Regional Travel Options program (see Preferred Scenario C in Attachment A).**

Strategy 1 Secure additional program funds for Regional Marketing Program through ODOT Transportation funds.

ODOT's 04-06 budget includes $1.5 million in federal STP funds to be used on transportation demand management measures around the state. A percentage of this funding may be available to the Metro region in Spring 2004.

Strategy 2 Develop a parking policy that could be used to fund the TDM program (e.g., charge for parking to fund TMAs and TDM).

Strategy 3 Research other Potential Funding Sources including BETC, Climate Trust, EPA, OTIA, STIP and corridor projects

Appendix A: Funding Scenarios

Three funding scenarios are offered up in Appendix A. Scenario A reflects a budget that maintains current levels of funding. Scenario B reflects a budget that reduces program funding by $500,000 in 2006 – 2008 and Scenario C reflect the preferred program funding scenario.

Appendix B: Detailed Work plans

Each Regional Travel Options program completed a detailed work program for the next 3-5 years. These work plans will be adjusted annually to reflect unexpected funding and policy changes. In order to be most effective and because the RTO program leverages so many private dollars, a stable regional funding source is needed to continue to implement successful travel options programs.

Appendix C: Past Program Expenditures

Information about past program expenditures for the TMA program and Region 2040 Initiatives program are provided. Funding decisions for both programs are made by the TDM Subcommittee and presented to TPAC on an annual basis.

Appendix A
Funding/Budget Scenarios

Budget/Funding Scenarios for the Regional Travel Options Program

December 2003

Regional Transportation Options (RTO) Program Scenario A	Financially Constrained A: Program restructured with $100,000 Reserve Retained			
Includes Allocated CMAQ Funds Only	**FY04/05**	**FY05-06**	**FY06-07**	**FY07-08**
Collaborative Marketing Program: Funds a collaborative marketing campaign that is an "umbrella" for all travel options programs	$98,280	$98,280	$130,000	$130,000
TriMet Employer Program: Supports employee outreach and Transit PASSport marketing program	$303,000	$303,000	$195,000*	$195,000*
Regional Rideshare: Combines Vanpool Program and CarpoolMatchNW into new structure that collaborates with regional partners including CTRAN.	$426,000	$245,720	$379,500	$379,500
SMART TDM: Employer outreach and marketing program for Wilsonville area.	$55,000	$55,000	$55,000	$55,000
Regional TMA Program: Promote travel options to employers as a catalyst for economic development while creating local leadership in key regional centers.	$281,250	$221,750	$409,000	$409,000
<u>Ongoing</u>: Distributes funds between 5 existing TMAs	$125,000	$125,000	$150,000	$150,000
<u>Startup</u>: Exploratory and 3-year formation funding for two to three new TMAs in Centers and Industrial Areas	$156,250	$96,750	$150,000	$150,000
<u>Innovative</u>: Funds new, expanded and innovative programs at existing TMAs	Not funded	Not funded	$109,000	$109,000
Region 2040 Initiatives Program: A grant program that funds innovative SOV reduction projects	$312,000	$312,000	$269,000	$269,000
Regional Telework Program: Markets telework to regional employers using ODOE online tools and training.	Not funded	Not funded	$15,000	$15,000
Regional Business Energy Tax Credit program: Promotes BETC to regional businesses as an incentive for developing travel options programs for employees.	Not funded	Not funded	$15,000	$15,000
Regional Evaluation Program: ECO data analysis and database management, annual programevaluation report, performance measures for all program elements	$100,000	$100,000	$100,000	$100,000
I-5 Corridor TDM Plan: Develops a strategy for implementing TDM in corridors.			$56,000	$56,000
Interstate TravelSmart: Pilot #2 for implementing home based marketing program in key corridors and centers.			$150,000	$150,000
TOTAL	**$1,575,530**	**$1,335,750**	**$1,773,500**	**$1,773,500**

*Does not fully fund program as currently implemented.

RTO Program Scenario B	Financially Constrained B: Program restructured with $500,000 Reserve Transferred to TriMet Frequent Bus Program			
Includes Allocated CMAQ Funds Only	**FY04/05**	**FY05-06**	**FY06-07**	**FY07-08**
Collaborative Marketing Program: Absorbs some of the cuts proposed above while moving towards more collaborative marketing program. Focus on message development and delivery.	$98,280	$98,280	$37,500	$37,500
TriMet Employer Program: Program cuts proposed in 06/07 and in 07/08 reflect transfer of $500,000 to TriMet Frequent Bus Program	$303,000	$303,000	$37,500	$37,500
Regional Rideshare: Same as Scenario A	$426,000	$245,720	$379,500	$379,000
SMART TDM: Same as Scenario A	$55,000	$55,000	$55,000	$55,000
Regional TMA Program: Same as Scenario A	$281,250	$221,750	$409,000	$409,500
Ongoing	$125,000	$125,000	$150,000	$150,000
Startup	$156,250	$96,750	$150,000	$150,000
Innovative	Not funded	Not funded	$109,000	$109,000
Region 2040 Initiatives Program: Same as Scenario A	$312,000	$312,000	$269,000	$269,000
Regional Telework Program: Same as Scenario A	Not funded	Not funded	$15,000	$15,000
BETC Program: Same as Scenario A	Not funded	Not funded	$15,000	$15,000
Regional Evaluation Program: same as Scenario A	$100,000	$100,000	$100,000	$100,000
I-5 Corridor TDM Plan: Same as Scenario A			$56,000	$56,000
Interstate TravelSmart: Same as Scenario A			$150,000	$150,000
TOTAL	**$1,575,530**	**$1,335,750**	**1,493,500**	**1,493,500**

RTO Program Scenario C	Preferred: Collaborative RTO Program			
Includes Allocated CMAQ Funds Plus Funding Not Yet Identified	**FY04/05**	**FY05-06**	**FY06-07**	**FY07-08**
Collaborative Marketing Program: Scenario A + moving entire RTO marketing program into collaborative structure to fund a 3 year campaign.	$485,000	$491,000	$150,000	$150,000
TriMet Employer Outreach Program: Continues employment site contacts, adds marketing rep. Assumes 5% inflation in FY07 & 08.	$385,649	$404,929	$425,175	$446,433
Regional Rideshare: Scenario A + expanded bi-state marketing and implementation in more focus areas.	$715,660	$646,755	$436,000	$436,000
SMART TDM: Scenario A + enhanced employer outreach and marketing program to leverage commuter rail investment.	$89,700	$91,400	$94,194	$96,966
Regional TMA Program: Scenario A + additional startups in key centers and industrial areas as coordinated with Metro's Centers program.	$348,750	$392,500	$507,000	$511,500
Ongoing: Scenario A + support for one additional TMA	$100,000	$125,000	$125,000	$175,000
Startup: Scenario A + TMA startups in 2 regional centers	$248,750	$267,500	$242,000	$196,500
Innovative: Same as Scenario A	Not funded	Not funded	$140,000	$140,000
Region 2040 Program: Same as Scenario A.	$312,000	$312,000	$269,000	$269,000
Regional Telework: Scenario A + enhanced marketing program.	$30,000	$30,000	$60,000	$60,000
BETC Program: Scenario A + enhanced marketing program	$30,000	$30,000	$60,000	$60,000
Regional Evaluation Program: Scenario A + survey research in Centers, RTO program performance measures, regional database and analysis	$280,281	$421,595	$270,000	$270,000
I-5 Corridor TDM Plan: Same as Scenario A			$56,000	$56,000
Interstate TravelSmart: Same as Scenario A			$150,000	$150,000
Subtotal: Collaborative Program	**$2,677,040**	**$2,820,179**	**$2,477,369**	**$2,505,899**
Programs submitted by TriMet *				
TriMet Targeted Travel Training: Increase transit ridership among seniors and people with disabilities (funding not identified).		$75,000	$78,750	$82,687
TriMet Targeted Pedestrian Safety Campaign (funding not identified)		$36,000	$37,800	$39,690
TOTAL	**2,677,040**	**2,931,179**	**2,593,919**	**2,628,276**

*Funding decision made by the RTO Subcommittee

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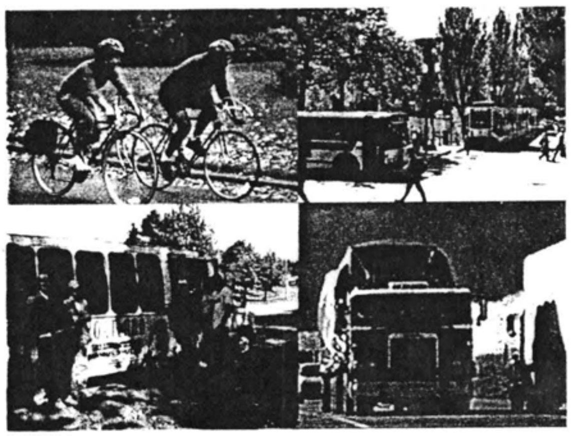
Regional Travel Options Program
5-Year Strategic Plan

Appendix B and C



December 2003

A consensus of the members of the Regional Travel Options Subcommittee

Portland Transportation Options
Clackamas County
C-TRAN
DEQ State of Oregon Department of Environmental Quality
City of Gresham 1905
Metro
Multnomah County
Oregon Office of Energy
Port of Portland
Oregon Department of Transportation
TRI-MET
Washington County

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Appendix B
Detailed Work Plans

Collaborative Marketing Campaign

Three-Year Workplan

December 2003

Goal 1 Develop a collaborative marketing campaign that is an "umbrella" for all travel options programs being implemented throughout the region.

Program Summary:
The RTO Collaborative Marketing Campaign is the number one priority for the next three years. The Campaign will work to coordinate all marketing and outreach efforts of the regional partners to create a broader public awareness of the travel options available to people travelling around the region. The regional Campaign will support the projects & messages currently being implemented by the partners and will be a clearinghouse of information that helps people learn about and access the options available to them.

Strategic Direction:
There is an exciting opportunity for the newly envisioned Collaborative Marketing Campaign to work closely with Metro's Community Media Project, "Zig Zag: Real Stories, New Angles," a program that seeks to broaden the discussion of transportation issues through personal stories told by people living in the region. The RTO Campaign will assist in the creation of a resource guide for the Zig Zag community screening events and will provide a venue for ongoing discussions during the two-year awareness campaign that will kickoff in Spring 2004. The impacts of the campaign will be measured by a pre and post campaign survey to determine if there has been a significant change in people's awareness and behavvior.

Strategy 1 Initiate a broad based Regional Travel Options Marketing campaign that invites people to think about how they travel around the region resulting in a measurable increase in the use of travel options over a two year period.

Action 1 Create a RTO Marketing manager position at Metro to coordinate RTO marketing efforts, raise awareness about travel options and measure the degree to which awareness is increasing.

Action 2 Develop a region-wide RTO image and message delivery strategy that more actively engages the general public and enhances local and regional program implementation activities.

Action 3 Create a series of position papers that explain the connection between travel options and health, transit, development patterns, air and water quality, and getting to school, work and shopping destinations throughout the region.

Action 4 Develop a unified RTO presence at special events, conferences and school events.

Action 5 Create a regional clearinghouse that includes a staffed informational hotline, an interactive website and a mobile program information unit.

Action 6 Develop a Regional Transportation Education Program over the next five years that works directly in schools throughout the region.

Action 7 Integrate Travel Smart as a one on one home-based marketing program in key regional centers.

Detailed Work Program:

ACTIONS	IMPACT	WHO	'03–'04	'04-'05	'05-'06	'06-'07	'07-'08
Create a Regional Marketing Program manager position at Metro to coordinate creation of identity package and regional marketing campaign.	Measured through Regional Evaluation Program	Metro Marketing Manager	$100,000	$110,000	$121,000	$130,000	$130,000
Create an RTO identity package including program name, logo, position papers, slogan and media messages and incorporate into other materials • Research and analyze attitude and awareness surveys, travelsmart results and other marketing data gathered in the region. • Conduct Focus Groups to determine which messages resonate with the general public and measure awareness • Finalize identity package	Measured through Regional Evaluation Program	TriMet Metro Regional Partners	$25,000	$25,000	$20,000	$20,000	$20,000
Launch a two-year Travel Options campaign in conjunction with the Community Media Project's Zig Zag, Real Stories, New Angles • Create timeline of all events that partners are involved in over the next two years • Launch Campaign Spring 2004 • Create a resource center guide • RTO Booth at events/conferences/schools • Create an RTO design award (like billboard program) • Solicit radio, tv and print ad media using position papers in identity package. Conduct a pre and post survey to measure the impact of the campaign.	Measured through Regional Evaluation Program pre and post survey	All regional partners with oversight from Metro Marketing Manager		$350,000	$350,000	Reevaluate need for ongoing campaign	
TOTAL			**$125,000**	**$485,000**	**$491,000**	**$150,000**	**$150,000**

TriMet Employer Outreach Program

Three-Year Work Plan
December 2003

GOAL: Reduce the number of vehicle miles traveled by employees commuting to and from work by helping employers set up successful TDM programs.

Program Summary:

TriMet works with employers in the Portland Region to help them develop successful TDM programs that will reduce the number of vehicle miles traveled by reducing drive alone commute trips. TriMet's Employer Outreach Program targets the region's ECO affected employers (51 or more employees), yet still provides the same level of assistance for employers with fewer employees. TriMet has been working with area employers since the early 1980's. At that time, agency staff worked with employers to establish employee transportation programs that consisted of transit planning and carpool matching assistance. Once the ECO Rule became effective (1996), the agency's TDM program evolved to include more outreach and technical assistance for employers and regional partners in the Portland area. The current program reflects many components from its predecessor, i.e., educational programs and training materials, individual consultations, presentations, and employer/employee training sessions (Transportation Fairs, Transportation Coordinator training, etc.). The TDM programs TriMet currently promotes are designed to "... enhance mobility and support the use of alternative transportation modes by improving regional accessibility to public transportation, carpooling, telecommuting, bicycling, and walking options,"[1] as well as vanpool, flexcar, compressed work week and flexible work hours. During the 2001-2003 fiscal years, TriMet helped 866 Portland area employers set up, or maintain, TDM programs that impacted 190,520 employees in the region.

Strategic Direction:

There are approximately 50,000 employers in the Portland Metropolitan Area. In FY03, employment levels fell to 777,195 which is below the last low recorded in 1998. Consequently, the Employer Outreach program has seen employment levels drop at many employers, which means fewer employees are reached for every employer the program works with. Currently, 580 employers participate in alternative mode programs marketed by TriMet. This includes over one-third of all ECO-affected employers, along with 271 employers with 50 or fewer employees. In total, over 143,000 employees benefit from TriMet's employer programs. While this represents solid market penetration and results in significant impact, there is still tremendous market potential for reducing SOV through employers, particularly in regional centers. Regional centers represent a special opportunity since they are called out in the Regional Transportation Plan (RTP).

At the current funding level, TriMet will continue to aggressively market TDM programs by working with employers, employees, regional partners, and the community at large. TriMet marketing and technical staff will provide one-on-one assistance to employers and employees by conducting Transportation Coordinator (TC) training classes, transportation fairs, promotional events in the community, and by offering technical assistance to regional partners, TMAs, and employers struggling to meet their ECO targets. TriMet's Employer Outreach Program will continue to rely heavily on resources beyond CMAQ grant funding; that is, we will rely on materials and services from the Legal, Finance, Marketing, and Operations Divisions within the agency. In addition, the agency is committed to providing materials and services above and

[1] Metro 2000 RTP, Page 1-60

beyond the agency's 10.23% CMAQ match agreement to promote regional TDM programs -- not only at employer sites, but at promotional events throughout the community as well. Should the current level of funding for the agency's TDM program cease at the end of this fiscal year (June 2004), it is unlikely that TriMet's general fund would be able to absorb the scope of the Employer Outreach Program and it would cease to exist. Consequently, it would be necessary for another entity to find a way to accommodate the needs of the region's 50,000 employers and their employees.

Over the next year, we anticipate 96 new employers on transportation programs, with approximately 23,000 employees who will reduce approximately 4,400,000 vehicle miles during 2003-04. With current funding maintained, we anticipate _ percentage point increase in non-SOV trips for all employees on transportation programs for 2004-05 and 2005-06.

Detailed Work Plan (Projections are based on results for '02-'03: 676 employment sites had transportation programs, 166,000 employees.)

Actions	Who Implements	'03–'04		'04-'05		'05-'06	
		Cost	Impact/ Objective	Cost	Impact Objective	Cost	Impact/ Objective
Employer Outreach 6.5 FTEs: Personal Services Materials & Services Dedicated to providing TDM consultation services to employers to help them meet their ECO goals by investing in the most beneficial transportation program for their employees and the region.	TriMet Marketing Staff	**$367,285** $348,685 $18,600	<u>Intense Direct Marketing</u> Make 8,300 calls/correspondence Conduct 525 face-to-face meetings Enroll 772 sites on a TDM program (189,000 employees) Train 72 TC reps Enroll 350 TCIP members Provide 450 sites w/ECO survey assistance Support 375 w/ECO Planning Circulate 1,700 quarterly newsletters <u>Distribute 10,000 Employer/ Employee Brochures Including:</u> "To Work", "Creating Choices", "Tax Savings for Transportation	**$385,649** $366,119 $19,530	<u>Intense Direct Marketing</u> Make 8,300 calls/correspondence Conduct 525 face-to-face meetings Enroll 868 sites on a TDM program (212,000 employees) Train 72 TC reps Enroll 370 TCIP members Provide 470 sites w/ECO survey assistance Support 400 w/ECO Planning Circulate 1,800 quarterly newsletters <u>Distribute 10,000 Employer/ Employee Brochures Including:</u> "To Work", "Creating Choices", "Tax Savings for Transportation	**$404,929** $384,425 $20,507	<u>Intense Direct Marketing</u> Make 8,300 calls/correspondence Conduct 525 face-to-face meetings Enroll 964 sites on a TDM program (235,000 employees) Train 72 TC reps Enroll 390 TCIP members Provide 500 sites w/ECO survey assistance Support 425 w/ECO Planning Circulate 1,900 quarterly newsletters <u>Distribute 10,000 Employer/ Employee Brochures Including:</u> "To Work", "Creating Choices", "Tax Savings for Transportation

			Programs", "Commute Options", "Benefits of Leaving the Car," and "Save $ on TriMet Passes" <u>Conduct 100 Transportation Fairs</u> Work with_10,000 employees Distribute 4,000 "New Employee Kits" Distribute 500 Posters to TCs Host 800 visits to Employer Web Site Maintain 68,000 Employees/ERH Program Establish onsite displays at 140 Events w/employers, community, TMAs, colleges, Marquam Hill, and Business Associations		Programs", "Commute Options", "Benefits of Leaving the Car," and "Save $ on TriMet Passes" <u>Conduct 100 Transportation Fairs</u> Work with 10,000 employees Distribute 4,000 "New Employee Kits" Distribute 500 Posters to TCs Host 900 Visits to Employer Web Site Maintain 71,000 Employees/ERH Program Establish Onsite displays at 140 Events employers, community, TMAs, colleges, Marquam Hill, and Business Associations		Programs", "Commute Options", "Benefits of Leaving the Car," and "Save $ on TriMet Passes" <u>Conduct 100 Transportation Fairs</u> talk to 10,000 employees Distribute 4,000 "New Employee Kits" Distribute 500 Posters to TCs Host 1000 Visits to Employer Web Site Maintain 74,000 Employees/ERH Program Establish Onsite displays at 140 Events w/employers, community, TMAs, colleges, Marquam Hill, and Business Associations
TOTAL		**$367,285**		**$385,649**		**$404,929**	

Program Impact:

Year	Number of Employers Impacted*	# Employees Impacted	# Employees Impacted & Surveyed	Annual VMT Reduction**	Program Cost	Cost per VMT Reduced
2003-04	772	260,000	143,000	32,270,000	$367,285	$0.011
2004-05	868	283,000	166,000	39,000,000	$385,649	$0.010
2005-06	964	306,000	189,000	45,500,000	$404,929	$0.009

* TriMet works with TDM partners to market transportation programs to employers, regardless of boundaries (for example, with TMAs).

