

A G E N D A

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METRO

Agenda

MEETING: METRO COUNCIL WORK SESSION MEETING
DATE: March 15, 2005
DAY: Tuesday
TIME: 2:00 PM
PLACE: Metro Council Chamber

CALL TO ORDER AND ROLL CALL

- | | | |
|----------------|---|--------------------|
| 2:00 PM | 1. DISCUSSION OF AGENDA FOR COUNCIL REGULAR MEETING, MARCH 17, 2005/ ADMINISTRATIVE/CHIEF OPERATING OFFICER AND CITIZEN COMMUNICATIONS | |
| 2:15 PM | 2. IMPACTS OF FY 2004-05 BUDGET CUTS | Vecchio |
| 2:45 PM | 3. REGIONAL TRANSPORTATION OPTIONS PROGRAM REVIEW | Peck/Barber |
| 3:05 PM | 4. BREAK | |
| 3:10 PM | 5. POLICY ISSUES IN THE FUNCTIONAL PLAN AND FRAMEWORK PLAN AMENDMENTS FOR THE NATURE IN THE NEIGHBORHOODS PROGRAM | Deffebach |
| 3:40 PM | 6. TRANSPORTATION PRIORITIES FUNDING AND PROJECT SELECTION | Leybold |
| 4:00 PM | 7. COUNCIL BRIEFINGS/COMMUNICATION | |

ADJOURN

IMPACTS OF FY 2004-05 BUDGET CUTS

Metro Council Work Session
Tuesday, March 15, 2005
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: March 15, 2005 Time: 2:15 PM Length: 30 minutes

Presentation Title: Impact of FY 04-05 Zoo Budget Cuts

Department: Oregon Zoo

Presenters: Tony Vecchio

ISSUE & BACKGROUND

The primary focus in preparing the FY 2004-2005 budget was to present a balanced budget with minimum impact to the Zoo's mission by preserving critical conservation and education programs and maintaining superior guest experiences. The Zoo was unable to provide status quo services and programs in FY 2004-2005. To address the budget shortfall, the Zoo enhanced revenues and examined expenses, including cutting programs, and ultimately reducing staff.

Revenue Increases

The FY 2004-2005 budget included the replacement of "Free Tuesday" with "\$2 Tuesday". "Free Tuesday" had resulted in safety issues for the visitors on grounds, parking issues, and significant traffic issues resulting in complaints from ODOT due to congestion impacting downtown traffic throughout the afternoon and evening. The Zoo recognized the significant financial pressure due to extra staffing for gate and security staff accompanied by the missed revenue opportunities, especially during the summer months, where tourists make up a large portion of the visitors. "\$2 Tuesday" was implemented in August 2004. The impact on social service agencies has been mitigated through complimentary Zoo admission passes for those groups who cannot otherwise afford to come to the Zoo.

Expenditure Decreases

Center for Species Survival (CSS)

The Center for Species Survival (CSS) was conceived out of a mandate by American Zoo and Aquarium Association. Its original intent was to be a refuge for breeding endangered, exotic animals. We achieved great success in these endeavors, to the point where now many of our endangered species are on contraception. While captive breeding is still one tool, our main contribution to conservation has become much more involved in saving local endangered species such as Washington pygmy rabbits, western pond turtles, Oregon spotted frogs, Oregon silverspot butterflies and California condors. These local conservation projects have become larger and broader and have taken precedent over saving exotic species.

Insect Zoo

The Insect Zoo was a former security shack that was converted almost twenty years ago. Every year more and more money was spent on patching up the old building. Ultimately, the decision was made that the money to repair the Insect Zoo could be better spent elsewhere. The temporary labor expenditure for Insect Zoo programming was eliminated

in FY 04-05, for a savings of \$20,925. The Zoo continues to utilize the insects as part of its extensive on-grounds and outreach education programs.

No Merit Raises for Non-Represented Staff

Zoo non-represented staff are not eligible for merit pay raises during FY 2004-2005. Savings for the Zoo totals \$106,917 for the year.

Night Keepers

Night Keepers were changed to day shifts beginning in the summer of 2004. The change involved switching the night keepers to days and implementing staggered shifts for longer coverage. In December, temporary staff provided additional coverage for the later activity of Zoolights. Zoo emergency response protocol was modified. Night security staff continues to make rounds and check animal areas.

Zoo Doo Bins

Prior to FY 04-05, the Zoo was paying \$22,000 per year to have animal waste hauled away by a company that composted it and then sold it. The Zoo terminated the hauling contract and entered into an arrangement with Best Buy Landscape to pick up the manure for free and deliver it to their customers. Because the Zoo was required to load the trucks, labor cost was incurred (averaging two hours per week). Additionally, the Zoo was required to buy the composted product back for use in the Zoo's gardens.

Last year the ENACT Committee contributed \$10,000 toward a compost bin structure which allows the Zoo to compost the waste on grounds for use in the gardens. The total project cost of \$50,000 will pay off in less than two years when considering the savings of \$22,000 per year in hauling plus the cost of purchasing compost for our beds (roughly \$5,000 to \$10,000 per year). There is additional savings on watering costs as composted planting beds retain water better for the plants.

OPTIONS AVAILABLE

IMPLICATIONS AND SUGGESTIONS

QUESTION(S) PRESENTED FOR CONSIDERATION

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

SCHEDULE FOR WORK SESSION

Department Director/Head Approval _____

Chief Operating Officer Approval _____

Agenda Item Number 3.0

REGIONAL TRANSPORTATION OPTIONS PROGRAM REVIEW

Metro Council Work Session
Tuesday, March 15, 2005
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: March 15, 2005 Time: 2:45 Length: 20 minutes

Presentation Title: Regional Travel Options Program Review

Department: Planning

Presenters: Pam Peck and Bill Barber

ISSUE & BACKGROUND

The Regional Travel Options Program is the region's transportation demand management (TDM) strategy for reducing reliance on the automobile. The program has been funded for nearly 20 years, and has grown to include a variety of regional partners and outreach programs. The Metro Council approved a new strategic plan for the RTO program in 2004, shifting the lead role for managing the program from TriMet to Metro. The updated program places a major emphasis on individual marketing, and will be augmented by a recently funded state TDM program. Most of the RTO program activities are carried out by public agency partners or consultant contracts, administered by Metro. The key components of the RTO program are:

- **A collaborative marketing 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 campaign is being developed in partnership with ODOT under Metro's management and will connect to a statewide marketing and message delivery campaign to increase awareness of travel options. The campaign will support the projects and messages currently being implemented by program partners.
- **The Rideshare program** includes both vanpool and carpool programs. In the next three years the program will be developed into a bi-state program. A regional rideshare market analysis will be conducted in 2005 to identify the most promising target areas for vanpool and carpool programs. The market analysis will cover an extended geographic area outside the UGB, recognizing that the commute travel shed for the Portland area reaches a radius of 50 miles or more from the central city.
- **Transportation Management Associations** are important private/public partnership tools that can be used effectively in the Central City, Regional Centers, Industrial Areas, and some Town Centers. TMAs work to 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.
- **The Region 2040 Program** is a grant program currently administered by TriMet with oversight by the RTO subcommittee of TPAC. Program management is expected to transition to Metro in April 2005. The grant funds are allocated annually and fund transportation demand management services and programs. 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.

The Collaborative Marketing program was established as a Metro responsibility as a result of the RTO Strategic Plan. Administrative responsibilities for the other program components described above will shift to Metro during 2005.

The RTO program reports annually to TPAC, JPACT and Metro Council. The report will be distributed at the work session in CD format, along with a brief memorandum describing report highlights.

Funding commitments in place over time for the RTO program include creation of a Program Manager position at Metro that was recently approved by Council through a budget amendment. 2008/09 funding for the RTO program is now being decided in the MTIP process, and two funding options have been brought forward by TPAC. One funding option would cut \$500,000 from the RTO program.

OPTIONS AVAILABLE

Metro staff recommended an RTO program budget of \$4.1 million over a two-year period, with the potential add-back of a \$500,000 Travel Smart project. One TPAC option includes the \$4.1 million RTO program budget but drops the \$500,000 Travel Smart project. The other TPAC option cuts \$500,000 from the RTO budget, cutting the program to \$3.6 million over a two-year period.

IMPLICATIONS AND SUGGESTIONS

Metro staff recommends not cutting the RTO program. If \$500,000 were cut from the 06-09 MTIP, Metro staff would recommend to the RTO subcommittee that the first programs to be cut would be Region 2040 initiatives, the Regional TMA program, and the Wilsonville SMART TDM program. These cuts would hurt innovative programs funded through RTO Region 2040 Initiatives. The latter has funded programs such as carpoolmatchNW, the WTA "carefree commute challenge" and a proposed light rail shuttle in the Clackamas Regional Center.

QUESTION(S) PRESENTED FOR CONSIDERATION

Metro is now responsible for the RTO Program.

1. How can the program be moved out of direct competition in the MTIP process with jurisdictional roadway capacity projects?
2. What can be done to improve RTO Program competitiveness for scarce regional transportation funds?

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 _____

M E M O R A N D U M

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METRO

DATE: March 8, 2005
TO: Metro Council
FROM: Pam Peck and Bill Barber, Regional Travel Options Program
SUBJECT: **Regional Travel Options 2003 Program Evaluation Report**

* * * * *

The Regional Travel Options 2003 Program Evaluation Report will be circulated at the Council work session on March 15, 2005 in a CD format, along with a short paper summary of the annual report highlights. The Program Evaluation Report includes the following:

- implementation of the RTO 5-Year Strategic Plan,
- regional employee commute options survey results,
- recommendations for marketing campaign development,
- a detailed travel options market analysis pilot for the Beaverton Regional Center, and
- Centers profiles for the Central City, Regional Centers, Industrial Areas and selected Town Centers.

The CD version also includes the appendix to the Program Evaluation Report, including descriptions of the Region 2040 Initiatives Program, the DEQ Information Clearinghouse, the TriMet Core TDM Program, the SMART TDM Program, and the Transportation Management Associations. Releasing the report on CD rather than paper copies resulted in cost savings of around \$2,500. The report is also available on Metro's web site.

After many years of implementing transportation demand management programs in the Portland region – and in response to changing travel behaviors – the partner agencies participating in those programs seized the opportunity to restructure programs to focus on implementing a new approach to changing travel behavior. Partner agencies are Metro, TriMet, SMART, C-TRAN, Oregon Department of Environmental Quality, Oregon Department of Transportation, Oregon Office of Energy, Port of Portland, Cities of Portland and Gresham, and Clackamas, Multnomah and Washington Counties.

The subsequent restructuring of TDM programs has resulted in the newly envisioned Regional Travel Options (RTO) program that will provide travel options to the residents of the region. Regional travel options include all of the alternatives to driving alone – carpooling, vanpooling, riding transit, bicycling, walking and telecommuting.

Regional Travel Options Program 2003 Evaluation Report Highlights

Regional Travel Options (RTO) 5-Year Strategic Plan

Goal 1 in the plan is to develop a collaborative marketing campaign that is an “umbrella” for all travel options programs being implemented throughout the region. RTO primarily is a marketing program for the millions of dollars worth of infrastructure investments made throughout the region. In order to reduce drive-alone trips, people must know that convenient, safe and consistent options exist. The goal is to work directly with people to find the best option for them for any number of trips they make throughout the day.

Regional Employee Commute Options Survey Results

Non-drive-alone trips to work have increased from 26 percent in 1996 to 31 percent in 2003 representing a five-percentage point increase in alternative transportation modes.

Recommendations for Marketing Campaign Development

The marketing campaign will be developed based on the research conducted in 2004. The campaign likely will use both traditional mass media marketing strategies such as billboard and radio advertising, and outreach strategies aimed at individuals and targeted groups such as employer and school programs and “TravelSmart” programs.

Travel Options Market Analysis Pilot: Beaverton Regional Center

To prepare for the marketing campaign, a pilot travel options market analysis was conducted for the Beaverton regional center. This information is intended to assist in the development of focused, individualized marketing campaigns for each center in the metro region.

Beaverton Regional Center characteristics

- Work related travel generates 30,000 trips – nearly one-third (31 percent) of all trips for the regional center.
- The RTO program partners have worked with 25 percent (2,000) of all employees in the Beaverton regional center representing 4 percent (20) of the employment sites.
- By working with approximately 15 more employment sites (3 percent), RTO will reach approximately 2,600 more employees.
- Non-participating small employment sites make up 93 percent and they employ 42 percent of all employees. A cost-effective program needs to be developed for these sites.
- Non-drive alone trend line increased from 14% in 1998 to 19% in 2003
- Other purpose trips (for example, shopping) generate 59 percent of all trips in the regional center, 33,000 trips were made driving alone.

There currently is no mechanism for monitoring non-work-related trips. We know from Metro’s original travel behavior study (1994-1995) and current forecasting that non-work travel represent a high percentage of drive-alone trips in the region and in the BRC

Centers Profiles

In most centers, there is a small percentage of employers affected by the ECO rules; however, employers that comply with those rules through the implementation of RTO programs are successful at reducing drive-alone trips. There is tremendous potential in most centers to reach those employers (both large and small) that are not currently implementing RTO programs.

Lloyd Center (Central City) characteristics

- Other purpose trips (for example, shopping) generate 49 percent of all trips for the Lloyd District; less than half of these were made driving alone.
- Work-related travel generates 42 percent of all trips; a large majority of these trips were made driving alone.
- ECO employers currently are achieving a non-SOV mode split of 54 percent, which exceeds the 2040 non-SOV modal targets.

Clackamas Regional Center characteristics

- Other purpose trips generate 62 percent of all trips for the Clackamas regional center; about half are made driving alone.
- Work-related travel generates 24 percent of all trips; a large majority are made driving alone.
- ECO employers currently are achieving a non-SOV mode split of 14.1 percent, well below the 2040 non-SOV modal targets.

Regional Travel Options Program Components

Region 2040 Initiatives program (\$219,625)

- CarpoolMatchNW.org (\$116,000) - seeks to reduce 70,000 metric tons of CO2 during the next 10 years; number of people actively seeking a carpool reached 2,700.
- Interstate Corridor Marketing Materials Project (\$20,000) - produced a walking map and campaign to choose walking for short trips
- Swan Island Transportation Management Association Get On Board (\$25,000) - provided information to Swan Island commuters about expanded transportation options and help facilitate growth and success of Swan Island
- TravelSmart pilot project (\$75,000 funded in 2002; results completed in 2003) - increases in walking, bicycling and transit with decrease in SOV in SW Portland area
- WTA Car Free and Carefree Commuter Challenge (\$25,000) - 67 employers representing 57,226 employees participated; 318,000 VMT reduction during 2-week event
- Flexcar: Lloyd District Passport Plus (\$16,000) - 164% increase in total hours of Flexcar use per day (7.2 hours to 19 hours); 98% increase in per vehicle use since July 1, 2003
- Gresham Regional Center Transportation Management Association wayfinding (\$8,125) - pedestrian information and wayfinding program with emphasis on historic downtown
- Washington County bike suitability map (\$9,500) - produced 10,000 maps that can be read by colorblind individuals.

DEQ Information Clearinghouse (\$47,000)

The Employee Commute Options rules affect employers in the metro region with more than 50 employees reporting to a single work site. ECO statistics include the following:

- ECO-affected employers in the Portland metro region = 1142
- ECO-affected employers with baseline surveys = 936
- ECO-affected employers who have met the 10 percent trip reduction target or other compliance option = 585
- ECO is getting 86 percent of its trip reduction its 319 largest employers (those with more than 150 employees)
- Total annual VMT reduction: 40,434,493
- Annual VMT reduction from employers with more than 200 employees: 34,726,477

TriMet Core TDM Management Program (\$700,000)

Employer Outreach - In December 2003, there were 580 employers participating in alternative mode programs marketed by TriMet. This includes more than one-third of all ECO-affected employers, along with 271 employers with 50 or fewer employees. In total, more than 143,000 employees benefit from TriMet's employer programs. While this represents solid market penetration and results in significant impacts, there still is tremendous market potential for reducing SOV through employers, particularly in regional centers. Annual VMT reduction of 36,000,000 exceeded plan by 3.7 million VMT.

Regional Vanpool - TriMet currently operates six vanpool shuttles and two traditional vanpools. C-TRAN operates 10 vanpools, including nine traditional vanpools and one shuttle. C-TRAN 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. Primary activity was development of a strategy for the Vanpool Program.

Wilsonville SMART Options (\$55,000)

South Metro Area Rapid Transit (SMART) is operated by the city of Wilsonville and provides five fixed routes with connections to TriMet in Portland, Cherriots in Salem and CAT in Canby. In January 2002, SMART added a transportation demand management program (SMART Options) to work directly with employers to help them set up programs to reduce the number of automobile trips made by their employees and to assist them in complying with the ECO rule. As a regional employment center providing approximately 16,000 jobs, Wilsonville is a vital target for trip reduction efforts.

Transportation Management Associations (\$150,000)

Transportation management associations are nonprofit coalitions of local businesses and/or public agencies dedicated to reducing traffic congestion and pollution and improving commuting options for their employees. The existing TMAs have helped achieve regional transportation goals by reducing single-occupancy vehicle trips in local areas. The TMAs also help achieve regional growth management goals of improved economic development by helping break congestion barriers to doing business. A total of \$150,000 in regional TMA funding was allocated in 2003. Existing TMAs include the Clackamas Regional Center (second year of operation), Gresham Regional Center (third year of operation), Western Transportation Alliance, Lloyd District and Swan Island - regional assistance to maintain existing TMAs.

