

# Metro | Agenda

Meeting: Transportation Policy Alternatives Committee (TPAC)  
Date: Friday, February 26, 2015  
Time: 9:30 a.m. to 12 p.m. (noon)  
Place: Metro Regional Center, Council Chamber

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- |          |            |   |  |
|----------|------------|---|--|
| 9:30 AM  | 1.         | <b>CALL TO ORDER AND DECLARATION OF A QUORUM</b>  | <b>John Williams, Chair</b>            |
| 9:35 AM  | 2.         | <b>COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS</b>  | <b>John Williams, Chair</b>            |
| 9:45 AM  | 3.         | <b>CITIZEN COMMUNICATIONS ON AGENDA ITEMS</b>   |  |
| 9:50 AM  | 4. *       | <b>CONSIDERATION OF THE TPAC MINUTES FOR JANUARY 29, 2016</b>   |  |
| 9:55 AM  | 5. **      | <b>2018 RTP UPDATE: BACKGROUND FOR REGIONAL LEADERSHIP FORUM#1</b> <ul style="list-style-type: none"><li>• Provide a project update and information on the April 22 Regional Leadership Forum - <a href="#">Information/Discussion</a></li></ul>  | <b>Kim Ellis, Metro</b>                |
| 10:30 AM | 7. #       | <b>DRAFT STRATEGIC PLAN TO ADVANCE RACIAL EQUITY, DIVERSITY AND INCLUSION</b> <ul style="list-style-type: none"><li>• Describe Metro's racial equity approach, present highlights of the content of the draft strategic plan, and discuss how best to engage members' organizations and constituents to solicit feedback on the plan - <a href="#">Information/Discussion</a></li></ul> | <b>Juan Carlos Ocaña-Chiu, Metro</b>   |
| 11:00 AM | 6. *<br>** | <b>MTIP &amp; RFFA POLICY UPDATE</b> <ul style="list-style-type: none"><li>• Discuss outcomes of Public Comment Opportunity and RFFA policy update process - <a href="#">Information/Discussion</a></li></ul>   | <b>Dan Kaempff, Ted Leybold, Metro</b> |
| 11:45AM  | 11.        | <b>ADJOURN</b>  | <b>John Williams, Chair</b>            |

Upcoming TPAC Meetings:

- Friday, March 25, 2016
- Friday, April 29, 2016
- Friday, May 27, 2016

- \* Material will be emailed with meeting notice
- \*\* Material will be emailed at a later date after notice
- # Material will be distributed at the meeting.

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**សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro**  
ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានក្បួនលំអររើសអើងសូមចូលទស្សនាការបោះពុម្ពផ្សាយ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។  
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1890 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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## 2016 TPAC Work Program

*As of 2/19/15*

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

<p><b><u>March 25, 2016</u></b></p> <ul style="list-style-type: none"> <li>• Comments from the Chair: growth distributions</li> <li>• MTIP &amp; RFFA Policy Update <u>Recommendation</u> (Dan Kaempff; Grace Cho; 30 mins)</li> <li>• WSDOT Update <u>Information/Discussion</u> (Michael Williams; 25 mins)</li> <li>• RFFA Criteria Options <u>Information/Discussion</u> (Dan Kaempff; Ted Leybold; 30 mins)</li> <li>• Transit Budget Process Update <u>Information/Discussion</u> (Hesse, Leybold; 15 mins)</li> <li>• <i>SW Corridor Update (Ford)</i></li> </ul>	<p><b><u>April 29, 2016</u></b></p> <ul style="list-style-type: none"> <li>• DEI - Equity Strategy Presentation <u>Information/Discussion</u> (Ocaña-Chíu; 30 mins)</li> <li>• ODOT Region 1 ACT prioritization <u>Information/Discussion</u> (30 mins Cho, Leybold)</li> <li>• 2017-2019 RTO Program <u>Information/Discussion</u> (Kaempff, 45 mins)</li> <li>• Vehicle Electrification Project Options <u>Information/Discussion</u> (Ted Leybold, Caleb Winter, 20 mins.)</li> </ul> <p>Event: April 22 – 8am-12pm at OCC: RTP Regional Leadership Forum #1 (Trends, Challenges and Vision for the Future)</p> <ul style="list-style-type: none"> <li>•</li> </ul>
<p><b><u>May 27, 2016</u></b></p> <ul style="list-style-type: none"> <li>• 2018 RTP Update: Background for Regional Leadership Forum #2 <u>Information/Discussion</u> (Kim Ellis, 40 mins)</li> </ul>	<p><b><u>June 24, 2016</u></b></p> <ul style="list-style-type: none"> <li>• 2018 RTP Update: Transportation Equity Priority Outcomes <u>Information/Discussion</u> (Cho; 35 mins)</li> </ul>
<p><b><u>July 29, 2016</u></b></p> <ul style="list-style-type: none"> <li>•</li> </ul> <p>Event: RTP Regional Leadership Forum #2 (date TBD)</p>	<p><b><u>August 26, 2016</u></b></p> <ul style="list-style-type: none"> <li>• 2018 RTP Update: Background for Regional Leadership Forum #3 <u>Information/Discussion</u> (Kim Ellis, 30 mins)</li> <li>• 2018 RTP Update: Performance Targets <u>Information/Discussion</u> (John Mermin; 40 mins)</li> </ul>
<p><b><u>September 30, 2016</u></b></p>	<p><b><u>October 28, 2016</u></b></p>
<p><b><u>November 18, 2016</u></b></p>	<p><b><u>December 16, 2016</u></b></p>

### **Parking Lot:**

- MAP-21 Implementation
- ODOT Enhance/Fix-It Process
- TAP project delivery contingency fund pilot update (Leybold, Cho)
- Special Transportation fund Allocation Process (Cho)
- Coordinated Transportation Plan for Elderly and People with Disabilities (Cho)
- Draft Regional Transit Vision (Jamie Snook, TriMet, SMART)
-



**TRANSPORTATION POLICY ALTERNATIVES COMMITTEE**  
**January 29, 2016**  
**Metro Regional Center, Council Chamber**

**MEMBERS PRESENT**

John Williams  
Eric Hesse  
Chris Deffebach  
Karen Buehrig  
Don Odermott  
Cora Potter  
Patricia Kepler  
Heidi Guenin  
Charity Fain  
Jared Franz  
Nick Fortey  
Lynda David  
Dave Nordberg

**AFFILIATION**

Metro  
TriMet  
Washington County  
Clackamas County  
City of Hillsboro, representing Cities of Washington Co.  
Community Representative  
Community Representative  
Community Representative  
Community Representative  
Community Representative  
Federal Highway Administration  
Southwest Washington Regional Transportation Council  
Oregon Department of Environmental Quality

**MEMBERS EXCUSED**

Adrian Esteban  
Katherine Kelly

**AFFILIATION**

Community Representative  
City of Gresham

**ALTERNATES PRESENT**

Phil Healy  
Amanda Ownings  
Jon Makler  
Ken Burgstahler  
Mark Lear  
Jessica Berry

**AFFILIATION**

Port of Portland  
City of Lake Oswego, representing Cities of Clackamas County  
ODOT  
WSDOT  
City of Portland  
Multnomah County

**STAFF:** Ted Leybold, Dan Kaempff, Kim Ellis, Grace Cho, Ken Lobeck, Lisa Hunrichs, Tom Kloster, Chris Ford

**1. CALL TO ORDER AND DECLARATION OF A QUORUM**

Chair John Williams declared a quorum and called the meeting to order at 9:33 a.m.

**2. COMMENTS FROM THE CHAIR AND COMMITTEE MEMBERS**

There were no comments from the chair or committee members.



### **3. CITIZEN COMMUNICATIONS ON AGENDA ITEMS.**

There were no citizen communications.

### **4. CONSIDERATION OF THE TPAC MINUTES FOR DECEMBER 18, 2015**

MOTION: Mr. Don Odermott moved and Amanda Ownings seconded the motion to adopt the TPAC minutes from December 18, 2015.

ACTION: The motion passed with Mr. Hesse, Mr. Makler, Ms. Fain, Ms. Guenin, Ms. Kepler, and Ms. David abstaining from the vote.

### **5. 2018 MTIP QUARTERLY AMENDMENT SUMMARY REPORT (10/1 TO 12/31/2015)**

Mr. Ted Leybold and Mr. Ken Lobeck provided the quarterly amendment summary report for the committee's review.

### **6. MTIP OBLIGATION & PERFORMANCE REPORT**

Mr. Ted Leybold and Mr. Ken Lobeck provided a summary of local project obligations during the past fiscal year. Mr. Leybold clarified the obligation process and noted that once funds have been allocated, the lead agency for each project enters into a contract with FTA or FHWA that regulates eligibility for reimbursement. Obligation is a recognition by the federal agency that a project is ready and can be reimbursed. Mr. Lobeck noted that out of 160 projects, 44 percent of projects were shifted from 2015 into 2016 for various delays that included project scoping issues, cost methodology issues, and other readiness issues that delayed the programmed phase obligations. Delays such as these can affect other projects and funding, state-wide. Members were asked to consider whether a work group that convenes quarterly might be helpful for discussion of delivery issues and policy guidance.