** Average weekday reduction (from aggregate of ECO survey commute mode data) x 261 total weekdays. Because of partnerships, VMT reductions somewhat overlap with estimates found in other partner's three-year plan documents.

Regional Vanpool Program
Three-Year Workplan
December 2003

GOAL: Ten new vanpools in the Portland-Vancouver metropolitan region each year over the next 8 years.

Program Summary:
TriMet currently operates 6 vanpool shuttles and 2 traditional vanpools. CTRAN operates 10 vanpools, including 9 traditional vanpools and 1 shuttle. CTRAN just completed a market analysis to determine the potential for vanpools in their service area. Initial findings show that there is a considerably large untapped vanpool market throughout the bi-state region including areas that fall outside of the Metro UGB.

Strategic Direction:
The primary objective over the next 3 years is to initiate a vanpool market analysis to determine what type of vanpool program should be promoted in the bi-state region, how much it will cost to implement that program and what agency/organization is best suited to operate the program. By July 2005, the TDM Subcommittee will have a clear sense of resource needs based on recommendations from the study.

In the next three years the Rideshare Program will be developed into a bi-state program that coordinates with CTRANs rideshare program. CTRAN recently completed a vanpool market analysis that calls for a doubling of their fleet in the next year. A marketing program will be developed to actively market carpooling and vanpooling in targeted areas throughout the region. These areas will be identified in 2004 through a regional rideshare market analysis. The market analysis will cover an extended geographic area outside the UGB, recognizing that the commute travelshed for the Portland area reaches a radius of 50 miles or more from the central city. This analysis will address the appropriate organizational structure for this program as TriMet would like to transition out of rideshare program administration.

Detailed Work Program:

I. Initiate a vanpool market analysis and Implementation	**GOAL**	**WHO**	**'03–'04**	**'04-'05**	**'05-'06**
Determine Travelshed for vanpool study		Partners/TDM Sub			
Begin vanpool project in Clark County, based on their market study results	Double current fleet	CTRAN/TriMet	$300,000		
Refine Scope of Work for hiring a consultant to do a market study on selected travelshed area		Partners/TDM Sub	Sept - Jan		
Send out Request for Proposals		Partners/TDM Sub	March		
Review applications, select consultant, sign contracts		Partners/TDM Sub	May - June		
Hire consultant for study July 1, 2004 – June 30, 2005.	1 target area a	Partners/TDM		$150,000	

Study elements would include: a) Determine baseline numbers for vanpools and carpools. b) Create an evaluation tool for the program c) Identify and begin one or two initial target areas. d) Develop Outcomes, Actions, Resources, Needs for program e) Determine appropriate organizational structure f) Develop funding strategy g) Develop marketing strategy h) Integration with existing vanpool programs	year	Sub		a.$100,000	
Ongoing investment in TriMet Vanpool Shuttle Program	One new shuttle a year	TriMet	$90,720	$106,140	$121,560
Evaluate initial Clark County project – January 2005		CTRAN/TDM Sub	$8,000	$5,000	
Integrate pilot project lessons learned into Vanpool program plan		Partners/TDM Sub			
Launch additional target areas – July 2005	One target area a year	TBD			$100,000 per area
TOTAL			**$398,720**	**$361,140**	**$221,560**

Fiscal Year	New Vanpools	Reduced Trips/day (Vanpool)	Reduced Trips/yr (Vanpool)	Annual VMT Reduction** (Vanpool)	Annual Funding	Cost/VMT reduced
01-02	10	100	26,200	2,358,000		
02-03	20	200	52,400	4,716,000	$245,140	$0.05
03-04	30	300	78,600	7,074,000	$206,720	$0.03
04-05	30	300	78,600	7,074,000	$398,720	$0.06
05-06	30	300	78,600	7,074,000	$361,140	$0.05
06-07	30	300	78,600	7,074,000	$221,560	$0.03
07-08	30	300	78,600	7,074,000	$221,560	$0.03
08-09	30	300	78,600	7,074,000	$221,560	$0.03
09-10	30	300	78,600	7,074,000	$221,560	$0.03
10-11	30	300	78,600	7,074,000	$221,560	$0.03
Totals	**270**	**2,700**	**707,400**	**63,666,000**		

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 90 miles round trip mileage per vanpool, 14 miles round trip mileage per carpool.

CarpoolMatchNW
Three-Year Workplan
December 2003

Goal: To reduce 70,000 metric tons of CO_2 over the next eight years by adding 1500 daily carpool trips each year.

Program Summary:
CarpoolMatchNW.org is a self-serve Internet based service that will link riders and drivers from Salem to Vancouver, Washington. It addresses the three barriers to conventional carpool matching programs: It's anonymous, so that people can feel secure about finding fellow car and vanpoolers; It's user driven and doesn't depend on a coordinator to find suitable riders; It's fast and convenient. People can find other riders in a few days, not in weeks or months. This ride match program which allows registered users to enter relevant information about their commute, including destinations and travel times, then view a map which displays the locations of other registered users who share their commute. It is one of the first systems of its kind in the country. There are three major components to the website:
1. Technical
2. Customer service
3. Marketing

Strategic Direction:
The Partner Team (PDOT, TriMet, SMART, and C-TRAN) would like to expand the reach and visibility of the site to not only be more effective for carpool matches but for establishing vanpool matches. A regional rideshare study will be conducted in 2004 to determine the market potential for both vanpools and carpools and an effective organizational structure will be recommended. TriMet, CTRAN, SMART and the City of Portland will continue to promote the program in conjunction with other regional partners until the appropriate organizational structure is determined.

Detailed Work Plan:

I. Technical **Goal:** to ensure site runs well and is accessible	**2003 - 2004**					**2004 - 2005**	**2005 - 2006**
	Currently Funded - CMAQ	**In-Kind**					
		TriMet	**PDOT**	**C-TRAN**	**Other**	**Budget**	**Budget**
Project Management	40,000					40,000	42,000
Site Maintenance	30,000					45,000	47,250
Site improvements – one-time trip component, improving admin. tool, translation, etc.			34,300			20,000	21,000
Monitoring and Verification			7,500			7,500	7,875
Subtotal	**$70,000**		**$41,800**			**$112,500**	**$118,125**

II. Customer Service	**2003 - 2004**					**2004 - 2005**	**2004 - 2005**
Goal: to keep database current and maintain existing 1,700 Users	**Currently Funded - CMAQ**	**In-Kind**					
		TriMet	**PDOT**	**C-TRAN**	**Other**	**Budget**	**Budget**
Customer Service (TriMet)		80,000*				80,000	84,000
Customer Service (C-TRAN)				65,000			68,250
Subtotal		**$80,000***		**$65,000**		**$80,000**	**$152,250**

III. Outreach and Marketing	**2003 - 2004**					**2004 - 2005**	**2005 - 2006**
Goal: to encourage people to register. See specific targets for individual activities	**Currently Funded - CMAQ**	**In-Kind**					
		TriMet	**PDOT**	**C-TRAN**	**Other**	**Request**	**Request**
One to one outreach, e.g. Transportation Coordinator campaigns, t-fairs, promotions to Users, outreach to magnet schools **GOAL:** 2,630 registrants	17,300	10,000*	10,000 40,000	2,500	12,000	67,925	66,070
General Public Marketing e.g. bus backs, drive time sponsorships, promoting translated site **GOAL:** general publicity, 5 major sponsors, 2.5 million impressions, 800,000 people driving alone	28,700	14,500 6,000*	44,725	10,710 plus graphic artist's time	6,000	94,095	88,750
Partnership Development **Goal:** 500+ registrants	could be part of project manager's job if technical is funded						
Subtotal	**$46,000**	**$30,500**	**$94,725**	**$13,210**	**$18,000**	**$162,020**	**$154,820**

TOTAL BUDGET	**$116,000**	**110,500**	**$136,525**	**$78,210**	**$18,000**	**$354,520**	**$425,195**

*CMAQ dollars currently directed through TriMet

Program Impact

Fiscal Year	New Carpools	Reduced Trips/day (Carpool)	Reduced Trips/yr (Carpool)	Annual VMT Reduction* (Carpool)	Annual Funding	Cost/VMT reduced
01-02	294	500	131,000	3,117,800		
02-03	588	1000	262,000	6,235,600	$245,140	$0.04
03-04	882	1500	393,000	9,353,400	$459,235	$0.05
04-05	1059	1800	471,600	11,224,080	$354,520	$0.03
05-06	1059	1800	471,600	11,224,080	$425,195	$0.04
06-07	1059	1800	471,600	11,224,080	$425,195	$0.04
07-08	1059	1800	471,600	11,224,080	$425,195	$0.04
08-09	1059	1800	471,600	11,224,080	$425,195	$0.04
09-10	1059	1800	471,600	11,224,080	$425,195	$0.04
10-11	1059	1800	471,600	11,224,080	$425,195	$0.04
Totals	**9,176**	**15,600**	**4,087,200**	**97,275,360**		

*Assumptions from CarpoolMatchNW/Climate Trust Agreement: 262 workdays per year, 2.7 passengers per carpool=reduction of 1.7 trips per carpool.

SMART/Wilsonville Travel Options Program
Three-Year Workplan
December 2003

Goal: Increase the number of people using travel options by 5% over the next 5 years.

Program Summary:
The objective of the SMART Options program is to reduce the proportion of single-occupancy vehicle trips in Wilsonville by encouraging employees and residents to use alternatives to driving alone. The ultimate goal is to meet the modal split targets set for Wilsonville in the Regional Transportation Plan. The SMART Options program employs three primary approaches in pursuit of this goal:

1. Outreach and Marketing - Program staff works with local businesses and community groups to develop and promote TDM strategies and to market TDM to employees and residents. Transportation fairs, vanpool development, and guaranteed ride home programs are some of the products of this approach.
2. Planning ˆ Program staff participates in the local planning process for the City of Wilsonville Transportation System Plan and for the development review process. These efforts are crucial to ensure that future policies and developments will support and encourage the use of alternative transportation modes.
3. Coordination ˆ The SMART Options program does not have its own carpool matching program, nor does the SMART transit system take Wilsonville employees everywhere they need to go. Coordination with other agencies and transportation service providers in the region is a high priority for the SMART Options program in order to leverage investments and improve regional drive-alone rates, avoid duplication of efforts, and facilitate information exchange.

Strategic Direction:

The SMART Options program is relatively new. The program has successfully created positive working relationships with the largest employers in Wilsonville through ongoing contact and transportation fairs. These relationships need to be maintained, but the program also needs to focus on the mid-sized employers and to increase its name recognition among all employers and the general public. Schools also remain a relatively untapped potential for the program. Over the next five years, the program will focus on marketing the program more broadly, while still maintaining existing employer programs.

Detailed Work Program:

I. General Outreach		Budget		
Action	**Goal/Target**	**'03 –'04**	**'04-'05**	**'05-'06**
Design, produce, and distribute program materials, including brochures and flyers.	Increase public awareness of TDM program. Distribute 1,000 per year. Target: General public/employers	$3,900	$1,500	$1,500
Walk to Lunch Event. Restaurants provide discounts for people who walk to lunch and are wearing a *Walk to Lunch* button. Additional publicity from press coverage.	Employees and residents who walk to lunch. 250 participants per year. Target general public and employers for participation.	$1,800	$1,800	$1,800
Booth at Clackamas County Fair. Primarily focused on promoting transit and Carpool Match NW, but also providing information on bicycling and walking, and connections to other transit systems (SMART, Canby Area Transit, Tri-Met, C-Tran, and Salem Area Transit)..	Increase use of transit and Carpool Match NW. 75 additional bus riders and 50 additional carpool sign-ups. Target: General public	$4,500	$4,725	$4,950
Write articles for Boones Ferry Messenger about TDM program activities, events, and opportunities.	Public awareness of employer efforts and TDM program. 12 articles per year Target: General Public	$1600	$1650	$1700
Create and maintain SMART TDM Webpage with information on individual transportation options and employer programs.	Provide general and employer TDM information and links to other services, such as Carpool MatchNW. 50 hits per month.	$2,000	$500	$500
New resident welcome meetings.	Provide new residents with information on transportation alternatives before they get into the habit of driving alone. Four events per year, with 120 new residents attending.	$1,600	$1,650	$1,700
Action	**Goal/Target**			
Create new resident welcome packets to distribute to apartment managers.	Same as above. Distribute 250 packets per year.	$3,000	$3,100	$3,200
Create informational displays for Chamber of Commerce, Library, and City Hall.	Six displays per year. General public/employers	$500	$500	$500
Subtotal		**$18,900**	**$15,425**	**$15,850**

II. Employer Outreach		Budget		
Action	**Goal/Target**	**'03 –'04**	**'04-'05**	**'05-'06**
Contact employers by visiting the work sites and calling them to let them know about the TDM program.	150 personal contacts and 200 phone contacts per year.	$1,300	$1,300	$1,300
Organize employer transportation meetings. Employers get together to discuss transportation issues that affect their work sites.	Gain a clear understanding of the transportation issues that concern employers. Create the opportunity for employers to work together on solutions. Four meetings per year with 25 employers participating.		$4,500	$4,500
Hold transportation fairs at work sites to provide information on all transportation alternatives.	12 per year, reaching 5,000 employees.	$6,500	$6,700	$6,900
Assist employers in developing and implementing TDM plans for their worksites.	Six TDM plans per year.	$3,600	$3,600	$3,600
Create and distribute employer information packets.	100 per year	$3,500	$500	$500
Compile and create training and reference materials for transportation coordinators in Wilsonville.	50 per year	$5,500	$750	$750
Hold Transportation Coordinator Training classes.	4 per year	$3,500	$3,500	$3,500
Create and distribute bulletin board updates, new employee packets, and articles for company newsletters	12 bulletin board updates 12 articles	$2,500	$2,000	$2,000
Promotion of regional and community events, such as Carfree & Carefree, Bike Commute Challenge, Earth Day etc, SMART Employer of the Year, etc.	500 employees per year participate in the events	$9,000	$9,000	$9,000
Guaranteed Ride Home program. Reach agreement with taxi company; print guidelines; distribute to employers.	Sign up 10 employers per year.	$2,000	$1,500	$1,500
SMART Employer of the Year award program.	Reward one employer for outstanding efforts in their TDM program. Get additional publicity from media release.	$400	$400	$400
Subtotal		**$36,500.00**	**$33,750.00**	**$33,950.00**

III. School Outreach		Budget		
Action	**Goal/Target**	**'03 –'04**	**'04-'05**	**'05-'06**
Art on the Bus competition in the schools. Children create artwork that illustrates the importance of transportation options. The three winning art works are incorporated into a buswrap.	Get children to think about transportation options by describing them in drawings. Create community awareness of transportation options via the traveling artwork on the bus. 150 elementary and middle school participants per year.	$6,000	$6,200	$6,400
Develop school outreach program based on existing successful programs and pilot programs.	Involve teachers and students in solving real-life transportation problems in the context of math, science, and other curricula. 500 students per year participate.		$6,500	$6,500
Subtotal		**$6,000.00**	**$12,700.00**	**$12,900.00**

IV. Planning and Coordination		Budget		
Action	**Goal/Target**	**'03 –'04**	**'04-'05**	**'05-'06**
Ensure that TDM provisions are included in development conditions for new developments in Wilsonville	All new developments in Wilsonville are required to support TDM at their worksites by posting information, submitting TDM plans, and providing adequate facilities for bicyclists, pedestrians, and transit.	$3,000	$3,000	$3,000
Work with Wilsonville Planning staff to ensure that TDM is supported in the planning process.	Ensure that Transportation Systems Plan (TSP) amendments, code amendments, and pedestrian/bike plans adequately support TDM.	$7,500	$7,725	$8,000
Write articles for weekly "FYI" newsletter to the Wilsonville City Council.	Ensure that City Councilors are aware of TDM issues and activities. 30 articles per year.	$2,500	$2,600	$2,700
Coordinate program activities with other regional groups, transit districts, and jurisdictions.	Create a unified message, coordinate activities, and prevent unnecessary duplication of effort.	$14,000	$14,500	$15,000
Subtotal		**$27,000.00**	**$27,825.00**	**$28,700.00**

Total for all SMART TDM Programs	**$88,400**	**$89,700**	**$91,400**

Regional TMA Startups
Five-Year Workplan
December 2003

GOAL: Establish new TMAs in Regional Centers and key Industrial/Employment areas over the next 3-5 years.

Program Summary:
TMAs are the Region's key vehicle for engaging the business community in creating transportation options for their communities and employees. TMAs are, in effect, small businesses, and trip reduction and environmental concerns, while mandated by law, are not compelling reasons for the private sector to invest in transportation options. The role of TMAs is to provide *low cost solutions to transportation capacity challenges*, i.e. how to get more goods and services or customers and employees to and from businesses without incurring the monumental costs of new lanes, roads and parking garages. TMAs advance Metro's 2040 vision by helping the business community achieve growth without overwhelming the region's transportation infrastructure. TMAs are key tools for Metro's 2040 vision and must be supported financially and politically to be effective.

Strategic Direction:
The following tasks need to be completed in order to accurately measure the success of any TMA and travel option strategies in 2040 centers:

- Establish agreed to commute mode-split (market share) targets for 2040 centers and Industrial areas with associated costs and interim benchmarks and direct local jurisdictions to partner in achieving agreed to mode-split targets
- Include Travel Options element in center and industrial area master plans with cost analysis of projected growth with and without travel options effort.
- Support existing and new TMAs with business plan development
- Coordinate regional transportation investments, i.e. light rail, commuter rail, rapid bus, with TMAs, local jurisdictions and Regional Travel Options program.
- Include economic development as key element of regional travel options marketing campaign.

Implications:
The TDM Subcommittee makes final recommendations on TMA Startup once the feasibility study has been completed. This budget shows the long-term financial implications of TMA startups. Implications on ongoing funding include $24,750 per TMA startup. Projecting these assumptions out to 2010, the ongoing regional investment will be $297,000/year to support 12 TMAs in regional centers and industrial areas.