***NATURE IN THE NEIGHBORHOODS ORDINANCE
REVIEW***

Metro Council Work Session
Tuesday, March 15, 2005
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: 3/15/05

Time:

Length:

Presentation Title: Policy issues in the Functional Plan and Framework Plan Amendments for the Nature in the Neighborhoods Program

Department: Planning

Presenters: Deffebach, Ketcham, Garrahan

ISSUE & BACKGROUND

In December, Council approved a Resolution, supported by MPAC, which directed staff to develop a Fish and Wildlife Habitat Program to reflect the following basic principles:

- Focus the regulatory element of the program on Class I and II Riparian Habitat;
- Develop a strong voluntary, incentive based approach to protect and restore Class III Riparian, and Class A, B and C upland habitat;
- Apply a regulatory element that limits development on Class I, II III Riparian and Class A and B Upland Habitat, in future additions to the Urban Growth Boundary; and

The Council directed staff to develop a program that relies on the use of voluntary actions to protect and restore habitat areas and specifically stated the Council's intention to seek voter approval of a bond measure to support fish and wildlife habitat acquisition and restoration. Other key elements of the program include expanding education and awareness of the value of habitat areas and increasing the capacity for restoration projects in the region.

In response to Council's direction from this and other resolutions, staff has developed a proposal for a Nature in the Neighborhoods Program that describes the implementation actions that Metro and others can take to support habitat conservation and restoration. Part of this proposal includes an amendment to the Urban Growth Management Functional Plan that would require cities and counties to ensure that their comprehensive plans substantially comply with the functional plan, which is based on Metro's habitat area maps and includes new development standards for Class I and II riparian habitat areas.

The proposed language for the Functional Plan calls for:

- Requiring cities and counties to allow the use of habitat friendly development practices in Class I and II areas, and
- Requiring cities and counties to avoid, minimize and mitigate for development in the Class I and II riparian habitat, based on the priorities established by Council for habitat areas.

Beginning in January, staff has been soliciting comments on draft versions of this proposal from Metro's technical and policy committees and others who have been interested in following the process. These discussions have raised both technical and policy issues.

At this work session, staff seeks to continue the discussion from the previous work sessions on the top policy issues. Council direction will help staff finalize the staff recommendation for release to the public for comment in April, 2005.

OPTIONS AVAILABLE

A separate memo outlines policy issues and an initial list of options available. These key policy issues for discussion include:

1. Do the proposed standards impose the appropriate regional requirements?
2. Should habitat-friendly development practices be required, where practicable, or should cities and counties simply be required to *allow* the practices?
3. What level of protection, or "floor" should be applied to new UGB expansion areas, and should the rules that apply there be spelled out explicitly at this time, or left to be developed at the time a new expansion is approved?
4. Is the Council willing to accept lower residential densities than established in Title 1 and agree to a more "automatic" and less rigorous review process than offered in Title 8 for the reduction?
5. Is it realistic to consider new regulations in a post-Measure 37 era and how much can Functional Plan language be used to help avoid claims?
6. Role of performance standards in setting vision/goals for the region and in linking to responsible actions and implications for ongoing monitoring?
7. Value of tree protection standards outside of development review process to protect trees in Class I and II areas, with exceptions for developed SFR?
8. Map verification process, including verification for urban development values (and the policy issues of the major institutions)
9. How best to motivate creativity in city and county compliance yet assure certainty and consistency?
10. How best to motivate and inspire voluntary activity among the region's governments, agencies, non-profits, business and individuals?
11. What is a reasonable, timely and consistent compliance timeline?
12. Should the program be submitted for meeting Goal 6 Water Quality and Goal 7 Hazards in addition to Goal 5?
13. What sites are similarly situated to the International Terminal Site?

IMPLICATIONS AND SUGGESTIONS

Council direction would be helpful in developing the staff (COO) recommendation.

QUESTION(S) PRESENTED FOR CONSIDERATION

On a variety of policy issues, how would you like to proceed? Questions are included in the separate memo.

LEGISLATION WOULD BE REQUIRED FOR COUNCIL ACTION __Yes __x__No
DRAFT IS ATTACHED __Yes x__No

SCHEDULE FOR WORK SESSION

Department Director/Head Approval _____

Chief Operating Officer Approval _____

Agenda Item Number 6.0

TRANSPORTATION PRIORITIES FUNDING AND PROJECT SELECTION

Metro Council Work Session
Tuesday, March 15, 2005
Metro Council Chamber

METRO COUNCIL

Work Session Worksheet

Presentation Date: March 15, 2005
minutes

Time:

Length: 30

Presentation Title: Transportation Priorities funding and project selection

Department: Planning

Presenters: Andy Cotugno, Ted Leybold

ISSUE & BACKGROUND

JPACT and the Metro Council will be selecting projects to be prioritized for funding in the Metropolitan Transportation Improvement Program (MTIP) on March 17 and March 24 respectively. The Council has been previously consulted on adoption of policy direction for the program and briefed on the technical recommendations for proposed funding of projects to implement the adopted policies.

Metro staff recommended to the Transportation Policy Advisory Committee (TPAC) a base package of projects and program funding, representing approximately 85% of expected funding, that it judged most clearly met the policy direction of JPACT and the Metro Council. Staff also recommended a list of other project and program options for funding consideration that met the policy objectives but not as distinctly as the "base package" list. From this recommendation, TPAC developed two project list options that fully allocate expected funds for JPACT and Metro Council consideration.

TPAC's recommended Option A includes the base package list of projects and added funding to several projects in the pedestrian, transit, bike and TOD modal categories. Option B reduced funding from the Transit Oriented Development and Regional Travel Options programs and Trolley Trail project in the base package, and added funding to projects in the planning, bike, transit, road capacity, road reconstruction, and large bridge modal categories.

OPTIONS AVAILABLE

Provide communication to Metro Council JPACT members on the following issues that have arisen as discussion items regarding the TPAC recommendation. Potential discussion items include:

1. General approach regarding JPACT discussion of the Metro Staff recommended base package of projects and program funding.
2. General approach regarding JPACT discussion of an approach to adding project and program funding beyond the base package recommendation (any policy or project emphasis).

3. Any specific project or program consideration. Significant differences between the two TPAC recommended options and items that have been identified by jurisdictional partners include:

- A. Option B recommends funding for the Metro sponsored Interactive Bike Map and bike model upgrade.
- B. Options A includes full funding for the Marine Drive bike lane and trail gaps project as that project did not received hoped for state funding.
- C. Option A includes funding for segments 5 and 6 of the Trolley Trail project between Milwaukie and Gladstone. The right-of-way for this project is under consideration for the possible location of a sewer trunk line should their be a consolidation of sewer districts in Clackamas County and the consolidated district decide to relocate plant treatment capacity away from the Milwaukie riverfront.
- D. Option A includes partial funding for the Rockwood pedestrian crossing and plaza improvements and funding of preliminary engineering of the Capitol Highway pedestrian project.
- E. Option B reduces funding of the Regional Travel Options program by \$500,000 from the base package. This reduction would likely result in a reduction of support for Transportation Management Associations throughout the region (non-profit organizations that implement programs to reduce single occupant vehicle travel to/within their areas) and potentially eliminate the 2040 Initiatives program that grants money to small capital projects within centers and industrial areas.
- F. Option B reallocates \$500,000 in funding from the regional TOD program (TOD projects focused on rail and high capacity bus stations) to the TOD urban centers program and does not provide funding to the Gateway TOD project.
- G. Option A provides a \$1,000,000 contribution to the construction of an Eastside Streetcar project.
- H. Option B provides funding to fully address the increase in costs (\$1.8 million) of the N. Ledbetter extension project discovered subsequent to an application for state funding rather than half of the cost increase provided in Option A.
- I. Option B provides planning and project development work for the Beaverton-Hillsdale/Scholls Ferry/Oleson Road intersection realignment project, right-of-way and a contribution towards construction of the SE 172nd Avenue widening project, and funding for the reconstruction of Cleveland Avenue in Gresham.
- J. Option A provides \$1.5 million and Option B provides \$2.0 million toward environmental analysis and preliminary engineering of the Sellwood Bridge. The objective of a contribution from regional flexible funds is to demonstrate a local commitment to the project adequate enough to leverage federal and state bridge funds to complete the project.

K. The Washington County transportation coordinating committee has requested that the 10th Avenue at Highway 8 intersections project in Cornelius be selected for funding through over-programming of funds.

IMPLICATIONS AND SUGGESTIONS

Metro Council communications to Metro Council JPACT members provides basis for JPACT member discussion items during JPACT deliberations.

QUESTION(S) PRESENTED FOR CONSIDERATION

None at this time.

**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 _____

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ALLOCATING \$62.2) RESOLUTION NO. 05-3529
MILLION OF TRANSPORTATION PRIORITIES)
FUNDING FOR THE YEARS 2008 AND 2009,) Introduced by Councilor Rex Burkholder
PENDING AIR QUALITY CONFORMITY)
DETERMINATION.)
)
)
)

WHEREAS, approximately \$62.2 million is forecast to be appropriated to the Metro region through the federal Surface Transportation Program (STP) and Congestion Mitigation – Air Quality (CMAQ) transportation grant programs, and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) are designated by federal legislation as authorized to allocate these funds to projects and programs in the metropolitan region through the Transportation Priorities process, and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) have provided policy guidance to Metro staff and the Transportation Policy Alternatives Committee (TPAC) on the type and balance of projects and programs that are a priority for these funds through Metro Resolution No 04-3431 For the Purpose of Adopting the Policy Direction, Program Objectives, Procedures and Criteria for the Priorities 2006-09 Metropolitan Transportation Improvement Program (MTIP) and Allocation of Regional Flexible Funds, adopted March 18, 2004 and further refined at the Metro Council work session of January 11, 2005, and the JPACT meeting of January 20, 2005, and

WHEREAS, Metro received approximately \$130 million in project and program applications, and

WHEREAS, those applications have been evaluated by technical criteria within one of twelve modal categories, by a summary of qualitative factors and by a summary of public comments, and

WHEREAS, an extensive public process has provided an opportunity for comments on the merit and potential impacts of the project and program applications between October 15th and December 6th, 2004 and at a public hearing before the Metro Council to respond to a staff and TPAC recommendation of proposed projects and programs to allocate funding, and

WHEREAS, TPAC has provided recommendations to JPACT and the Metro Council on a list of projects and programs to allocate funding in response to the policy direction provided, considering the technical evaluation, qualitative factors, and public comments provided as shown in the staff report Attachment 1, and

WHEREAS, a public hearing was conducted by JPACT and the Metro Council February 17th, 2005 to solicit comments on the TPAC recommendation, and

WHEREAS, JPACT took action on the TPAC recommendation March 17th, 2005, and

WHEREAS, receipt of these funds are conditioned on completion of requirements listed in staff report Attachment 5, and

WHEREAS, the recommended list of projects and programs, along with all of the projects and programs expected to receive federal funding in the 2006 through 2009 fiscal years was analyzed for conformity with the State Implementation Plan for air quality and adopted within the Metropolitan Transportation Implementation Plan (MTIP); now therefore

BE IT RESOLVED that the Metro Council adopt the recommendation of JPACT on the project and programs to be funded through the Transportation Priorities 2006-09 process as shown in staff report Attachment 1.

ADOPTED by the Metro Council this 24th day of March 2005

David Bragdon, Council President

Approved as to Form:

Daniel B. Cooper, Metro Attorney

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 05-3529, FOR THE PURPOSE OF ALLOCATING \$62.2 MILLION OF TRANSPORTATION PRIORITIES FUNDING FOR THE FEDERAL FISCAL YEARS 2008 AND 2009 PENDING AIR QUALITY CONFORMITY DETERMINATION.

Date: March 3, 2005

Prepared by: Ted Leybold

BACKGROUND

The Transportation Priorities 2006-09; Investing in the 2040 Growth Concept program allocates transportation funding to Metro area transportation agencies from two federal grant programs; the Surface Transportation and Congestion Mitigation/Air Quality programs. The Metro region is forecast to receive \$62.2 million from these sources in the federal fiscal years of 2008 and 2009. Previous allocations have identified projects and programs to receive funds during the fiscal years of 2006 and 2007.

Prior to the application process, an outreach process identified a general policy direction for the allocation of these funds. The primary objective of the program as adopted by the Metro Council is to leverage economic development through investments that support Region 2040 centers, industrial areas and urban growth boundary expansion areas that have completed concept plans. Other policy objectives include emphasizing modes that do not have other sources of dedicated revenue, completing gaps in modal systems and developing a multi-modal transportation system.

Metro expects to distribute approximately \$62.2 million in regional flexible funds during the Transportation Priorities process. Table 1 demonstrates the new funds forecast to be available for projects and programs.

Table 1: New Regional Flexible Funds Available for Programming

	2006	2007	2008	2009
STP			\$16,800,000	\$16,800,000
CMAQ			\$13,400,000	\$13,500,000
Interstate Transfer	\$1,728,000			
Total	\$1,728,000		\$30,200,000	\$30,300,000

More than 70 project and program applications were received requesting more than \$130 million. A technical ranking of projects was completed for the project applications within twelve modal categories. This technical analysis, along with qualitative considerations was used to inform a decision process to select a first cut of project and program applications for public comment. Public comments were received for all applications and the first cut list between October 15th and December 16th 2004.

Further policy direction was provided by the Metro Council and JPACT to direct staff on how to narrow the First Cut List to a draft staff recommended Final Cut List. The direction included honoring past commitments for these funds and continuing funding of Metro planning. The direction also included funding projects in all 2040 mixed-use and industrial land areas and emphasizing non-road or bridge projects in mixed-use areas to maximize development and multi-modal objectives. Finally, all projects

and programs were to be screened based on their relationship to the implementation of mixed-use and/or industrial area plans and development using the 2040 technical score and qualitative issues identified in project applications or through public comments.

Attached are the following updated Transportation Priorities 2006-2009 documents:

Attachment 1 summarizes the list of candidate applications recommended by Metro staff as best meeting program goals and objectives (a "base package" representing 85% of forecasted revenues) and the recommendations of TPAC of two options that fully allocate all forecasted revenues.

Attachment 2 is a summary of program policy goals and objectives and policy direction from Metro Council and JPACT to technical staff on how to narrow the First Cut List to a Final Cut List balanced against expected revenues.

Attachment 3 is an explanation of the TPAC Recommendations as it relates to the program policy goals and objectives.

Attachment 4 is a draft recommendation outlining the conditions to be met to allow obligation of Transportation Priorities funds for each project or program recommended for funding.

ANALYSIS/INFORMATION

1. **Known Opposition** None known at this time.
2. **Legal Antecedents** This resolution allocates transportation funds in accordance with the federal transportation authorizing legislation (currently known as the Transportation Equity Act for the 21st Century or TEA-21). The allocation process is intended to implement the Transportation Priorities 2006-09 program policies as defined by Metro Resolution No. 04-3431.
3. **Anticipated Effects** Adoption of this resolution would instigate an air quality conformity analysis of the effects of implementing these projects and programs for compliance with the State Implementation Plan for air quality.
4. **Budget Impacts** Adoption of the resolution would begin staff analysis of the air quality impacts of implementing the list of projects and programs as provided for in the Unified Work Program. Grant funds allocated to Metro planning require a match totaling 10.27% of project costs. Current options under consideration would include \$203,400 over the fiscal years 2008 and 2009. Metro would also negotiate with other transportation agencies for responsibility of a portion of \$419,200 of required local match for other regional planning activities over the course of the 2006 – 2009 time period.

RECOMMENDED ACTION

Approve the resolution as recommended.