Members provided feedback on the suggestion of a work group, and requested further clarification about abbreviated descriptions in the summary reports. Discussion also included issues regarding scoping, best use of resources, and impacts of funding delays. Members agreed that the process could be improved by forming a work group. Staff will further refine the concept and return to the committee for consideration.

### **7. RTO STRATEGIC PLAN AND 2017-19 GRANT PROGRAM**

Mr. Dan Kaempff provided an update on next steps for updating the RTO Strategic Plan. He gave an overview of the program's activities, history, and outcomes. The existing plan extends to 2017. Due to various policy discussions underway that will affect funding and strategy, staff recommends delaying updating the plan until early 2017. Since this affects the grant program, the staff recommendation includes administering the 2017-19 grant program using the current strategic plan direction.

Committee members agreed that it would be helpful to postpone the update in order to most accurately reflect policy direction that comes out of other regional conversations. Mr. Kaempff will return to the committee in April 2016 to discuss grantmaking and potential process improvements with the committee.

### **8. 2018 RTP UPDATE: 2016 ACTIVITIES AND MILESTONES**

Ms. Kim Ellis provided a status report on the Regional Transportation Plan (RTP) update. She reminded the committee about the Regional Leadership Forum event on April 22, from 8:00 am to 12:00 pm. The event will provide an opportunity for the Metro Council and regional leaders from the

Metro Policy Advisory Committee (MPAC), Joint Policy Advisory Committee on Transportation (JPACT), and invited business and community leaders to discuss important issues impacting future travel in the Portland metropolitan region. This is the first of three Regional Leadership Forums that will be held in the coming year.

Significant activities planned for 2016 include:

- Online engagement through surveys and quick polls
- Regional Leadership Forums
- Community discussion group
- Regional speakers series, video clips and news stories
- Equity panel on challenges and performance measures for transportation equity analysis
- Livable Streets Safety and Design Discussion Panels and Best Practices Tours
- E-Blasts, social media and newsfeeds with project updates, public comment opportunities and notice of related events
- Topical workshops and events in partnership with other agencies and organizations
- Project briefings and presentations
- Technical work group meetings
- In addition, staff are conducting research to document transportation system conditions and support development of a Regional Snapshot, a collection of data, expert commentary, personal profiles and events that tells the story of transportation trends and challenges in the region. Staff also began modeling the performance of current RTP investments and compiling revenue data to document local, state and federal transportation funding sources.

Members appreciated the update and recommended that summaries of work group meetings be provided

#### **9. TRANSIT-ORIENTED DEVELOPMENT PROGRAM UPDATE**

Ms. Megan Gibb and Mr. Jonathan Williams provided an overview on Metro's Transit-Oriented Development (TOD) program. Metro's TOD Program implements the 2040 Growth Concept by stimulating private investment in compact mixed-use projects near light rail stations, along frequent service bus corridors and in town and regional centers. To best capture existing and future development opportunities with limited resources, the TOD program must be highly strategic when targeting and investing in station areas and corridors. Over the seventeen years since the TOD program's inception in 1998, program financing has totaled more than \$43 million cumulatively. Regional partners have allocated federal transportation funds to support the TOD program as part of the Metropolitan Transportation Improvement Program (MTIP) planning process. MTIP funds, currently \$3 million annually, are then exchanged to provide local funding for project investments and program operations. Historically, other funding sources have included direct federal transportation grants, income from property transactions, interest earnings and Metro general funds.

Members expressed interest in guidelines for how projects are selected, affordability targets, market strength, and challenges due to zoning constraints.

#### **10. SW CORRIDOR DRAFT MODE RECOMMENDATION / UPDATE ON PROJECT**

Mr. Chris Ford provided an update on the SW Corridor and summary of decisions made and what is ahead. The Southwest Corridor Plan is a collaborative effort between project partners Portland, Sherwood, Tigard, Tualatin, Beaverton, Durham, King City, Washington County, ODOT, TriMet and Metro. It is a comprehensive approach to achieving community visions through integrated land use and transportation planning. The Plan is rooted in the adopted local land use plans of the corridor

communities, including the Barbur Concept Plan, the Tigard High Capacity Transit Land Use Plan, Linking Tualatin and the Sherwood Town Center Plan. In support of these community visions, the Southwest Corridor Plan Steering Committee has recommended a Shared Investment Strategy that includes key investments in transit, roadways, active transportation, parks, trails and natural areas.

The project team is currently performing analysis of the PCC Sylvania connection options. During spring 2016 the steering committee will decide whether to continue study of direct light rail tunnel to PCC Sylvania. In May, the steering committee will be making a recommendation on the best mode for the corridor, light rail or BRT. In summer 2016, DEIS scoping will be underway. Mr. Ford will return to TPAC in March 2016 with further developments in the project.

**11. ADJOURN** Chair Williams noted that the next meeting be held on February 26, 2016. The meeting was adjourned at 11:58. a.m.

Respectfully submitted,



Lisa Hunrichs, Planning and Development

**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JANUARY 29, 2015**

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT No.
1	Agenda	1/22/16	01/29/16 TPAC Agenda	012616T-01
2	Work Program	1/22/16	2016 TPAC Work Program	012616T-02
3	Meeting Summary	12/18/15	12/18/15 TPAC meeting summary	012616T-03
4	Memo	1/19/16	To: TPAC and Interested parties From: Ken Lobeck, Senior Transportation Planner and Pamela Blackhorse, Program Assistant Re: TIP Adjustments for October – December 2015	012616T-04
5	Handout	December 2015	Metro 1 <sup>st</sup> Quarter FFY 2016 (October 1 – December 31, 2015) MTIP Amendment Summary Report	012616T-05
6	Handout	12/29/2015	MTIP Annual listing of federally obligated projects	012616T-06

**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JANUARY 29, 2015**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DOC DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT No.</b>
7	Memo	1/20/2016	To: TPAC and Interested parties From: Ken Lobeck, Senior Transportation Planner Re: MTIP Federal Fiscal Year 2015 Obligation and Performance Report	012616T-07
8	Memo	1/25/2016	To: TPAC and Interested parties From: Dan Kaempff, Principal Transportation Planner Re: RTO Strategic Plan and 2017-19 Grant program update	012616T-08
9	Memo	1/28/2016	To: TPAC and Interested parties From: Kim Ellis, Principal Transportation Planner Re: Regional Transportation Plan update – 2016 activities	012616T-09
10	Handout	1/27/2016	2018 RTP Update Technical Work Groups (Member Rosters)	012616T-10
11	Handout	July 2014-June 2015	Transit-Oriented Development Annual Report	012616T-11
12	Handout	January 2016	TOD Updated map	012616T-12
13	Handout	1/7/2016	Southwest Corridor Plan Summary of options to improve transit access to PCC Sylvania	012616T-13
14	Handout	12/31/2015	Southwest Corridor High Capacity Transit Mode Comparison	012616T-14
15	Handout	December 2015	What would bus rapid transit look like in the Southwest Corridor	012616T-13



## 2018 REGIONAL TRANSPORTATION PLAN UPDATE STATUS REPORT FOR JANUARY – FEBRUARY 2016

February 24, 2016

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

Our region's economic prosperity and quality of life depend on a transportation system that provides every person and business access to safe, reliable and affordable ways to get around. Through the 2018 Regional Transportation Plan update, the Metro Council is bringing together the communities of the Portland metropolitan region to plan the transportation system of the future by updating our shared vision and investment strategy for the next 25 years.

A list of accomplishments and activities that are underway for different elements of the update follows.