Regional TMA Program Budget

December 2003

FY 2003-04		FY2004-05		FY2005-06		FY2006/2007		FY2007/2008	
Swan Island TMA	$25,000	Swan Island TMA	$25,000	Swan Island TMA	$25,000	Swan Island TMA	$25,000	Swan Island TMA	$25,000
Lloyd District	$25,000	Lloyd District	$25,000	Lloyd District	$25,000	Lloyd District	$25,000	Lloyd District	$25,000
Gresham	$25,000	Gresham	$25,000	Gresham	$25,000	Gresham	$25,000	Gresham	$25,000
WTA	$25,000	WTA	$25,000	WTA	$25,000	WTA	$25,000	WTA	$25,000
Clackamas TC TMA	$50,250	Clackamas TC TMA	$24,750	Clackamas TC TMA	$25,000	Clackamas TC TMA	$25,000	Clackamas TC TMA	$25,000
		Troutdale	$67,500	Troutdale	$50,250	Troutdale	$24,750	Troutdale	$25,000
		Lake Oswego	$67,500	Lake Oswego	$50,250	Lake Oswego	$24,750	Lake Oswego	25,000
				Hillsboro	$67,500	Hillsboro	$50,250	Hillsboro	$24,750
						Washington Square	$60,000	Washington Square	$55,000
								Gateway Regional Center	$60,000
				North Portland/I-5/Interstate/ Rivergate	$67,500	North Portland/I-5/Interstate/ Rivergate	$50,250	North Portland/I-5/Interstate/ Rivergate	$24,750
Startup TMAs		**Startup TMAs**		**Startup TMAs**		**Startup TMAs**		**Startup TMAs**	
Lake Oswego	$32,000	Hillsboro	$32,000	Washington Square	$32,000	Gateway Regional Center	$32,000	Oregon City Regional Center	$32,000
		North Portland/I-5/Interstate/ Rivergate	$32,000						
Special Studies									
		TMA "Failure" Study	$25,000						
Total	**$182,250**		**$348,750**		**$392,500**		**$367,000**		**$371,500**

Ongoing Funding				
Ongoing Funding Budgeted	$100,000	$125,000	$125,000	$175,000
Ongoing Funding Available	$125,000	$125,000	$150,000	$150,000
Balance	**$25,000**	**$0**	**$25,000**	**($25,000)**
Startup Funding				
Startup Funding Budgeted	$248,750	$267,500	$242,000	$196,500
Startup Funding Available	$156,250	$96,750	$150,000	$150,000
Balance	**($92,500)**	**($170,750)**	**($92,000)**	**($46,500)**
TMA Innovative Program				
Funding Budgeted			to be submitted through TMA process	
Funding Available			$140,000	$140,000
Balance				

Planned TMAs identified in the RTP (no funding has been commmitted for exploratory or the 3-year formative step)
Washington Square Regional Center*
Beaverton Regional Center*
Hillsboro Regional Center*
Gateway Regional Center
Oregon City Regional Center
North Macadam (Portland Central City)
Milwaukie Town Center
Downtown Portland (Portland Central City - between I-405 and River)**

* These Regional Centers are within the boundary of the WTA TMA.

** Exploratory study completed in 2000; advancement to 3-year formative step not recommended at that time.

Other Potential TMAs identified by TDM Subcommittee:
PDX TMA
North I-5 Trade Corridor TMA

Lloyd District TMA
Three-Year Workplan
December 2003

GOAL: To support the efficient, safe and fluid movement of employers, visitors and residents, from and within the Lloyd District consistent with the district's economic and environmental health.

Program Summary:
The Lloyd District TMA provides a broad range of programs and services to building owners, employees and employees located in the Lloyd District. These include transit, bicycle, pedestrian and rideshare programs as well as outreach and educational assistance to businesses and individuals. The LDTMA also coordinates district events and supports a Board and committee structure that facilitates policy and advocacy positions of the organization on state, regional and local transportation issues.

Strategic Direction:
The strategic direction of the LDTMA over the next three years is to continue to increase the "market share" of non-SOV trips to the Lloyd District in a manner that assures a balance of access options in the Lloyd District. The Lloyd District is committed to attracting and locating nearly 17,000 net new employees in the district by the year 2015. The work of the LDTMA is directed to facilitate the development of the Lloyd District as an attractive, vital and competitive place to do business. Strategically developing access options, programs and strategies will assist property owners, businesses and employees in choosing access options that are the most cost effective and efficient.

Detailed Work Program:

I. TO IMPLEMENT PROGRAMS AND STRATEGIES THAT ALLOW THE LLOYD DISTRICT TO ACHIEVE ITS CONSENSUS MODE-SPLIT GOALS			BUDGET			
TASK	**GOAL**	**WHO**	**IN-KIND**	**'03–'04**	**'04-'05**	**'05-'06**
TMA programs for transit: PASSport, T-Fairs, employer/employee assistance, transportation store, transportation investment fund and transportation committee.	40% transit/6,000 passports	TMA Staff, Board	$30,000 BID $35,000 Meters	$16,000	$16,000	$16,000
Pedestrian programs: Pedestrian Committee, crosswalk safety improvements, awareness programs, walking map, GIS program, improved sidewalk amenities	5% commute trips	TMA staff Ped. Committe e	$7,500 BETC fund $10,000 BID $5.000 meters			
Bicycling programs: 14 events, Bicycle committee, bike	10%	TMA staff	$15,000 Meters	$4,500	$4,500	$4,500

box program, transportation store, interactive bike map, safety and anti-theft programs, education and incentive programs	commute trips	Bike Committe e	$7,500 BETC $10,000 BID			
Ride Share programs: Carpool program, Flexcar incentive, transportation store, Transportation Committee support	10% commute trips	TMA Staff Flexcar Transport ation committee	$10,000 BID $5,000 Meters	$4,500	$4,500	$4,500
District Transportation Advocacy: Streetcar, Lloyd Crossing, Wayfinding, Light rail, transit service delivery, liaison w/ LDCA and adjacent neighborhood associations	17,000 net new jobs	TMA Board TMA Staff Committe es	$25,000 BID $15,000 Meters			
Special Projects: Underwriting CTRAN 157, transit trackers, marketing and communications, infrastructure investments, studies and research	Support all goals	TMA Board TMA Staff	$175,000 BETC $30,000 Commissions			
TOTAL			$75,000 BID $75,000 meters $190,000 BETC $30,000Commissions	**$25,000**	**$25,000**	**$25,000**

Program Impact:

Year	TMA Members	Number of employees represented	Non-SOV mode split	Annual VMT Reduction (miles)*	Program Cost	Cost per VMT Reduced
2003-04	55	8,000	55%	746 per capita or 3.73 million VMT	$25,000	$0.01
2004-05	58	8,075	52%	760 per capita or 3.8 million VMT	$25,000	$0.01
2005-06	61	8,150	50%	775 per capita or 3.88 million VMT	$25,000	$0.01

*Based on survey sample of approximately 5,000 district employees

Swan Island TMA
Three-Year Workplan
December 2003

GOAL: In order to facilitate the continuing growth and success of Swan Island, the Swan Island TMA works to improve the movement of goods and people in the most effective way by expanding the area's transportation options.

Program Summary:
The Swan Island TMA's current program includes
- transit improvements, includingTriMet service upgrades due in 2004,
- rideshare programs including the Swan Island Evening Shuttle, the Clark county vanpool, carpool incentive and preferential carpool parking, and
- bike/ped capital improvements and marketing programs including "Going to the River," and the recently launched "Swan Island Bluff to River Initiative."

The challenges on Swan Island include:
- Free parking at all organizations
- Little or no transit service to portions of the area
- Poor bike and pedestrian access from adjacent neighborhoods

The opportunities on Swan Island include:
- Interstate MAX opening in Spring 2004
- Adjacent affordable neighborhoods
- Portland River Renaissance & Bureau of Environmental Services projects
- Large number of Clark county residents commute to the island

Strategic Direction:
Once Interstate MAX is in operation, SITMA will shift our focus from our "Get On Board!" campaign to
- Organizing vanpools for employees beyond the reach of transit,
- Creating Location Efficient Living options for Swan Island employees and residents of adjacent neighborhoods, and
- Implementing the Swan Island Bluff to River Initiative for better bike/pedestrian access for jobs and recreation through restored habitats.

Finally, we will look at the potential for an expanded TMA in North Portland that would including Rivergate, Lower Albina, and the Interstate and I-5 Corridors. The North Portland TMA work program would include the following elements:
- Clark County Vanpool Campaign: three new vanpools in 2004-05.

- North Portland Location Efficient Living: 25 employees who rent to ownership in North Portland, 25 employees relocated to N. Portland.
- Swan Island Bluff to River Initiative: preliminary design and secured funding for 3 top projects: BES CBO, River Renaissance and Metro
- North Portland TMA Exploratory: Expand TMA to include Rivergate, Lower Albina and Interstate and I-5 Corridors.

Detailed Work Program:

STRATEGY			**BUDGET**					
ACTIONS	**OUTCOME/IMPACT**	**WHO IMPLEMENTS**	**'03–'04**		**'04-'05**		**'05-'06**	
			OTHER FUNDING SOURCES	**CMAQ Stabilization Funds**	**OTHER FUNDING SOURCES**	**CMAQ Stabilization Funds**	**OTHER FUNDING SOURCES**	**CMAQ Stabilization Funds**
Current Carpool Incentive for shifts not served by transit	24 new carpools/yr	TMA, Parcel Delivery employers	$6,000 TriMet JobAccess		$10,000 TriMet Job Access		$12,000	
Swan Island Evening Shuttle Add two evening runs in 2004	50% ridership growth/yr	TMA, TriMet, Swan Island employers	$50,000 TriMet Job Access		$60,000 TriMet Job Access		$65,000	
Get On Board campaign to coincide with Interstate MAX opening 2003-4	50% increase in transit, rideshare and bike/walk	TMA, area businesses, TriMet	$25,000 TDM 2040 grant 03-04					
On going Transit program: planning, promotion and advocacy	Include in above	TMA, TriMet and area businesses	$12,500 TMA dues and TDM grant	$12,500	$27,500 TMA dues & TDM grant	$12,500	$22,500 TMA dues & TDM grant	$12,500
Bike/Walk capital	Double bike and	TMA, PDOT,	$12,500	$12,500	$27,500	$12,500	$22,500	$12,500

projects: Going to the River and Bluff to River Initiative	walk mode share	River Renaissance, BES, Alta Planning	TMA BETC funds, $250,000 BES CBO capital funds		TMA BETC funds, other City grants			
Proposed Clark County Vanpool campaign	3 new vanpools	C-Tran, TMA, TriMet, Area employers			$25K TDM 2040 grant		$30,000 TDM 2040 grant	
Location Efficient Living	50 employees in new N. Portland homes	TMA, PDC, Portland ONI, N. Portland neighborhoods, area employers			$25K TDM 2040 grant		$30,000 TDM 2040 grant	
North Portland TMA Feasibility Expand existing TMA to include Rivergate, Lower Albina and I-5 and Interstate Corridors		TDM Subcom, TMA, contractor			$25K TMA Startup Funds		$67,500 TMA Startup Funds	
TOTAL			**$316,000**	**$25,000**	**$200,000**	**$25,000**	**$249,500**	**$25,000**

Program Impact:

Year	TMA Members	Number of Employees represented	Non-SOV mode split	Annual VMT Reduction* (miles)	Program Cost	Cost per VMT Reduced
2003-04	12	7,000	20%	2,400,000	$91,000	$0.04
2004-05	15	7,500	25%	1,000,000	$225,000	$0.23
2005-06	20	8,000	30%	1,000,000	$274,500	$0.27

* 1000 trips a day x 10miles x 240days

Clackamas Regional Center TMA
Three-Year Workplan
December 2003

GOAL: To promote the use of alternative forms of transportation, reduce congestion, and improve internal mobility; thereby providing reasonable and safe access for all to the Clackamas Regional Center business area.

Program Summary:
The CRC-TMA is currently partnering with large businesses in the CRC-TMA service area and identifying other potential partners. Many of our larger stakeholders are under-served by the current transportation system, but the CRC-TMA offers an employee shuttle to transport workers from Clackamas Town Center to the outlying employment areas. Due to the overwhelming employee participation, the CRC-TMA has made transportation fairs a priority at area businesses. Additionally, the CRC-TMA acts as a transportation information clearing house.

Strategic Direction:
Over the course of the next 3 to 5 years the CRC-TMA will continue to engage the business community in an effort to create strong partnerships that foster a positive dialogue between the public and private sectors as it relates to transportation and transportation demand management. Additionally, we will continue to operate the *Clackamas Link* shuttle service and make every effort to expand the service to enhance existing and planned fixed route transportation such as I205LRT. The CRC-TMA is the newest functioning TMA in the region, but our stakeholder group is working diligently to develop a detailed workplan for identifying our current mode splits and targets.

Detailed Work Program

I. TMA ADMINISTRATION/IMPLEMENTATION	**Outcomes**	**Who**	**'03-'04**	**'04-'05**	**'05-'06**
❑ Director ❑ Clerical Assistance (40 hours/Month) ❑ Printing support, publications,/other miscellaneous expenditures	Office space, work station, etc.	TMA Partners: TriMet, North Clackamas Chamber, O.I.T., Clackamas County, LiveBridge, Kaiser Permanente.	$7500 $29,000 $1,000 $1,500	$8,000 $29,000 $1,000 $1,750	$8500 $29,000 $1,000 $2,000

REGIONAL COORDINATION ❑ Meet with TriMet, TDM Subcommittee, Clackamas County and others as needed/appropriate.	Achieve a *true* regional TDM program				
EMPLOYER PROGRAMS ❑ Clackamas Link Shuttle Service ❑ Develop Online Newsletter for employers/employees ❑ Maintain/Promote TMA website ❑ One-one stakeholder outreach effort ❑ Monthly T-Fairs at area businesses (more often if needed/desired) ❑ CarFree/CareFree sponsorship ❑ Creation and subsequent updates of TMA's "Is your business stuck in traffic" brochure ❑ Newsletter publication ❑ Grow TMA memberships and contributions ❑ Advocate for improved level of service for TriMet – in anticipation of I-205 LRT ❑ TMA Communications Programs – Brochures, other informational/educational pieces including maintenance and updates to the CRC-TMA website.	We are now at 75-100 trips each month, we are striving to reach 75-100 each day. Our goal is to reach all 8,000 employees within our service area. Direct mail, monthly meetings, Minimum of 12/year Mailed to 1,600 employers Quarterly Our goal is a 5% annual increase		$20,000 $1,000 $3,000 $1,000 $2,000 $2,600 $6400	$22,000 $1,100 $3,000 $1,100 $2,000 $1,500 $1,000	$24,000 $1,200 $3,000 $1,200 $2,000 $1,750 $1,500
TOTAL			**$50,250 Startup $24,750 Other***	**$24,750 Ongoing $46,700 Other***	**$24,750 Ongoing $50,400 Other***

* Other funds are generated through membership dues, grant applications and TMA Innovative program funds.

Program Impact:

Year	TMA Members	Number of Employees represented	Non-SOV mode split	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2003-04	15	3,000	TBD	TBD	$50,250	TBD
2004-05	20	4,000	TBD	TBD	$24,750	TBD
2005-06	25	5,000	TBD	TBD	$24,750	TBD

Gresham Regional Center TMA
Three-Year Work Plan
December 2003

GOAL: To increase access and develop alternative options in the Gresham Regional Center through programs for transit, parking management, pedestrian environment improvements and business outreach.

Program Summary:
Linking the regional center together as an integrated economic entity focusing on transportation and access issues (i.e. parking, pedestrian environment, commute trip reduction, infrastructure and outreach and business assistance).

Strategic Direction:
To finalize the creation of an organization, with representative membership, promoting economic development and linkages to the Gresham Regional Center made through auto, transit, pedestrian, and bike/walk modes as well as through education, outreach and business assistance.

Detailed Work Program:

I. DEVELOP, IMPLEMENT, AND COMPLETE PROGRAMS THAT ACHIEVE CONSENSUS WORKPLAN OBJECTIVES OF THE HISTORIC DOWNTOWN AND THE LARGER REGIONAL CENTER			BUDGET			
TASK	**GOAL**	**WHO**	**IN-KIND**	**'03–'04**	**'04-'05**	**'05-'06**
• Monthly coordination with Regional TDM Program • Attend and coordinate with other TMAs as is appropriate at regional quarterly meetings	Maintain regional coordination and resource sharing	TMA staff	2,000	750	750	750
Participate in web based carpool program	Continue on-going promotion campaign and web site link to increase new carpools by 10% per year	TMA staff State of Oregon. com	1,000	300	300	300
• Work with TriMet to improve frequency of transit service • Work with TriMet to assure easily accessible transit stops and improve lighting/ shelters/ safety	Improve performance and efficiency of local transit	TMA staff Action Committee TriMet & City	4,000	2,000	2,000	2,000

	system					
Coordinate w/City of Gresham, TriMet, Region, and local businesses on transportation issues and task force meetings	On a monthly basis	TMA staff City liaison	10,000	4,000	4,000	4,000
TMA Business Climate Survey Development and Report	Once a year	Action Committee	3,000	2,500	2,500	2,500
Monthly meetings with TMA Action Committee	Increase number of monthly participants by 10% per year	TMA staff	6,000	1,500	1,500	1,500
Strategic Planning effort with GDDA Board	Develop revolving three-year work plan	TMA staff GDDA Board	8,000	3,500	3,500	3,500
Work with City, Town Fair and East Hill Church to develop access routes for pedestrians	Develop two access routes	City of Gresham Action Committee	3,000	1,200	1,200	1,200
Customer First program	Expand reach of program to the larger Regional Center by 10% per year	Action Committee Regional Center Stakeholders	4,250	2,000	2,000	2,000
Develop education/awareness program to communicate alternative options	Increase local awareness of transportation options for 250 people	Action Committee	5,000	3,500	3,500	3,500
Develop a work plan and implementation strategy with the City of Gresham to maintain downtown public parking supplies	Assume operational and maintenance control of downtown public parking supply	City of Gresham TMA staff Action Committee	4,000	3,500	3,500	3,500
Total			**$50,250**	**$24,750**	**$24,750**	**$24,750**

Program Impact

Year	TMA Members	Number of employees represented	Non-SOV mode split	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2003-04	156	2,317	436 (18.8%)	5,450	$24,750	$4.54
2004-05	172	2,658	529 (19.8%)	6,613	$24,750	$3.74
2005-06	189	2,920	607 (20.8%)	7,588	$24,750	$3.26

WTA TMA
Three-Year Workplan
November 2003

GOAL: **To serve the transportation needs of west side employers through public/private partnerships that reduce traffic congestion, improve air quality, foster economic vitality, and improve quality of life.**

Program Summary:
The WTA provides a range of programs and services to the employers of Washington County and subsequently to their employees. These programs include education, on-line services, advocacy, and outreach. The WTA also runs its' signature program, Car Free and Carefree, a commuter challenge for all employers and their employees in the Metro area.

Strategic Direction:
The direction for the next three years is to improve our partnership base and to expand our services to Washington Square and the City of Hillsboro.