Funding Recommendations

Transportation Priorities 2006-2009

Project code	Project name	Metro Staff Recommendation		TPAC Recommendation ³	
		Base package recommendation (millions of \$) ¹	Potential Adds ²	Option A funding amounts	Option B funding amounts
Planning					
PI0005	Regional Freight Planning: region wide	\$0.300		\$0.300	\$0.300
PI0001	MPO Required Planning: region wide	\$1.731		\$1.731	\$1.731
PI1003	Milwaukie LRT Supplemental EIS: Portland central city to Milwaukie town center	\$2.000		\$2.000	\$2.000
PI5053	Multi-Use Master Plans: Lake Oswego to Milwaukie, Tonquin Trail, Mt. Scott -Scouter's Loop	\$0.300		\$0.300	\$0.300
PI0002	Next Priority Corridor Study	\$0.500		\$0.500	\$0.500
PI1017	Willamette Shoreline - Hwy 43 Transit alternatives analysis: Portland South Waterfront to Lake Oswego	\$0.688		\$0.688	\$0.688
PI8000	Bike Model and Interactive Map: region wide		\$0.201		\$0.201
PI0004	Livable Streets Update: region wide		\$0.200		
Bike/Trail					
Bk1009	Springwater Trail-Sellwood Gap: SE 19th to SE Umatilla	\$1.629		\$1.629	\$1.629
BK4011	Marine Dr. Bike Lanes & Trail Gaps: 6th Ave. to 185th	\$0.966	\$0.685	\$1.651	\$0.966
Bk2055	Springwater Trailhead at Main City Park	\$0.310		\$0.310	\$0.310
Bk2052	MAX Multi-use Path: Cleveland Station to Ruby Junction	\$0.890		\$0.890	\$0.890
Bk5026	Trolley Trail: Arista to Glen Echo (Segments 5-6)	\$0.742		\$0.742	
Bk3012	Rock Creek Trail: Orchard Park to NW Wilkens	\$0.675		\$0.675	\$0.675
Bk3072	Powerline Trail (north): Schuepback Park to Burntwood Dr. (ROW)		\$0.600	\$0.600	\$0.600
Bk5110	Jennifer St:16th to 122nd		\$0.550		
Pedestrian					
Pd3163	Forest Grove Town Center Pedestrian Improvements	\$0.660		\$0.660	\$0.660
Pd5054	Milwaukie Town Center: Main/Harrison/21st	\$0.450		\$0.450	\$0.450
Pd2105	Rockwood Ped to MAX: 188th Avenue and Burnside		\$1.400	\$0.900	
Pd1227	Tacoma St: 6th to 21st		\$1.402		
Pd1202	SW Capitol Highway (PE): Multnomah to Taylors Ferry		\$0.538	\$0.538	

Funding Recommendations
Transportation Priorities
2006-2009

Project code	Project name	Metro Staff Recommendation		TPAC Recommendation ³	
		Base package recommendation (millions of \$) ¹	Potential Adds ²	Option A funding amounts	Option B funding amounts
Regional Travel Options					
n/a	Program management & administration	\$0.340		\$0.340	\$0.340
n/a	Regional marketing program	\$2.960		\$2.960	\$2.460
n/a	Regional evaluation	\$0.300		\$0.300	\$0.300
n/a	1 TravelSmart project	\$0.500		\$0.500	\$0.500
n/a	1 TravelSmart project		\$0.500		
Transit Oriented Development					
TD8005	Regional TOD LRT Station Area Program	\$3.000		\$3.000	\$2.500
TD0002	Regional TOD Urban Center Program	\$1.000	\$0.500	\$1.000	\$1.500
TD0003	Site acquisition: Beaverton regional center	\$2.000	\$1.000	\$2.650	\$2.000
TD0004	Gateway Transit Center Redevelopment		\$0.500	\$0.500	
Transit					
Tr1001	I-205 LRT, Commuter Rail, S Waterfront Streetcar	\$16.000		\$16.000	\$16.000
Tr1002	I-205 Supplemental	\$2.600		\$2.600	\$2.600
Tr8035	Frequent Bus Capital program	\$2.750		\$2.750	\$2.750
Tr1106	Eastside Streetcar (Con)		\$1.000	\$1.000	
Tr5126	South Metro Amtrak Station: Phase II		\$1.150	\$1.150	\$1.000
Road Capacity					
RC6014	SW Greenburg Road: Washington Square Dr. to Tiedeman	\$1.000		\$1.000	\$1.000
RC1184	Beaverton-Hillsdale Hwy/Oleson/Scholls Ferry intersection (PE)		\$1.411		\$1.000
RC7000	SE 172nd Ave: Phase I; Sunnyside to Hwy 212 (ROW + \$1.0m)		\$2.000		\$2.000
RC6127	Boones Ferry Road at Lanewood Street		\$1.400		
RC2110	Wood Village Blvd: Arata to Halsey		\$0.815		
Road Reconstruction					
RR1053	Naito Parkway: NW Davis to SW Market		\$3.840		
Fr3166	10th Avenue at Highway 8 intersections		\$0.837		
RR2035	Cleveland St: NE Stark to SE Powell		\$1.540		\$1.000

Funding Recommendations

Transportation Priorities 2006-2009

Project code	Project name	Metro Staff Recommendation		TPAC Recommendation ³	
		Base package recommendation (millions of \$) ¹	Potential Adds ²	Option A funding amounts	Option B funding amounts
Boulevard					
Bd3020	Rose Biggi extension: Crescent St. to Hall (PE)	\$0.580	\$1.140	\$0.580	\$0.580
Bd1051	Burnside Street: Bridge to E 14th (PE)	\$1.650		\$1.650	\$1.650
Bd1260	Killingsworth: N Commercial to NE MLK (PE)	\$0.400		\$0.400	\$0.400
Freight					
Fr4063	N Lombard: Slough over crossing	\$2.210		\$2.210	\$2.210
Fr3016	SW Tualatin-Sherwood Road ATMS: I-5 to Highway 99W	\$0.341		\$0.341	\$0.341
Fr4087	N Leadbetter Extension: N Bybee Lake Ct. to Marine Dr.	\$0.900	\$0.900	\$0.900	\$1.800
Fr6086	Kinsman Road extension: Barber to Boeckman	\$1.400		\$1.400	\$1.400
Fr8008	Freight Data Collection Infrastructure and Archive System: Approximately 50 interchanges region wide	\$0.179		\$0.179	\$0.179
Large Bridge					
RR1012	Sellwood Bridge Replacement: Type, Size & Location Study, Preliminary environmental	\$1.500	\$1.000	\$1.500	\$2.000
Green Streets					
GS1224	NE Cully Boulevard: Prescott to Killingsworth	\$2.457		\$2.457	\$2.457
GS2123	Beaver Creek Culverts: Troutdale, Cochran, Stark	\$1.000		\$1.000	\$1.000
Total		\$56.908	\$25.109	\$62.931	\$62.867

¹ Base Package: Project and program funding that best meet policy objectives and direction from a technical evaluation perspective.

² Potential Adds: Projects and program funding that meet policy objectives and direction, but not as definitively as the Base Package recommendation. Need policy-level determination of which projects/programs to include in the final funding package.

³ Options A & B: Transportation Policy Alternative Committee (TPAC) recommendation options for public comment and JPACT/Metro Council consideration.

: Reduction from Base Package recommendation

Transportation Priorities 2006-09 Policy Objectives

The primary policy objective for the Transportation Priorities 2006-09 program is to leverage economic development in priority 2040 land-use areas through investments that support:

2040 Tier I and II mixed-use areas (central city, regional centers, town centers, main streets and station communities)

2040 Tier I and II industrial areas (regionally significant industrial areas and industrial areas), and

2040 Tier I and II mixed-use and industrial areas within UGB expansion areas with completed concept plans

Other policy objectives include:

- emphasize modes that do not have other sources of revenue
- complete gaps in modal systems
- develop a multi-modal transportation system with a strong emphasis on funding bicycle, boulevard, freight, green street demonstration, pedestrian, regional transportation options, transit oriented development and transit projects and programs
- meet the average biennial requirements of the State Implementation Plan for air quality for the provision of pedestrian and bicycle facilities (5 miles of bicycle improvements and 1.5 miles of pedestrian improvements, independent of road/bridge capacity or reconstruction projects)

Implementation of Program Policy Objectives For Narrowing To Final Cut List

1. Support economic development in priority land use areas.

In addition to the quantitative technical summary, provide information in the staff report on how each project or modal category of projects addresses:

- link to retention and/or attraction of traded-sector jobs,
- transportation barrier to development in 2040 priority land use areas
- support of livability and attractiveness of the region.

2. Emphasize priority modal categories in the following manner:
 - A. Emphasize projects in the bicycle, boulevard, freight, green street demonstration, pedestrian, regional transportation options, transit oriented development and transit categories by:
 - proposing the top-ranked projects at clear break points in technical scoring in all of the emphasis categories (with limited consideration of qualitative issues and public comments).
 - B. Nominate projects in the road capacity, reconstruction or bridge categories when the project competes well within its modal category for 2040 land use technical score and over all technical score, and the project best addresses (relative to competing candidate projects) one or more of the following criteria:
 - project leverages traded-sector development in Tier I or II mixed-use and industrial areas;
 - funds are needed for project development and/or match to leverage large sources of discretionary funding from other sources;
 - the project provides new bike, pedestrian, transit or green street elements that would not otherwise be constructed without regional flexible funding (new elements that do not currently exist or elements beyond minimum design standards).
 - C. When considering nomination of applications to fund project development or match costs, address the following:
 - Strong potential to leverage discretionary (competitive) revenues.
 - Partnering agencies illustrate a financial strategy (not a commitment) to complete construction that does not rely on large, future allocations from Transportation Priorities funding.
 - Partnering agencies demonstrate how dedicated road or bridge revenues are used within their agencies on competing road or bridge priorities.
3. As a means of further emphasis on implementation of Green Street principles, the following measures should also be implemented:
 - Staff may propose conditional approval of project funding to further review of the feasibility of including green street elements, particularly interception and infiltration elements.
 - Strong consideration will be given to funding the Livable Streets Update application in the Planning category. This work would document the latest research and further the training and education of green street implementation in the region.

**Transportation Priorities 2006-09:
*Investing in the 2040 Growth Concept***

Explanation of Metro Staff Project/Program Recommendations

Following is a summary of the rationale used by Metro staff to implement the policy direction provided by JPACT and the Metro Council in developing a Final Cut List recommendation as shown in Attachment 2 to the staff report. The summary is organized by mode category.

Bike/Trail

- The top six technically ranked projects were nominated for inclusion in the final cut list base package. The fourth, fifth and sixth ranked projects had similar technical scores while there is a more pronounced break point between the sixth and seventh ranked project.
- The Marine Drive trail gaps project was initially reduced in recommended funding in the Base package by the amount that project was thought likely to receive through the state Transportation Enhancement (TE) funding program. Subsequent communication with the TE staff indicates the project is not likely to receive funding through that program. TPAC recommended this funding be restored in the Option A add package.
- The Trolley Trail project was reduced in recommended funding in the Base package by half to allow coordination with the area sewer districts for the potential use of the trail right-of-way for a sewer trunk line. Slowing the rate of funding for this project would allow better construction coordination and the potential for shared construction costs. The Option B package would eliminate all funding consideration for this project in this funding cycle.
- Right-of-way for the Powerline Trail from Schuepback Park to Burntwood Drive is included in the Option A package to help secure the undeveloped Mt. Williams property where the project is located prior to the expiration of a purchase option owned by a consortium seeking to secure the property for park and trail use.
- The projects included in the Base package will meet progress needed on air quality Transportation Control Measures of 5 miles per biennium. Option A proposed projects would provide 7.6 miles of new bicycle facilities. Option B proposed projects would provide a total of 5.5 miles of new bicycle facilities. However, the location of the 2.3 miles of MAX multi-use path project is located in the Gresham regional and Rockwood town centers and therefore is eligible to meet required pedestrian improvements. As proposed funding for the Pedestrian improvements may not meet air quality TCM requirements (further definition is needed for the Forest Grove Town Center project) a portion of the MAX path project may be needed to meet the pedestrian projects need.

Attachment 3

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the bicycle modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

- Address transportation barrier to development in 2040 priority land use areas

None of the projects in the bicycle/trail category remove or reduce a congestion barrier that is preventing development in a 2040 priority land use area. However, all of the projects, other than the Springwater Trailhead project, would provide an alternative mode option to priority land use areas that have or are forecast to have congestion.

- Support livability and attractiveness of the region.

The development of a regional bike system and bike access to 2040 priority land use areas contribute to the economic vitality of the region by increasing bike trips that do not require more land intensive and costly auto parking spaces in those areas where efficient use of land is most critical. The provision of a well-designed network of bicycle facilities also contributes to the overall livability and attractiveness to both companies and work force to locate in the region.

Emphasize modes that do not have other sources of revenue

On-street bicycle projects, outside of vehicle capacity or reconstruction projects that are required to build bike facilities, only have the dedicated funding of a state program that allocates approximately \$2.5 million per year to bicycle and pedestrian projects on state facilities. Off-street trails are one of several eligible project types that compete for statewide Transportation Enhancement grants of approximately \$4 million per year. Additionally, one percent of state highway trust fund monies passed through to local jurisdictions must be spent on the construction or maintenance of bicycle or pedestrian facilities.

Complete gaps in modal systems

The bicycle projects recommended for further consideration all complete gaps in the existing bicycle network. While the Springwater Trailhead project does not strictly complete a gap in the provision of a bike trail or lane, it does provide needed user facilities on the trail system that do not exist today.

Develop a multi-modal transportation system

This is a modal emphasis category for the Transportation Priorities program.

Meet the average annual requirements of the State air quality implementation plan

The bicycle and trail projects recommended for further consideration would provide 8.65 miles of a required 5 miles of new bicycle facilities for the two-year funding period. This

Attachment 3

assumes the MAX multi-use path project in Gresham would be applied to meeting requirements for the provision of pedestrian facilities and is included in the calculation of that category.

Boulevard

- The top three technically ranked projects were nominated for further consideration as there is a clear break point between the third and fourth ranked projects.
- As the Rose Biggi project is adjacent to the TOD acquisition site in Beaverton that is also recommended for funding, only preliminary engineering is recommended in the base package to reserve availability of resources for other areas of the region. PE is the minimum effort necessary to sustain momentum on the extension of the road north to Hall Boulevard.
- The Burnside Street project may receive a federal earmark that would complete PE funding for this project phase.
- Recommended funding for the Killingsworth project is reduced by the amount the project is likely to receive through the state Transportation Enhancement funding program. This recommendation may be revisited as the TE funding award process progresses. PE funding is recommended for the remaining segment between N Commercial and NE MLK Boulevard.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the boulevard modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs
The Boulevard projects recommended support the redevelopment of adjacent properties to higher-density mixed-uses. Office and commercial space in these mixed-use areas may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure.
- Address transportation barrier to development in 2040 priority land use areas
None of the projects in the boulevard category remove or reduce a congestion barrier that is preventing development in a 2040 priority land use area. However, all of the projects would enhance the trip end experience for users of alternative modes to access priority land use areas that have or are forecast to have congestion.
- Support livability and attractiveness of the region.
The recommended projects are a direct investment in priority 2040 mixed land use areas and support further economic development in those areas by providing the facilities and

Attachment 3

amenities necessary to support higher densities of development, a mix of land use types and higher percentage of trips by alternative modes and by enhancing land values in the vicinity of the project.

Emphasize modes that do not have other sources of revenue

While elements of Boulevard projects are eligible for different sources of transportation funding, they have no source of dedicated funding to strategically implement these types of improvements in priority 2040 land use areas.

Complete gaps in modal systems

The recommended projects add new or enhance existing pedestrian and some bike facilities to the regional network. The Rose Biggi project would construct a new collector level motor vehicle connection within a regional center to meet regional guidance on street connectivity.

Develop a multi-modal transportation system

This is a modal emphasis category for the Transportation Priorities program.

Meet the average annual requirements of the State air quality implementation plan

The Boulevard projects recommended for further consideration would only provide preliminary engineering funds and therefore not contribute to the required 5 miles of new bicycle facilities and 1.5 miles of pedestrian facilities for the two-year funding period.

Large Bridge

- The Sellwood Bridge type, size and location study and preliminary environmental work is proposed for funding in the base package in the amount of \$1.5 million.
- The recommendation for this project is based on this project best meeting the policy direction for inclusion of projects in the non-emphasis categories. The project has the potential for regional flexible funds to seed local and state project development funds that could then leverage a large allocation from federal and state Bridge Replacement funds to reconstruct the Sellwood Bridge. ODOT Region One is proposing \$1.5 million in STIP funding for this project with the County providing \$2.1 million of matching funds. These funds will be used to solicit \$12.8 million additional funds, currently under recommendation by the state bridge committee to the Oregon Transportation Commission for PE and right-of-way costs. The total effort will be used to solicit additional HBRR and other federal funds in the future to complete construction of the project.
- An additional \$500,000 is recommended in the Option B package to solicit discussion on the need for additional Transportation Priorities funding to secure the \$12.8 million of HBRR Local Bridge funds.

Attachment 3

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the large bridge modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

The Sellwood Bridge project supports the redevelopment of the South Waterfront and Tacoma main street and the greater North Milwaukie industrial area. Industrial, office and commercial space in these mixed-use areas may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure.

- Address transportation barrier to development in 2040 priority land use areas.

Due to bridge cracking, the Sellwood Bridge is currently closed to all vehicles greater than 10,000 lbs gross vehicle weight. This represents a significant barrier to the attractiveness for any business development in the vicinity of the bridge that would rely on truck access.

- Support livability and attractiveness of the region.

With one 4-foot sidewalk occluded by light and sign posts, narrow travel lanes and no bike lanes, the current bridge is a significant barrier to access to the network of multi-use paths and bicycle lanes in the area. A new bridge provide greater connectivity between the east and west sides of the Willamette River.

Emphasize modes that do not have other sources of revenue

Bridge projects receive dedicated sources of revenue from federal and state funding sources. Award of these funds is done on a competitive process and allocation of regional flexible funds would be intended to develop enough project detail to effectively compete for those sources of revenue.

Complete gaps in modal systems

Meets the narrowing policy objectives of and providing new pedestrian and bicycle facilities that do not exist and are not likely to be constructed without programming of regional flexible funds. The project would also reopen the bridge to freight and transit traffic that is currently rerouted to the Ross Island Bridge approximately 2.5 miles to the north.

Develop a multi-modal transportation system

This is not a modal emphasis category for the Transportation Priorities program. However, a new bridge would provide new bicycle lanes, replace a single side substandard sidewalk, provide local freight access and serve two regional bus routes that can no longer use the current bridge.

Attachment 3

Meet the average annual requirements of the State air quality implementation plan

As a replacement or reconstruction project, this project does not address this policy goal.