<b>Outreach and public engagement</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ 30-day online survey on equity and transportation</li> <li>✓ Briefing to Regional Environmental Public Health Directors</li> <li>✓ Quarterly email update with RTP activity status and list of related events</li> <li>✓ Ongoing updates to regional technical and policy committees</li> <li>✓ Project website launched at <a href="http://oregonmetro.gov/rtp">oregonmetro.gov/rtp</a></li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Regional Leadership Forum #1 planning</li> <li><input type="checkbox"/> Distribution of online survey results</li> <li><input type="checkbox"/> Community interviews and video production to support regional snapshot on transportation trends and challenges</li> <li><input type="checkbox"/> Development of project factsheet</li> </ul>
<b>Safety</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ Published on-line Metro Crash Map at <a href="http://crashmap.oregonmetro.gov/file/index.html">crashmap.oregonmetro.gov/file/index.html</a></li> <li>✓ Received input from Transportation Equity work group</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Updating safety data and Regional High Injury Network</li> <li><input type="checkbox"/> Status review of Regional Transportation Safety Plan</li> <li><input type="checkbox"/> Conducting safety policy review</li> <li><input type="checkbox"/> First work group meeting on May 20</li> </ul>
<b>Transportation equity</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ Convened two work group meetings on Jan. 8 and Feb. 18, 2016</li> <li>✓ Discussed communities being focused on for the transportation equity work</li> <li>✓ Began discussion of transportation equity outcomes to measure in the 2018 RTP</li> <li>✓ Provided initial input to RTP transit and safety work groups</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Continue discussion of transportation equity outcomes to measure in the 2018 RTP</li> <li><input type="checkbox"/> Documenting trends and existing transportation conditions in context of historically underrepresented communities as well as older adults and younger persons</li> <li><input type="checkbox"/> Begin discussion of existing policies pertaining to transportation equity and existing measurement practices</li> </ul>

<b>Transit</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ Convened first work group meeting on Jan. 7, 2016</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Regional Transportation Snapshot support</li> <li><input type="checkbox"/> Preparing existing conditions report on transit</li> </ul>
<b>Freight</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ First Freight Work Group meeting on Jan. 20, 2016</li> <li>✓ Prepared Draft of Key Freight Trends and Logistics Issues Report</li> <li>✓ Identified individual freight modal needs, for trucks, rail, air, freight, marine and river, and constraints in the freight system.</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Updating draft of Key Freight Trends and Logistics Issues Report</li> <li><input type="checkbox"/> Review of existing 2010 freight action plan, freight vision and freight policies</li> </ul>
<b>Finance</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ Briefed local jurisdictions on work plan and data needs at staff-level county coordinating committee meetings</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> First work group meeting on Feb. 29, 2016</li> <li><input type="checkbox"/> Participating in ODOT-led discussions on state and federal revenues</li> <li><input type="checkbox"/> Compiling revenue data to document existing transportation funding sources</li> </ul>
<b>Performance</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ Convened Measuring Success workshop (Jan. 25, 2016) – with presentations from local jurisdictions on their experience with performance-based planning</li> <li>✓ Convened first Performance work group meeting on Feb. 22, 2016</li> <li>✓ Discussed interests, concerns and aspirations of work group members</li> <li>✓ Discussed 2018 RTP, relationship to other work groups, and highlights from background research on performance based planning</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Draft Performance Measures Scoping report – requirements, best practices, challenges &amp; issues, scope of 2018 RTP performance work, and assessment of current measures</li> <li><input type="checkbox"/> Modeling and analysis of 2014 RTP and Climate Smart Strategy Investments</li> </ul>
<b>Design</b>	<p><u>Accomplishments</u></p> <ul style="list-style-type: none"> <li>✓ Stakeholder interviews, scoped cases studies, and engagement plan</li> <li>✓ Mark Fenton walking event in Beaverton and the Jade District</li> </ul> <p><u>Underway</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Developing visual library</li> <li><input type="checkbox"/> Developing calendar of forums, workshops and best practice tours</li> <li><input type="checkbox"/> First work group meeting on Aug. 19, 2016</li> </ul>
<b>Policy actions</b>	<p><i>This work will begin in 2017.</i></p>

## 2018 RTP UPDATE | Council and Regional Advisory Committees Briefings *(dates are tentative)*

2016	Council	TPAC	JPACT	MTAC	MPAC	Regional Leadership Forum
January		<b>Jan. 29</b> <i>Project update</i>				
February		<b>Feb. 26</b> <i>Background for RLF 1</i>				
March	<b>March 1</b> <i>Project update; Background for RLF 1</i>		<b>March 17</b> <i>Project update; Background for RLF 1</i>	<b>March 2</b> <i>Project update; Background for RLF 1</i>	<b>March 9</b> <i>Project update; Background for RLF 1</i>	
April						<b>April 22</b> 8-noon, OCC <i>Trends, Challenges, and Vision for Future</i>
May		<b>May 27</b> <i>Background for RLF 2</i>		<b>May 18</b> <i>Background for RLF 2</i>		
June	<b>June TBD</b> <i>Background for RLF 2</i>	<b>June 24</b> <i>Transportation equity priority outcomes</i>	<b>June 16</b> <i>Project update; Background for RLF 2</i>		<b>June 22</b> <i>Project update; Background for RLF 2</i>	
July				<b>July 6</b> <i>Transportation equity priority outcomes</i>		<b>July 15 (tentative)</b> <i>Funding</i>
August						
September	<b>Sept. TBD</b> <i>Background for RLF 3</i>	<b>Sept. 30</b> <i>Background for RLF3; Draft RTP performance targets</i>		<b>Sept. 21</b> <i>Background for RLF3; Draft RTP performance targets</i>		
October			<b>Oct. 20</b> <i>Project update; Background for RLF 3</i>		<b>Oct. 12</b> <i>Project update; Background for RLF 3</i>	
November		<b>Nov. 18</b> <i>Project update; transportation equity measures</i>		<b>Nov. 16</b> <i>Project update; transportation equity measures</i>		<b>Nov. 10 (tentative)</b> <i>Designing A Safe, Reliable and Affordable System</i>

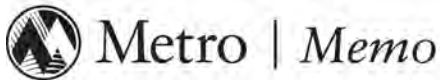
*No briefings are planned for December 2016. Meeting materials will be posted at [oregonmetro.gov/calendar](http://oregonmetro.gov/calendar)*

## 2018 RTP UPDATE | Technical Work Group Meetings

2016	Equity	Finance	Transit	Freight	Performance	Safety	Design
January	<b>Jan. 8</b> 9-11 a.m. Room 401, MRC		<b>Jan. 7</b> 10 a.m.-noon Room 401, MRC	<b>Jan. 20</b> 8-9:30 a.m. Room 370, MRC			
February	<b>Feb. 18</b> 1-3 p.m. Room 401, MRC	<b>Feb. 29</b> 2:30-4:30 p.m., Room 501, MRC	<b>Feb. 24</b> 1 - 3 p.m., Room 401, MRC		<b>Feb. 22</b> 2-4 p.m. Room 501, MRC		
March			<i>TBD thru work group doodle poll</i>				
April		<i>TBD thru work group doodle poll</i>			<b>April 25</b> 2-4 p.m. Room 501, MRC		
May	<b>May 12</b> 1-3 p.m. Room 401, MRC	<i>TBD thru work group doodle poll</i>		<i>TBD thru work group doodle poll</i>		<b>May 20</b> 9 a.m.-noon TBD	
June	<b>June 16</b> 1-3 p.m. Room 401, MRC		<i>TBD thru work group doodle poll</i>		<b>June 27</b> 2-4 p.m. Room 501, MRC		
July			<i>TBD thru work group doodle poll</i>				
August			<i>TBD thru work group doodle poll</i>				<b>Aug. 19</b> 9 a.m.-noon Room 270, MRC
September	<b>Sept. 15</b> 1-3 p.m. Room 401, MRC	<i>TBD thru work group doodle poll</i>		<i>TBD thru work group doodle poll</i>	<b>Sept. 12</b> 2:30-4:30 p.m. Room 501, MRC	<b>Sept. 23</b> 9 a.m.-noon Room 270, MRC	
October							<b>Oct. 21</b> 9 a.m.-noon Room 270, MRC
November	<b>Nov. 17</b> 1-3 p.m. (if needed)						
December						<b>Dec. 2</b> 9 a.m.-noon Room 270, MRC	<b>Jan. 6, 2017</b> 9 a.m.-noon Room TBD

Meetings of the Policy Actions Work Group begin in 2017. Meeting materials will be posted at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp) and [oregonmetro.gov/calendar](http://oregonmetro.gov/calendar)





DATE: February 24, 2016  
TO: TPAC, MTAC and Interested Parties  
FROM: Kim Ellis, RTP Project Manager  
SUBJECT: 2018 Regional Transportation Plan Update – Technical Work Group Meetings

\*\*\*\*\*

#### **PURPOSE**

Provide meeting notes from technical work group meetings. No action requested.

#### **BACKGROUND**

At the January meeting, members of the Transportation Policy Alternatives Committee (TPAC) requested meeting notes from work group meetings be provided to TPAC and the Metro Technical Advisory Committee (MTAC) to help TPAC and MTAC members stay informed of the work group discussions and progress.

All work group meeting materials and other project related information are posted online at: [www.oregonmetro.gov/rtp](http://www.oregonmetro.gov/rtp)

#### **NEXT STEPS**

Copies of completed meeting notes are attached to this memo. In addition to providing work group meeting notes, staff will provide a project status report to TPAC and MTAC at least every two months in addition to other scheduled project briefings.