Detailed Workplan:

I. EXPAND TMAS IN REGIONAL CENTERS WITHIN THE WTA TMA SERVICE AREA			BUDGET		
TASK	**GOAL**	**WHO**	**'03–'04**	**'04-'05**	**'05-'06**
Add a TMA representative to Washington Square	Leverage the commuter rail investment	WTA Washington Square Nimbus Business Center		$32,000 TMA Startup funds	$67,500
Add a TMA representative to Hillsboro	Leverage regional center development	WTA City of Hillsboro			$32,000 TMA Startup funds

II. Ongoing WTA Activities and programs					
Expand membership Distribute Outreach materials Produce Bi-weekly newsflash for all ETC's Produce Bi-monthly newsletter Produce an ETC Transportation Fair	15 New members – 3years 150 ETC's on record 200 distribution 150	WTA	$24,750 CMAQ TMA Educational Fund $14,600	$24,750 CMAQ TMA Membership Dues $8,000	$24,750 CMAQ TMA Membership Dues $8,000
Car Free & Carefree	Reduce VMT by 20,000 miles each year	WTA Other TMA's Many Corporate Sponsors	$50,000 Region 2040 Initiatives	$52,500 Region 2040 Initiatives	$55,125 Region 2040 Initiatives
III. Educational Grant	To Educate Washington County Employers on strategies of TDM and reduce VMT	WTA		$14,600	
TOTAL			**$24,750 CMAQ** **$50,000 Region 2040**	**$56,750 CMAQ** **$52,500 Region 2040**	**$179,375**

Program Impact:

Year	TMA Members	Number of Employees represented	Non-SOV mode split	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2003-04	28	25000+	Not measured	Not measured	$24,750*	Not measured
2004-05	32	27000+	Not measured	Not measured	$24,750	Not measured
2005-06	37	30,000+	Not measured	Not measured	$24,750	Not measured

* Only includes ongoing regional funding allocation. Eligible for Region 2040 and TMA Innovative Program funding.

Telework Program
Three-Year Work Plan
December 2003

GOAL: Increase the number of telework programs by 10% a year for the next 3 years resulting in a reduction in VMT of 762,300.

Program Summary:
For the past ten years, the Oregon Department of Energy (ODOE) has provided technical assistance and outreach services to organizations in the Portland region to develop successful telework programs. Program services include educational and training materials, consultations, presentations, training sessions and an extensive telework web site. Telework is working at home or a location closer to home instead of traveling to the traditional place of business. Telework reduces the number of vehicle miles traveled by eliminating or reducing commute trips. This program is not offered by any other organization in Oregon and is recognized as a leader in promoting and implementing successful telework programs.

As a part of the Metro 2001-2003 grant, ODOE provided .5 FTE to operate the telework program. During this time ODOE helped 340 Portland area employers set up telework programs. ODOE estimates that more than 6,000 employees from these organizations telework, resulting in an estimated VMT reduction of 84,000 miles annually. For the 2003-04 period, ODOE's Telework Program is not receiving funding from Metro to implement the telework program. ODOE has committed to funding .10 FTE for the remainder of the 2003-04 fiscal year, which is a significant reduction in the amount of effort and services available to work with businesses promoting telework in the Portland area. The Telework Program survey conducted in June 2003 states "If little or no funding is invested in telework outreach, strategies will be primarily passive (i.e. providing a web site, sending kits when requested), and it is unlikely that telework will continue to grow significantly." It will be critical for the Regional Travel Options marketing program to market telework to employers.

Strategic Direction:
ODOE contracted with the University of Oregon's Community Planning Workshop to conduct a survey to determine the effectiveness of the telework program. The survey reports that there are many employees interested in telework and many employers who might consider offering this work option in the future. It also recommends that public agencies continue to promote telework as a regional travel option that reduces vehicle miles traveled. ODOE has developed a comprehensive package of stand-alone tools to help employers set up successful telework programs, including an extensive web site. With these resources and an effective marketing program, employers will have the tools they need to set up successful telework programs.

ODOE estimate that there are approximately 2,000 employers in the Portland metro area that can take advantage of the telework program. ODOE, in conjunction with other regional marketing efforts, will work to contact all of these within five years with a goal of setting up programs with 35% of these employers.

At the current funding level, ODOE will provide .10 FTE. This will allow a staff person to work with a limited number of larger employers helping set up telework programs. ODOE will conduct train-the-trainer programs to increase the number of resources available to provide one-on-one assistance to employers. ODOE will rely heavily on the existing tools and our web site to help employers with telework rather than one-on-one assistance. The Collaborative Marketing Program will be responsible for the oversight of marketing telework to employers.

ODOE anticipates that 50 new telework programs with approximately 500 teleworkers will save about 7,000 vehicle miles during 2003-04. ODOE also anticipate a 10 percent increase in the number of telework programs each year for the next three years.

Detailed Work Plan

I. Increase the Number of Telework Programs	**Who Implements**	**Impact**	**'03–'04**	**'04-'05**	**'05-'06**
Fund .10 FTE to: • Provide one-on-one consulting services to large Portland-area employers implementing telework • Provide telework resources and materials to employers • Maintain a web site for customers to access materials and products on line	ODOE	10% increase in number of teleworkers per year	ODOE	$10,000 (funds .10 of FTE)	$10,000 (funds .10 of FTE)
Increase telework resources by conducting train-the-trainer workshops	ODOE, Tri-Met, TMA's		ODOE	ODOE	ODOE
Market telework to employers throughout the region	TriMet, TMAs, local jurisdictions		ODOE	ODOE	ODOE

Program Impact:

Year	Telework Programs	Number of Teleworkers	Annual VMT Reduction (miles)	Program Cost	Cost per VMT Reduced
2002-03	340	6,000	7,560,000	$100,000	$0.01
2003-04	50	500	630,000	OOE funded*	
2004-05	55	550	693,000	$30,000	$0.04
2005-06	60	605	762,300	$30,000**	$0.04
2006-07	66	665	837,900	$60,000**	$0.07
2007-08	72	731	921,060	$60,000**	$0.07

*Assumes that Collaborative Marketing Program is marketing telework to employers.

** For technical support only. The dollars for marketing are in the Regional Marketing Program.

Business Energy Tax Credit Program

Three-Year Workplan

December 2003

GOAL: Increase the number of Oregon employers taking advantage of BETC program from 72 to 103 in the next 3 years resulting in VMT reduction of 134,000,000 miles.

Program Summary:

Oregon businesses, non-profits, and government agencies are eligible to receive a state of Oregon income tax credit for investing in projects that reduce vehicle miles traveled by employees, students, clients, or customers. Eligible projects include telework, transit passes, commuter pool vehicles, financial incentive programs, bicycles, Transportation Management Association (TMA) dues, parking cash out and flexcar. The tax credit is 35 percent of the eligible project cost and is taken over five years. Projects less than $20,000 take the credit all in one year. ODOE has targeted Portland-area employers affected by the ECO rules. There are currently no other state incentives available for employers providing alternative transportation programs for employees.

Since 1996, ODOE has approved 228 BETC transportation projects in the Metro area for more than $11 million. These projects reduce approximately 216 million commute miles and save more than 10 million gallons of gas annually. In 2002, ODOE approved 45 BETC transportation projects in the Metro region totaling $2.7 million. Employers received $945,000 in tax credits for investing in projects that reduce employee transportation. These projects reduced about 59 million commute miles, saved 3 million gallons of gas and $3.7 million in employee transportation expenses.

Strategic Direction:

The BETC Program is a one-of-a-kind in the nation. For the 2003-04 period, ODOE's BETC Program is not receiving funding from Metro. ODOE has committed to funding .15 FTE for the remainder of the 2003-04 fiscal year. The Metro grants for 2004-05 and 2005-06 will ensure funding/services for .15FTE. This significantly reduces the amount of effort and services previously available from ODOE to work with businesses promoting the BETC Program. This will pay for a staff person to serve on the Regional Travel Options Subcommittee and train and consult with transportation partners to market BETC. This proposal shifts marketing responsibility to the Collaborative Marketing Program. ODOE will cover all costs related to working directly with customers and processing tax credit applications.

ODOE is currently reviewing rules and will likely be expanding eligibility criteria that will significantly increase the number of transportation projects eligible for the BETC. With an effective marketing campaign, we anticipate a 60 percent increase in the number of BETC transportation projects approved for 2004. With continued marketing, we should see at least an annual increase of 20 percent in approved projects.

Detailed Work Plan:

I. Increase number of employers using BETC	WHO IMPLEMENTS	IMPACT	'03–'04	'04-'05	'05-'06
Fund .15 FTE to: • Work with Tri-Met, TMA's and other transportation organizations to market BETC to employers as an incentive to implement trip reduction programs. • Review and approve BETC transportation applications • Market BETC to employers throughout the region	ODOE, TriMet, TMAs, local jurisdictions, Collaborative Marketing Program	Increase the number of BETC project from 72 – 103 over the three year period	ODOE	$20,000 (funds .15FTE)	$20,000 (funds .15FTE)

Program Impact:

Year	New BETC Projects Approved	Total Project Implementation Costs (submitted)	Annual VMT Reduction* (miles)	Total Gallons of Gas Saved**	Cost of Program	Cost per VMT reduced***
2002-03	45	$2,700,000	59,000,000	3,000,000	$100,000	N/A
2003-04	27	$1,900,000	35,000,000	1,700,000	ODOE	N/A
2004-05	14	$900,000	18,000,000	900,000	$30,000****	N/A
2005-06	17	$1,100,000	22,000,000	1,100,000	$30,000***	N/A
2006-07	15	$1,400,000	20,000,000	1,300,000	$60,000	N/A
2007-08	16	$1,600,000	20,000,000	1,200,000	$60,000	N/A

*In 2002 59,000,000 VMT reduced x 60% increase in 2003. A 20% increase is assumed for the next three years. 68% of the projects approved are for transit passes. The remaining 32% includes telework, bicycles, commuter pool vehicles, incentives and TMA dues.
** Based on an average gas mileage of 20mpg
***The program itself does not reduce VMT but provides the incentive to businesses to reduce their VMT.
****Assumes Regional Travel Options Marketing program is actively marketing BETC

Regional Travel Options Evaluation Program

Three-Year Workplan

December 2003

GOAL: **Refine performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.**

Program Summary:

The RTO evaluation program will improve how we collect, analyze and report data for each RTO program component. The annual evaluation report will be used to refine program development, marketing and implementation so that we can invest limited program dollars in the most cost effective ways.

Strategic Direction:

To achieve the greatest result with the limited RTO funding available, the RTO Subcommittee is pursuing development of measures of effectiveness of possible programs. These measures are based on both the techniques used in selecting employer-based programs and on preference survey methods. This proposed work will allow us to move beyond the measures for employer-based programs developed for ECO into a broader range of programs.

TriMet technical staff will continue to be responsible for ECO survey processing (paper or electronic at trimet.org). During the 2001-2003 fiscal years, technical staff produced 877 ECO employer reports, representing a total of 141,022 employees.

TriMet and Metro staff will work together on research design, fielding, analysisand report writing.Further, technical staff at Metro and TriMet are working with J. Richard Kuzmyak, Transportation Consultant[1], for the purpose of analyzing the cost-effectiveness of various TDM programs. It is anticipated that results from this work will help regional partners determine which program or "bundle of programs" promise the greatest return for dollars invested (ROI).

As part of the region's desire to work with university students, technical staff is identifying projects that would be particularly suited to urban planning and/or transportation planning students. It is thought that work studying RTO efforts in regional centers would be an ideal project for these students to pursue.

Strategy 1 Report annually on RTO program activities and impact.

Strategy 2 Survey all ECO affected employers in the next five years and increase the number of ECO employers that are in compliance with ECO Rules from 50% to 75%.

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[1] Transportation Research Board Special Report 264, *The Congestion Mitigation and Air Quality Improvement Program, Assessing 10 Years of Experience - Appendix E: Cost- Effectiveness of Congestion Mitigation and Air Quality Strategies*, Kuzmyak, J.R., Page 275-419

Strategy 3 Evaluate all 38 Region 2040 Centers on an annual basis to determine progress towards non-SOV modal targets.

Strategy 4 Develop a set of prediction factors that would be used to select the most cost-effective RTO programs for implementation.

Detailed Work Program

STRATEGY 1: REPORT ANNUALLY ON RTO PROGRAM ACTIVITIES	**WHO IMPLEMENTS**	**BUDGET**		
		'03-'04	**'04-'05**	**'05-'06**
Produce annual report	Metro with all regional partners	$100,000	$100,000	$100,000
Subtotal		**$100,000**	**$100,000**	**$100,000**
STRATEGY 2: ENHANCE ECO PROGRAM				
TriMet Technical Services		$147,025	$154,376	$162,095
Develop Guidance Tool/Package (07/04 – 11/04)	Metro with all regional partners		$38,400	
Develop training module for Guidance T/P (11/04 – 12/04)	Metro with all regional partners		$7,200	
Run employer outreach (01/05 – 04/05)	TriMet Employer Program		$4,800	
Deliver training to employers (02/05 – 06/05)	TriMet Employer Program		$15,000	
Provide call-in support to employers (02/05 – 10/05)	TriMet Employer Program		$2,000	$1,000
Produce materials	TriMet Employer Program		$5,500	$2,000
Supervise work (07/04 – 10/05)	Metro/TDM Sub		$4.500	$1,500
Subtotal		**$147,025**	**$227,281**	**$166,595**
STRATEGY 3: EVALUATE ALL 38 REGION 2040 CENTERS				
Work with regional partners to establish commute mode split targets for regional centers preparing for TMA development.	Metro with all regional partners	$5,000	$5,000	$5,000
Identify land use measures that can be monitored and related to travel behavior data.	Metro with all regional partners	$5,000	$5,000	$5,000
Develop and implement a targeted marketing effort for large non-participating employers in key regional centers.	TriMet Employer Outreach Program	see Employer Outreach Program Budget		

Subtotal		**$10,000**	**$10,000**	**$10,000**
STRATEGY 4: DEVELOP A SET OF PREDICTION FACTORS				
Review literature for additional methods and practices (05/04 – 08/04)	Metro/TDM Sub	$3,000		
Identify RTO programs that are candidates for Predictors (09/04 – 11/04)	Metro/TDM Sub		$10,000	
Develop work statement for consultant on Predictors (12/04 – 02/05)	Metro/TDM Sub		$6,000	
Issue RFP and select consultant (03/05 – 05/05)	Metro/TDM Sub		$2,000	
Develop Predictor Set #1 (06/05 – 10/05)	Metro/TDM Sub Consultant		$20,000	$150,000
Evaluate process and identify additional RTO programs (11/05)	Metro/TDM Sub		$5,000	$5,000
Subtotal		**$3,000**	**$43,000**	**$155,000**
Total		**$260,025**	**$380,281**	**$431,595**

Appendix C
Past Program Expenditures

Region 2040 Initiatives Program

FY 2002-03		FY 2003-04	
City of Portland Travel Smart program	$75,000	Lloyd district TMA transportation store	$14,375
Nimbus shuttle	$93,250	City of Portland Interstate Avenue corridor TDM marketing program	$20,000
Marquam Hill partnership bicycle program	$35,000	Swan Island TMA "Get on Board" program	$25,000
Tualatin Shuttle	$20,000	Westside Transportation Alliance "Car Free and Carefree Weeks" program	$25,000
Cascadia Design	$3,800	Lloyd district TMA flexcar and PASSport plus marketing program	$16,000
Metro Assistance	$75,000	Washington County bicycle map update	$9,500
		Gresham TMA information and wayfinding system	$8,125
		Metro Assistance	$75,000
		Cascadia Design	$3,000
Total	**$302,050**	**Total**	**$196,000**

Vanpool Program

FY 2002-03		FY 2003-04	
Sitel	15,420	Sitel	15,420
LSI	14,520	LSI	14,520
Sheraton	15,420	Sheraton**	15,420
Credence	14,520	Credence	14,520
Viking	15,420	Viking	15,420
OHSU	15,420	OHSU	15,420
Gunderson*	15,420		
CarpoolMatchNW	139,000	CarpoolmatchNW	116,000
Total	**$245,140**	**Total**	**$206,720**

*Gunderson recently discontinued their vanpool shuttle.

**Sheraton is in breach of contract and will likely lose their shuttle.

Oregon Department of Energy

Business Energy Tax Credit Pass-through Option

Ensure Oregon has an adequate supply of reliable and affordable energy, and is safe from nuclear contamination, by helping Oregonians save energy, develop clean energy resources, promote renewable energy and clean up nuclear waste.

NEW Rate Change

The Oregon Department of Energy has new rates for the net present value of the Business Energy Tax Credit. These rates, for projects using the Pass-through Option, took effect October 1, 2003 and apply to all Pass-through applications received on or after that date.

The rate is 25.5 percent for Business Energy Tax Credits that are more than $20,000 in eligible costs. The new rate is 30.5 percent for tax credits with eligible costs of $20,000 or less. The Oregon Department of Energy made this change based on the uncertainty existing in the current marketplace.

The Business Energy Tax Credit Pass-through Option lets a project owner transfer a tax credit to a pass-through partner in return for a lump-sum cash payment upon completion of the project. The Pass-through Option now allows non-profit organizations, schools, governmental agencies, tribes, other public entities and businesses without tax liability to use the Business Energy Tax Credit by transferring their tax credit for an eligible project to a partner with a tax liability. Businesses with a tax liability may also choose to use the Pass-through Option. The same review, rules and standards apply to Business Energy Tax Credit projects approved under the Pass-through Option.

RATES

The Business Energy Tax Credit is 35 percent of the eligible project costs. When the Pass-through Option is used, the pass-through partner pays the project owner a lump-sum payment - the net present value - of the tax credit. The net present value takes into account the value of the money over time and other factors. Effective October 1, 2003 the net present value rate for the five-year Business Energy Tax Credit is 25.5 percent; the net present value rate for the one-year Business Energy Tax Credit is 30.5 percent. The Oregon Department of Energy reviews and

Pass-through Option Application form*
Word (Updated 8/12/03)
pdf

***Please note**: The application form is available in both Word and PDF. If you save the Word form to use for future projects, please check our Web site to ensure you are using the most current version. (Date in lower right-hand corner.) Both the Word and pdf versions may be filled out on your computer, printed, signed and mailed to the Oregon Department of Energy. Forms can NOT be submitted on-line.

Applications for Preliminary Certification and Supplementary Information Form

General information on the Business Energy Tax Credit

Final Application form for Pass-through projects **(Word)** sets the net present value rate.

The rate used will be the rate in effect at the time the Department of Energy received the Pass-through Application.

The net present value payment for the tax credit is paid at the time the Final Certificate is issued to the pass-through partner.

PASS-THROUGH PARTNER

Project owners must find their own pass-through partner. In the past, utilities often agreed to be pass-through partners for projects in their service territories. Project owners working with a building contractor, energy services company or equipment vendor may find that those businesses will agree to be pass-through partners. Non-profit organizations and public entities (such as schools) can approach large industrial or commercial companies in their communities or local business and service organizations to help identify a potential partner. Project owners can use multiple partners who divide the credit appropriately. If you would like assistance in finding a pass-through partner for your project, contact Barbara Bonnem at the Oregon Department of Energy at 503-378-8444 or toll-free at 1-800-221-8035.

The Department of Energy recommends that project owners find their pass-through partners **before** beginning their project, although project owners may begin projects without an identified pass-through partner.

When a project owner identifies a pass-through partner and completes the Pass-through Option Application, the Department of Energy strongly recommends that a project owner and a pass-through partner consult their tax and legal advisers for a formal agreement between the two parties.

TIMING

The project owner must complete the Application for Preliminary Certification and project-specific Supplementary Information form and send the review fee to the Oregon Department of Energy **BEFORE** beginning the project. The Oregon Department of Energy will review the applications and issue a Preliminary Certificate.