Green Streets

- The top technically ranked green street demonstration projects for street and culvert retrofits are recommended for the final cut list base package. While these were the only candidate applicants in these categories, both are strong projects and worthy of funding.
- The Cully Boulevard project will provide improvements in a 2040 mixed-use main street located in a low-income and minority community and will provide technical data on water quantity/quality improvements associated with green street techniques.
- The Beaver Creek Culverts project will support recovery of endangered species, removing barriers associated with transportation facilities and will leverage a large local match and state restoration grant (70% of total project cost). To balance the program, funding is recommended to be reduced by \$470,000 to a regional share of \$1,000,000. The reduction would need to be made up from other sources or by a reduction in work scope such as reconstructing 2 of the 3 culverts or constructing lower-cost retrofit options.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the green street modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

The Cully Street project would support the redevelopment of adjacent properties to higher-density mixed-uses. Office and commercial space in these mixed-use areas may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure. Additionally, green street design principals and the removal of fish barrier culverts are part of the region's management plan to address the listing of several native fish species under the federal endangered species act. Demonstrating programmatic implementation of the management plan is important to staying in compliance with the act and preventing lawsuits or federal actions that could hinder future ability to attract traded sector jobs to the region.

- Address transportation barrier to development in 2040 priority land use areas
Neither of the applications address a specific transportation congestion barrier to development in a 2040 priority land use area. However, the Cully project would provide on-street parking, sidewalks and bicycle lanes that are lacking today and deter access and investment in the area.

Attachment 3

- Support livability and attractiveness of the region.

The Cully Street demonstration project supports the economic development of a mixed-use main street. As a demonstration project for innovative stormwater management techniques in the public right-of-way, the project has the potential to promote a less costly, environmentally sensible means of managing stormwater runoff region wide. The Beaver Creek culverts retrofit project support economic development by supporting the provision of wildlife within an urban area, increasing its attractiveness to companies and work force to locate in the area.

Emphasize modes that do not have other sources of revenue.

There are no sources of dedicated revenue to support the demonstration of innovative stormwater management techniques in the public right-of-way. There are state grants available through the Oregon Water Enhancement Board to restore stream habitat, including retrofit or replacements of culverts. However, these grants require local match funds and are competitive relative to the needs and range of project eligibility.

Complete gaps in modal systems.

As a demonstration project category, Green Streets projects do not directly address this policy.

Develop a multi-modal transportation system

This is a modal emphasis category for the Transportation Priorities program.

Meet the average annual requirements of the State air quality implementation plan.

As a demonstration project category, Green Streets projects do not directly address this policy.

Freight

- All or a portion of the top five technically ranked projects are recommended for further consideration by Metro staff in the freight category. There was a clear break point in the technical score between the fifth and sixth ranked projects.
- The Base package proposes to split with the Port of Portland the increase in project costs discovered subsequent to application for and the proposed award of OTIA III funds to the N Leadbetter railroad over crossing project. Option B restores full funding of the cost increase to the project.

Attachment 3

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the freight modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

The Lombard Slough over crossing project is the central freight connector through the region's largest regionally significant industrial area with 190 companies and 8,000 industrial jobs. If the Lombard Slough over crossing is weight limited in the future, it would require an 11 mile out-of-direction travel between South Rivergate, where many traded-sector companies are located, and Terminal 6, the region's only inter-modal container terminal. The Leadbetter extension project would provide grade-separated access over a rail spur from a large traded-sector employer (Columbia Sportswear) and developing industrial land to the entrance of Terminal 6, extending the capacity of the existing warehouse facility and number of potential employees located there.

- Address transportation barrier to development in 2040 priority land use areas

Without the Lombard Slough bridge improvement, a 113 acre vacant parcel, one of 25 industrial sites of statewide significance identified by the Governor's Industrial lands Task Force and the potential for an additional 1,000 new jobs (scenario of recent Vestas proposal), would not be able to fully develop. The Leadbetter extension project would increase attractiveness to three developable parcels in the vicinity by creating an alternative to increasing number and length of delays caused by rail traffic blockage. The Tualatin-Sherwood ATMS project would improve operating efficiencies of a congested major freight route connecting a large industrial area, including several hundred acres of vacant industrial land brought into the UGB in 2002 and 2004, with I-5 and 99W. The Kinsman Road project would create a new extension from an existing regional freight road connector and provide new access for 175 acres of vacant industrial land in west Wilsonville that is awaiting development until local concurrency requirements for road capacity can be met.

- Support livability and attractiveness of the region.

By supporting the retention and expansion of traded-sector companies that can grow jobs independent of local economic conditions and supply high-wage jobs, freight projects as a category support the livability and attractiveness of the region.

The freight data collection infrastructure would provide data that would allow more accurate tracking and forecasting of truck movements to better understand freight transportation needs in the region.

Emphasize modes that do not have other sources of revenue

The five recommended freight projects are road capacity, reconstruction or operations projects. These projects are eligible for funding through state trust fund and pass through

Attachment 3

revenues. The OTIA III process has also dedicated \$100 million of statewide funding to these types of projects.

Complete gaps in modal systems

The Lombard slough over-crossing project would prevent the closure of freight traffic on the regional freight system. The Kinsman Road and Leadbetter projects would provide new connections to the motor vehicle system.

Develop a multi-modal transportation system

This is a modal emphasis category for the Transportation Priorities program.

Meet the average annual requirements of the State air quality implementation plan

As capacity, reconstruction or operational projects, this project category does not address this policy goal.

Planning

On-Going

- MPO Required Planning is recommended for funding. This funding continues the practice of previous allocations (adjusted 3% annually for inflation) to the Metro planning department for the provision of regional transportation planning services necessary to carry out MPO functions. Use of regional flexible funds for this purpose began as an alternative to collection of dues from local transportation agencies.
- Regional Freight Planning is recommended for funding. Funding for regional freight planning services began in FFYs 2004 and 2005 as freight and economic development became prominent regional and political issues. This allocation would fund these services for 2006 through 2009.

Corridor Planning

- The Milwaukie light rail Supplemental EIS is recommended for funding at \$2.0 of its \$3.725 million cost from regional flexible funds. This effort is needed to make the project eligible to receive federal funds.
- The Willamette Shoreline – Highway 43 Transit alternatives analysis is proposed for funding. Preliminary engineering phase is not recommended at this time but should await further development of a strategy for corridor improvements through the AA process.
- Three of the four Multi-Use master plans (Lake Oswego to Milwaukie, Tonquin Trail, and the Mt. Scott to Scouter's Loop trail) are recommended for funding. These trail projects span multiple local jurisdictions that need technical support to prepare trails to enter preliminary engineering and continue efforts provided at Metro to developing regional trail projects through implementation of the Greenspaces bond measure. The Sullivan's Gulch trail is not recommended for funding as it was not indicated as a local priority to the city of Portland and to the degree of cooperation and effort that will be needed to complete master planning work for this project.

Attachment 3

- The Next Priority Corridor analysis is recommended for funding. This work would address the fourth corridor from regional flexible funds of the 18 corridor plans the state Department of Land Conservation and Development requires the region to complete as part of the adoption of the Regional Transportation Plan. JPACT has requested ODOT also contribute to the completion of a second corridor study in this time frame conditioned on regional funding of one corridor study.

Planning Enhancements

- The Bicycle Interactive Map and Model Update is recommended for funding in the Option 2 package.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the planning category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

None of the candidate planning activities claimed a direct link to the retention or attraction of a specific traded-sector business to the region. However, planning activities are necessary to ensure federal funding eligibility and adequate transportation services to the region, both essential to retaining and attracting traded-sector businesses to the region in general.

- Address transportation barrier to development in 2040 priority land use areas

The 2000 RTP allows development in the region's priority 2040 mixed-use areas even when motor vehicle congestion is forecast in the peak hour as long as certain conditions exist, one of which is the availability of frequent transit service. The Milwaukie LRT Supplemental EIS and the Willamette Shoreline AA are steps in providing reliable frequent transit service to the Central City and Milwaukie and Lake Oswego town centers, key pieces of investment to ensuring the allowance of future development to proceed in those areas. Other planning activities proposed for funding support economic development by ensuring the 2040 priority land use areas are adequately served by transportation services and that requirements are met to allow state and federal funding to be allocated to projects serving those areas.

- Support livability and attractiveness of the region.

Transportation planning activities support the livability and attractiveness of the region by ensuring the transportation system adequately serves the comprehensive land use plans of the region and local communities.

Attachment 3

Emphasize modes that do not have other sources of revenue

General planning transportation activities, but not specific corridor planning activities, are supported through limited federal planning revenues, though not enough to cover planning services provided to the region.

Complete gaps in modal systems

Planning activities identify and direct funding to projects that complete gaps in modal systems.

Develop a multi-modal transportation system

Planning activities identify and direct funding to projects that develop multi-modal systems. This is an emphasis category for the Transportation Priorities program.

Meet the average annual requirements of the State air quality implementation plan

While used to develop, coordinate and report on the implementation of the annual requirements, planning does not construct new facilities to meet State air quality plan requirements.

Pedestrian

- The top two technically ranked projects are recommended for funding on the final cut list base package as there is a clear break in the technical scoring between the second and third ranked projects and no clear break between the third and fifth ranked projects.
- \$900,000 is recommended for the Rockwood Pedestrian to MAX project is in the Option A package.
- The Capitol Highway (PE) pedestrian project is recommended for funding in the Option A package.
- The ODOT Preservation Supplement request is a result of regional policy request to ODOT. The funding amount from regional flexible funds would provide cost sharing with ODOT Region One from funding proposed in the draft STIP outside of their preservation program to provide pedestrian and potentially bicycle and transit improvements in conjunction with their preservation work. It appears at this time that ODOT will be able to provide pedestrian improvement treatments on the two urban preservation projects (Powell Boulevard: 50th to I-205, and NW Yeon) with existing STIP revenues. A preliminary cost analysis of adding bicycle lanes on SE Powell between 71st and 82nd Avenues, consistent with the Portland TSP, was cost prohibitive at between \$5 and \$7 million as a preservation supplement project.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the pedestrian modal category addresses the following policy guidance.

Attachment 3

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

The Pedestrian projects recommended support the redevelopment of adjacent properties to higher-density mixed-uses. Office and commercial space in these mixed-use areas may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure.

- Address transportation barrier to development in 2040 priority land use areas

The 2000 RTP allows development in the region's priority 2040 mixed-use areas even when motor vehicle congestion is forecast in the peak hour as long as certain conditions exist, one of which is the availability of a well-connected local street system to support walking trips within the mixed-use area. The Forest Grove and Milwaukie town center pedestrian projects are steps in providing pedestrian access on their well connected downtown street networks, key pieces of investment to ensuring the allowance of future development to proceed in those areas.

- Support livability and attractiveness of the region.

The pedestrian projects recommended contribute to the economic vitality of the Forest Grove and Milwaukie mixed-use areas by providing access by users who would not require more land intensive and costly auto parking spaces.

Emphasize modes that do not have other sources of revenue

Pedestrian projects outside of vehicle capacity or reconstruction projects that are required to build bike facilities only have dedicated funding limited to a state program that allocates approximately \$2.5 million per year or as one of several eligible project types that compete for statewide Transportation Enhancement grants of approximately \$4 million per year. Additionally, one percent of state highway trust fund monies passed through to local jurisdictions must be spent on the construction or maintenance of bicycle or pedestrian facilities.

Complete gaps in modal systems

The pedestrian projects recommended for further consideration all complete gaps, either with new facilities or upgrading substandard facilities, in the existing pedestrian network.

Develop a multi-modal transportation system

This is a modal emphasis category for the Transportation Priorities program.

Meet the average annual requirements of the State air quality implementation plan

The pedestrian projects recommended for further consideration would provide .26 miles (+ Forest Grove – still confirming length of project) of a required 1.5 miles of new pedestrian facilities within mixed-use areas for the two-year funding period. The MAX multi-use path project, evaluated in the Bike/Trail category could contribute a portion of its 2.32 miles of pedestrian improvement to meet air quality plan requirements for the provision of pedestrian facilities as it is located in the Gresham regional and Rockwood town centers.

Road Capacity

- The SW Greenberg Road project in the Washington Square regional center is recommended for funding as the top tier road capacity project with a clear break point in project score between it and the next tier of projects (#2 through #5). The \$1 million request would complete project funding of local resources and prior regional award of PE funds for a total project cost of \$5 million.
- The Beaverton-Hillsdale/Scholls Ferry/Oleson Road intersection project is located in the Raliegh Hills town center. Funding is recommended for a portion of the PE costs in the Option B package. Funding would be conditioned on the completion of some planning work for the large portion of the town center area to be impacted by the right-of-way acquisition process. The county is seeking to use progress on PE work to solicit state and federal funds for right-of-way and construction.
- Right-of-way acquisition costs of \$2 million is recommended for funding of the 172nd Avenue project in the Option B package. This would address the \$1.0 million estimated right-of-way costs and a start on construction costs. This project is located in the newly expanding urban area on the east side of Happy Valley. The application will leverage \$10 million of County funds to complete construction of the project. The County has begun master planning of the area surrounding this project and anticipates designating much of it as Regionally Significant Industrial Area to serve as a job base for Happy Valley. This is also the only project proposed for funding in the recently expanded urban growth boundary area, which when master planning is completed, is one of the priority land use emphasis areas. This funding is recommended to be conditioned on completion of the Damascus master plan and for the project design to be consistent with implementation of the master plan.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the road capacity modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

The SE 172nd Avenue project will provide the primary arterial access to the future Rock Creek industrial area. Forecasts of expected traded-sector jobs will be available upon completion of the Damascus concept plan.

The B-H/Scholls project would support the redevelopment of adjacent properties to higher-density mixed-uses. Office and commercial space in these mixed-use areas may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure. No specific link to the retention or attraction of traded-sector jobs was provided by the project applicant.

Attachment 3

- Address transportation barrier to development in 2040 priority land use areas
Upon completion of the Damascus concept plan, the SE 172nd Avenue project will address the primary urban infrastructure need to development of the future Rock Creek industrial area. The Beaverton-Hillsdale/Scholls Ferry/Oleson intersection project, if tied to the development of a Raleigh Hills town center planning effort, is of a scale and impact to provide significant redevelopment opportunities in that area. The Wood Village Boulevard project would provide new access and development opportunity in the Wood Village town center.

- Support livability and attractiveness of the region.

Emphasize modes that do not have other sources of revenue

Road capacity projects are supported through pass through state trust fund revenues to local jurisdictions, system development charges and some local taxes or improvement districts. However, some jurisdictions have maintenance needs that are larger than state pass-through revenues and which generally take priority over capacity projects.

Complete gaps in modal systems

Other than the Wood Village Boulevard project, which would complete a gap in the motor vehicle street system between Halsey and Arata Road, these projects expand existing motor vehicle connections. New connections to complete gaps in the pedestrian and bicycle system would be provided with these projects, however.

Develop a multi-modal transportation system

This is not a modal emphasis category for the Transportation Priorities program. However, all of these projects would provide new or upgrade substandard pedestrian and bicycle facilities on these roads (current Greenburg Road has existing sidewalks but no bike lanes).

Meet the average annual requirements of the State air quality implementation plan

These projects do not address this policy goal.

Road Reconstruction

- The Cleveland Street project is recommended for funding at \$1 million in the Option B package. If funded, it would be necessary to work with the City of Gresham to define a phase of the project that could be completed with this amount or additional sources secured. This project demonstrated strong connections to the development of the Gresham regional center and adds sidewalk, bicycle and transit elements that are currently missing from the existing facility. It also strongly incorporates green street elements, providing another demonstration project for the region.

Response to Policy Guidance

Attachment 3

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the road reconstruction modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

The Cleveland Street project would support the redevelopment of adjacent properties in the regional center to higher-density mixed-uses. Office and commercial space in these mixed-use areas may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure.

- Address transportation barrier to development in 2040 priority land use areas
- Support livability and attractiveness of the region.

Emphasize modes that do not have other sources of revenue

Road reconstruction projects are supported through pass through state trust fund revenues to local jurisdictions, system development charges and some local taxes or improvement districts. However, some jurisdictions have maintenance needs that are larger than state pass-through revenues and which generally take priority over reconstruction projects.

Complete gaps in modal systems

The recommended project does not complete gaps in the existing motor vehicle system but provides new pedestrian and bicycle facilities, completing gaps in those modal systems.

Develop a multi-modal transportation system

This is not a modal emphasis category for the Transportation Priorities program. However, the project would provide new or upgrade substandard pedestrian and bicycle facilities.

Meet the average annual requirements of the State air quality implementation plan

These projects do not address this policy goal.

Regional Travel Options

- The Regional Travel Options program is recommended for further consideration at the level of funding needed to implement the programs strategic plan, with the exception of providing vanpool capital assistance, in the base funding package.
- \$500,000 is recommended to be eliminated from the RTO Program in the Option B package. No specific guidance on which portion of the program to eliminate was provided.

Response to Policy Guidance

Attachment 3

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the regional travel options category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

- Address transportation barrier to development in 2040 priority land use areas

The RTO program is regional in scope and therefore markets and provides travel option services, reducing congestion region wide.

- Support livability and attractiveness of the region.