#### Attachments

- Regional Transit Providers Workshop #1 (*Sept. 25, 2015*)
- Regional Transit Technical Work Group Meeting #1 (*Jan. 7, 2016*)
- Transportation Equity Technical Work Group Meeting #1 (*Jan. 8, 2016*)
- Freight Technical Work Group Meeting #1 (*Jan. 20, 2016*)
- Transportation Equity Technical Work Group Meeting #2 (*Feb. 18, 2016*)
- Performance Technical Work Group Meeting #1 (*Feb. 22, 2016*)





**REGIONAL TRANSIT PROVIDERS WORKSHOP #1**  
**September 25, 2015, 1:00 to 3:00 PM**  
**Metro Regional Center, Room 501**

**ATTENDED:**

- Dan Bower, PSI
- Eric Hesse, TriMet
- Stephan Lashbrook, SMART
- Roger Hanson, C-TRAN
- Steve Dickey, Salem-Keizer Cherriots
- Andi Howell, Sandy
- Jacques Livingston, Mt Hood Express
- Cynthia Thompson, Yamhill County
- Karyn Criswell, ODOT
- Kathy, Woodburn

**INVITED:**

- Julie Wehling, Canby Area Transit
- Cora Potter, Ride Connection
- Shirley Lyons, South Clackamas Transportation District

**DISCUSSION**

- Each of the different agencies has a lot going on: Increases in service, expansion in service, new transit center, funding opportunities and developing short/long term plans
- Transit riders don't care about funding, just getting from point A to point B.
- We should be looking at opportunities to connect
  - We need a coordinated system.
  - There is a need to smooth out connections.
  - E-fare/shared fare system
  - Bus procurement
- This is an opportunity to share ideas and plans
- There should be fairness in the way that transit is funded. There needs to be an increased statewide conversation (beyond Portland) – intercity connections, statewide and how do we fund transit. This should include Washington.
- Define roles and responsibilities
  - What can the state do:
    - Assure permanency in routes
    - Funding
    - Common approaches
    - Commuter rail planning/intercity connections
  - What can Metro do:
    - Coordinate efforts in planning, policy and funding
    - Develop common policy for all transit providers
    - Focus on the land use and transportation connection
    - Define corridors by need

**KEY TAKE AWAY:**

- There are tangible products resulting in the Regional Transit Strategy and non-tangible products resulting in partnerships and future opportunities:
  - Build partnerships
  - Develop shared vision
  - Define roles and responsibilities

**ADJOURN:**

There being no further business, Chair Jamie Snook, adjourned the meeting at 12:00 p.m.

*Meeting summary prepared by Jamie Snook.*



**Regional Transit Work Group Meeting #1**  
**Thursday, January 7, 2016, 10:00 a.m. to 12:00 p.m.**  
**Metro Regional Center, Room 401**

**Committee Members**

	<b>Affiliation</b>
Dan Bower	Portland Streetcar
Lidwien Rahman	ODOT
Karyn Criswell	ODOT
Steve Dickey	Salem-Keizer Transit
Roger Hanson	C-Tran
Eric Hesse	TriMet
Andi Howell	City of Sandy / Sandy Transit
Stephan Lashbrook	City of Wilsonville/SMART
Nancy Kraushaar	City of Wilsonville
Jacques Livingston	Clackamas County
Karen Buehrig	Clackamas County
Shirley Lyons	S. Clackamas Transportation District
Steve Szigethy	Washington County
Cynthia Thompson	Yamhill County and BCB Consulting
Andrea Hamberg	Oregon Health Authority
Nancy Kraushaar	City of Wilsonville
Ken Recker	ATP for Beaverton
Denny Egner	City of Milwaukie
Mike Coleman	Port of Portland
Mauricio LeClerc	City of Portland
Alex Page	Ride Connection
Kelly Clark	City of Gresham
Kate McQuillan	Multnomah County
Steve White	Oregon Public Health Institute

**Metro Staff**

Tom Kloster	Metro
Jamie Snook	Metro
Grace Cho	Metro
Janet Toman	Metro

## **I. WELCOME**

Mr. Tom Kloster welcomed meeting attendees. Everyone provided introductions. Mr. Kloster introduced Ms. Jamie Snook who talked about the regional transit strategy, which is part of the 2018 RTP update. This is updated every four years. It was announced this will be the first of additional periodic meetings.

## **II. WHAT ARE OTHER PLANNING EFFORTS OR PROJECTS**

Other planning projects and efforts discussed by the committee included:

- Oregon State transportation plan
- Oregon Rail Plan
- TriMet service enhancement plan

## **III. OVERVIEW OF THE REGIONAL TRANSIT STRATEGY (RTS)**

Ms. Snook provided an overview of the Regional Transit Strategy. Highlights included:

- My Place in the Region
- High capacity transit as a whole
- Transit supportive elements
- Regional Transit Plan History
- Proposed approach
- Key phases
- Schedule and milestones

## **IV. HOW TO GET INVOLVED (PROPOSED WORKING GROUPS/WORKSHOPS)**

- Public engagement opportunities
- Special events
- Regional Transit Providers workshops (this group)
- Transit working group
- TPAC/JPACT
- MTAC/MPAC
- Metro Council

## **V. WHO SHOULD BE ENGAGED**

The work group suggested engaging the state in a statewide conversation including Washington, around coordination and funding.

The attendees discussed who should be engaged in this process. Comments included looking at partnerships, ensuring coordinated vision, building off previous work (Climate Smart) and regional leadership forums.

Other opportunities discussed: We should be looking at opportunities to connect around the need for a coordinated system, smoothing out connections and a coordinated fare system.

#### **VI. WHAT IS IMPORTANT FOR THE RTS TO ADDRESS (OPPORTUNITIES & CHALLENGES)**

Issues attendees recommended or were important to address include the following:

- Clarifying roles and responsibilities
- Funding / Clarifying capital and operating improvements
- Demand on infrastructure
- Transit connections
- Flexible transit community services

There are tangible products resulting in the Regional Transit Strategy and non-tangible products resulting in partnerships and future opportunities:

- Build partnerships
- Develop shared vision
- Define roles and responsibilities

#### **VII. ADJOURN**

Ms. Snook provided a quick overview of the meeting. She announced that this work group would meet about 15 times over the next two years. Attendees discussed future meeting formats and preferred to have future meetings with periodic workshops. Ms. Snook said that the next meeting would be in February 2016 and would be focused on the existing conditions and preparing for the first leadership forum. She agreed to send out meeting notes and links to the current HCT Plan and System Expansion Policy.

There being no further business, the meeting was adjourned at 3:00 p.m.

*Meeting summary prepared by: Janet Toman, Planning and Development.*

Meeting materials:

Item	Topic	Document Date	Description
1	Agenda	01/07/16	Regional Transit Work Group Agenda
2	PDF	01/07/16	Regional Transit Strategy PowerPoint presentation
3	PDF	8/2015	RTS Approach overview and timeline
4	PDF	9/17/15	RTS_factsheet_FINAL-091715







**2018 RTP Transportation Equity Analysis Work Group – Meeting #1**  
**Friday, January 8, 2016**  
**9:00 – 11:00 a.m.**  
**Metro Regional Center, Room 401**

<b>Committee Members</b>	<b>Affiliation</b>	<b>Attendance</b>
April Bertelsen	City of Portland, Bureau of Transportation	Present
Jessica Berry	Multnomah Co. Dept. of Community Services	Present
Stephanie Caldera	Oregon Department of Environmental Quality	Present
Brad Choi	City of Hillsboro	Present
Corky Collier	Columbia Corridor Association	Present
Kay Durtschi	Community member	Present
Zan Gibbs	City of Portland	Present
Aaron Golub	Portland State University	Present
Heidi Guenin	Transportation Council	Present
Andrea Hamberg	State of Oregon	Present
Jon Holan	City of Forest Grove	Present
Eric Hesse	TriMet	Present
Stephanie Millar	State of Oregon Department of Transportation	Present
Cora Potter	Ride Connection	Present
Steve Williams	Clackamas County	Present
<b>Interested Parties</b>		
Sarah Armitage	State of Oregon DEQ	Present
Noel Mickelberry	Oregon Walks	Present
Nichole Phillips	Community member	Present
Katie Selin	Portland State University	Present
<b>Metro Staff</b>		
Grace Cho	Metro	Present
Scotty Ellis	Metro	Present
Cliff Higgins	Metro	Present
Ted Leybold	Metro	Present
Jessica Martin	Metro	Present
John Mermin	Metro	Present
Peggy Morell	Metro	Present
Jamie Snook	Metro	Present
Janet Toman	Metro	Present

## **I. WELCOME**

Cliff Higgins welcomed meeting attendees. Mr. Higgins introduced Grace Cho, the project manager for transportation equity analysis. Mr. Higgins and Ms. Cho explained the agenda and what the work group will talk about for the meeting.

## **II. WORK GROUP MEMBERS INTRODUCTIONS**

All those present introduced themselves.