The Preliminary Certificate will include the estimated eligible project costs. A project owner without a designated pass-through partner can approach a potential pass-through partner with this information.

Case Studies

University of Oregon Lundquist School of Business (pdf) (reprinted with permission from the Daily Journal of Commerce)

North Santiam School District

St. John the Baptist (pdf)

The Relief Nursery (pdf)

The Ecotrust (pdf) Reprinted with permission from the Daily Journal of Commerce

Other Resources

Administrative Rules (pdf)

Energy Loan Program

Business Energy Tax Credit brochure (pdf)

Project owners without identified pass-through partners please note: The Oregon Department of Energy must receive a completed Pass-through Option Application signed by the project owner and a pass-through partner within **one year** from the date the Preliminary Certificate was issued or the Preliminary Certificate will be revoked. Project owners may request an extension, if needed.

APPLICATION PROCESS

The project owner may complete the Pass-through Option Application form:

- at the same time as the Application for Preliminary Certificate and Supplementary Information forms
or
- after receiving the Preliminary Certificate.

The pass-through partner must also complete and sign the Pass-through Option Application. Any subsequent changes to the scope of the project must be resubmitted to the Department of Energy and approved. The pass-through partner will be notified of these changes.

Upon review and approval of the Pass-through Option Application, the Department of Energy will issue a Preliminary Certificate to the pass-through partner and a copy to the project owner. Once the Preliminary Certificate has been issued, a project owner may begin the project. Please note that Department of Energy review may take four to six weeks. You may begin your project before receiving your Preliminary Certificate, however, there is no guarantee of project approval if you do.

Within 90 days of project completion, the project owner and pass-through partner must submit an Application for Final Certification of the project. The Oregon Department of Energy will issue the tax credit in the name of the pass-through partner as the tax credit recipient. The pass-through partner may file for the tax credit as specified in the Final Certificate.

Once the Final Certificate is issued, the pass-through partner must pay the project owner the net present value of the tax credit based on the eligible costs documented on the Final Certificate.

Oregon Department of Energy
625 Marion St. N.E.
Salem, Oregon 97301
503-378-4040
Toll Free (Oregon only): 1-800-221-8035
E-Mail Us

Oregon
Department of
Energy

How businesses can help their communities during a tight economy

Ensure Oregon has an adequate supply of reliable and affordable energy, and is safe from nuclear contamination, by hel Oregonians save energy, develop clean energy resources, promote renewable energy and clean up nuclear waste.

Back to Transportation home page

Brooks Resources Corporation is important to the Central Oregon economy as one of the oldest and most productive developers in the region. The 90-employee firm can trace its roots to 1916 to the Brooks-Scanlon lumber company, the principal business in town when lumber was king.

And Brooks Resources wants to see a healthy economy and flourishing community.

The Oregon Department of Energy's Business Energy Tax Credit Pass-through Program interested Brooks Resources President Kirk Schueler and Chief Financial Officer Jade Mayer. They saw it as a way to help the Bend community and, in particular, St. Charles Medical Center, an important regional leader, and its employees.

The hospital contracted with Commute Options to manage their employee program that encourages alternative forms of transportation. Commute Options is a Central Oregon non-profit organization that works with employers to offer choices that reduce traffic congestion, promote livability and improve health. The approximately $17,000 yearly contract with Commute Options qualified for a Business Energy Tax Credit since the work promotes energy savings by reducing commuter trips.

But the non-profit hospital could not benefit from the tax credit because it had no Oregon tax liability. Brooks Resources could be the pass-through partner for St. Charles by paying 33.5 percent of the contract cost to St. Charles and assuming the 35 percent tax credit. The hospital and its employees would benefit and Brooks Resources would get some financial return in addition to goodwill.

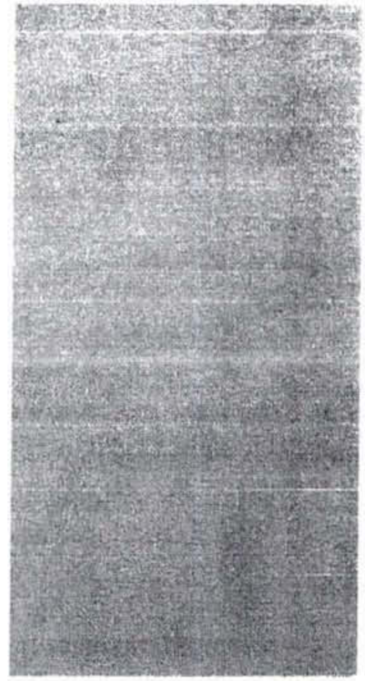
"From our perspective, the financial risk was minimal if any," Schueler said. "There wasn't an exceptional return on your investment, but it was an easy vehicle. We looked at it as what's good for the community. It's not always about just the numbers."

"The Pass-through Option forms are good, the project is good and it's not hard to do," Schueler added.

Since the Pass-through Option Program was approved, the Oregon Department of Energy has received nearly 300 qualifying projects from non-profits and public entities.

Any business that would like to help their local community and be a pass-through partner for these projects should call the Department of Energy at 1-800-221-8035 or visit our Web site www.energy.state.or.us/bus/tax/pass-through.htm

"Department of Energy staff will be happy to find a project for you and help with the paperwork," said Kathy King with the Department of Energy. "It can make a difference."



Oregon Department of Energy
625 Marion St. N.E.
Salem, Oregon 97301
503-378-4040
Toll Free (Oregon only): 1-800-221-8035
E-Mail Us
Fax: 503-373-7806

Updated 11/10/03

Tax Credits for Transportation Projects

Businesses, non-profits and government agencies in Oregon can receive a state tax credit for projects that reduce energy used in transportation or invest in cleaner-burning transportation fuels. The Oregon Legislature made the following projects eligible for the Business Energy Tax Credit to encourage alternatives to driving alone and reduce air pollution.

Bicycle Projects – Purchase bicycles or equipment used to store bicycles for riders to reduce miles driven a minimum of 45 working days per calendar year.

Car Sharing Project – A program in which drivers pay to become members in order to have joint access to a fleet of cars. Eligible cost for car sharing includes the cost of operating a car sharing program, including the fair market value of parking spaces used to store the cars available for the program, but does not include the cost of the fleet cars. It does not include operations conducted by a car rental agency.

Commuter Pool Vehicle - Purchase vehicles for transporting two or more riders. Vehicle must reduce vehicle miles traveled at least 150 days per calendar year. Transportation districts, mass transit districts, and metropolitan service districts within communities of 50,000 or more people are not eligible.

Financial Incentive Programs – Financial incentives paid to riders to reduce vehicle miles driven at least 45 days per calendar year. Employers must submit an incentive program plan for approval by the Oregon Department of Energy.

Parking Cash Out – A cash allowance or a transit pass given to an employee in lieu of offering or providing the employee a free or subsidized commuter parking space for a commuter vehicle. Eligible cost for parking cash out includes the cost of providing a commuter parking space.

Research, Development and Demonstration Project (RD&D)– An innovative travel reduction project that reduces vehicle miles traveled. The applicant must conduct pre and post surveys that measure travel reduction and submit the results with the application for final certification. Transportation districts, mass transit districts, or metropolitan service districts within communities of 50,000 or more people may not qualify for more than $2 million annually in eligible costs for RD&D projects.

Telework – Equipment purchased that allows an employee to work from home or an office closer to home at least 45 working days per calendar year **OR** purchase of equipment that reduces employees' business-related travel by at least 25 percent.

Transit Passes – Transit passes purchased for riders. Monthly pass participants must use transit at least 45 working days per calendar year. The total cost of a group pass program is eligible. The applicant must have a written agreement with a public, private or non-profit transportation provider to pay for transit passes. Equipment used as a shelter for people waiting for transit qualifies if it is part of the transit pass project. Transportation districts, mass transit districts, and metropolitan service districts are not eligible.

Transportation Management Services Fees – Fees paid to a Transportation Management Association (TMA) or non-profit organization for providing services to riders that reduce the number of vehicle miles driven. Projects must demonstrate travel reduction or be part of a qualifying transportation project. The fee cannot exceed the cost of the transportation project. The applicant must provide an agreement with the transportation provider for specific services that reduce vehicle miles traveled.

OVER

How to Apply

1. Send a completed application for Preliminary Certification for the Business Energy Tax Credit to the Oregon Department of Energy, 625 Marion St. NE, Salem, OR 97301-3737. Forms are available on our Web site at www.energy.state.or.us. Staff can process your request quickly if your application is complete. Include payment to cover application review costs.
2. You'll receive a Preliminary Tax Credit Certificate in about 10 days if your application is approved. You'll also receive an application for Final Certification. (If your application is denied, you'll receive a letter telling you why and what you can do to appeal.)
3. Once you've finished your project, a completed Application for Final Certification and verification of your project costs to the Oregon Department of Energy. Projects costing more than $50,000 must be accompanied by a letter from a Certified Public Accountant. You'll receive a Final Tax Credit Certificate in about 10 days.
4. Claim the tax credit when you file your Oregon income tax return. Include a copy of your Final Tax Credit Certificate with your tax return.

Things to Remember about the Tax Credit

- Pre-approval is required. You must submit your application and receive approval before you start the project.
- You can apply for a tax credit for car sharing programs, parking cash out, transit passes, financial incentive programs, and transportation management services even if you already have these programs in place. Your "start date" is the date we receive your application. You can also apply annually for a tax credit on these types of projects.
- The application and approval process is easy. Call the Oregon Department of Energy. We'll show you how easy it is and answer any questions you have about the program.

OREGON DEPARTMENT OF ENERGY

625 Marion Street, NE, Salem, OR 97301-3737, 1-800-221-8035 (Toll-Free, 503-378-4040 (Salem)
Web site: www.energy.state.or.us

LLOYD DISTRICT TMA
TRANSPORTATION MANAGEMENT ASSOCIATION

TRANSPORTATION MATTERS

A Newsletter of the Lloyd District Transportation Management Association

Fall 2003

Expanded Horizons for Lloyd District thanks to BETC Partnership

What do you do when you can't use your Business Energy Tax Credit (BETC)? How about transferring it to a company that can use it and donating the revenue to a district transportation fund to increase commute and access options for Lloyd District commuters? That's just what Metro, Bonneville Power Administration (BPA) and the Lloyd Business Improvement District (LBID) decided to do. All three passed their BETC's through to PacifiCorp (known in this case as a "Pass-through Partner" —see sidebar) and contributed $190,000—**Yes, $190,000**—to a new district transportation fund. Direct route transit service to and from Clark County, a van pool opportunity fund, *transit trackers*, pedestrian improvements, and bike incentive programs and infrastructure are just a few projects which, thanks to the fund, will benefit the entire district.

"The initiative and generosity of BPA, Metro and the LBID," says Rick Williams, Executive Director of the LDTMA, "have dramatically expanded our horizons. We now have the ability to implement a number of projects which, before, were just a wish list. This couldn't have happened without PacifiCorp's steadfast commitment to this innovative concept and to the district. We're immensely grateful to these organizations for their commitment to supporting our work by using BETC. We also appreciate the help we received from the State Office of Energy in arranging the 'pass through'

option."

The end result is funding for projects that clearly create many commute options for Lloyd District employees and businesses.

Larry Martin, US Tax Director of ScottishPower/PacificCorp says, "PacifiCorp is excited to participate in the BETC program offered by the State of Oregon. The funding of these credits goes directly toward improving local transportation needs. We are glad to make this investment in the community and we encourage others to seek ways to reduce local energy costs by utilizing the BETC programs offered by the State."

Dave Unsworth, Transportation Planner for Metro says, "The TMA is critical to keeping the Lloyd District a great place to work, shop and live despite growth pressures. We have a special concern for transportation access in the Lloyd District because two of our facilities with more than 500 employees are here. Also, the Lloyd District is designated as a Regional Center in Metro's 2040 Growth Concept, a long-term plan for growth in the region. Regional centers are hubs of commerce and local government services that offer many ways to travel. For all these reasons, we're glad we could be part of this unique partnership."

"At BPA, we recognize that not only do we have a corporate responsibility—we also have a community responsibility," says Greg Drais, Manager for Workplace Services. "Being part of the BETC partnership is a means by which we can help our community."

The LDTMA had two primary roles in the process: bringing PacifiCorp to the table and handling a significant amount of paper work. Though challenging at times, the process was a rewarding one. Owen Ronchelli, TMA Program Director, shepherded the project through gateways and over hurdles. He says, "We had to find a business with an Oregon tax liability willing to accept the credits—that was the missing link.

continued on next page

HOW IT WORKS—The tax credit is an Office of Energy program that provides a 35 percent tax credit to businesses that invest in energy efficiency, renewable energy, alternative fuels and transportation projects that reduce the number of vehicle miles traveled. Non-profits and public entities with no Oregon tax liability can participate in the tax credit program if they partner with a business that accepts the tax credit for them in exchange for a payment.

www.energy.state.or.us/bus/tax/taxcdt.htm

"This unique private-public partnership created by the Pass-through Option means non-profits and public entities can stretch their projects by a third. That means they can save even more energy."

—Kathy King
Oregon Office of Energy
Transportation Program

Expanded Horizons continued

We sought PacifiCorp for the partnership and were thrilled when they agreed. Every step of the process was worth it. We're excited about the doors we'll be able to open with the district transportation fund—a fund which would not have been created without forward-thinking organizations who were willing to be part of this 'BETC partnership.' We hope other organizations will follow their example and help us build on the fund they enabled us to establish."

If you would like more information about Business Energy Tax Credits, log on to: www.energy.state.or.us/bus/tax/taxcdt.htm

A Road Map For the Future

The LDTMA continues to move forward with our long-term planning process in order to identify and define strategic goals and create a work plan for implementing them. In July, the Board and staff met for a strategic retreat to review where the TMA has been and where we want to go.

As we look back, we can report that over 5,000 Passports have been issued. An active, enthusiastic bicycle committee holds a number of successful events each year to promote bicycling. The TMA has been an effective advocate for specific transit improvements in the district including new transit service to SE and SW Portland and Clark County; improved signage, shelters and pedestrian lighting near transit shelters; and the extension of Fareless Square. In addition, the BETC partnership [see cover article] and new district transportation fund position us to implement exciting projects that greatly expand options for Lloyd District commuters.

In this context, the strategic planning retreat provided a forum in which ideas and opinions were expressed and examined in regard to the future direction of the TMA and the Lloyd District. The session was highly productive and lays the foundation for the "nuts and bolts" work to follow. Watch this space for reports on the progress and results of our planning.

Blend one-stop-shopping with transportation and you get . . .

. . . our nifty TRANSPORTATION STORE. The LDTMA's "one stop shopping" center offers transit passes, SmartMeter cards, Flexcar registration, bike locker rentals, trip planning, maps, carpool registration and more. We'll also be selling bike accessories, as well as unique art, frames, clocks and fun stuff from Resource Revival (see sidebar.)

"We've been providing information resources for some time," says Rick Williams, LDTMA Executive Director. "Now we're moving into something more exciting. The store offers Lloyd District employees a spectrum of transportation products and services at a central location. It's convenient; saves time; and offers a casual, "user friendly" place to learn, browse and explore."

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Thank You . . .

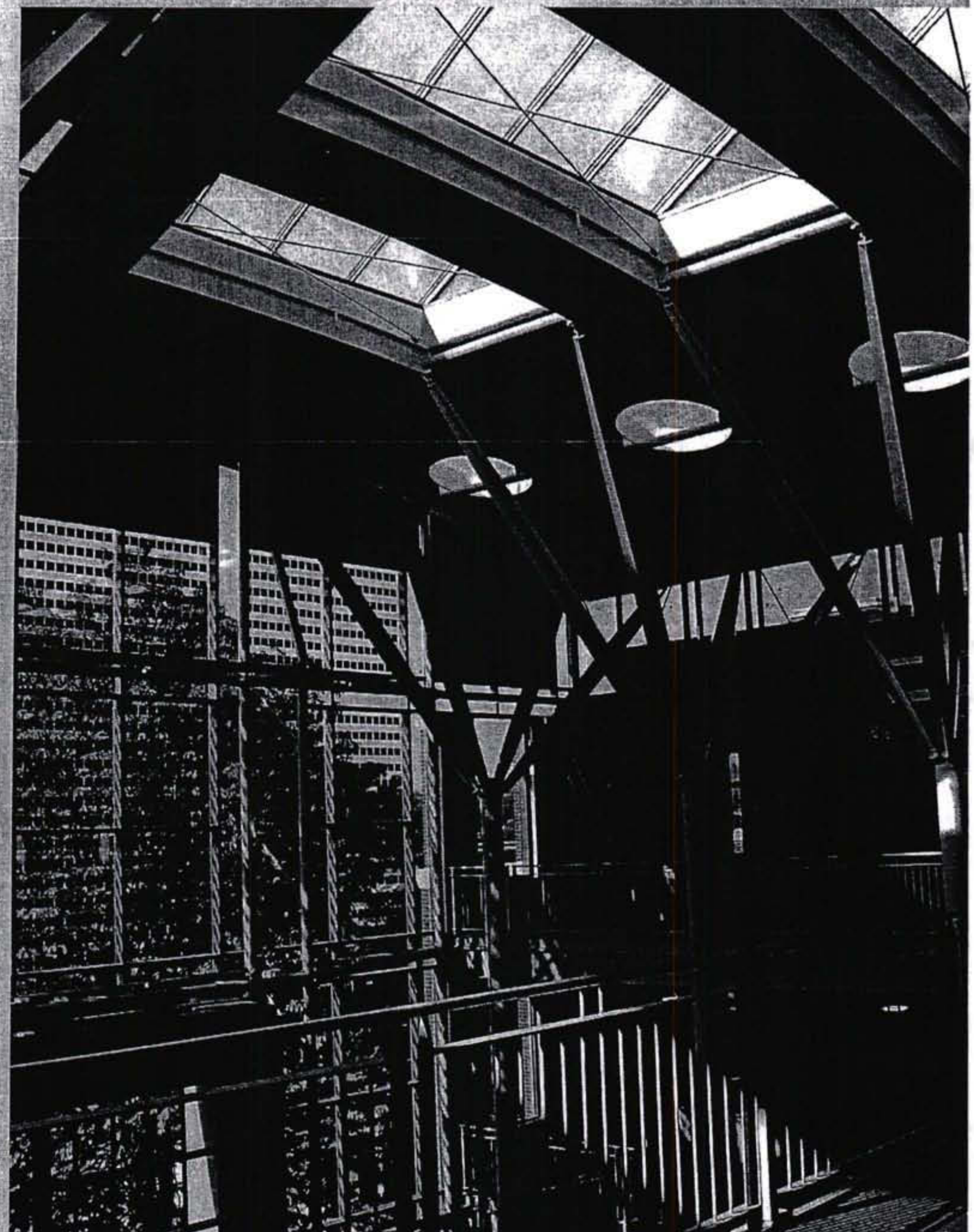
. . . to **Matt Zolbe** of the **Doubletree Hotel** for hosting our strategic planning session, and to the **Lloyd Center Mall** for donating a $25 gift certificate for our "Name the Transportation Store" contest. Thanks also to **Stanford's Restaurant** for donating a $20 gift certificate as a drawing prize for newsletter story submissions; to **Florio**, **Staccato Gelato** and **Pix** for donating samples of delicious desserts to the cyclists who participated in our Bakery Ride; and to **James Davis** of **Metro** for his terrific presentation on our Springwater Trail ride. We also appreciate the gift certificate discounts given to us by **Seattle's Best** and **The Bike Gallery** for this summer's cycling incentive program.