Emphasize modes that do not have other sources of revenue

These programs are not supported by other sources of dedicated transportation revenues although they do leverage funding from private Transportation Management Associations and other grants.

Complete gaps in modal systems

The RTO program does not construct projects and therefore does not address this policy goal.

Develop a multi-modal transportation system

This is a policy emphasis category for the Transportation Priorities program. RTO projects contribute to the development of a multi-modal system by educating and providing incentives to reduce trips or use existing pedestrian, bicycle and public transit facilities.

Meet the average annual requirements of the State air quality implementation plan

While the RTO programs promote use of the facilities provided by the requirements, it does not specifically address this policy goal.

Transit Oriented Development (TOD)

- The TOD rail station area and urban centers programs are recommended for funding equal to the previous allocation.
- The Beaverton TOD site acquisition project is also recommended for funding at \$2 million, equal to the previous allocation to the Gresham Civic station site in the previous allocation. This would be a \$1 million cut from the requested amount. It is recommended that the City of Beaverton investigate use of other sources to match the large regional contribution to the project. \$650,000 of this cut would be restored in the Option A package.
- The Gateway TOD site would be funded for \$500,000 in the Option 1 package.

Attachment 3

- The urban centers program is recommended for an additional \$500,000 in the Option B package but the same \$500,000 is recommended to be eliminated from the TOD category, with no specific recommendation on what project or program to reduce, in the Option B package.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the transit oriented development category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs
- Address transportation barrier to development in 2040 priority land use areas
The TOD program and recommended projects address market development barriers to development in 2040 priority mixed-use land use areas.

- Support livability and attractiveness of the region.
The TOD program and recommended projects support implementation of regional and local comprehensive plans by supporting mixed-use development at densities and with amenities beyond what the current market will bear in emerging mixed-use areas.

Emphasize modes that do not have other sources of revenue

While urban renewal and other programs facilitate new development, transit oriented development projects are specifically designed to increase the efficiency of the regions investment in the transit system and is not supported by other sources funding.

Complete gaps in modal systems

The TOD program and projects do not address this policy goal.

Develop a multi-modal transportation system

This is a modal policy emphasis category for the Transportation Priorities program. TOD projects contribute to the development of a multi-modal system by increasing the density and design of development in areas well served by existing pedestrian, bicycle and public transit facilities. This increases the use of those facilities and makes them more cost-effective.

Meet the average annual requirements of the State air quality implementation plan

While the TOD programs promote use of the facilities provided by the requirements, it does not specifically address this policy goal.

Attachment 3

Transit

- The existing commitments (by Metro Resolution) to rail transit projects in the region are recommended for funding.
- The Frequent Bus program is recommended for funding at a rate equal to the previous allocation amount.
- The Eastside Streetcar is recommended for funding in the Option A package.
- The South Metro Amtrak station is recommended for funding at \$1.15 million in the Option A package and for \$1 million in the Option B package.

Response to Policy Guidance

In addition to the technical score that reflects a quantitative measure of the policy guidance, the Metro staff recommendation within the transit modal category addresses the following policy guidance.

Economic development in priority land use areas

- Link to retention and/or attraction of traded-sector jobs

Office and commercial space in the mixed-use areas served by these transit projects may serve traded-sector employment and locates that employment in the regions priority development areas that are well served by existing urban infrastructure.

- Address transportation barrier to development in 2040 priority land use areas

The 2000 RTP allows development in the region's priority 2040 mixed-use areas even when motor vehicle congestion is forecast in the peak hour as long as certain conditions exist, one of which is the availability of frequent transit service. The existing rail commitments and the Frequent Bus capital improvement program are steps in providing reliable frequent transit service to mixed-use and industrial areas region-wide, key pieces of investment to ensuring the allowance of future development to proceed in those areas.

- Support livability and attractiveness of the region.

The development of a comprehensive regional transit system with frequent and reliable access to 2040 priority land use areas contribute to the economic vitality of the region by increasing trips that do not require more land intensive and costly auto parking spaces in those areas where efficient use of land is most critical. The provision of a well-designed network of transit facilities also contributes to the overall livability and attractiveness to both companies and work force to locate in the region.

Emphasize modes that do not have other sources of revenue

The existing rail commitments and the Eastside Streetcar fund applications are used to leverage large federal grants to construct those projects. Currently, TriMet general fund revenues are committed to transit service as a means of not having to cut bus service hours and to start new light rail service during the on-going recession. While this was a

Attachment 3

resource allocation choice, on-street capital improvements for the Frequent Bus program now come solely from the Transportation Priorities program. The south Amtrak station improvements are not eligible for any other source of transportation revenues.

Complete gaps in modal systems

The rail commitments and Eastside Streetcar projects extend high frequency service to new areas consistent with the RTP and local Transportation System Plans, however, they do not strictly fill in gaps within the existing rail network. Frequent Bus improvements will allow new frequent bus service connecting gaps in the existing system.

Develop a multi-modal transportation system

This is a modal policy emphasis category for the Transportation Priorities program. Transit projects contribute to the development of a multi-modal system by providing higher efficiency transit service in the corridors served by those projects.

Meet the average annual requirements of the State air quality implementation plan

While the rail commitment and Frequent Bus program do not result directly in the provision of additional service hours as required by the air quality implementation plan, they do contribute to service efficiencies that can then be reallocated to providing additional transit service.

**Transportation Priorities 2006-09:
*Investing in the 2040 Growth Concept***

Conditions of Program Approval

Bike/Trail

All projects will meet Metro signage and public notification requirements.

(Bk2052) The MAX multi-use path project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction-mitigation phase to the significant concentration of Hispanic and low-income populations in the vicinity of the project.

(Bk3072) The Powerline Trail (Schuepback Park to Burntwood Drive) funding is conditioned on the execution of the purchase option of the Mt. Williams property for use of right-of-way for the project. If the purchase option is not executed, Metro may rescind the funds for future reallocation.

Boulevard

All projects will meet Metro signage and public notification requirements.

All projects will meet street design guidelines as defined in the *Creating Livable Streets* guide book (Metro; 2nd edition; June 2002).

All projects will incorporate stormwater design solutions (in addition to street trees) consistent with Section 5.3 of the *Green Streets* guide book and plant street trees consistent with the planting dimensions (p 56) and species (p 17) of the *Trees for Green Streets* guide book (Metro: 2002).

(Bd3020) The Rose Biggi project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction mitigation phase to the significant concentration of Hispanic and low-income populations in the vicinity of the project.

(Bd1051) The E Burnside project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction mitigation phase to the significant concentration of low-income population in the vicinity of the project.

(Bd1260) The Killingsworth project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction mitigation phase to the significant concentration of Black and low-income populations in the vicinity of the project.

Attachment 4

Large Bridge

(RR1012) Funding of the Sellwood Bridge project is contingent on the programming \$1.5 million of STIP funding and Multnomah County prioritizing the Sellwood Bridge as the first priority large bridge project for receipt of HBRR funds after completion of the Sauvie Island bridge in 2007.

Freight

(Fr4063): Funding of the N Lombard project is contingent on the demonstration of a financial strategy that does not rely on large (> \$2 m) future contributions from the Transportation Priorities process.

(Fr4087): Funding for the Ledbetter over crossing project is contingent on the programming of \$6 million in ODOT OTIA III funding and \$2 million of local match by the Port of Portland to the project.

The N Lombard and N Ledbetter over crossing project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction mitigation phase to the significant concentration of Black population in the vicinity of the project.

Green Streets

All projects will meet Metro signage and public notification requirements.

All projects will meet street design guidelines as defined in the *Creating Livable Streets* and *Green Streets* guidebooks (Metro; June 2002).

(GS1224): The Cully Boulevard project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction mitigation phase to the significant concentration of Black, Hispanic and low-income populations in the vicinity of the project. It is also conditioned on provision of results of the water quantity and quality testing as described in the project application.

Planning

(P10002): The RTP Corridor Plan – Next Priority Corridor is conditioned on a project budget and scope being defined in the appropriate Unified Work Program.

Pedestrian

All projects will meet Metro signage and public notification requirements.

All projects will meet street design guidelines as defined in the *Creating Livable Streets* guidebook (Metro; 2nd edition; June 2002).

Attachment 4

Road Capacity

All projects will meet Metro signage and public notification requirements.

All projects will meet street design guidelines as defined in the *Creating Livable Streets* guidebook (Metro; 2nd edition; June 2002).

(RC7001) The 172nd Avenue project funding is conditioned on a project design that implements the transportation implementation strategies and recommendations of the Damascus/Boring concept plan. Based on the recommendations of the plan, the County may request, in coordination with the cities of Damascus and Happy Valley, a different arterial improvement location or scope.

(RC 1184) The Beaverton-Hillsdale/Scholls Ferry/Oleson Road intersection PE funding is conditioned on the provision of a redevelopment plan being completed for the area encompassed by the project construction impacts in conjunction with PE activities. A general scope for such redevelopment plan will be further defined prior to the March 17th JPACT meeting. Demonstration of a financial strategy (not a commitment) for funding of right-of-way and construction that does not rely on large future allocations from regional flexible funds is also required prior to programming of awarded funds.

Road Reconstruction

All projects will meet Metro signage and public notification requirements.

All projects will meet street design guidelines as defined in the *Creating Livable Streets* guidebook (Metro; 2nd edition; June 2002).

(RR2035) Cleveland Avenue is conditioned on the provision of green street elements as described in the project application.

Transit Oriented Development (TOD)

All projects will meet Metro signage and public notification requirements.

(TD8005): Upon completion of a full funding grant agreement, station areas of the I-205 MAX and Washington County commuter rail are eligible for TOD program project support.

Transit

Capital projects will meet Metro signage and public notification requirements.

(TR1106) The Eastside Streetcar project funding is conditioned on the demonstration of targeted public outreach activities in the project design phase and construction mitigation

Attachment 4

phase to the significant concentration of low-income population in the vicinity of the project. It is also conditioned on the securing of other funding to complete the preliminary design and engineering costs of the project.

A G E N D A

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METRO

Agenda

MEETING: METRO COUNCIL REGULAR MEETING – revised 3/14/05
 DATE: March 17, 2005
 DAY: Thursday
 TIME: 2:00 PM
 PLACE: Metro Council Chamber

CALL TO ORDER AND ROLL CALL

1. INTRODUCTIONS

2. CITIZEN COMMUNICATIONS

3. COMMUNITY ENHANCEMENT GRANT PROCESSES NEED IMPROVEMENT Dow

4. CONSENT AGENDA

4.1 Consideration of Minutes for the March 3, 2005 Metro Council Regular Meeting.

5. ORDINANCES – FIRST READING

5.1 **Ordinance No. 05-1076**, For the Purpose of Amending the FY 2004-05 Budget And Appropriations Schedule by transferring \$90,250 from Contingency To Materials and Services in the Zoo Operating Fund for Expenses Associated With an Additional Concert.

6. RESOLUTIONS

6.1 **Resolution No. 05-3560**, For the Purpose of Appointing Wayne Kingsley, Charlie Gregorio, and David Whitehead as Members of the Ballot Measure 37 Task Force. Liberty

7. EXECUTIVE SESSION HELD PURSUANT TO ORS 192.660(1)(e). DELIBERATIONS WITH PERSONS DESIGNATED TO NEGOTIATE REAL PROPERTY TRANSACTIONS.

7.1 **Resolution No. 05-3550**, For the purpose of Authorizing the Chief Operating Officer to Purchase Property in the Forest Park Target Area, Subject to Unusual Circumstances. Burkholder

7.2 **Resolution No. 05-3555**, For the purpose of authorizing the Chief Operating Officer to purchase property in the Milwaukie Town Center for a Transit-Oriented Development/Centers Project. Liberty

8. **OREGON LEGISLATIVE UPDATE**

9. **CHIEF OPERATING OFFICER COMMUNICATION**

10. **COUNCILOR COMMUNICATION**

ADJOURN

Television schedule for March 17, 2005 Metro Council meeting

<p>Clackamas, Multnomah and Washington counties, and Vancouver, Wash. Channel 11 -- Community Access Network www.yourtv.org -- (503) 629-8534 2 p.m. Thursday, March 17 (live)</p>	<p>Portland Channel 30 (CityNet 30) -- Portland Community Media www.pcatv.org -- (503) 288-1515 8:30 p.m. Sunday, March 20 2 p.m. Monday, March 21</p>
<p>Gresham Channel 30 -- MCTV www.mctv.org -- (503) 491-7636 2 p.m. Monday, March 21</p>	<p>Washington County Channel 30 -- TVTV www.yourtv.org -- (503) 629-8534 11 p.m. Saturday, March 19 11 p.m. Sunday, March 20 6 a.m. Tuesday, March 22 4 p.m. Wednesday, March 23</p>
<p>Oregon City, Gladstone Channel 28 -- Willamette Falls Television www.wftvaccess.com -- (503) 650-0275 Call or visit website for program times.</p>	<p>West Linn Channel 30 -- Willamette Falls Television www.wftvaccess.com -- (503) 650-0275 Call or visit website for program times.</p>

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, (503) 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 e-mail, fax or mail or in person to the Clerk of the Council. For additional information about testifying before the Metro Council please go to the Metro website www.metro-region.org and click on public comment opportunities. For assistance per the American Disabilities Act (ADA), dial TDD 797-1804 or 797-1540 (Council Office).

TRAVEL OPTIONS COLLABORATIVE MARKETING

Campaign goals

- Reduce single-occupancy vehicle travel and increase use of travel options including carpooling, vanpooling, riding transit, bicycling, walking and telework.
- Encourage people to use their vehicles wisely when they do drive, through behaviors like trip chaining.

Objectives

- Develop a plan for a statewide 10-year campaign to increase public awareness of alternatives to driving alone and techniques for driving wisely. Funding is available to implement years one and two of the campaign in the Portland metropolitan area.
- Develop a streamlined, meaningful message that can be sustained over time and used in a wide variety of applications and media, and is portable to other markets in Oregon in the future.
- Identify target audiences that are most likely to change their travel behavior.
- Deepen the commitment of people who are already using alternatives for some or all of their trips.
- Develop cost-effective outreach strategies to enhance the benefits and reduce the barriers to changing travel behavior.
- Develop partnerships with businesses, health organizations, academic institutions and public agencies to leverage campaign resources.
- Create a visual identity for the campaign.
- Recommend methods for campaign themes and messages to existing marketing programs and materials.

Scope of work

Consultant tasks

1. Develop a statewide 10-year marketing plan to reduce single-occupancy vehicle travel and to encourage people to use their vehicles wisely when they drive that builds upon the Regional Travel Options Programs travel behavior study completed in December 2004. The study identifies target audiences, key messages and potential outreach strategies for the campaign.
2. Implement years one and two of campaign in the Portland metropolitan area including:
 - a) Develop a streamlined, meaningful message that can be sustained over time and used in a wide variety of applications and media, and is portable to other markets in Oregon in the future.
 - b) Develop marketing program creative design: create and test a visual identity and apply to all collateral and other campaign materials,
 - c) Identify potential partners and develop partnerships with businesses, health organizations, academic institutions and public agencies to leverage campaign resources,

- d) Produce recommended collateral materials,
 - e) Conduct media and advertising planning and implementation (earned and purchased),
 - f) Conduct event planning and implementation (if part of strategy),
 - g) Recommend methods for applying campaign themes and messages to existing marketing programs,
 - h) Distribute campaign messages and materials via e-mail to a list of statewide contacts provided by Metro, and
 - i) Conduct implementation of any additional outreach methods recommended.
3. Evaluate campaign results, including:
- a) Recommend methods to measure the campaign's effectiveness and
 - b) Track campaign results.
4. Reporting:
- a) Provide Metro project manager and ODOT's Travel Options Steering Committee with interim progress reports,
 - b) Present the proposed marketing plan and evaluation measures in a report and personal presentation, and
 - c) Develop and present a final report that includes an analysis of the campaign's effectiveness and recommends next steps in a report and personal presentation.

Metro tasks

1. Manage the consultant selection process in the areas of overall campaign development as well as implementation of the marketing campaign in the Portland metro market with oversight from ODOT's travel options steering committee, and provide staff support for the committee's proposal review and consultant selection process, including:
 - Ensure that the consultant selection process meets legal requirements.
 - Develop request for proposal documents.
 - Develop a vendor list.
 - Circulate the RFP to the vendor list via mail.
 - Advertise the RFP in appropriate publications and on the Metro and ODOT web sites.
 - Coordinate and staff an RFP information (pre-proposal) meeting for interested firms. Provide minutes of the pre-proposal meeting to the vendor list via mail.
 - Provide information to interested consultants as appropriate.
 - Provide written answers to questions to the vendor list, as necessary.
 - Provide proposal score sheets.
 - Schedule interviews.
 - Finalize scope of work and contract with the most responsive proposer.
 - Inform proposers of the committee's selection decision.
 - Document the committee's selection process.

- Provide documentation of the committee's selection process to Metro's and ODOT's contract offices as required.
2. Manage consultant contracts in the areas of overall campaign development as well as implementation of the marketing campaign in the Portland metro market, including:
 - Serve as the primary staff contact for the consultant team.
 - Review consultant work products and progress reports.
 - Review consultant invoices.
 - Provide consultant work products and reports to the steering committee for review and input.
 - Provide updates about the consultant's progress and work products to Metro's Regional Travel Options subcommittee and marketing working group and provide the comments and suggestions made by those groups to ODOT's steering committee.
 3. Administer consultant contracts in the areas of overall campaign development as well as implementation of the marketing campaign in the Portland metro market, including:
 - Ensure completion of appropriate forms to meet ODOT requirements.
 - Prepare contracts for signature.
 - Process consultant invoices for payment.