## **III. TRANSPORTATION EQUITY ANALYSIS TECHNICAL WORK GROUP PURPOSE AND CHARGE**

Ms. Cho explained the work group purpose and charge for the next two years:

- Help develop the region's long-range transportation blueprint by:
- Advise Metro staff in:
  - Shaping what and how equity is measured in transportation plans and investments
  - Supporting the development of the region's transportation plans
- Build partnerships and better serve community
- Asked members to be active participants and bring up concerns
- Loop back with your constituents and leadership about the TEA
  - Make sure to bring input back to this table
- Bring forward your feedback and concerns early

## **IV. OVERVIEW OF TRANSPORTATION EQUITY ANALYSIS**

The work group was presented some background information about the Transportation Equity Analysis and its relationship to the broader Regional Transportation Planning and the Metropolitan Transportation Improvement Program. As part of the discussion of the background, she addressed:

### **2018 RTP**

- Serves as the region's long-range transportation blueprint
- Identifies the capital transportation investments the region wants to make in the next 20+ years
- Timeline for the 2018 RTP development

### **2018-2021 Metropolitan Transportation Improvement Program (MTIP):**

- Identifies the capital transportation investments the region will make in the next 20+ years
- Monitors how the RTP is implemented
- Provides policy direction for the Regional Flexible Fund Allocation

Ms. Cho noted that the MTIP is a complementary document to the RTP and identifies plans Metro is making over the next four years and shows the RTP is being implemented.

Following the discussion on the RTP and the MTIP, Ms. Cho discussed in further detail the work plan for the Transportation Equity Analysis. As part of the work plan discussion she addressed its main purposes, which includes:

- Assessing long-range transportation investment scenarios
- Highlighting performance of transportation investments to community identified priorities
- Measuring the equity component of the transportation plan
- Better connecting transportation investments to regional equity goals/policies

She also walked through the TEA timeline and discussed the general topics which will be discussed at the working group meetings in 2016. Ms. Cho said the big focus in 2016 will be on the technical process. The TEA work group is set to meet 8-10 times over the next two years. The work group will first determine community priorities and the priorities to measure. After May 2016, they will review the tools available to measure priorities in relationship to the transportation investment scenarios. Ms. Cho emphasized said the May and September 2016 meetings will be important for the work group.

Ms. Cho said in summary, the work group will advise on the following:

In 2016:

- What community values to measure transportation investments packages against
- How to measure the transportation investments packages

In 2017 and 2018:

- Analysis results, findings, recommended policy refinements and short list of actions

## **V. Public Engagement Strategy**

Peggy Morell, Senior Public Affairs Specialist, discussed the RTP public engagement strategy. Many plans resulting from the RTP will be refined over the next three years. Ms. Morell said the work group would have the opportunity to influence these plans. An online survey will be posted regarding travel and speaker events to be scheduled. Updates will be sent to the work group via email. Ms. Morell also took the opportunity to advertise another RTP event to get involved and distributed the January 25, 2016 Measuring Success workshop flyer.

Mr. Higgins added to Ms. Morell's discussion of the Snapshot series and made a plug for individuals and stories to include. He asked workshop attendees to get in touch with staff if they have contacts to provide as Metro seeks gathering a wide variety of stories.

## **VI. TRANSPORTATION EQUITY**

Ms. Cho reviewed the definition of equity definition. Equity means access to the same opportunities. Additionally, Ms. Cho discussed with the group that having access to the same opportunities leads to fairness. This relates to transportation regarding:

- Affordability
- Transportation Safety
- Accessibility
- Multimodal Choices
- Public Health and Air Quality

Ms. Cho reviewed with the group the communities in which the work will be are focused on. Maps were presented:

- People of Color
- People with Lower-Incomes
- People with Limited English Proficiency
- Older Adults
- Younger Persons

The community of people with disabilities was addressed, including the need to get a meaningful count of people with disabilities; not just where they live but where they need to go.

She mentioned that the discussion of transportation needs will be discussed at the next work group meeting.

Members of the work group expressed a concern regarding incomplete population data. It was suggested that a lack of a complete dataset to not hinder the analysis and lead to more focus on other areas with more data.

There was a suggestion to include motor vehicle data and it was noted that driving is a more practical choice in many areas of the region.

Maps showing above noted communities were reviewed.

Mr. Higgins shared with the group that the focus will need to be on what is most important.

Homelessness and air quality was brought up as being important issues.

## **VII. NEXT STEPS**

Ms. Cho asked members to think about issues for discussion at the next meeting. She stated that the process will likely raise pressing issues and recognized the work group will want to arrive at solutions quickly, but as a first step in the process she asked the work group to first define community values.

She asked members to think about the following requests and bring responses and other ideas to the next meeting. These “homework” assignments were:

- Develop a list of priorities to measure and evaluate transportation investments against
- Note the opportunities to engage and partner with your community

## **VIII. ADJOURN**

There being no further business, Ms. Cho and Mr. Higgins adjourned the meeting at 11:00 a.m.

*Meeting summary respectfully submitted by:*

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*Janet Toman, Regional Planning Administration Specialist*

Attachments to the Record:

Item	Topic	Document Date	Description	Document Number
1	Agenda	01/08/16	TEA Meeting Agenda – 1.8.16	010816rtp-01
2	TEA Meetings	12/23/15	2016 TEA Work Group Meetings	010816rtp-02
3	Factsheet	06/01/15	Transportation Equity Factsheet – Summer2016	010816rtp-03
4	Work Plan	10/01/15	2018 RTP/2018-21 MTIP – TEA Work Plan	010816rtp-04
5	Charge	01/08/16	TEA Work Group Charge & Meeting Protocols	010816rtp-05
6	Work Plan	12/15/15	TEA Detailed Work Plan	010816rtp-06
7	Maps	01/01/10	Communities maps	010816rtp-07
8	Map definitions	01/08/16	Definitions and Technical Information for maps	010816rtp-08
9	Memo	12/30/15	TEA Meeting 1 Memo	010816rtp-09
10	Flyer	12/15/15	Measuring success – performance workshop	010816rtp-10
11	Definition	01/08/16	Metro’s Working Definition of Equity	010816rtp-11
12	Presentation	01/08/16	TEA Work Group Presentation	010816rtp-12
13	Mtg. Evaluation	01/08/16	TEA Meeting #1 Meeting Evaluation	010816rtp-13





**Regional Freight Work Group Meeting #1**  
**Wednesday, January 20, 2016, 8:00 a.m. to 9:30 a.m.**  
**Metro Regional Center, Room 370 A&B**

<b>Committee Members</b>	<b>Affiliation</b>	<b>Attendance</b>
William Burgel	Burgel Rail Group	Present
Gary Cardwell	NW Container Services, Inc.	Present
Kelly Clarke	City of Gresham	Present
Tony Coleman	Oregon Department of Transportation (ODOT)	Present
Lynda David	SW WA Regional Transportation Council (RTC)	Present
Jill Eiland	Intel Corporation	Present
Jerry Grossnickle	Bernert Barge Lines	Present
Brendon Haggerty	Multnomah County Health Department	Present
Phil Healy	Port of Portland	Present
Robert Hillier	City of Portland, Office of Transportation Planning	Present
Jana Jarvis	Oregon Trucking Association	Present
Steve Kountz	City of Portland, Bureau of Planning & Sustainability	Present
Kate McQuillan	Multnomah County, Land Use and Transportation	Present
Zoe Monahan	City of Tualatin, Community Development	Present
Don Odermott	City of Hillsboro, Transportation Planning	Present
Derrick Olsen	Greater Portland, Inc.	Present
Patrick Sweeney	City of Vancouver	Present
Erin Wardell	Washington County	Present
Steve Williams	Clackamas County	Present
<b>Metro Staff</b>		
Tim Collins	Metro	Present
Janet Toman	Metro	Present

**I. WELCOME AND INTRODUCTIONS**

Mr. Collins welcomed meeting attendees and introductions were made.

**II. OVERVIEW AND WORK GROUP PURPOSE AND SCHEDULE**

Mr. Collins reviewed the purpose of the meeting, which was to get to know each other, provide an overview of the Regional Freight Strategy, and discuss work group purpose and individual freight modal needs and constraints.

It was stated there was movement of 60,000 to 90,000 containers across the region in the last year. Mr. Collins discussed other aspects of the Regional Transportation Plan, including the region's long-range transportation blueprint and identifying the capital transportation investments to make in the next 20-plus years.

2018 RTP Timeline reviewed:

- Phase 1: Getting Started, May to December 2015
- Phase 2: Framing Trends and Challenges, January to April 2016 (Current)
- Phase 3: Looking Forward, May 2016 to February 2017
- Phase 4: Building a Shared Strategy, March to December 2017
- Phase 5: Adopting a Plan of Action, 2018

Metro staff will convene the following technical work groups to provide input to staff on draft materials and implementing policy direction from Regional Leadership Forums:

- Transit
- Equity
- Finance
- Performance
- Freight
- Design
- Safety
- Policy Actions

### **III. DRAFT KEY FREIGHT TRENDS AND LOGISTICS ISSUES REPORT**

Regional Freight Strategy presented:

- Regional Freight Trends and Logistics Issues
- Regional Freight Vision and Supporting Policies
- Freight Investment Priorities
- Priority Freight Projects for Implementation

Westside Logistics study addressed computer and electronics commodities being transferred to other freight modes then moving to other airports; there is not a lot going directly out of Portland International Airport.