Cogs, sprockets, wheel rims and tires are just a few of the recycled parts from bikes and cars that RESOURCE REVIVAL artist/inventors use to create cool things that radiate innovation, creativity and ingenuity. You'll find RESOURCE REVIVAL picture frames, bottle openers, key chains, earrings, clocks, candle holders and more at our transportation store. You'll recognize them immediately — they have a unique, stylish "look and feel" that is unlike anything you've seen before. Learn more about RESOURCE REVIVAL at www.resourcerevival.com.

WE'RE INTO CHAINS AND GEARS

When University of Oregon says energy conservation, it means business

By Therese Lang
Oregon Department of Energy


The airy atrium houses the learning centers and the Career Center. Solar panels will be installed into the skylights. Photo courtesy of the Oregon Department of Energy.

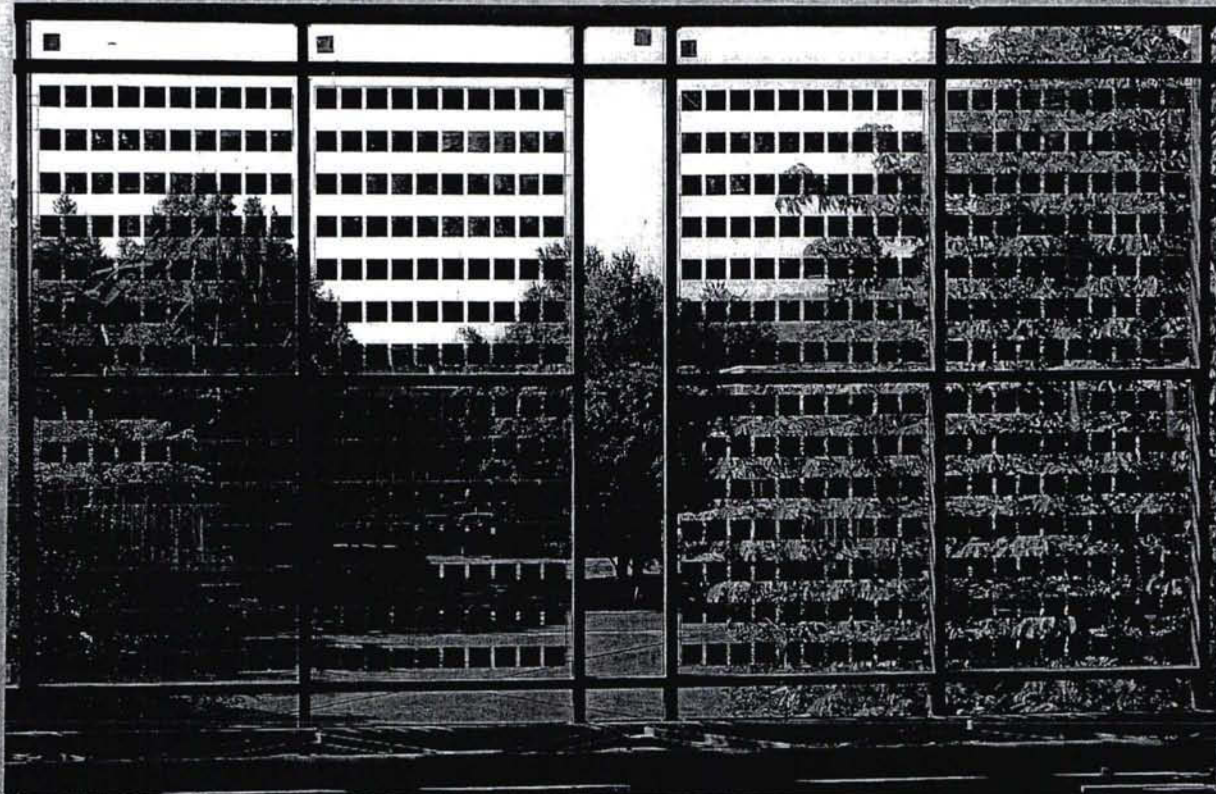
Necessity. That's what got the whole ball rolling. In 1999, Phillip Romero, the new dean of the Lundquist School of Business at the University of Oregon in Eugene, scratched his head and wondered, how are we going to accommodate all these students? Obviously, the School of Business was in dire need of an expansion, but how were they going to pay for it?

Almost as if a fairy godmother had read his mind, the Lundquist School of Business received a $12 million donation from businessman Charles Lillis and his wife. Lillis, former chairman of MediaOne Group, earned a Ph.D. from the U of O Business College in 1972.

Finding the money to fund the $40 million complex was one of many challenges Dean Romero faced. The other was designing a facility that would better reflect the values associated with the U of O and its students.

"Students at our college prize Oregon values, which include community and stewardship, so to express these values, we felt it critical that our building erase its environmental footprint," said Romero. Implementing sustainable design principles would add a bit to the cost of construction, but that didn't deter the planning team. They turned to two programs offered through the Oregon Department of Energy to help defray those costs, the Business Energy Tax Credit and the energy loan program.

The Business Energy Tax Credit (BETC) is intended to help businesses that invest in energy conservation, recycling, renewable energy resources



At left, solar panels greet the students at the front of the Lillis Building. The panels provide about 6 percent of the electricity for the whole building. Below, theater seating was planned for the largest lecture hall in the Lillis Building. Each seat has a power source for laptop computers. Photos courtesy of the Oregon Department of Energy.

and less-polluting transportation fuels. The tax credit is for 35 percent of the eligible project costs. The energy loan program is a low-interest loan available to individuals, businesses, schools, government entities, public corporations, tribes, and non-profits. Projects must be in Oregon and must promote energy conservation and/or renewable energy resource development.

Mick Westrick, director of technology and business services at the U of O Chiles Business Center, acknowledges that without these programs, the project wouldn't have come to fruition. "We're blessed in Oregon to have BETC and the low-interest loan program. It makes energy-construction projects cost-effective."

By using the natural resources available, such as the sun and cool breezes, the 145,000-square-foot structure will use 40 percent to 50 percent less energy than a building of the same size built with conventional methods.

The building is positioned in an East-West orientation, allowing the structure to take advantage of the light and wind exposure. This process enables the practices called daylighting and passive ventilation. Daylighting involves shelves that are mounted halfway up the window and reflect the incoming light into the classroom, bouncing the light off the ceiling. This reduces the need for electric lights.

Passive ventilation uses open windows and vents which draw in outside air, distributing it underneath the slab flooring, warming or chilling it as it is delivered throughout the building. While this doesn't totally eliminate the need for heating and cooling, it certainly reduces the reliance on a central heating/cooling system.

The front of the building is lined with photovoltaic solar panels and shine in the sunlight like sapphires. These south-facing panels generate 6 percent of the electricity used in the building. Other high-tech features include a massive central computer system, called an Advanced Monitoring System. This computer measures light levels, temperatures, building occupancy, heating load and power generation. It automatically adjusts the controls for maximum energy-efficiency.

Another appealing feature is the "eco-roof." This rooftop garden holds 20 different kinds of plants, mostly succulents. Because these plants absorb sunlight during the summer, it cools the building down. In the winter, the garden reduces the amount of rain runoff. The roofs that do not have a garden on them are painted either white or gray, deflecting the sunlight and thereby keeping the building cool in the summer.

An important aspect of the building that needed to be incorporated was the concept of group projects. Much of the business school curriculum centers on groups of students working with real businesses, in order to gain real-life business experience. The open and airy atrium houses the learning centers and the new Career Services Center. The six learning centers offer space for teamwork, studying, and computer access and are divided based on the six academic departments. The Career Services Center is designed to help students research jobs and potential employers.

The example set by the Lillis Complex inspired the University of Oregon to adopt a Sustainable Development Plan in 2000. It calls for the use of sustainable design elements in any new construction or remodeling on campus. The University of Oregon intends to lead the way in sustainable design principles and to show the rest of the world that these concepts are cost-effective and are helping to promote a renewable and sustainable way of life, values that U of O students, faculty and staff, hold dear.

Therese Lang is with the Oregon Department of Energy.

Case Study: The Dalles Middle School

Energy use to drop dramatically

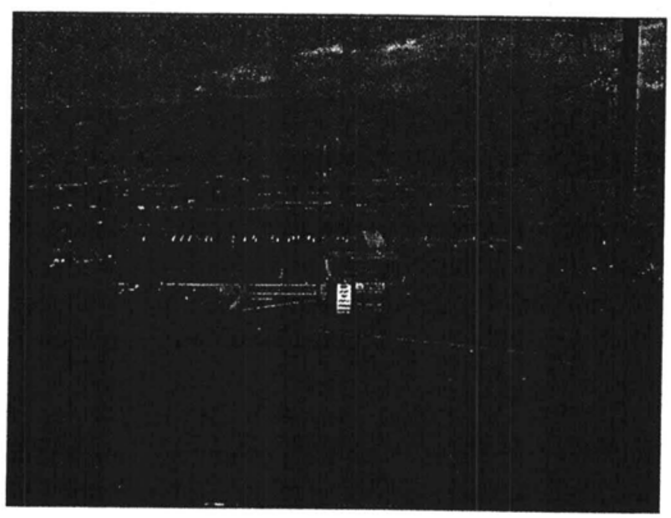
When you have a lemon — you make lemonade. The Dalles School District, 83 miles east of Portland, Oregon, was faced with a big lemon: a poorly built middle school located in a landslide area. The school district decided to make lemonade and turn a negative into a positive.

> "...our architect and engineers tell us we could see up to a 60 percent cost reduction (in energy)."
>
> – *Dan Chamness*
> *Business Manager*
> *The Dalles School District*

The Dalles new $12.5 million middle school opened in September 2002. It is one of the first schools in the nation that is heated and cooled with the very ground water that caused the landslides. The Oregon Office of Energy's School Program, in conjunction with Rebuild American and other U.S. Department of Energy program partners, provided technical assistance. This unique application of free geothermal energy and other energy-saving measures are expected to reduce the school's annual energy consumption by at least 46 percent.

District Business Manager Dan Chamness couldn't ask for much more. "We were conservative in our budget to reflect a 46 percent reduction in energy costs," Chamness said. "But, our architect and engineers tell us we could see up to a 60 percent cost reduction. We hope to be pleasantly surprised."

The 96,000 square-foot building was constructed for an estimated $104 per square foot (not including site work), reasonable for a school in Oregon. The project was both on budget and on time. Both Chamness and District Maintenance Supervisor Ross Cain noted that the number of change orders, that only add to the bottom line, were less than anticipated, too.



The lemon was turned into lemonade. The new school is comfortable

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and healthy for students and staff and energy and resource efficient. It is a high performance school that will serve as a model for other Oregon schools.

The Dalles Middle School
1200 East 12th Street
The Dalles, OR

The Dalles School District No. 12
Superintendent: Cheryl Crawley
Principal: Jan Anderson

Architect: Heinz Rudolf, BOORA
Contractors: Turner Construction
Project Manager: Heery International

Groundbreaking: August 9, 2001
Open House: August 22, 2002

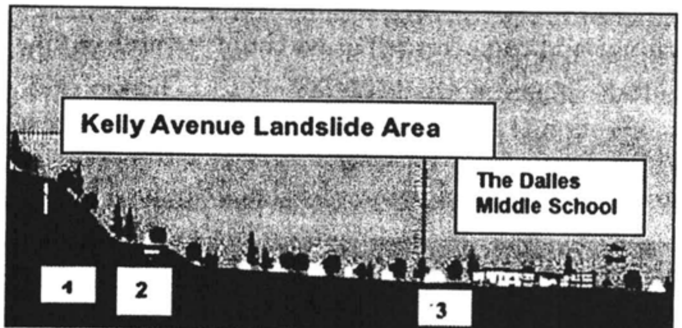
Cost: $12.5 million
600 students in grades 6,7,8
96,000-square-foot building
On 13 acres in residential area

A 'temporary' school

The original middle school comprised of three buildings and a gym/cafeteria opened in 1955. Construction of The Dalles Dam had brought a sudden influx of students, and the school district had to respond quickly to meet the demand. They constructed "temporary" facilities on the Kelly Avenue Landslide Area expecting to be there for 20 years or less.

The 20 years turned into 45 years. They were not easy ones for the school district, students, staff or taxpayers. The shifting ground and hurried construction of the buildings resulted in expensive repairs and labor-intensive maintenance. The classrooms were uncomfortable for students and staff. Because there was little insulation, heating and cooling bills were high. There were constant problems that stretched the maintenance staff.

There was talk of a new middle school when Cain joined the district in 1985. But, it was just that — talk. The decision to build a new middle school was made by the State Fire Marshall. He closed one of the buildings in 1995 and condemned the others following the 1999-2000 school year.



1. Dewatering wells; 2. Well water holding tank; 3. Rock key trench between slide area and new school site.

New building challenge

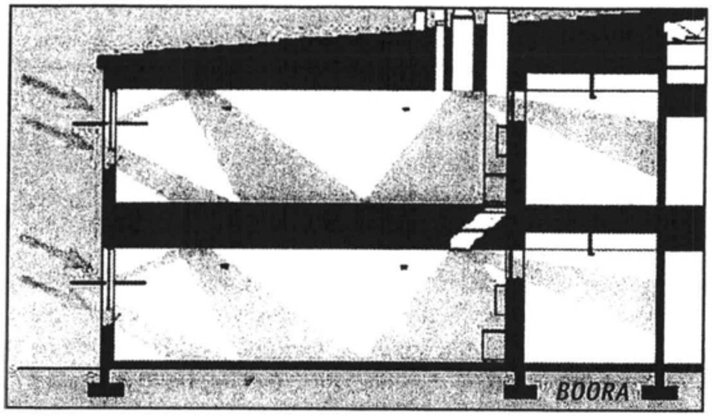
Building a new middle school posed quite a challenge for the district. The district selected a new school site, but voters rejected the building bond because the location was too far from the residential core. The district went back to the engineers to see if the existing site favored by the community could be used.

However, the favored site had landslide problems. In the late 1980s, in an attempt to mitigate the landslides, the city had rehabilitated the landslide area with six dewatering wells that drew water from the ground and two large well water holding tanks. These actions had stabilized the ground.

The engineers gave their approval for a new school to be built on the existing site with the addition of a rock key trench 180 feet long, 80 feet wide and 35 feet deep between the slide area and the school to further stabilize the school grounds. In addition, the original nine-acre site was expanded to 13 acres to allow for reorientation of the school to the far end of the landslide area. Voters were asked to approve a second building bond issue. This time, they approved.

Building Design

The school district architect, Heinz Rudolf with BOORA architectural firm of Portland, is an advocate of energy efficient, "green" or sustainable buildings. He saw the 58 to 60 degree ground water being pumped from the landslide area as a readily available source of renewable energy for a new building.



Exterior and interior lights bounce the light deep into the classroom.

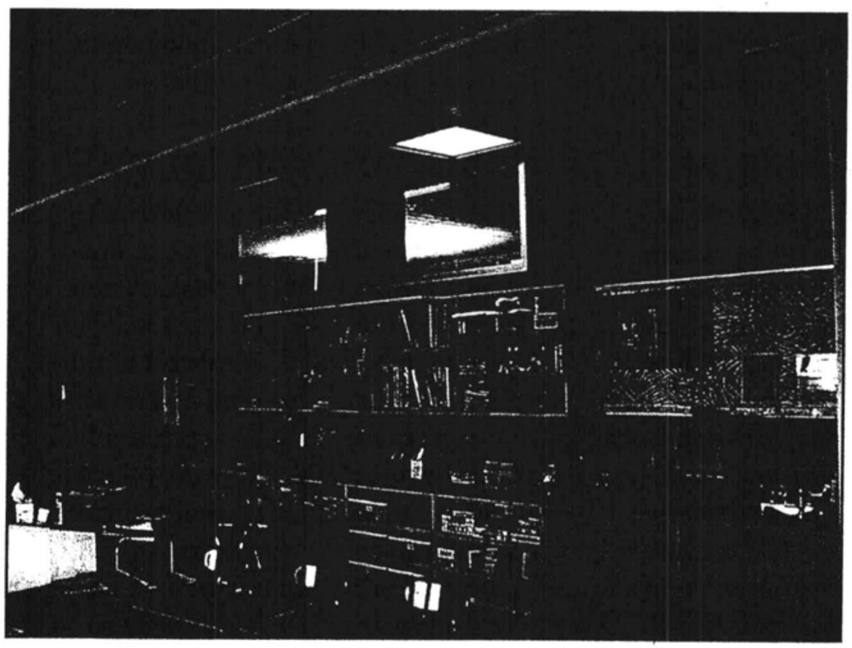
The water could provide both heating and cooling using geothermal principles. For heating, a heat pump extracts the heat from the water. For cooling, the heat pump reverses the process. In addition, the relatively cool ground water is used directly to chill the air flowing through the ventilation system that cools the building.

Heating and cooling are a large part of the energy use of a school building. Having a renewable resource, one that nature maintains at a constant supply over time, will impact on the bottom line. It is an attractive concept, but School District Maintenance Supervisor Ross Cain had to see for himself that this process would work. He researched the technology and visited several geothermal sites before he gave approval.

The unusual heating/cooling system is of special interest to the foreman who installed the heat pump. Bob Loftin attended the old middle school and lives in The Dalles. "This is a feather in our cap to do this," Loftin said. "The old school was a mess. We want to keep our kids in school and this new building will be nice. Now this community really has something they can be proud of. It puts us on the map."

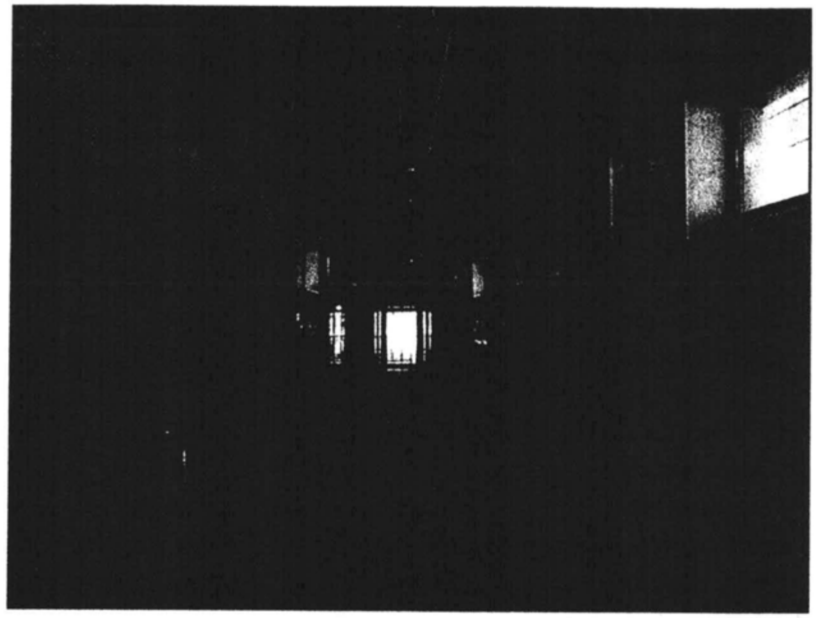
Daylighting

The Dalles School District considered other measures to reduce energy use. It incorporated lots of natural light to reduce the need for electric lighting and the associated increase in the air conditioning load. More importantly, studies show that students perform better when skylights and windows bring natural, non-glare light inside the classroom. This is called "daylighting." (See Daylighting Report on Office of Energy Web site: www.energy.state.or.us/school/highperform.htm)



Light tube provides light in interior wall area. High windows on the interior walls allow light into the hallway.