Products to be produced 2005-2007

1. Request for proposal document(s) – Develop request for proposals (RFP) documents with direction and oversight by the ODOT steering committee.

Deliverables:

 - Request for proposals document
 - Advertisements
 - RFP information meeting
 - Vendor list
 - Proposal score sheets
 - Acceptance and rejection letters
 - Scope of work
2. Progress reports – The Metro project manager will provide progress reports to the ODOT steering committee throughout the consultant selection process. The consultant scope of work will include provision of progress reports to Metro and the steering committee at intervals to be determined.

Deliverables:

 - Progress reports
 - Copies of consultant work products

Travel Behavior Barriers and Benefits Research

December 14, 2004

Prepared for:



METRO
PEOPLE PLACES • OPEN SPACES

Prepared by:



with ECONorthwest

Executive Summary

In order to target effective and efficient outreach that results in behavior change, the Regional Travel Options Program sought to understand the real and perceived barriers and benefits to changing travel behavior for all types of trips. In response to this need the PRR team designed and implemented a three-phase research approach starting in September 2004 and ending in later November 2004.

Phase 1 was a literature review of relevant articles, reports and studies dealing with the benefits and barriers to changing travel behavior. This review included reports from other communities, database searches, trade publications, academic articles, and a review of attitudes and marketing research performed by the project partners over the last 10 years. The results of the literature review provided direction for the Phase 2 qualitative research involving focus groups. The results of the focus groups provided direction for Phase 3, a more broad-based telephone survey of those who use and do not use alternative travel modes in the Portland metropolitan region.

QUALITATIVE RESEARCH

In cooperation with the Portland Metro team the PRR team developed, organized, and moderated two focus groups discussing the issues, barriers and benefits identified in the literature review. One focus group was composed of those who use alternative travel modes at least 3 days a week on a regular basis. The other group was composed of those who do not use alternative travel modes.

The major findings from the focus groups included:

- People know much of their travel is not work related and they're proud of their trip-chaining
- Time and ability to trip-chain influence travel mode choice
- Alternative modes are seen as less comfortable and less safe, but some think it's worth it
- Make it safe, fast, reliable, easy and cheap if more people are to use transit
- Not a big demand for more information about alternative travel modes

QUANTITATIVE RESEARCH

The PRR team developed a survey instrument with Metro's review and approval and fielded the survey to a representative sample of the metropolitan region's residents. The survey was designed to obtain statistically valid information on current attitudes and behaviors regarding travel options. Another major goal of the survey was to determine what factors distinguish those who use alternative travel modes from those who do not, as well as identify those who would respond positively to motivators designed to increase alternative travel mode use.

When comparing the two groups in this survey (those that use alternatives to driving alone at least two times each week, and those that don't use alternatives) there was no significant difference between them in the percent that commute nor in the amount of time it takes to commute or in the distance of their commute. Both groups were similar in the frequency with which they change their travel plans to avoid traffic congestion (about 40%) and they also have similar flexibility in the time they can commute to or from work/school (40-45% have no flexibility; 25%-30% have ½ hour flexibility). Lastly there was no difference between these two groups when it comes to trip-chaining that is connected with their commuting.

Overall, it was found that households with more members are less likely to use alternative modes of travel. Households with more members 15 years-of-age or younger are also less likely to use alternative travel modes. In general, older respondents are less likely to use alternative travel modes.

The following items highlight what initially motivated those who use alternative travel modes:

- Cost of parking
- Higher gas prices
- Parking hard to find
- Traffic congestion
- Reduced stress by not driving alone
- Enjoyment of traveling with others

These results indicate an emphasis on three general types of motivators: cost, convenience (less hassle), and social.

When both sample groups were asked if a series of 26 potential motivators "would actually get you to drive alone one less day per week," the results once again pointed to the importance of three major motivating factors: cost, convenience (less hassle) and safety. The following lists the 26 potential motivators, as well as each motivator's target market based on the analysis results:

- *Financial incentives* appear to be most effectively targeted to younger, less-affluent people, including students.
- *Carpool matching services* appear to be most effectively targeted to less-affluent workers and students who commute longer distances. Women seem more interested than men.

- *Preferred parking for carpoolers* appears to be most effectively targeted to less-affluent workers. It is not a powerful motivator and may have the unintended consequence of encouraging people to shift from transit to carpools.
- *Selling parking passes at work (or school)* appears to be most effectively targeted to less-affluent workers and students. Women seem more interested than men.
- *Less expensive transit passes* appear to be most effectively targeted to less-affluent people, including students. Women seem more interested than men.
- *Providing company vanpools* appears to be most effectively targeted to less-affluent workers. Women seem more interested than men.
- *More express buses* appear to be most effectively targeted to workers and students.
- *Free travel options consultation* appears to be most effectively targeted to less affluent people with less education. It does not appear to be a powerful motivator, especially for people who do not already use alternative modes. Those with more education may feel that they can figure it out for themselves. It is also possible that, to more adequately assess its impact as a motivator, the nature of this motivator needs to be explained to respondents further than was possible in this survey.
- *Guaranteed rides home* appear to be most effectively targeted to less affluent and younger workers and students. More-affluent workers may see taxis as a viable guarantee.
- *Reduced crowding on transit* appears to be most effectively targeted to people with lower incomes and less education.
- *Improved safety on transit* appears to be most effectively targeted to women and to people with lower incomes and less education.
- *Information about how transit saves you money* appears to be most effectively targeted to people with lower incomes and less education
- *Information about health benefits of using alternative travel modes* appears to be most effectively targeted to everyone, though people with less income or who live near where they work may be more likely to actually reduce drive-alone trips.
- *Information about how air quality is improved* appears to be most effectively targeted to people with lower incomes and less education.
- *More bike lanes* appear to be most effectively targeted to younger people with lower incomes and more education. People who already bike are especially likely to respond (and to be younger, with lower incomes and more education), as are people who live within five miles of work.
- *Safer bike lanes* appear to be most effectively targeted to people between 25 and 54 with lower incomes. People who already bike are especially likely to respond, but younger bikers are less concerned with safety.
- *Covered, secure bike storage* appears to be most effectively targeted to younger people with lower incomes. People who already bike are especially

likely to respond (and to be younger, with lower incomes), as are people who live within five miles of work.

- *Shower facilities* appear to be most effectively targeted to workers and students who are between 25 and 54. Older students and people who live within five miles of work are most likely to respond.
- *More marked crosswalks* appear to be most effectively targeted to people with children under 15. It may be that walking children to school or allowing children to walk to school, rather than driving them would be the primary source of reduced driving.
- *Safer pedestrian crossings* appear to be most effectively targeted to people with lower incomes. It may be that people with lower incomes live in areas with less-safe pedestrian crossings. Women are more likely to respond.
- *Better directional signs* appear to be most effectively targeted to people with lower incomes.
- *Discounts on biking and walking gear* appear to be most effectively targeted to people with lower incomes. People who already bike or walk are especially likely to respond, as are people who live within five miles of work.
- *Improved lighting at bus stops* appears to be most effectively targeted to less-affluent people with less education. Women are more likely to respond.
- *Shelters at bus stops* appear to be most effectively targeted to people likely to use the bus (younger people with lower incomes).
- *The ability to use transit passes for discounts* appears to be most effectively targeted to budget-conscious people (people with lower incomes and with children under 15) who are likely to use transit. Women are more likely to respond. Those with post-graduate degrees are less likely to respond.
- *The ability to work at home* appears to be most effectively targeted to workers under 54 with long commutes. Women are more likely to respond.

In addition, a cluster analysis was performed in order to identify major market segments to target for particular motivators, and also to determine what groups to avoid. The following targeted groups, or clusters were identified as those to emphasize:

- Urban cost/safety conscious
- Citywide professionals
- Suburban commuters

There are two other groups that seem unresponsive to most of the motivators offered in the survey. It may be that the market penetration for these groups has been maximized since they may already use alternative transportation and are simply less likely to use it more or differently. These groups are:

- Older Urbanites
- Poorer Elders

The last part of the survey asked respondents how they would prefer to be informed about alternative ways to travel, and if they would be interested in more information about specific alternative travel options. Those who do not use alternative travel modes currently get their travel related information through newspapers, followed by radio. Those who do use alternative travel modes are more likely to get their travel-related information on websites, followed by newspapers.

When asked what types of alternative travel modes they would like more information about, those who do not use alternatives are most interested in MAX and bus, whereas those who do use alternatives are interested in these modes as well as bicycling and walking.

STRATEGIES FOR CHANGE

Community-based social marketing (CBSM) stresses direct contact with people at the community level to promote behavioral change. It has been demonstrated that this approach can produce higher levels of success per contact than traditional media advertising.

While this may be true, CBSM is often espoused as a distinct alternative to media advertising. However, successful marketing often combines a number of disciplines. CBSM can often be best served when combined with media advertising, earned media and other techniques that reinforce the message. A strong brand established in multiple media will provide a convincing backdrop for effective CBSM efforts.

Portland Metro and its partner agencies' initiative to market transportation options provides an excellent opportunity to support a pervasive CBSM effort. If the message is consistent and coordinated, the overall effect will be maximized.

The scope of work for this project involves identifying benefits and barriers to changing travel behavior and suggesting strategies to address these benefits and barriers. This is a very broad, general objective, versus something more specific (i.e. increasing ridership on a specific transit route). Therefore, suggested strategies and tactics must be somewhat general as well. Keep in mind that many of the motivators identified in research are suggestions for improvements in public transportation facilities or operations (improved safety on public transportation, improved light at bus stops, more marked crosswalks, reduced crowding on public transportation, etc.). Where these motivators/barriers are perceptual only, they might be changed through community-based social marketing. Otherwise, they cannot be addressed through marketing activities without the necessary accompanying facility and operational changes.

The PRR team is recommending 9 strategy approaches:

1. Employer/Employee Outreach
2. Neighborhood Outreach
3. Neighborhood Interventions
4. Rideshare Parties
5. Street Teams
6. Fairs and Festivals
7. Special Day Promotions
8. Partnerships
9. Special Event Shuttles



Rideshare Program Market Research and Implementation Plan

PROJECT WORK PLAN

The RTO Program 5-Year Strategic Plan identifies the following goal:

Regional Rideshare Program Goal (2003 – 2008): “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.”

The following Work Plan outlines three primary Tasks designed to work with the RTO Rideshare Working Group to develop and implement a program to achieve the above goal. In the simplest terms, the project will answer the following core questions in order to meet the five-year goal:

- Where are we today?
- How do we track progress toward the five-year goal?
- Where are the best market opportunities for program growth?
- What are the programmatic considerations for success?
- What is the best organizational structure for development, implementation, and evaluation of the regional rideshare program?

TASK A – RESEARCH

The first step of this project will be establishing a regional ridesharing baseline, and a methodology for tracking progress. Our team will use various information and data sources to establish this baseline, recognizing the inherent challenges of the data sets, each with its own various limitations. Our team understands the data sets available in the Portland region, and has worked through similar data-oriented challenges in other regions of the country.

Establishing a Baseline

Our approach to this task will be to work with the RTO Rideshare Working Group to gather and assess existing data sources. Members of our team have worked with these data sets, such as EcoSurvey data and modeling data from the development of the Regional Transportation Plan, and understand the strengths and weaknesses of this data. We have also worked extensively with other national data sets, such as the National Household Travel Survey and the 2000 Census data from the Census Transportation Planning Package (CTPP).

The key element in developing baseline service metrics are the concepts of reliability and defensibility. These concepts are necessary in order to achieve stakeholder, technical, and public buy-in to policy and implementation options to be conducted in the course of the project. If key groups do not feel the baseline metrics themselves are accurate, or, if they cannot easily be described as accurate, then these groups may not be vested in the project outcomes.

For the Portland / Vancouver Metropolitan Statistical Area, the Census 2000 Journey to Work data indicates a total of 11.5 percent of commuters (109,197 out of 951,489) traveled by car with two or more occupants. Only 545 commuters reported traveling in non-transit vehicles with seven or more people. Assuming an average 10 occupants per vanpool, this yields a total of 55 vanpools in the Portland region. At a glance, and comparing to many peer metropolitan regions with active carpool and vanpool programs, these numbers indicate the CTPP data may be



accurate enough to establish a baseline.

Utilizing the 2000 Census Journey to Work Parts One, Two, and Three data, the project team will first develop baseline metrics for the region and then develop metrics for primary areas of employment concentration. The Journey to Work data allows for a detailed cross-commute and origin/destination analysis from census tract - to - census tract. The project team will work with project partners and area TMAs to determine if the sub regional analysis is both reliable and defensible (and comparable to trends suggested in other data sets).

Methodology for Tracking Progress

Following the conduct of the baseline analysis, a methodology for tracking modal use over time will be developed. This methodology will be based upon the principal policy and implementation options developed over the course of the project, and, what is desired for tracking. For example, if only the aggregate modal use is desired, a simple stated-preference telephone survey may be conducted every two to three years to monitor change in use. If greater information is desired, including the ability to track multiple trip purposes within commute behavior, such as traveling to the store on the way home from work, personal travel diaries may be employed every two to three years, with various options for implementation of tracking. The former is used by the San Francisco Bay Area; The latter is used by the City of Boulder.

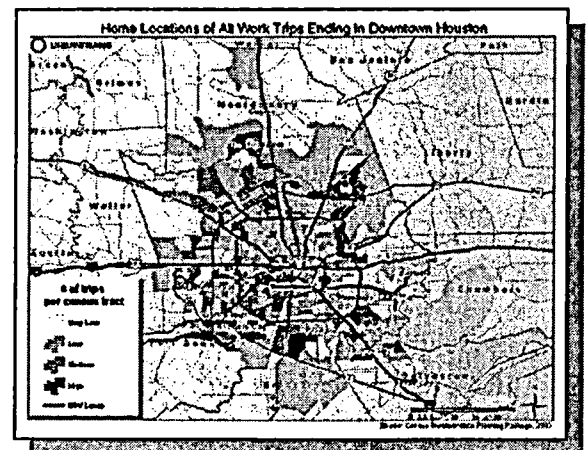
- ✓ **Product:** Task A will conclude with an Interim Report outlining research results, and will include full documentation of all raw data.

TASK B – MARKET ANALYSIS

Understanding the existing baseline of carpoolers and vanpoolers, from Task A, will form the basis for the market analysis. The market analysis will also build upon the significant quantitative and qualitative research and analysis summarized in the *Travel Behavior Barriers and Benefits Research*, as well as other regional and activity center based research already conducted (such as EcoSurveys, model data, and other transportation planning studies conducted).

The process of identifying and prioritizing rideshare markets is essentially a process of assessing rideshare “opportunities.” Existing research documenting the barriers and benefits to particular travel options establishes many of the qualitative factors affecting the rideshare market. In this task, our team will supplement this work with more detailed assessment of the following market opportunities:

- **Travel O-D Patterns.** The CTPP 2000 data sets allow for effective analysis and mapping of origin-destination patterns. UrbanTrans has used this analysis technique in Atlanta and Houston to map “origin densities” for people commuting to any number of destination clusters (likely the 2040 regional centers, and/or TMA service areas). CTPP and other data sets can then be mined for demographic information on these origin clusters. The map above is a recent





Rideshare Program Market Research and Implementation Plan

example of analysis completed by UrbanTrans displaying the home locations of employees working in downtown Houston, TX. The darker shaded areas represent a greater density of employees living in these census tracts, and traveling to downtown Houston. These maps are a great tool for isolating trip origin and destination clusters, and will help in the important process of prioritizing opportunity areas for marketing investments (both in terms of geographic areas AND trips types). CTPP files can also show the home-end locations of all rideshare commuters, regardless of destination.

- **Positioning Relative to Other Travel Options.** A key opportunity area for assessing rideshare markets will be the availability and service quality of other travel options. Our team will compare the travel pattern analysis to existing transit service coverage and quality (hours of operation, headways, etc.). Additionally, assessments of additional infrastructure features conducive to carpooling and vanpooling (such as HOV lanes, park-n-ride lots, etc.) will be included.
- **Additional Factors.** The team will also include assessment of additional factors impacting the identification and prioritization of rideshare markets, including:
 - Upcoming roadway reconstruction plans along major corridors.
 - Relative impacts of regional and localized congestion (and the degree to which rideshare alternatives may provide travel advantages along congested routes).
 - Regional land use or economic development prioritizations or plans.
 - Business sector and labor market trends.

From these analyses, our team will determine the appropriate travel shed for carpool and vanpool programs in the Portland region. This is a critical element in moving forward with market prioritization and program development (specifically related to organizational structure issues). In the San Francisco Bay Area, for example, the market for vanpools extends as far as 150 miles east of downtown San Francisco.

Utilizing all of the results of this task, our team will identify key rideshare markets (geographically and demographically) and develop initial recommendations on prioritizing these markets to meet the regional rideshare goals in the five-year strategic plan. Our team will meet with the RTO Rideshare Working Group to review findings and recommendations, and to build consensus among stakeholders on a priority market list for a five year period.