The goal to look at prioritizing projects and implementing freight projects was discussed, including updating the Regional Freight Plan from 2010.

Freight Work Group charge:

- Review 2010 Regional Freight Plan recommendations
- Review Key Freight Trends and Logistics Issues Report
- Review shared freight investment strategy
- Review draft freight policy refinements and actions
- Assist in building awareness
- Consider input from partners and the public
- Participate!



The Regional Transportation Plan was discussed:

- Region's long-range transportation blueprint
- Identifies the capital transportation investments we want to make in the next 20+ years

The Freight Analysis Framework (2007 survey) was discussed regarding the base year data on modes and commodities. Talk points included:

- Freight Flows by Mode of Travel
- Top Domestic Commodities
- Top Import Commodities
- Top Export Commodities

A question was asked about the availability of getting the quantity of exports out of the region by mode of travel. Mr. Collins will check on the availability of that data, which would be useful.

#### **IV. DISCUSS FIRST REGIONAL FREIGHT TARGET OUTCOME**

The Key Freight Trends and Logistics Issues Report was presented to the workgroup. Mr. Collins asked the work group to review the Table of Contents, to ensure it included all necessary topics as of July, 2010.

The Global Trade Investment Plan would be forwarded to Mr. Collins, since it was stated that findings related to exports and strategy are updated on the Metro Export Initiative.

The committee discussed a freight forecast conducted by Eco Northwest Forecast in 2012, which addressed surrounding land needs for marine terminals. The forecast showed the ability to compensate for land supply freight area expansion is an important equity and public health concern.

The committee discussed several concerns including:

- That the Metro area does not have enough of a local market, and that is why product goes elsewhere.
- The increase of trucks on Interstate-5 from 1,000 to 1,200
- The vehicle capacity over the Columbia River (I-5) bridge to Portland has not increased, but the daily volume over bridge has increased.

ODOT's Corridor Bottleneck Study was discussed.

Mr. Collins stated that it is hard to quantify all truck traffic that moves through our region. Regarding movement south and north, we need to look at boundaries and try to quantify it. Mr. Collins stressed to the importance of addressing this as thoroughly as possible.

Mr. Collins overviewed the freight modal needs and constraints including:

- Truck travel constraints
- Rail needs and constraints
- Air freight needs and constraints
- River and Marine freight needs and constraints

It was brought to the group's attention that they would need to analyze where truck congestion occurs.

The group discussed the impacts of high water levels on the Columbia River/I-5 Bridge and the adjacent railroad bridge. Years in which water levels rise by 6 feet or more, call for many more lifts of the I-5 Bridge. Mr. Grossnickle proposed that a lift span on the railroad bridge would make it faster. Currently, the railroad bridge has a swing span and a very narrow opening. The old railroad bridge was built in 1908 and the swing span is slow. A member stated that freight traffic is majorly affected when the I-5 Bridge lift is up. The use of lifts are limited during the peak travel periods on I-5.

Rail traffic topics discussed:

- Rail velocity: industrial mile-long trains and railroad crossings. These block a lot of traffic and are a major impact to our system.
- Rail lines
- Avoid blocking crossings.
- Freight rail impacts on passenger rail
- Passenger trains delayed by freight trains
- Increase of rail traffic in region
- Double-track some of the tracks adjacent to Sandy Boulevard. There are 30-40 trains per day along this track.

Airfreight traffic topics discussed:

- Need for more marine terminal space
- Cost of redevelopment
- Kenton Rail Line Study continuation
- Access to airport and consolidation. Airfreight will grow as area population will grow.
- USPS will be at Air Trans way. It is predicted there will be a huge increase of traffic and employees at that airport area.
- Port of Portland will conduct a study on the Hillsboro Airport needs.
- Westside Logistics Study regarding electronics commodities found that there is not a lot going out of PDX, but transferred to other modes than to other airports.

Metro freight traffic topics discussed:

- How to get freight from (smaller areas/cities) to systems such as I-5
- Increased congestion on Interstate-5 congestion
- Increased amount of trucks on all freeway systems
- Need to address intra-county freight movements
- Capacity restraints at Columbia River Bridge. Artificial speeds are reported. It is important that we look at the tools being used; leadership is needed to move forward.
- Fast Act identifies the Rose Quarter and Interstate-5 as having major bottlenecks.

Barge freight traffic topics discussed include:

- The need is to use the lift on the I-5 Bridge when the river rises over six feet. There have been some years of nine months of high water.
- The location of the narrow opening of the railroad bridge makes for a difficult s-curve maneuver of barge traffic on the Columbia River that comes under these two bridges.

Other concerns:

- Ensure Metro takes this project seriously
- The ramp meter bypass which is a solution, but not for trucks; the sign is on wrong side of interchange
- Costs
- Build priorities and tie to the economic value of the freight being moved

## **V. NEXT STEPS**

Mr. Collins overviewed the next steps:

- Finalize Key Trends and Logistics Issues Report
- Review existing freight action plan, freight vision and supporting freight policies
- Identify tools and evaluation measures
- Regional Transportation Snapshot (April)
- Regional Leadership Forum (April)

A consensus was reached on scheduling two-hour meetings in the future. The PowerPoint presentation used in this meeting would be made available to members and interested parties.

## **VI. ADJOURN**

There being no further business, Chair Tim Collins, adjourned the meeting at 9:30 a.m.

*Meeting summary respectfully submitted by:*

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*Janet Toman*

Attachments to the Record:

Item	Topic	Document Date	Description	Document Number
1	Agenda	1/20/16	Regional Freight Work Group – Meeting #1 Agenda	012016rtp-01
2	Fact Sheet	9/01/15	Getting there by moving freight	012016rtp-02
3	Work Plan	9/01/15	2018 RTP   Regional Freight Strategy Work Plan	012016rtp-03
4	Document	1/14/16	Regional Freight Work Group – Draft Charge and meeting protocols	012016rtp-04
5	Report	1/01/16	Key Freight Trends and Logistics Issues Report	012016rtp-05
6	Presentation	1/20/16	Regional Freight Strategy - PowerPoint show	012016rtp-06



**2018 RTP Transportation Equity Work Group – Meeting #2**  
**Thursday, February 18, 2016**  
**1:00 – 3:00 p.m.**  
**Metro Regional Center, Room 401**

<b>Committee Members</b>	<b>Affiliation</b>	<b>Attendance</b>
Duncan Hwang	APANO	Present
Jessica Berry	Multnomah County	Present
Stephanie Caldera	Oregon Department of Environmental Quality	Present
Brad Choi	City of Hillsboro	Present
Corky Collier	Columbia Corridor Association	Present
Nicole Phillips	OPAL/Bus Riders Unite	Present
Jared Franz	Amalgamated Transit Union	Present
Aaron Golub	Portland State University	Present
Heidi Guenin	Transportation Council	Present
Scotty Ellis	Metro	Present
Jon Holan	City of Forest Grove	Present
Jake Warr	TriMet	Present
Noel Mickelberry	Oregon Walks	Present
Cora Potter	Ride Connection	Present
Karen Buehrig	Clackamas County	Present
Kari Schlosshauer	National Safe Routes to School Partnership	Present
Karen Savage	Washington County	Present
Nancy Kraushaar	City of Wilsonville	Present
Kelly Clarke	City of Gresham	Present
Brendon Haggerty	Multnomah County Health Department	Present
<b>Interested Parties</b>		
Katie Selin	Portland State University	Present
<b>Metro Staff</b>		
Grace Cho	Metro	Present
Lake McTighe	Metro	Present
Cliff Higgins	Metro	Present
Ted Leybold	Metro	Present
Jamie Snook	Metro	Present
Janet Toman	Metro	Present
Joyce Felton	Metro	Present

## **I. WELCOME**

Cliff Higgins welcomed meeting attendees and walked through the agenda for the work group meeting.

## **II. WORK GROUP MEMBERS INTRODUCTIONS AND PARTNER UPDATES**

All those present introduced themselves and provided a brief update on who they've discussed the transportation equity work plan with and what they heard in response.

## **III. TRANSPORTATION EQUITY POLICY FRAMEWORK**

Ms. Cho provided an overview of the policy framework in which the Regional Transportation Plan (RTP) operates under as the first item of business for the meeting. She noted the desire to walk through the policy framework as a means of ensuring members of the work group have the same shared understanding of the RTP as a policy document. She mentioned her ultimate goal was to have all work group members feel better equipped when the time comes to start discussing policy refinement and recommendations for the 2018 RTP. As part of her presentation, Ms. Cho discussed the different entities which shape and influence the content of the RTP. She also discussed what local, state, and regional plans and programs the RTP has the ability to influence. She noted at the end of the policy framework discussion, this first pass at the policy framework is the beginning to a number of discussions and as a follow up the work group will receive federal, state, and regional policy scoping document to review prior to the May work group meeting. The scoping document outlines the applicable policies to regional transportation planning which address social equity issues and concerns.