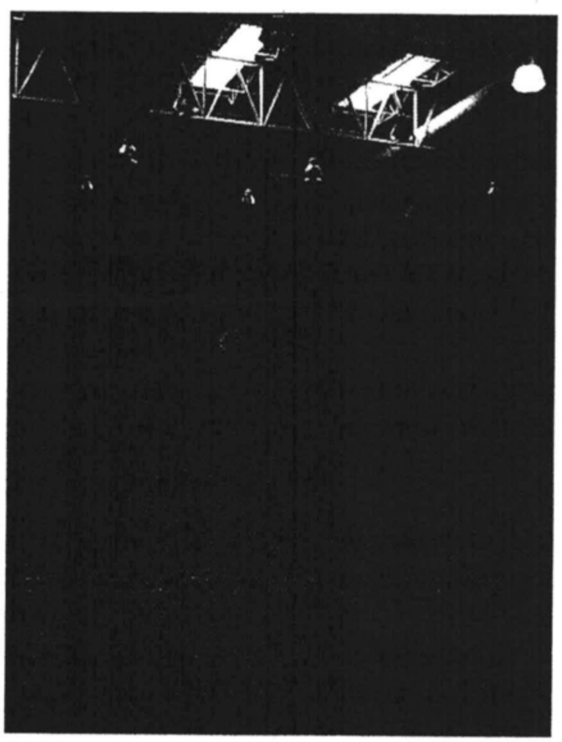
Case Study: The Dalles Middle School



Natural light comes into the interior hallways of the new school from high windows on the interior walls of classrooms.

The Dalles Middle School has incorporated daylighting into each classroom using four methods.

1) The school is oriented so classrooms face north and south. They do not get direct western sun during the hottest time of the day.
2) The large windows have a special glazing to minimize glare and heat, but bring lots of natural light inside the room.
3) Light "shelves" are built on the outside and the inside of the windows. These three-foot reflective projections are located about a third of the way down the window. They reflect the sunlight to the white ceiling which "bounces" the light deeper into the room. The shelves also shade the lower window and reduce heat gains into the room caused by the sun.
4) One or two light tubes are located on the inside wall of the room to bring in additional natural light. The light tubes are much smaller diameter than a skylight and made of reflective material to bring direct sunlight and ambient light through the ceiling and into the room. A diffuser spreads the light evenly.



Gym skylights are lined with spun fiberglass to diffuse natural light.

Near the light tubes, three high windows within the classroom allow some of the light into the interior hallway. Both the first and second floors have light tubes and light shelves.

Other energy efficient measures to include:

- The electric lights installed in the classroom are energy efficient fluorescent T-5s. They can be controlled separately so the fixture closest to the windows can be turned off, while the one closest to the interior wall can be left on, if necessary.

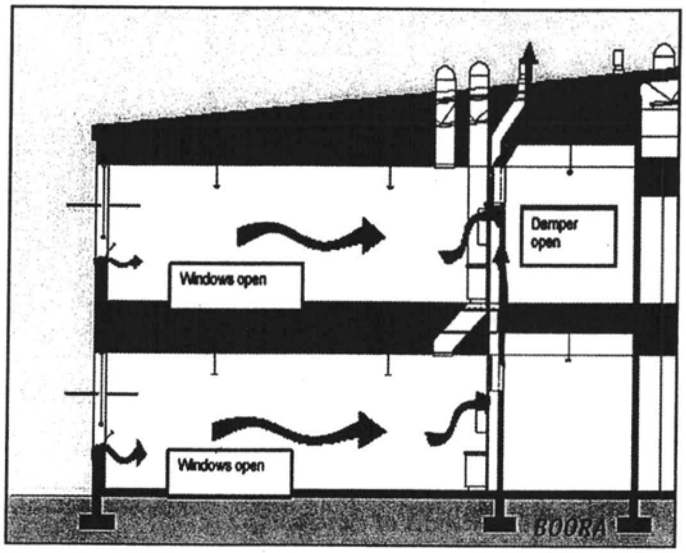
- The media center and computer labs have an entire wall of windows. There are no light tubes in these rooms as the wall of windows brings in abundant light.

- Windows that face west have vertical sunscreens that provide shade in late afternoon without blocking the view.

- In the gym, several interior skylights are lined with a spun fiberglass. This diffuses the light so there is no direct sunlight on the gym floor.

Natural ventilation

The middle school design included an old concept into the new building — natural ventilation. The operable windows pull fresh air into one side of the classroom, while ventilation stacks (chimney-like devices) pull the air out on the opposite side of the classroom. When outside temperature conditions are within a certain range, teachers can open the windows. When outside temperatures are too high or too low, the back-up mechanical ventilation system automatically turns on.



Green/red light system lets teachers know when to open windows.

The benefits of natural ventilation are substantiated in studies of student performances. (See Daylighting Report on Office of Energy Web site: www.energy.state.or.us/school/highperform.htm). Natural ventilation connects students and staff to the outside and can be easily controlled. In addition, natural ventilation saves energy, maintenance and has lower initial costs.

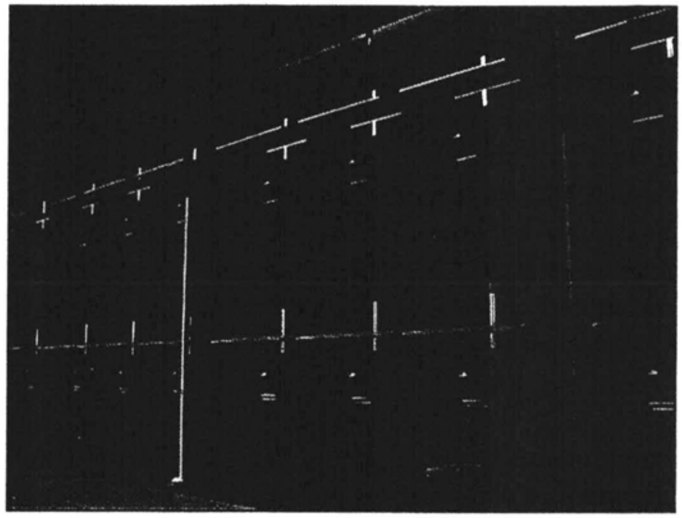
Sustainable Building

The school district took considerable care to make the building a high performance school that will save energy, natural resources and money. For example:

- They controlled erosion through grading, sediment control and landscaping, in addition to rehabilitating the damaged landslide area.
- They used light-colored concrete for the parking area to reduce heat "islands."
- They directed the exterior lighting downward to reduce night light pollution.
- They included 176 bicycle parking spots and even an area for a future electric car charging station.
- They used drought-resistant plantings.
- They are irrigating the three ball fields behind the school with the reclaimed ground water.
- Building materials were specified to contain post-consumer recycled content.
- They had building contractors recycle or salvage construction waste.
- They specified that building materials contain post-consumer recycled content.
- They ordered toilet and shower partitions made from recycled plastic.
- They used ceiling tiles produced from 75 percent post-consumer recycled waste.
- They used local building products when possible to avoid transporting materials long distances and consuming more fuel.
- They designed a recycling center in the building.
- They used paints, wood stains and sealers with low or no-volatile organic compounds (VOCs) as much as possible.
- They mechanically zoned science classrooms to avoid exposure to hazardous chemicals.
- They stained the concrete walls to look like basalt rock and to blend with the colors of the natural landscape.

Commissioning

A key to operating a building as it was intended to run is to have a commissioning agent involved during the construction process. Commissioning is the systematic process of ensuring that building systems are designed, installed, tested and capable of being operated and maintained to perform according to the design intent and owners' needs. The Dalles School District included this expense in their plans.



The new school walls are concrete and stained to look like basalt rock. Note the shading the light shelves provide to reduce glare and heat gain inside the classroom.

Commissioning begins in the design phase. The commissioning agent's task is to identify system deficiencies as early as possible in the project and to track their status until they are corrected. The result will be improved tenant comfort and productivity, improved air quality, reduced operation, maintenance and equipment replacement costs and lower energy costs. It includes the training of operating staff. Commissioning agents may be an independent third party, a design professional, a general contractor or a mechanical contractor.

The cost of commissioning can vary considerably with the size of each project and the level of commissioning. For whole-building commissioning, the price range is normally 0.5 to 1.5 percent of total design and construction cost. For The Dalles building, commissioning costs were $55,000.

Going for Gold

Because the building incorporates numerous sustainable materials and ideas as well as many energy-saving measures, The Dalles School District has applied for the gold certification level from the U.S. Green Building Council's LEED™ (Leadership in Energy and Environmental Design) Program. The U.S. Green Building Council independently reviews all the construction documents for energy efficiency and environmentally sustainable products. The gold certification is the second highest level. Only 26 schools in the nation have applied for a LEED certification rating.

The Dalles Middle School also received an Energy Award from the Oregon Office of Energy for outstanding design achievement.

"The Dalles School District has created a high performance school that is an asset to the community, enhances teaching and learning, reduces operating costs and protects the environment," said Director of the Oregon Office of Energy Michael Grainey.

Greg Churchill

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Natural Success

Contractor embraces client's green vision, strikes gold

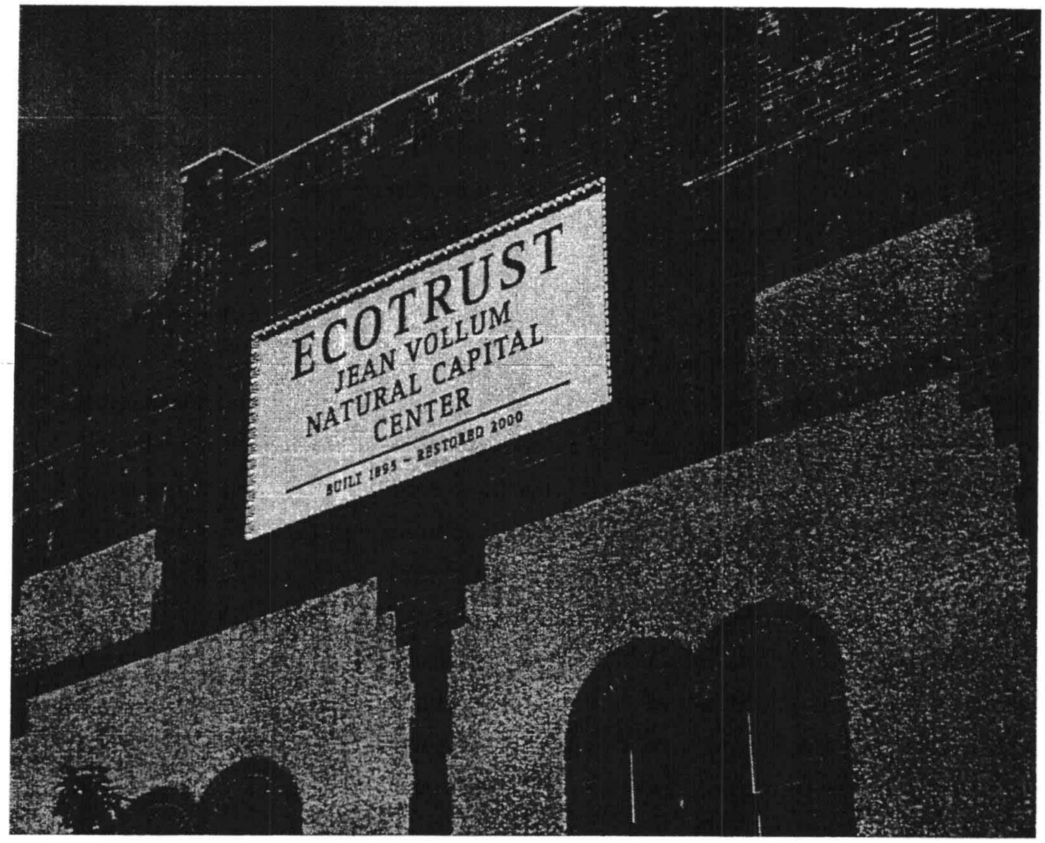
By Ann Grim
Oregon Office of Energy

Those oft-repeated R words — reduce, reclaim, reuse and recycle — are now getting something new from the building industry: Respect.

Carrington Barrs of Walsh Construction made the four R words his mantra while construction site manager for the Jean Vollum Natural Capital Center building project in Northwest Portland.

His company's client, the non-profit Ecotrust, wanted to redevelop an 1895 historical warehouse to be its headquarters and a marketplace for others offering the goods and services of a conservation economy. Using a green building approach was an obvious step for Ecotrust in restoring the Natural Capital Center. In addition to reducing, reclaiming, reusing and recycling materials, Ecotrust's objectives for the building restoration included storing and filtering stormwater on site, reducing energy use, using wood from well-managed forests, specifying low-toxic materials with high recycled content, maximizing access to fresh air and natural light, and building a sense of community. Ecotrust added a clause to the Walsh Construction contract specifying a minimum recycling rate of 75 percent. The client also wanted to achieve a LEED gold certification from the U.S. Green Building Council.

The task was daunting: Take a deteriorating 70,000-square-foot brick-and-timber warehouse inhabited by pigeons and transform it into an award-winning showcase of sustainable building practices.



The 70,000-square-foot Jean Vollum Natural Capital Center at 721 N.W. Ninth Ave. in Portland earned a business energy tax credit. Photo by Adam Bacher.

Barrs, who had just finished his master's degree at University of Washington, had a personal interest in sustainable building practices. But, he knew it was going to take something special to get everyone involved with the project to embrace the vision.

Communications

Barrs began by establishing good communications and partnerships with subcontractors, suppliers and employees.

"Forming partnerships was key to our success," Barrs said. "We told them what our goal was, and asked them how we could go about working together to meet it."

Barrs made sure that the intent to use sustainable practices was spelled out in all specifications and the message was consistent. He wrote the specifics into contracts. He issued pre-job form letters and constant verbal reminders. And, he provided end-of-the-day incentives for those who followed through.

Most importantly, he managed reducing,

reclaiming, reusing and recycling on site. Even simple ideas such as placing well-marked recycling drop boxes close to the work location and general garbage drop boxes in the far corner of the job site successfully changed the workers' well-established habits.

He formed a partnership with a nearby local hauler to pick up the recycled cardboard on a frequent basis so it became a win-win situation. He found facilities to recycle styrofoam and visquine.

"We had nice signs made for the recycled material rather than using the typical piece of plywood," Barrs said. Having the recycled material well marked, carefully piled and frequently removed kept the job site neat and reinforced the message that recycling was important.

Construction crews even reclaimed and reused structural materials from an old annex near the main warehouse.

The end result surprised even Barrs. They recycled or reclaimed an amazing 98 percent of the material from the job site when the building opened in September 2001. This was the highest documented reclamation for a commercial project in Portland.

The U.S. Green Building Council awarded its second highest LEED (Leadership in Energy and Environmental Design) certification to the Natural Capital Center. It was the first building in the Pacific Northwest and the first historic building nationwide to receive a gold LEED rating. Photo by Adam Bacher.

Sustainable

Reducing, reclaiming, reusing and recycling, in addition to a number of other green building features, helped Ecotrust achieve its vision for its headquarters. The building has attracted tenants that also work in the conservation economy. And, tenant employees enjoy their work environment.

Eugenie Frerichs, one of Ecotrust's 25 employees and 125 building occupants and the manager of the Natural Capital Center, says there is a synergy throughout the building.

"I interact a lot with the other businesses' staffs as part of my job," Frerichs said. "There is a wonderful creative, collaborative and open atmosphere throughout. People really enjoy working here."

In addition to increasing occupant comfort and productivity, redeveloping the historic building as a sustainable building has had some more financial payoffs. Ecotrust raised over $8 million in foundation and individual grants for their efforts to reconstruct an historic building using sustainable practices. And, the building qualified for the Oregon Office of Energy's sustainable building tax credit.

Tax credit incentive

A sustainable building tax credit is calculated on the square footage of a building and not on the increased cost of a project above the industry standard or the energy code like a traditional energy tax credit. The incentive helps offset the cost of applying for the LEED rating and the extra design and commissioning costs.

A building owner must apply for the Sustainable Building tax credit before beginning the project. The building must achieve a LEED rating of silver or better with at least two LEED credits earned for energy efficiency and at least one credit for additional commissioning beyond the LEED prerequisite requirements. In addition, the owner must report the amount of solar energy received by the building annually.

Because Ecotrust is a non-profit organization and cannot use a tax credit, it transferred its tax credit to Walsh Construction using the tax credit pass-through option. This option, approved by the 2001 Legislature, allows non-profits, public entities and private businesses with insufficient tax liability to transfer an energy tax credit to a business or individual with an Oregon tax liability.

In exchange, the tax credit recipient (the "pass-through partner") makes a cash payment to the project owner. Currently, the value of the cash payment is set at 27 percent of the eligible project costs for projects with eligible costs over $20,000 and 33.5 percent for those with eligible costs of $20,000 or less.

Ecotrust's eligible project costs based on their square footage and gold LEED rating were $321,700. Walsh Construction, the pass-through partner and tax credit recipient, paid the Ecotrust $86,859, the net present value of the credit. The 35 percent tax credit of $112,595 was issued to Walsh Construction.

"The sustainable business tax credit is a wonderful incentive program. We appreciate Walsh Construction for being our pass-through partner and allowing us to benefit from it," said Bettina von Hagen, who managed the Natural Capital Center redevelopment for Ecotrust and is vice president of the Natural Capital Fund. "It paid for our LEED certification and building commissioning costs while providing tremendous public benefits to the people of Oregon, in terms of improved water quality, less energy and material use, and significantly less construction waste. The more building owners who take advantage of this incentive program, the better off we all will be."

Ann Grim is communications specialist with the Oregon Office of Energy.

Ecotrust's building strikes LEED gold

Due in part to its phenomenal reclamation efforts, the Ecotrust building at 721 N.W. Ninth Ave. in Portland qualified for the gold-level Leadership in Energy and Environmental Design certification under the strict standards developed by the U.S. Green Building Council. But, there were other sustainable building features to consider, too. These included:

• The building features an "eco-roof" and bioswales in the parking lot that filter and absorb about 95 percent of the site's rainwater. This greatly reduces the amount of runoff into the overburdened storm drain system protecting the Willamette River.

• The energy-efficient windows, fixtures and ventilation system contribute to a 20 percent energy savings.

• Sustainably harvested wood that is Forest Stewardship Council-certified is used throughout the building.

• It offers numerous transportation options including the Portland streetcar, 50 bicycle parking spots, showers and lockers.

• The cupboards in supply rooms and kitchen areas are made from certified wheat board sealed with a product that produces zero VOC (volatile organic compound) emissions.

• Food scraps from offices in the building are composted in the worm bins on the third floor patio.

• Marmoleum flooring in bathrooms and supply rooms is made from all natural renewable resources.

• Appliances are Energy Star models.

• The Center purchases renewable power through Portland General Electric's Renewable Power Program.