Additionally, UTC will conduct an electronic survey of transportation coordinators of all individuals identified by DEQ, Tri-Met and C-Trans. The email addresses will be provided by the three agencies. The survey will focus on assessing customer service needs and satisfaction.

- ✓ ***Product:** Task B will conclude with an Interim Report outlining the market analysis results and illustrating prioritized markets.*

TASK C – PROGRAM DEVELOPMENT

The heart of this effort will be the Program Development phase. The first two project tasks will set a baseline understanding of markets and market potential, but the key to a successful project – one of true value to all regional stakeholders – will be full consensus among RTO Subcommittee members on the best possible organizational structure to implement a regional rideshare program and meeting the carpool and vanpool goals of the 5-Year Strategic Plan.



Rideshare Program Market Research and Implementation Plan

Our team will deliver a program development and implementation plan that is based solidly on supporting research and data analysis, but that also has the buy-in and support of all key regional RTO stakeholders. Our team understands both the technical and political factors impacting the development of an effective regional rideshare program for the Portland area. We understand the legal, liability, safety and operational issues related to carpool and vanpool service delivery – as we manage similar regional programs nationally. Our Project Manager and other team members are also skilled consensus-builders with a capacity for balancing technical program requirements and organizational interests and constraints. In this program development phase, we will establish a solid foundation of technical analysis. However, our focus will be on developing agreement on a program structure, program operator, and program budget that is realistic and ready for near-term implementation. Key steps in this process will include:

- **Identifying Legal, Safety, Operational and Liability Issues.**
 - **Legal & Liability.** Our team will outline the legal and liability issues that do, and do not, face regional rideshare programs, and will outline the opportunities to mitigate this liability.
 - **Safety.** We will outline safety and safety mitigation issues (including those related to vanpool rollovers) and identify all necessary organizational measures to operate the program using industry best practices.
 - **Operational.** We will outline all relevant operational issues, from fleet procurement / replacement and maintenance to van driver and fare payment integration, and develop assessment for how these factors relate to various organizational structures options.
- **Developing Outcomes, Actions, and Evaluation Tools.** Our team will deliver an Annual Work Plan that details the outcomes, actions and evaluation tools of the program. Annual Plans provide the details necessary to achieve specific quantitative program goals. Evaluation measurements will be recommended as the achievement of quantitative goals such as those suggested in the Regional Transportation Options Plan for the carpools, vanpools and employer subsidy programs.
- **Test Qualitative Information.** UTC will conduct up to three focus groups to further the knowledge collected through the PRR study. The focus groups may be of commuters and/or employers.
- **Program Implementation Plan.** Our team will outline a specific organizational structure to most efficiently and effectively implement a regional rideshare program. Our team will work with the RTO Working Group to assess various organizational options, given both the research from Tasks A / B, and the parameters suggested by the first two parts of Task C (above).
- **Three Year Funding Strategy and Budget.** The Team will identify the available funding options in the bi-state Portland area, and will develop a funding strategy and budget detailing all program revenues and expenses.
- ✓ **Products:** *Task C will conclude with the following reports:*
 - *Program Development Plan.*
 - *Program Implementation Plan, with Three-Year Funding Strategy and Budget*
 - *Final Report & Final Presentation*

031505 CW-05
(CD)

Regional Travel Options
Promoting alternatives
to driving alone

2003 Program Evaluation Report

031505CW
05

December 2004



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METRO

To : Metro Council
 From: Chris Deffebach
 RE: Nature in Neighborhoods
 Date: March 15, 2005

In December, Council approved a Resolution, supported by MPAC, which directed staff to develop a Fish and Wildlife Habitat Program to reflect the following basic principles:

- Focus the regulatory element of the program on Class I and II Riparian Habitat;
 - 41,240 acres or 50% of the total habitat inventory
 - 40% of this is covered by Title 3 Water Quality Resource Area standards, and another 22% is covered by Flood Management Area cut and fill requirements
 - 38% is in parks
 - 4,615 vacant buildable acres within the urban growth boundary
- Develop a strong voluntary, incentive based approach to protect and restore Class III Riparian, and Class A, B and C upland habitat;
- Apply a regulatory element that limits development on all Class I, II III Riparian and Class A and B Upland Habitat, in future additions to the Urban Growth Boundary; and

The Council directed staff to develop a program that relies on the use of voluntary actions to protect and restore habitat areas and specifically stated the Council's intention to seek voter approval of a bond measure to support fish and wildlife habitat acquisition and restoration. Other key elements of the program include expanding education and awareness of the value of habitat areas and increasing the capacity for restoration projects in the region.

In response to Council's direction from this and other resolutions, staff has developed a proposal for a Nature in the Neighborhoods Program that describes the implementation actions that Metro and others can take to support habitat conservation and restoration. Part of this proposal includes an amendment to the Urban Growth Management

Functional Plan that would require cities and counties to ensure that their comprehensive plans substantially comply with the functional plan, which is based on Metro's habitat area maps and includes new development standards for Class I and II riparian habitat areas.

The proposed language for the Functional Plan calls for:

- Requiring cities and counties to use habitat friendly development practices in Class I and II areas, and
- Requiring cities and counties to avoid, minimize and mitigate for development in the Class I and II riparian habitat, based on the priorities established by Council for habitat areas.

Since January, staff have been soliciting comments on draft versions of this proposal from the Program Working Group, MTAC, MPAC, Goal 5/WRPAC, private business representatives and non-profit groups who have been participating in this process as well as individuals and other elected officials not represented on MPAC. These discussions have raised both technical and policy issues. The intent of this memo is to identify the areas of highest priority for your consideration. Below are the top thirteen policy issues. This memo adds issues identified by Councilors at the March 2 2005 work session discussion. Discussion on a few of the issues will be updated prior to the next work session review.

1. **Appropriate level of regional requirements:** Do the proposed standards impose the appropriate regional requirements?
2. **Habitat-friendly development practices:** Should habitat-friendly development practices be required, where practicable, or should cities and counties simply be required to *allow* the practices?
3. **New UGB expansion areas:** What level of protection, or "floor" should be applied to new UGB expansion areas, and should the rules that apply there be spelled out explicitly at this time, or left to be developed at the time a new expansion is approved?
4. **Residential densities:** Is the Council willing to accept lower residential densities than established in Title 1 and agree to a more "automatic" and less rigorous review process than offered in Title 8 for the reduction?
5. **Measure 37 claims:** Is it realistic to consider new regulations in a post-Measure 37 era and how much can Functional Plan language be used to help avoid claims?
6. **Compliance timeline:** What is a reasonable, timely and consistent compliance timeline?

7. **Map verification process:** Map verification process, including verification for urban development values (and the policy issues of the major institutions)
8. **Exemptions from the program:** What sites are similarly situated to the International Terminal Site and how do these relate to Title 3 Exempted areas?
9. **Compliance alternatives:** How best to motivate creativity in city and county compliance yet assure certainty and consistency?
10. **Performance Objectives and targets:** Role of performance standards in setting vision/goals for the region and in linking to responsible actions and implications for ongoing monitoring?
11. **Tree protection standards:** Value of tree protection standards outside of development review process to protect trees in Class I and II areas, with exceptions for developed SFR?
12. **Encourage language:** How best to motivate and inspire voluntary activity among the region's governments, agencies, non-profits, business and individuals?
13. **Other Federal/State requirements:** Should the program be submitted for meeting Goal 6 Water Quality and Goal 7 Hazards in addition to Goal 5?

Policy Issues on the Functional Plan Title for Fish and Wildlife Habitat Areas

1. Application of Avoid, Minimize and Mitigate Standards to Class I and II Riparian

Key Policy Issue: Do the proposed standards impose the appropriate regional requirements?

This section sets the standards of regional consistency for conserving habitat in Class I and II Riparian areas. It is a key policy decision as it sets the floor or minimum for protection in the streamside areas. The comments on this section range from concerns about placing any new requirements in a post Measure 37 era, to concerns that the level of protection isn't enough to make it worth the effort to change comprehensive plans and that it may, in fact, undermine existing programs in some jurisdictions, to comments that it is about right.

The new requirements build off of the Avoid, minimize and mitigate standards in place in the region now under the existing Title 3. The proposal would retain the existing Title 3 standards, which already apply to about 60% of these riparian habitat areas. However, the new standards would place more requirements on undeveloped floodplains, since these areas are currently subject only to cut and fill requirements for water storage but not the avoid, minimize, mitigate standards that apply to the Water Quality Resource Areas.

The proposal ties the requirements to avoid, minimize and mitigate to the habitat resource quality and the urban development values approved by Council in the ESEE (economic, social, environmental and energy) analysis, and creates three types of Habitat Conservation Areas (HCA):

- High HCA: Avoid, Minimize, Mitigate (same standard as Title 3);
- Moderate HCA: Minimize, Mitigate; and
- Low HCA: Mitigate only.

Options to make the "floor" level of protection higher include making the Avoid test apply to all habitat conservation areas, instead of only the high conservation area, as proposed. Options to make the "floor" level of protection lower include eliminating any need for a development to show that practical options to Avoid the habitat areas have been considered as part of the development application. Instead, a minimize or mitigate standard could apply.

Council direction to apply regulatory protection only to Class I and II habitat greatly simplified the types of habitat covered and significantly reduced the area subject to new regulations. A substantial portion of the Class I and II habitat is covered by Title 3 Water Quality Resource Area standards. Opinions have been expressed that the urban development value is not an appropriate tool to vary protection levels from two perspectives: habitat in centers and regionally significant industrial areas is just as valuable as in other areas, and that residential development should not be classified as

“low urban development value” since it is a major driver of the regional economy and the single largest user of land. One way to address these concerns is to treat all of the Class I and II habitat the same and apply a Minimize and Mitigate standard, since the core area closest to streams is already subject to Avoid under existing Title 3 standards.

The approach proposed in the Functional Plan is necessarily a discretionary approach, because it requires a jurisdiction to consider specific facts related to a property and determine, for example, whether or not it is reasonably possible to “avoid” the habitat. Recall that the Goal 5 rule requires that the program provide property owners with a clear and objective approach and, once that approach has been provided, then a discretionary approach may also be provided. The draft functional plan passes this requirement through to the region’s cities and counties, requiring them to have a clear and objective approach that would result in protection at least as protective as the protection that would be provided by the discretionary approach described above. The model ordinance will provide an example of a clear and objective development approval approach, consistent with the Goal 5 rule, and a discretionary approach.

2. Require Habitat-Friendly Development Practices, where technically feasible, in Class I and II Riparian areas.

Key Policy Issue: Should these practices be required, where technically feasible, or should cities and counties only be required to *allow* the practices?

Habitat-Friendly Development practices include a variety of tools such as reducing water runoff and reducing the amount of effective impervious surfaces. Some of these are included in some city and county stormwater management plans. The proposal calls for requiring city and county codes to require the use of these practices. Because only some practices are feasible in some instances, the proposal specifies that the requirements would apply only when technically feasible. The proposal calls for requiring these practices in all Class I and II habitat areas, even in existing Title 3 WQRA and floodplain areas and in the streamside areas that were exempted from Title 3 when it was adopted.

Based on comments received, the difficulties in using these habitat friendly practices today range from concerns about capital and maintenance cost, barriers in local codes that make the practices difficult to apply, and lack of up to date familiarity or knowledge on the part of all parties involved on how to apply the quickly evolving technologies. The advantages of using these practices are their benefits to water quality and channel conditions as well as opportunities to retain green infrastructure on the site.

3. Applicable Habitat Conservation Area Standards for New Urban Areas

Key Policy Issue: What level of protection, or “floor” should new additions to the UGB have, and should the rules that apply there be spelled out explicitly at this time, or left to be developed at the time a new expansion is approved?

The proposal will identify a process that new urban areas would be required to follow, including establishing a habitat inventory consistent with the methodologies for the existing habitat inventory and establishing the urban development value of the area consistent with the methodology developed in the ESEE. (A new inventory may not be needed for several years because the current inventory extends one mile beyond Metro's jurisdiction, but the inventory would need to be updated at the time of the expansion). The concept level design types would guide the application of the urban development values until final planning was completed and final design types applied.

The proposal anticipates to apply the same Avoid, minimize, mitigate principle to upland areas as in the Class I and II areas. The same choices regarding the use of Avoid apply as described above. However, new urban areas also offer opportunities to avoid the resources in the initial concept planning in ways not possible in the more built-up urban areas. For example, rules could be imposed that prohibited habitat areas from being divided into parcels smaller than a certain size, or from being zoned for dense uses. In addition, other provisions become more relevant, such as a tree protection ordinance, because of the importance of trees in defining the upland habitat functional values. The same disadvantages that the Council weighed in deciding to designate the upland areas "allow" apply in new urban areas, too, since many of the upland areas are also less constrained development areas.

4. Relaxation of Title 1 Density/Capacity Requirements.

Key Policy Issue: Is the Council willing to accept lower residential densities than established in Title 1 and agree to a more "automatic" and less rigorous review process than offered in Title 8 for the reduction?

Metro Council has indicated, in multiple Resolutions, its intent to reduce density targets for residential capacity if necessary to protect natural resources. Title 8 allows a process for a city or county to do that by applying to Metro, in March of each year, for approval of a density requirement reduction to support natural resource areas. To date, no local jurisdiction has made a request under these provisions.

As proposed, the process would not require further approval by Metro. Approval would occur automatically if the decision was necessary to protect the regionally significant habitat from development and offered permanent protection of the habitat. The loss of housing units would be taken into consideration in sizing the next UGB expansion or asking cities and counties to absorb additional capacity in other ways. Transfer of Development Rights are encouraged to minimize the effect on land supply.

This ability to reduce density would apply to only areas on Metro's Inventory Map and to local Goal 5 inventories if they were on a map prior to the adoption of Metro's program. This would apply to all habitat areas, both upland and riparian.

The reduction in density offers the ability to build larger lots at a lower density than currently allowed within the UGB. The provision would apply to residential areas only, not commercial, though residential zoning makes up 40% of the inventoried habitat areas.

5. Approach to Measure 37

Key Policy Issue: Is it possible to consider new regulations in the post-Measure 37 era, and if so, how much can language in the functional plan help to avoid Measure 37 claims?

Council Direction in Resolution No. 03-3506A called for:

- Program shall not result in reductions in FMV of properties unless program provides source of funds to compensate property owners.
- Not the intent of previous statement to require compensation in any instance where M37 would not require compensation—i.e. all exceptions apply (e.g. rules implemented to protect health and safety or to comply with federal law are exempt under M37).

The approach in current draft:

- Explicitly states goal of program is to increase fair market value of each property affected (by using more flexible development approaches such as allowing more intensive, but clustered, development; allowing less intensive development of properties than would otherwise be required under density rules; etc.).
- Requires cities and counties to include provisions intended to increase the fair market value of individual properties; and makes all other rules subject to that provision (this ostensibly means that, if the other rules would decrease the FMV of a property, then the rule would not apply).
- Variances—provides a procedure to allow a property owner to obtain a variance if the rules resulted in a loss in FMV of a property; process is a land use decision (i.e. appeals to LUBA—bringing these claims “within” the land use system, unlike M37 claims); only minimum variance necessary may be granted; includes waiver of future M37 claims based on functional plan; one incentive for property owners to use the variance procedure is that the variance could be transferred to future property owner (unlike M37 waiver).
- Incorporates concept that rules should not decrease property values without including any exceptions, and provides variance procedure to waive rules to the extent that they do reduce FMV of property; if a property owner chose not to apply for a variance, or rejected an offered variance because the owner believed it was insufficient, and instead filed a M37 claim, then a city or county (or Metro) could still assert that the entire program was exempt under the “comply with federal rules” exception.

Comments on this section from advisory committee representatives, especially representatives of cities and counties (including both staff and elected officials) have included:

- The intent to increase fair market value goes beyond Measure 37's requirements to compensate for losses in fair market values;
- Forcing jurisdictions to establish a separate variance procedure parallel to the Measure 37 procedure and separate from the jurisdictions other variance procedures is unnecessarily duplicative, and having the variance process "within" the land use decision arena (i.e. decisions can be appealed to LUBA, unlike Measure 37 decisions) could result in confusing and inequitable results for property owners;
- The draft functional plan institutionalizes Measure 37 and does not take into account the possibility that the measure could be amended in the future; and
- The approach does not seek to take advantage of any of the exceptions provided in Measure 37, such as an argument that these new rules are necessary to implement the soon to be finalized TMDL rule issued pursuant to the federal Clean Water Act.

Alternative approaches include;

- Be generally silent within the functional plan (but address as part of the overall program description) as to the program's effect on FMV—address M37 claims as they arise under the terms of the measure, either compensating or waiving the rules on a case-by-case basis. This would still allow Metro or a local government to assert M37 exceptions regarding all claims—i.e. argument that program was implemented to protect health/safety or to comply with TMDL Rule.
- Provide cities and counties with the option of considering the effect of the program on the fair market value of properties as part of the discretionary review process. For example, under the current approach in a High HCA, a property owner pursuing the discretionary approval approach must show, under the avoid standard, that there is no practicable alternative to the proposed development that would keep development out of the HCA. The UGMFP defines practicable to mean available and capable of being done after taking into consideration cost, existing technology, and logistics in light of overall project purpose. (LUBA decisions interpreting the term practicable show that it establishes a demanding standard.) This alternative approach suggests that, if a city or county chose to do so, it could add impact on fair market value to its consideration of whether the avoid standard had been met. In other words, if avoiding the HCA would result in any loss in FMV, then the avoid standard would be met and development within the HCA would be permitted. Similarly, FMV could also be added as a factor to consider when determining whether proposed development had sufficiently minimized its incursion into the HCA. Thus, during the discretionary review process, the city or county would simply apply the required standards right up to the point where they did not result in any loss in FMV of the property. Incorporate

references to not reducing the fair market value of property into the discussion of the discretionary review alternative using the Avoid, minimize, mitigate approach.