At the end of the presentation, Ms. Cho paused to take any questions.

A work group member made a comment that the policy framework did not emphasize the entity of local jurisdictions as an influence on the RTP as local jurisdictions see through and carry out the RTP policies.

Ms. Cho responded that was an oversight on her part in not making that come across clearly in the framework presentation.

Another work group member noted that community voices are not well represented in the policy framework.

Ms. Cho responded that is the representation of community voices, particularly hard to reach communities, continues to be an area in which the RTP works better to reflect and respond. She said that previous processes in the past may not have emphasized grassroots engagement of communities, but rather utilized the traditional civic process.

Other work group members noted that this process is working to change the process to engage communities and reflect community voices.

#### **IV. TRANSPORTATION TRENDS AND EXISTING CONDITIONS**

For the second item of business, Ms. Cho presented the overarching timeline for the 2018 RTP. She explained the process is in the existing conditions and trends and challenges phase of the work plan. As part of this phase Metro staff has been collecting data and information to help update the existing conditions chapter of the 2018 RTP and shape the Regional Snapshot series. Following the introduction, the work group was presented some select very early draft information about the transportation trends and existing conditions of the region, with a particular focus on how these trends break out by different race and ethnic communities or income levels. She covered basic information about the demographics of the region, but also addressed travel trends, access to jobs, and housing trends. Ms. Cho noted Metro staff is still in the process of gathering, refining, and sorting the data and more information and takeaways are still yet to come.

At the end of the transportation trends and existing conditions presentation, she posed the following question to the work group for a brief discussion:

“What do we want to communicate to other working groups, technical advisory committees (TPAC and MTAC), and to our elected officials?”

Work group responses to the question included:

- Recognizing that transportation inequities are a symptom of a number of broader societal and systematic inequities and that in many ways what is being asked of the transportation system is to solve the broader issue.
- There remains a need to have a meaningful conversation about the jobs-housing balance. Reinforce to other work groups, technical advisory committees, and elected officials the interconnectivity of transportation and land use in widening disparities. That to address the disparities a holistic approach must be taken.
- A recognition that changes to federal programs, particularly in the transit realm, are moving away from holistic considerations. As a region, seeing the disparities by race and ethnicity as well as income, there is a need to communicate back to the federal government the importance of taking a holistic approach when considering improvements or enhancements to the transportation system.
- In seeing some draft trends and statistics around the disparities experienced by communities of color and the white population, a message to push forward is that race should be the central focus of the transportation equity work.

Additionally a work group member noted that there is a danger when sorting and refining data which might not fully articulate the nuance of what is happening. The work group member expressed that not articulating the nuance may lead the region down a path of wrong solutions. An example was raised by the work group member that there is a growing income disparity in the region, but when looking at per capita income or median income, a solution may be to increase or attract the number of high wage jobs and skilled workers to the region. This solution does not address bringing economic opportunity to those who are already in the region and not receiving a share of the economic prosperity.

#### **V. BREAK**

Mr. Higgins excused everyone for a short stretch break and Ms. Cho and Metro staff reset the room for a breakout exercise.

## **VI. TRANSPORTATION EQUITY PRIORITY OUTCOMES EXERCISE**

Following the break, the meeting room was reset with markers and butcher paper set at each table. Ms. Cho reminded the work group members at the end of the first work group meeting, members were asked to complete a “homework” assignment. The homework was to bring to the second meeting a list of the transportation priorities, needs, and desires their communities want to see from the region’s transportation system. For the remainder of the meeting, the work group had the opportunity to write those community priorities and values on butcher paper and had an opportunity to discuss shared priorities. But before launching into the exercise, Ms. Cho and Mr. Higgins walked through what was heard and major themes to emerge from past public comment periods. Additionally, Ms. Cho provided time for Lake McTighe and Jamie Snook, the leads for the Safety and Transit work groups, to provide an overview of their work and make a request to the work group members on areas in which their work groups need feedback. Ms. Cho notes as a result there are additional butcher paper sheets with the specific questions from the Safety and Transit work groups that members are free to discuss. At the end of the discussion of the public comment themes, she provided the work group instructions for the exercise and allowed work group members to break out into the exercise.

## **VII. QUESTIONS AND ANSWERS AND NEXT STEPS**

At the end of the exercise Ms. Cho walked through the next steps for herself and the homework assignments for the work group. She mentioned she will follow up with communication with the presentation slides, since they were a challenge to see, as well as the policy scoping memos, and a memo or summary which outlines the feedback from the exercise.

Between the second and third work group meeting, she asked members to complete the following “homework” assignments:

- Report back to your people what was discussed at the work group meeting and bring any feedback.
- Review the forthcoming federal, state, and regional policy scoping papers.
- Based on what was seen through the exercise, come prepared at the next work group meeting to vote on three transportation priority areas in which the transportation equity evaluation of the 2018 RTP investment scenarios should focus on.

She also mentioned during the interim period there will likely be communication to the work group regarding updates and other opportunities to engage in the broader RTP process.

## **VIII. ADJOURN**

There being no further business, Ms. Cho and Mr. Higgins adjourned the meeting at 3:00 p.m.

*Meeting summary prepared by: Grace Cho, Transportation Equity Project Manager*



Meeting materials:

Item	Topic	Document Date	Description
1	Agenda	02/18/16	Meeting Agenda
2	Meeting Overview Memorandum	02/18/16	Overview of what is covered in the packet of materials and anticipated for the meeting
3	Work Group Meeting 1 Summary	02/18/16	Summary of transportation equity work group meeting #1
4	Public Comment Review	02/18/16	Public Comment Retrospective Memo 1
5		02/18/16	Public Comment Retrospective Memo 2
6	Presentation	01/08/16	TE Work Group Presentation
7	Mtg. Evaluation	01/08/16	TE Meeting #2 Meeting Evaluation





**2018 RTP Performance Work Group - Meeting #1**  
**February 22, 2016**  
**2 - 3:30pm**  
**Metro Regional Center, Room 501**

**Committee Members Present**

**Name**

Abbot Flatt  
Kelly Rodgers  
Dan Riordan  
Kelly Clarke  
Christina Fera-Thomas (Alternate)  
Karla Kingsley  
Ken Lobeck  
Jessica Berry  
Bill Holstrom  
  
Lidwien Rahman  
Phil Healy  
Peter Hurley  
Lynda David  
Chris Rall  
Eric Hesse  
Steve Kelley  
Steve Adams

**Affiliation**

Clackamas County  
Confluence Planning  
Forest Grove  
Gresham  
Hillsboro  
Kittelson & Associates Inc.  
Metro – MTIP staff  
Multnomah County  
Oregon Department of Land Conservation &  
Development  
Oregon Department of Transportation, MTAC  
alternate  
Port of Portland, TPAC  
Portland, TPAC  
Southwest Washington RTC, TPAC  
Transportation-4-America  
TriMet, TPAC & MTAC  
Washington County  
Wilsonville

**Metro Staff Present**

John Mermin  
Kim Ellis  
Grace Cho  
Jamie Snook  
Cindy Pederson

**Others Present**

Nick Kobel  
Portland Bureau of Planning & Sustainability

## **I. WORK GROUP MEMBER INTRODUCTIONS**

Work group members introduced themselves and described why they are interested in this work and if they have any specific concerns or desires for what they'd like to see come out of it. Highlights included:

- Be clear about the scope of our work – planning level measures vs project prioritization vs development review. Performance based planning takes a great deal of time so we need to be clear about what we are going to tackle and ensure our schedule is realistic.
- Measures to help tell a story
- Link investments to performance
- Be aspirational
- Visionary and achievable targets
- Performance measures – meaningful, manageable, measurable
- Sensitive to local geographic context
- Establishing a clear connection as to how performance measures will be used
  - Example: prioritization in Regional Flexible Fund process
  - What is the relationship between this workgroup and criteria used in project selection for the Regional Flexible fund process?
- Performance measure should reflect and provide clarity on what the region wants to accomplish with the transportation system
  - The performance measures should connect the nebulous goals of the RTP to actions and investments
- The region should also think of its performance measures in the context of the region's role in the state
- Set performance measures for the appropriate scale and context
  - Measures for decision-making
  - Measures for monitoring
  - Long-range and system planning measures
  - Prioritization of investments
  - Development review
- Improve transparency in decision-making, build public confidence in government and support for more investment
- Measures that look forward (not just looking back)
- Measures that locals could use in TSP and possible plan amendments

## **II. PERFORMANCE WORKGROUP PURPOSE, CHARGE AND SCHEDULE**

Metro staff provided a brief overview of the schedule, role and the expectations of workgroup members, highlighting its major purposes to provide technical input to help simplify RTP measures, and to keep leadership at their agencies informed of our work (and bring forward concerns (sooner rather than later).