• The HVAC system is a variable air volume model that allows the percentages of fresh and recycled air to vary depending upon existing conditions in the building.

• The floors on the main level of the building are the original Douglas Fir planks that were milled in the warehouse more than 100 years ago.

• The flooring in a portion of the Patagonia store on the first floor is made from the bark of cork trees that can be harvested every 10 to 15 years.

• The janitorial service uses products that are biodegradable, all natural, phosphate-free and without any animal by-products or perfumes.

• The lighting fixtures use compact fluorescent lamps with a dimming ballast. Several of the lamps have occupancy sensors that automatically turn lights off when a space is not in use. Lights in the atrium are tied to a photocell that brighten or dim depending on the amount of natural light available from the skylights.

• The interior paints come from used cans of latex paint that were collected by Metro's recycling program. Unwanted and partially used paints are collected, remixed and re-sold in a variety of colors.

• Several doors from the warehouse were salvaged and reused throughout the building.

• Builders used reclaimed wood for structural members, concrete form work, flooring, trim, furniture and artwork.

• All of the structural steel beams and concrete rebar contain more than 95 percent recycled steel scrap.

Kathy Morgan King
Conservation Program Consultant
Conservation Division
Policy and Operations Section
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0113O4C-08

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF SUPPORTING THE *IT'S COOL TO CARPOOL* CAMPAIGN.	)))	RESOLUTION NO. 04-3413 Introduced by Councilor Park

WHEREAS, Metro adopted the 2000 Regional Transportation Plan on August 10, 2000; and

WHEREAS, Policy 19.0. Regional Transportation Demand Management (TDM) calls for enhances mobility and supports the use of alternative transportation modes by improving regional accessibility to public transportation, carpooling, telecommuting, bicycling and walking options; and

WHEREAS, the TDM Subcommittee of the Transportation Policy Alternatives Committee (TPAC) that provides oversight for the development and evaluation of TDM strategies has gone through a strategic planning process and has developed a Regional Travel Options (RTO) 5-year Strategic Plan; and,

WHEREAS, the Regional Travel Options program will be investing $270,000 of program funding in the carpoolmatchNW.org program over the next two fiscal years.

BE IT RESOLVED by the Metro Council

1. Support the *It's Cool to Carpool* campaign, February 23 – March 5, 2004, by signing a letter to business leaders throughout the region asking them to encourage their employees to participate in the campaign (Attachment A).

ADOPTED by the Metro Council this 15th day of January, 2004

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 04 - XXXX, FOR THE PURPOSE OF SUPPORTING THE *IT'S COOL TO CARPOOL* CAMPAIGN.

Date: January 9, 2004 Prepared by: Bill Barber

Staff recommends support of the *It's Cool to Carpool Campaign* from February 23 – March 5, 2004. Resolution No.04-3413.

BACKGROUND

The purpose of the Regional Travel Options Program includes guiding implementation of regional transportation demand management (TDM) policies in the Regional Transportation Plan (RTP). These policies, in turn, are the RTP strategy for leveraging the development of compact centers with transportation investments. The program provides for analysis and recommendation of TDM techniques and strategies within the Portland region. Metro chairs the TDM Subcommittee of TPAC and works with TriMet, ODOT, Oregon Department of Environmental Quality (DEQ) and other state agencies; local jurisdictions and private employers to plan fund and implement TDM strategies. Target groups served or affected include local cities and counties, state and regional agencies and the public at-large. The program relates to Metro's mission and value statement by ensuring that people have the ability to get around the region using a variety of transportation options.

Companies around the region are realizing that convenient, stress-free options for commuting to work can provide tremendous employee benefits and help improve the economy and the environment. By reducing the number of people driving alone carpooling reduces traffic congestion, improves air quality and freight movement, encourages employees to be on time, and is a more relaxing way to get to work.

ANALYSIS/INFORMATION

1. **Known Opposition**

No known opposition.

2. **Legal Antecedents**

Legislation related to the proposed legislation, including federal, state, or local law and Metro resolution numbers, include the following:

<u>1991 Federal Clean Air Act Amendments.</u> The need for a comprehensive regional TDM program was addressed in Metro Resolution No. 91 – 1474, amending the FY1992 Unified Work Program to include air quality planning activities, in response to the Oregon Transportation Planning Rule and the Federal Clean Air Act Amendments of 1990.

<u>TDM Subcommittee.</u> The TPAC TDM Subcommittee was established by Metro Resolution 92 – 1610, establishing the TPAC Transportation Demand Management Subcommittee. Oversight for the development and evaluation of TDM strategies, and formation of final recommendations to TPAC, the Joint Policy Advisory Committee on Transportation (JPACT) and Metro Council concerning TDM planning, programming and implementation activities were assigned to the Subcommittee.

TDM Relationship to DEQ's Ozone Maintenance Plan (Governor's Task Force on Motor Vehicle Emissions Reduction (HB 2214). The task force recommended a base plan focused on specific strategies to maximize air quality benefits. The air quality strategies selected by the region formed the base for a 10-year air quality maintenance plan for the Portland area. The primary TDM transportation control measures (TCMs) in the maintenance plan are the employee commute options program (ECO) and the regional parking ratio program.

Transportation Management Association (TMA) Policy. The policy basis and funding strategy for TMAs was adopted through Metro Resolution No. 98 – 2676, establishing a policy basis and funding strategy for Transportation Management Associations (TMAs) through the MTIP/STIP development process. Metro Resolution No. 99- 2864, selection and funding allocation of $1 million to Transportation Management Associations for FY 2000 to FY 2003, allocated $1 million in regional funding to existing and new TMAs for FY 2000 to 2003. Metro Resolution No. 02 – 3183, revising regional Transportation Management Association (TMA) policy to provide additional regional funding options for TMAs, revised TMA policy by calling for balanced support of existing TMAs with the start-up of new TMAs, and for funding new and innovative TMA programs.

2000 Regional Transportation Plan. The RTP establishes regional TDM policy and objectives to help reduce vehicle trips and vehicle miles traveled. Chapter 1 (Ordinance 00 – 869A and Resolution 00 – 2968B), adopting the 2000 Regional Transportation Plan, provides TDM policies and objectives that direct the region's planning and investment in the regional TDM program.

3. Anticipated Effects

The campaign will result in an increase in the number of people carpooling throughout the region. The effectiveness of the campaign will be measured with the carpoolmathcNW.org online database.

4. **Budget Impacts**

None.

RECOMMENDED ACTION

Approve Resolution No. 04 – 3413.

ATTACHMENT A

600 NORTHEAST GRAND AVENUE PORTLAND, OREGON 97232 2736
TEL 503 797 1700 FAX 503 797 1794

METRO

Dear Business Leader,

Metro is asking for your support for CarpoolMatchNW, an innovative online tool for reducing drive alone trips throughout our region. You are cordially invited to join us at one of the kick-off events for the Portland/Vancouver Metropolitan Region's *It's Cool to Carpool* Campaign (dates and locations listed in the attached invitation).

Companies around the region are realizing that convenient, stress-free options for commuting to work can provide tremendous employee benefits and help improve the economy and the environment. By reducing the number of people driving alone carpooling reduces traffic congestion, improves air quality and freight movement, encourages employees to be on time, and is a more relaxing way to get to work.

It's Cool to Carpool is a two week promotion sponsored by Metro, TriMet, C-TRAN, SMART, and the City of Portland. The campaign goal is to encourage commuters to take advantage of the successful online carpool matching tool, www.CarpoolMatchNW.org, and focus attention on sharing the ride to work and other trips made throughout the day from work. You can support www.CarpoolMatchNW.org and our region's air quality by endorsing the frosty fun promotions during the two week *It's Cool to Carpool* campaign.

During the *It's Cool to Carpool* campaign employees who carpool for at least one day will be eligible for fabulous prizes. Your company's Transportation Coordinator will soon receive their invitation to the kick-off event where they can pick up a complete set of *It's Cool to Carpool* promotional materials. We hope you will encourage your employees to carpool during this two week period and support your Transportation Coordinator in their efforts.

Sincerely,

____
David Bragdon

____
Rex Burkholder

____
Rod Park

____
Brian Newman

____
Susan McClain

____
Rod Monroe

____
Carl Hostika

011304C-09

Major Features of Next Transfer Station RFP
Currently under Consideration

1. Proposals would be accepted to operate one or both of the stations

2. Term would be for five years beginning October 1, 2004

3. Proposals would be evaluated based on:

- Cost (50 points)[1]
  - Lowest cost proposal gets all 50, other proposals scored as percentage of low cost

- Material Recovery Approach (25 points)
  - 20 points allocated based on contractor's recovery guarantee
  - 5 points allocated based on feasibility of exceeding guarantee, cost of bonus, approach)

- Operation & Maintenance Approach (25 points)
  - 20 points allocated based on how well proposal satisfies RFP requirement and Metro goals (healthy & safe environment, efficient operations
  - 5 points allocated based on sustainable measures contained in proposal beyond requirements.

4. New Sustainability Elements under Consideration:

- Material Recovery includes a **guaranteed recovery rate** and the ability to receive **bonus payments**
- Purchase of 15% **renewable energy** (wind power) for operations
- Instituting a **clean exhaust program** to improve emissions from rolling stock

5. At least 50% of the payments will be guaranteed to the contractor as required by IRS rules.
   - First 17,000 tons/mo. at MSS and the first 18,000/mo. at MCS are paid for as fixed payments.
   - The first 850 tons recovered at each station per month are paid for as fixed payments

6. Schedule:

    Council Approval – February 2004
    Release to Vendors – February 2004
    Proposals Due – March 2004
    Evaluation of Proposals – April 2004
    Council Hearings on Award/Appeals – May 2004
    Contractor Mobilizes – May through September 2004
    New Contract Begins – October 1, 2004

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[1] See Attachment No.1 on the reverse side for detailed cost information used to calculate total costs.

ATTACHMENT No.1

Price Schedule
for
<u>Option #3</u> - Metro South and Metro Central Station Operation

<u>METRO SOUTH ONLY ITEMS</u>

1.	Fixed Annual Payment for Waste Transfer	$______________.___
2.	Per Ton Price for each ton in excess of 17,000 tons per Month	$________.____
3.	Per Ton Price for each ton of source separated yard debris/wood	$________.____
4.	Per Ton Price for each ton of source separated clean drywall	$________.____
5.	Per Ton Price for each ton of source separated asphalt roofing material	$________.____
6.	Contractor's Recovery Guarantee	_____%
7.	Fixed Annual Payment for Waste Recovery	**<u>$344,556</u>**

<u>METRO CENTRAL ONLY ITEMS</u>

1.	Fixed Annual Payment for Waste Transfer	$_______________.__
2.	Per Ton Price for each ton in excess of 18,000 tons per Month	$________.____
3.	Per Ton Price for each ton of source separated yard debris/wood	$________.____
4.	Per Ton Price for each ton of source separated clean dry wall	$________.____
5.	Per Ton Price for each ton of source separated asphalt roofing material	$________.____
6.	Per Ton Price for each ton of source separated organics	$________.____
7.	Contractor's Recovery Guarantee	_____%
8.	Fixed Annual Payment for Waste Recovery	**<u>$344,556</u>**

<u>Items for Both Stations</u>

1.	Per Ton Bonus Recovery Credit	$________.____
2.	Percentage of CPI proposed (cannot exceed 75%)	_____%

<u>Other Payments</u>

A.	Per Ton Compaction Bonus	$ 8.01
B.	Per Ton Compaction Deduction	$16.02
C.	Per Load Overload Adjustment	$19.58
D.	Per Ton Recovery Credit/(Disposal Cost Reimbursement)	$33.78

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011304C-10

MEMORANDUM

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232 2736
TEL 503 797 1700 | FAX 503 797 1797

METRO

TO: Metro Council

DATE: January 13, 2004

FROM: Michael Hoglund, Director, Solid Waste & Recycling Department

RE: BFI Contract Extension

BFI submitted a document to Metro titled "Benefits of Transfer Station Contract Extension for Metro and BFI" (attached). The company organized its arguments in support of an extension around four themes: 1) RSWMP; 2) Competitive and stable pricing; 3) Operational improvements; and 4) Customer service standards.

Below is a summary of arguments in the BFI document followed by staff responses.

Regional Solid Waste Management Plan (RSWMP)
BFI: The RSWMP planning period creates uncertainties lasting several years. A contract extension would allow Metro the highest degree of operational consistency during the RSWMP update process, and highest degree of flexibility after the process is complete.

Staff: The RSWMP update is scheduled for completion in mid-2005. The transfer stations RFP process will conclude this spring. There are uncertain outcomes associated with each project. These are perhaps overstated at times by BFI.

Competitive and Stable Pricing
BFI: Competitive and stable pricing will continue under an extension, and Metro will avoid the uncertainties of litigation or cost problems that are likely to occur in the award of a new operations contract.

Staff: Whether costs negotiated under an extension would be competitive with a RFP process is unknown. Only by going through the RFP process will comparative costs be known.

BFI is correct that an appeal from one or more unsuccessful proposers will increase costs to Metro. Conducting the RFP process as a whole is more costly than an extension in terms of staff resources. The Office of the Metro Attorney has indicated an appeal of the award is a reasonable assumption.

Operational Improvements

BFI: A new operator (or two) would have a steep learning curve, and inefficiencies will result from this. BFI is experienced, and ready to immediately make the necessary investments in replacement equipment and in implementing aggressive waste prevention programs.

Staff: Staff acknowledges there are uncertainties associated with having a new operator.

BFI offers few details about its plans to invest in recovery-related equipment or to implement aggressive waste prevention programs. It's difficult, therefore, to comment on cost-effectiveness. New equipment would presumably reduce Metro's share of maintenance costs. BFI has an opportunity in the procurement process to propose the operational improvements it refers to.

In the event of an extension, waste prevention and other sustainability measures could be negotiated as conditions of an extension. However, the benefits could be less than might be gained through the procurement process.

Customer Service Standards at Public Facilities

BFI: Metro and BFI have built a trustworthy partnership over the years, which serve customers as well as Metro's long-term interests. Metro has had problems with other transfer station operators, but BFI has continuously met the needs of Metro and its customers.

Staff: BFI's performance and experience in providing customer service is acknowledged. In the procurement process such experience will be evaluated among all potential proposers.

In sum, Metro staff will be looking for Council direction at the January 27th work session as to the issue of a potential contract extension. Staff is available to answer Council questions and provide more analysis, as necessary.

MH:sm
Attachment
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BENEFITS OF TRANSFER STATION CONTRACT EXTENSION
FOR METRO AND BFI
December 10, 2003

Regional Solid Waste Management Plan (RSWMP)

- Plan update has just started and is expected to take two-years to complete. This schedule is very aggressive and may be overly optimistic given the various stages the planning process will have pass before completion.

  It is advantageous for Metro to be able to maintain a consistent level of service and costs at its transfer stations during this regional planning process that will take several years to complete. A system in flux will only complicate the work of planners updating RSWMP and very likely could result in added costs and other unintended consequences.

- Operational continuity, with flexibility, allows planners to test various operation methods and recovery programs at Metro's transfer stations.

  It is advantageous for Metro to be able to test planning options with an operator the agency is satisfied performs at or above Metro's standards. BFI's expertise and understanding of the issues related to increased recovery at the facilities is a valuable resource to Metro during the RSWMP planning process.

- Implementation of an operational revision in RSWMP can be easily accomplished with an experienced operator.

  It is advantageous for Metro to be able to act on a revised RSWMP when it is completed, no matter what the decision may be; i.e., no change from current system, sell, close, lease, etc. This could be very difficult to accomplish with a new operator that may have the expectation that the operation contract will last at least three years, or more probably five years. BFI remains flexible in its operations and will do the same with its financing, related to an extension to accommodate the outcome of the RSWMP update.

  Delay in implementing changes in the updated RSWMP could be costly – organic recovery, mandatory MRFing of material, etc. This will not occur with an experienced operator.

- There is at least one future application from a private business to operate a material recovery facility and local transfer station, which will pull significant tonnage away from Metro facilities. There is no clear time frame for when this application will be delivered to Metro or what the approval of the application will bring.

  This unknown level of inbound tonnage makes an RFP bid uncertain and risky. This unstable environment can lead to unintended consequences and possible default on a new contract.

Competitive And Stable Pricing

- BFI is confident that it can operate the facilities with a competitive and stable cost structure and rate. The history of our company's relationship with Metro demonstrates our ability and commitment to do this.

  Metro staff has indicated several sustainability policies to be included in a new contract, several of which will impact the cost of operation. BFI is prepared to discuss these policies and related implementation strategies with Metro staff so that fair and reasonable rate adjustments can be made.

- Metro will know what it should cost to extend BFI's transfer station contract. The Solid Waste and Recycling Department is now developing a "cost model" for its transfer stations. The cost data developed from this project should be available by late December 2003, in time for use in contract extension discussions between Metro and BFI.

- Cost problems can occur with a new operator. No matter how a prospective vendor considers the conditions stated in a proposal, there is always the potential for a bidder to "under price" the services expected by Metro.

  It is advantageous for Metro to be satisfied with the operator of its transfer stations at all times, but especially during the RSWMP update. It will be very difficult for Metro to maintain ratepayer satisfaction if Metro and the operator have a different view on what is to be done for the price Metro is willing to pay the operator. This is not speculation, it has happened to Metro in the past.

- Extending BFI's current operation contract will enable Metro to avoid costly and time-consuming litigation resulting from unsuccessful companies protesting the award of a new operation contract. This appeal process will be very disruptive at Metro.

Operational Improvements

- BFI will spend the necessary resources for replacement equipment as soon as the contract is extended. This equipment will be spec'd appropriately and dedicated to increase recovery efforts at the facilities as well as contribute to recommended sustainability policies.

  It is advantageous for Metro for the current operator to immediately purchase equipment rather than allow more than a year for new equipment to be used at the transfer stations. New equipment will reduce escalating replacement and maintenance costs and will help boost recovery.

- BFI intends to implement an aggressive waste prevention and reuse educational program at the facilities. These programs may require minor capital investment and will be targeted at educating and engaging the public in Metro's waste prevention programs.

- A new operator, or possibly two new operators, will have a very steep learning curve. It will not matter whether a new operator(s) starts work with the best of intentions, and in an open and honest fashion, there will be inefficiencies during the RSWMP update. This will not be a problem if BFI continues to operate the transfer stations since the company is experienced with Metro's operation and with Metro's customer service expectations.

Customer Service Standards At Public Facilities

- Customer service to the public and Metro is the number one priority of BFI. Metro has had its share of problems in dealing with transfer station operators, from theft to indifferent service, to lack of effort toward material recovery.

  It is advantageous for Metro to retain the trustworthy relationship of BFI. This allows Metro to focus on the long-term RSWMP update with the assurance that their interests are being protected at its facilities. In addition, BFI views its current relationship with Metro as a partnership, which is why the company continuously makes changes in its operation to meet the needs of Metro and the use of the facilities.

- BFI is familiar with Metro's culture and commitment towards serving public self-haul and commercial haulers. We treat them a valued customers with the understanding that tons delivered to Metro's transfer stations by them can go elsewhere.

  It is advantageous for Metro to have such an operator since the operator can operate effectively and efficiently in a situation when it appears there may be uncertainty at Metro about the agency's goals and objectives.