6. Compliance Timeline

Key Policy Issue: What is a reasonable, timely and consistent compliance timeline?

The issue of a compliance timeline was a point of debate in the December Resolution discussion. The current draft proposes the same language as in Title 8 of the functional plan, a one year deadline for cities and counties to make land use decisions consistent with the new title and with compliance no later than two years after acknowledgement to amend comprehensive plans and land use regulations consistent with the new title.

The uncertainty caused by M37 for initiating new regulations argues for a longer timeline for compliance to give M37 issues time to be better understood. Concerns about clarifying regulatory changes for development practices and for continuing habitat conservation argue for a shorter timeline. Options include:

- Use the current language for compliance
- Double the time for compliance to give cities and counties 2 years for land use action compliance and 4 years for compliance in comprehensive plans.
- Stage the compliance requirements focusing on the habitat friendly development code revisions in the first year and the land use action/comprehensive plan actions in years 2 and 3.

7. Map Verification Process

Key Policy Issue: How should the Functional Plan address the map verification process for Habitat Conservation areas, should there be a process for adjusting urban development values, and should a special process be defined for adjustments for regionally significant educational and medical facilities?

The Functional Plan currently proposes that city and counties provide property owners with a reasonable, timely, and equitable process to verify the specific location of habitat areas and that the process be handled administratively in most cases. It also identifies a process for local administration of the Habitat Conservation Areas Map that involves determining the boundaries of habitat areas and urban development values on a property specific basis.

One policy issue is whether there should be a special process in the Functional Plan to adjust the urban development value as well as the habitat value, and should the process specifically allow cities and counties to increase the urban development value of regionally significant educational and medical facilities. This adjustment would result in lower protection of Class I and II riparian habitats located within the boundaries of these facilities. The rationale for this adjustment is that Metro's economic model used in the ESEE analysis can undervalue the economic importance of these facilities.

One of the major drivers for this adjustment process was the inclusion of upland habitats in the proposed regulatory treatments under Council Resolutions 03-3376B and 04-3440. Medical and educational facilities may have Class A and B upland habitat areas on their campuses that are also identified as future facility expansion areas. Since the Council is applying a regulatory approach for Class I and II riparian areas only, and not upland habitat areas, this lowers the degree of conflict between habitat protection and facility expansion plans.

Last May, during the adoption of the ESEE, Council directed staff to bring back a proposal to consider the urban development value of regionally significant major institutions. The Functional Plan currently provides a process to allow local jurisdictions to designate major medical and educational institutions as high urban development value because of the economic contributions these facilities provide to the region. The Functional Plan would set the criteria to encourage regional consistency, but allow the local jurisdiction to make the decision administratively or through a quasi judicial process as they would other verifications to the resource location.

Several alternative approaches are possible:

- Identify the regionally significant facilities verification criteria and allow local jurisdictions to determine their urban development value.
- Identify the regionally significant facilities and map them as high or medium development value as part of the Habitat Conservation Areas and not rely on local considerations of criteria.
- Do nothing additional for the regionally significant institutions because the area subject to regulation is much less (only Class I and II) than was considered last May when the issue was raised and would be subject to the avoid, minimize, and mitigate standard in discretionary review.

8. Exemptions from the program

Key Policy Issue: What sites are “similarly situated” to the International Terminal site and should be at least partially exempted from the requirements of Habitat Conservation Areas?

Last May, Council determined that economic importance of the International Terminal Site outweighed habitat values and directed staff to identify any other “similarly situated” sites that would be subject to an “allow” decision for conflicting uses.

Under Title 3, certain geographic areas were exempted from the requirements to establish Water Quality Resource Areas and Flood Management Areas. These areas include portions of lower Willamette River (Portland Harbor), portions of the Rivergate industrial area in the Columbia Corridor, downtown Beaverton and Tualatin, and other areas determined to support water-dependent industrial uses or otherwise to be of high economic importance. The Title 3 maps adopted by Council depict these exempted areas.

Additional exempt areas were proposed by local governments and deemed by Metro to be in substantial compliance with Title 3.

The current amendment to the Functional Plan recommends that these Title 3 exempt areas be incorporated into the Functional Plan as “similarly situated” sites to the International Terminal site. They would be partially, not fully, exempt from the requirements of Functional Plan because the requirements for Habitat Friendly Development Practices would continue to apply in these areas.

Options include:

- Use Title 3 Water Quality Resource Areas and/or Flood Management Area exemptions to identify “similarly situated sites” for purposes of exempting additional sites from the program.
- Encourage these “similarly situated sites” to participate in a District Plan approach to take special economic and environmental conditions into consideration.

9. Compliance Alternatives

Key Policy Issue: How best to motivate creativity in city and county compliance yet assure certainty and consistency?

The current draft of the Functional Plan Amendment defines five different ways that a city or county could comply with the regional requirements.

1. Amend its comprehensive plan and implementing ordinances to adopt the Title 13 Model Ordinance and the Metro Habitat Conservation Areas Map.
2. Demonstrate that its existing or amended comprehensive plan and existing, amended or new implementing ordinances substantially comply with Metro’s Habitat Conservation Map and the performance standards and best management practices.
3. Amend its comprehensive plan and implementing ordinances to comply with the Tualatin Basin Approach.
4. Demonstrate that it has a program that will achieve the program objective and targets described in the Functional Plan and include provisions to monitor and measure whether the objectives and targets have been met and adapt program to ensure that they are achieved. May assert substantial compliance by relying on combination of comprehensive plan, implementing ordinances and incentive based, voluntary programs.
5. Adopt a district plan that applies over a portion of the city or county... and demonstrate that the district plan area complies with program objectives and targets. A district plan is for areas within a common watershed, or which are within areas in adjoining watersheds that share an interrelated economic infrastructure and development pattern.

The major issue that arises over compliance options 4 and 5 are the standards against which the proposals should be judged. Options include:

- Performance objectives and targets for all of the habitat. This would encourage a city or county to protect more of the uplands in exchange for less or different approach in the riparian areas.
- Performance objectives and targets for Class I and II habitat only. This is what is included in the current draft of the functional plan, or
- For comparable performance as established in the performance standards and best management practices in the functional plan and model ordinance.

Alternatives to adopting a model ordinance or the performance standards/ best management practices that a city or county could use to achieve comparable results with an appropriate level of certainty include:

- Existing tree protection ordinance
- Funded program for voluntary tree protection and/or replanting and restoration
- Institutionalized habitat preservation incentive programs, through fee structures or other mechanisms
- A local acquisition program
- Aggressive stormwater or habitat friendly development standards
- Maintaining and enhancing publicly-owned habitat

10. Performance objectives and targets.

Key policy issue: What role should performance objectives play in setting vision/goals for the region and in linking to responsible actions and implications for ongoing monitoring?

Resolution 04-3506A, adopted by the Metro Council on December 9, 2004 directed staff to develop regional outcome measures to evaluate the region's progress toward meeting the vision of conserving, protecting, and restoring fish and wildlife habitat in the region. The resolution also calls for an annual assessment of progress including, but not limited to, an evaluation of the habitat inventory. Metro staff proposed changing the term "outcome measures" to "performance objectives" to further clarify their use to measure the region's performance in fish and wildlife habitat protection and restoration over time.

The Nature in the Neighborhood Program will coordinate and lead protection and restoration efforts and also evaluate regional progress. Metro's habitat inventory identifies 80,000 acres of regionally significant fish and wildlife habitat based on the best available science, computer mapping, and fieldwork. To monitor success, staff proposed performance objectives and targets that reflect goals for habitat protection while also accounting for habitat quality and the urban development value of habitat land. Performance objectives can serve to motivate and inspire individual actions and broadly supported cooperative efforts to preserve and restore habitat as well as provide guidance for monitoring and potentially for choosing habitat areas for future acquisition.

One option for compliance in the draft Functional Plan is to allow cities or counties to demonstrate that their comprehensive plans and implementing ordinances will achieve performance objectives through a combination of regulatory and voluntary, incentive-based tools (See Issue #9). Performance objectives that include an identified target provide additional direction for flexible local compliance and greater specificity for the region's habitat goals.

Staff developed four performance objectives that are derived from the Vision Statement and the ecological function criteria that serve as the basis of the Habitat Inventory. Staff has proposed targets for each of the four performance objectives that set the bar for improvement over baseline conditions in each watershed by focusing on enhancing existing habitat condition over the next ten years. The table below shows the four performance objectives, targets for each, and a description of the conditions considered in setting the target.

Staff Proposed Performance Objectives and Targets
for use in clarifying regional expectations, identifying monitoring priorities and
potentially in evaluating functional plan compliance

Objective	Target	Considerations in Setting Target
1. Preserve and improve streamside, wetland, and floodplain habitat and connectivity.	<p>1a. 10% increase in vegetated acres within 50 feet of streams (on each side) and wetlands in each subwatershed over the next 10 years (2015).</p> <p>1b. 5% increase in vegetated acres within 50 to 150 feet of streams (on each side) and wetlands in each subwatershed over the next 10 years (2015).</p> <p>1c. Preserve 90% of remaining undeveloped floodplains in each subwatershed over the next 10 years (2015).</p>	<ul style="list-style-type: none"> • Most riparian regulatory programs are focused within the first 50 feet of streams and wetlands, and some include land within 150 of streams and wetlands, especially in steep slope areas • The 150 foot distance includes the outer distance of all primary ecological functions for riparian areas (with the exception of large undeveloped floodplains) • Mitigation, enhancement and restoration projects typically occur in this area • As redevelopment occurs, habitat within 150 of streams and wetlands can be restored • A higher target for increasing vegetation cover within 50 feet of streams and wetlands is justified based on the high level of existing protection • Applying the “avoid, minimize, and mitigate” tests to undeveloped floodplains would increase protection levels compared to existing Title 3 “cut and fill” requirements for flood areas
2. Preserve large areas of contiguous habitat and avoid fragmentation.	<p>2a. Preserve 60% of vacant Class A and B upland wildlife habitat in each subwatershed over the next 10 years (2015).</p> <p>2b. Of the upland habitat preserved, retain 80% in patches 30 acres or larger in each subwatershed over the next 10 years (2015).</p>	<ul style="list-style-type: none"> • Vacant Class A and B upland wildlife habitat within the UGB is most vulnerable to loss over time compared to other upland wildlife habitat located in developed areas or in parks • Acquisition programs and habitat friendly development practices (e.g., cluster development, on and off site density transfers) can help preserve upland wildlife habitat within the UGB • Reforestation programs can help restore upland wildlife habitat
3. Preserve and improve connectivity for wildlife between riparian corridors and upland wildlife habitat.	<p>3a. Preserve 70% of habitat acres within corridors with a vegetative width of 200 feet in each subwatershed over the next 10 years (2015).</p>	<ul style="list-style-type: none"> • Upland wildlife habitat is vulnerable to loss, and connectivity between riparian corridors and adjacent upland wildlife habitat can be expected to decline, especially within the UGB • Acquisition and habitat friendly development practices (cluster development, on and off site density transfers) can help slow the loss of habitat connectivity
4. Preserve and improve special habitats of concern.	<p>4a. Preserve 80% of habitats of concern acres in each subwatershed over the next 10 years (2015).</p>	<ul style="list-style-type: none"> • Habitats of concern are located in both Class I riparian areas and Class A upland wildlife habitat. • Bottomland hardwood forests, wetlands, riverine islands are mostly located in Class I riparian areas and are afforded more protection compared to habitats of concern located in Class A upland habitats

As proposed, the targets described above are achievable based on reasonable circumstances, provide guidance for flexible local compliance with functional plan,

incorporate the Council's ESEE decision, and provide direction for voluntary, incentive-based efforts.

11. Tree Protection Requirements prior to a development application

Key Policy Issue: What is the value of requiring tree protection standards outside of development review process to protect trees in Class I and II areas, with exceptions for developed SFR?

Tree canopy located in vacant Class I and II riparian habitat areas is vulnerable to loss outside the development review process. For example, a landowner could remove trees on a vacant parcel unless doing so required a tree removal permit from the city or county. Some cities and counties already have tree protection ordinances in place while others do not. Including language in the Functional Plan to protect trees by establishing minimum standards of forest canopy retention and reforestation would help address this situation. The tree protection could apply to forested land within Class A and B upland habitats coming into the UGB .

Given the central role of tree canopy in providing multiple ecological functions and values to riparian areas, tree protection requirements could also be included in the development review process. Under this approach, specific references to tree protection standards would be included in the Avoid, Minimize, and Mitigate tests.

Tree protection and forest conservation standards can be an effective means for protecting fish and wildlife. Tree protection may have additional benefits such as increase in property values, stormwater reduction, energy savings, and air pollution reduction.

Policy options include:

- Establish mandatory tree protection requirements in the functional plan (as currently proposed) to address tree removal outside the development process;
- Encourage local governments to provide tree protection outside the development review process;
- Rely on regional education efforts to increase awareness of the value of trees and to inform property owners about the new regulations in a way that reduces interest in cutting trees before applying for a development permit.
- Expand existing Title 3 approach to development, which is defined to include "removal of more than 10 percent of the vegetation on the lot," to Class I and II Habitat. Define tree removal over a certain threshold as development subject to the provisions of the Functional Plan.

12. Encourage Language

Key Policy Issue: How best to motivate and inspire voluntary habitat protection and restoration activity among the region's governments, agencies, non-profits, businesses and individuals?

The Nature in the Neighborhoods Program supports conservation and restoration of all regionally significant habitat through a variety of regulatory and non-regulatory means, as directed by previous Council Resolutions. The Program supports additional education and awareness efforts, acquisition and restoration funding, incentives technical assistance, and monitoring. Metro has a strong and growing role in all of these areas and staff is working to unite the similarly related activities under the Nature in the Neighborhoods name.

One question is how to best encourage cities and counties to increase their commitment to voluntary, incentive based activities for habitat protection. Three different approaches include:

- Describing what Metro would encourage cities and counties to do in the Functional Plan
- Describing what Metro would encourage cities and counties to do in the Nature in the Neighborhoods Program description
- Include descriptions in both the functional plan and the Nature in the Neighborhoods Program.

The issue is how to best communicate this message and whether the functional plan or the Nature in the Neighborhoods Program descriptions will have the greatest visibility and longevity. The functional plan specifies requirements for cities and counties. If included in the functional plan, the encourage language would be visible to all who focus on the functional plan, but the encourage language does not have any legal value by being in the functional plan.

The Nature in the Neighborhoods Program describes Metro's proposed activities but also defines expectations for others. If included in the Nature in the Neighborhoods Program, it would be compatible with descriptions of other voluntary, incentive based programs. It could be distributed to cities and counties and individuals to be highly visible, but it may not have the shelf life that something listed in Metro's legal documents (functional plan) would have.

Including the language in both documents would be the strongest, if somewhat redundant.

13. Other Federal/State requirements

Key Policy Issue: How much should the program be integrated with other state requirements for public health and safety, and federal requirements for clean water and endangered species? Should the program be submitted for meeting Goal 6 Water Quality and Goal 7 Hazards in addition to Goal 5?

In developing the fish and wildlife inventory and conducting the ESEE analysis, staff have engaged in significant additional research regarding water quality, and have learned that the program, as proposed, will add significantly to the region's ability to maintain

and improve water quality in the regions waterways. Staff is therefore confident that a strong scientific basis exists to support an assertion that this program supports and implements Statewide Planning Goal 6. This is consistent with one of the aims of the program from the beginning-to ensure that it contributes toward compliance with the federal Clean Water Act (CWA). Despite the adoption of Title 3 in 1998, the region's waterways are nevertheless still not in compliance with the water quality requirements of the CWA, and are soon to be the subject of a Total Maximum Daily Load rule promulgated by DEQ. More needs to be done to improve the quality of the region's waterways, and this program will take additional steps toward doing so. Making a more explicit statement that the program is being implemented to improve water quality pursuant to Goal 6 would provide support for the assertion that any new land use rules adopted under the program should qualify under the required to comply with federal law exception to M37.

Both the Vision Statement and the Intent Section of the draft Functional Plan Title 13 state that part of the purpose is to comply with federal laws, including the Endangered Species Act. The draft Functional Plan elements to address Class I and II riparian areas will help achieve the purposes of the federal ESA for listed species dependent on riparian areas, and potentially help prevent future listings.

In addition, the Multnomah County Drainage Districts have requested that the Council reconsider one aspect of the Title 3 cut and fill rule that applies to work in floodplains. The MCDDs note that floodplains within their district are completely managed areas that are likely to flood only if the region were to face a truly catastrophic flood. Even a hundred-year flood is highly unlikely to flood such areas. Thus, the MCDDs request that the Council consider repealing the cut and fill requirement as it applies within their districts. If the Council were to adopt such an amendment to Title 3, the action would necessarily be applying Goal 7.