## **III. RECAP OF 1/25 MEASURING SUCCESS WORKSHOP**

Metro staff shared a recap of the workshop. The two main purposes for the workshop: 1) Gear up for regional conversations about performance measurement; 2 )Provide a forum for information sharing amongst local jurisdictions to help them do performance based planning in

their local transportation plans. The workshop included presentations by staff from Wilsonville, Washington County, Portland and Transportation For America. About 60 people attended.

A few workgroup members shared their takeaways from the workshop. Highlights included:

- Impressed by turnout / interest in a wonky topic
- Helpful to hear how other local jurisdictions are using and applying performance measures. It was interesting to hear how applications varied, but all cases were working towards a common goal.
- Interest in application of measures at different scales.
- Interest in hearing about investment level measures from Bay Area MTC (in Transportation For America presentation)

#### **IV. BRIEF OVERVIEW OF 2018 RTP, OTHER WORKGROUPS, PERFORMANCE BASED PLANNING**

Metro staff provided an overview of why the RTP is important, describing that it's a regional blueprint that shapes what communities will look like, how people will be able to get around and it establishes eligibility for federal and state funding.

Metro staff provided an overview of the timeline for the RTP update (to be adopted in 2018).

Metro staff described the interface with the other 7 technical workgroups. At the June and September meetings, other Metro workgroup leads, e.g. Safety, Transit, Equity, Freight will provide direction on performance measures in those topic areas.

Metro staff described how performance based planning is defined in the RTP and a comment was made by a workgroup member that we need to get on the same page on the meaning of other related words: performance measures, standards, and targets – which mean different things but get used interchangeably.

Metro staff provided highlights from research on performance based planning that will be part of a performance scoping report (that will be sent to the workgroup for review before the next meeting). The report includes requirements (and gaps in current policies), best practices, challenges & issues.

The RTP currently includes 5 of 7 Federally (MAP-21) required goal areas. Two that are missing include "Infrastructure condition" and "Reduce project delivery delays".

A workgroup member commented that the report should also cover State requirements as well as Federal requirements.

Best practices highlighted by Metro staff include: Congested Vehicle Miles traveled per capita (a new way of measuring congestion used by Sacramento MPO), Vital Signs ([www.vitalsigns.mtc.ca.gov](http://www.vitalsigns.mtc.ca.gov)) a website that monitors transportation related outcomes in SF Bay area) and project screening done for the SF Bay area's RTP (cost-benefit analysis for expensive projects and qualitative screening for others)

A workgroup member commented that the Virginia DOT has done some performance measure-related work that has been recognized as a best practice as well.

Challenges & Issues highlighted by Metro staff include: right-sizing measures – relevance, simplicity, coverage, expense of data collection, need to define how data is used in decision-making and that it must be communicated effectively.

Metro staff recapped the existing 10 policy-level RTP Performance Targets (first adopted in 2010). A workgroup member asked if the workgroup would also be addressing the two additional, long standing policy measures required by the State – Auto Volume/Capacity (“Interim mobility target”) and Non-SOV mode share by 2040 design type, as well as the technical measures in chapter 4 of the plan: system evaluation measures and system monitoring measures. Staff responded that all of those things were on the table and the intent was to look to streamline and update them.

Staff added that ODOT Region 1 had a project to look at updating the V/C target “Portland Metro Area Highway Performance Project” and that ODOT’s workgroup representative would keep us informed of the progress of that project, which aims to make recommendations for mobility and safety applicable to the Portland metro area.

A work group member asked whether an analysis has been completed to see and understand which performance measures in the RTP are “working” and which ones are not. She hoped this could provide a starting place to help focus efforts. Metro staff responded that the scoping report will help to highlight some of the issues.

Metro staff described the “Work Plan at a glance” handout. It summarizes all of the performance-related work that is part of the 2018 RTP update. It follows a similar flow as the overall RTP update schedule. Metro staff called attention to an item in Phase 4 (March to Dec 2017): “Inform project solicitation process.” Staff emphasized that this would be driven by our elected policy makers. They would give us direction regarding whether performance measurement will influence the project solicitation process.

A workgroup member asked about the schedule/topics for the Regional Leadership Forums. Metro staff replied that the first forum is April 22, 2016, and that the following three forums are tentatively scheduled for July 2016, November 2016 and February 2017. The February forum is when we would receive direction on how we update the project list.

## **V. NEXT STEPS**

Metro staff described the next steps including: 1) reporting back to your leadership. 2) Gathering any concerns about this work. 3) Reading the scoping report and sending Metro staff feedback by April 4. Metro staff will send out the draft scoping report for review by the workgroup by March 21

## **VI. ADJOURN**

Chair Ellis and John Mermin adjourned the meeting at 3:15pm

*Meeting summary prepared by: John Mermin, RTP Performance Work group lead*

Meeting materials:

Item	Topic	Document Date	Description
1	Agenda	02/22/16	Meeting Agenda
2	Performance Measures Work Group Charge, meeting protocols and roster	02/22/16	Description of Performance workgroup Purpose, protocols and roster
3	Performance work group meeting schedule	02/22/16	Summary of meetings for Performance work group
4	Performance measures work plan at a glance	02/22/16	Summary of performance-related work that is part of the 2018 RTP update

Getting there with a connected region



## 2018 REGIONAL TRANSPORTATION PLAN UPDATE Rosters for Technical Work Groups

Metro is working with local, regional and state partners and the public to renew the region's shared vision and strategy for investing in the transportation system for decades to come.

To support the 2018 Regional Transportation Plan update, Metro staff are convening eight technical work groups to provide input to the project team on implementing policy direction from the Metro Council and regional policy advisory committees. In this role, the work group members will review draft materials and analysis, keep their respective elected officials and agency/organization's leadership informed, and integrate input from partners and the public. The work groups will also help identify areas for further discussion by the Metro Council and regional technical and policy advisory committees.

Work group members include topical experts and representatives from the Metro Technical Advisory Committee (MTAC) and the Transportation Policy Alternatives Committee (TPAC) or their designees, and other city and county partners. Meetings of the technical work groups will be posted on Metro's calendar at [www.oregonmetro.gov/calendar](http://www.oregonmetro.gov/calendar) and [www.oregonmetro.gov/rtp](http://www.oregonmetro.gov/rtp).

### Transit Work Group | as of 2/24/16

	Name	Affiliation
1.	Jamie Snook	Metro lead
2.	Eric Hesse	TriMet
3.	Stephan Lashbrook	City of Wilsonville's SMART
4.	Roger Hanson	C-TRAN
5.	Dan Bower	Portland Streetcar Inc.
6.	Karyn Criswell	Oregon Department of Transportation
7.	Dyami Valentine Chris Deffebach (alternate)	Washington County
8.	Karen Buehrig	Clackamas County
9.	Kate McQuillan	Multnomah County
10.	Denny Egner	City of Milwaukie
11.	Mauricio LeClerc April Bertelsen (alternate)	City of Portland
12.	Brad Choi Gregg Snyder (alternate)	City of Hillsboro
13.	Katherine Kelly	City of Gresham
14.	Jon Holan	City of Forest Grove
15.	Ken Rencher	City of Beaverton
16.	Nancy Kraushaar	City of Wilsonville/Cities of Clackamas County
17.		<i>Transit user/advocate</i>
18.	Steve Hoyt-McBeth	City of Portland Bike Share program
19.	Steve White	Oregon Public Health Institute
20.	Alex Page	Ride Connection
21.	Dayna Webb	City of Oregon City
22.	Mike Coleman	Port of Portland
23.+	Regional Transit Providers Group	Varying transit providers in/around the region

*\* Italics means the member is unconfirmed or tentative to date.*



**Freight Work Group | as of 2/24/16**

	<b>Name</b>	<b>Affiliation</b>
1.	Tim Collins	Metro lead
2.	Robert Hillier (PBOT)	City of Portland
3.	Phil Healy	Port of Portland
4.	Tony Coleman	Oregon Department of Transportation
5.	Steve Williams	Clackamas County
6.	Kate McQuillan	Multnomah County - Planning
7.	Erin Wardell Karen Savage (alternate)	Washington County
8.	Kelly Clark	City of Gresham
9.	Zoe Monahan	City of Tualatin
10.	Sandra Towne Patrick Sweeney (alternate)	City of Vancouver
11.	Steve Kountz (PBPS)	City of Portland
12.	Don Odermott Gregg Snyder (alternate)	City of Hillsboro
13.	Nick Fortey	Federal Highway Administration
14.	Jana Jarvis	Oregon Trucking Association; Portland Freight Committee (Trucking)
15.	William Burgel	Burgel Rail Group; Portland Freight Committee (Railroads)
16.	Pia Welch	FedEx Express; Portland Freight Committee (Air)
17.	Jerry Grossnickle	Bernert Barge Lines; Portland Freight Committee (Marine/River)
18.	Lynda David	Regional Transportation Council
19.	Jim Hagar Katy Brooks (alternate)	Port of Vancouver
20.	Raihana Ansary	Portland Business Alliance
21.	Brendon Haggerty	Multnomah County - Public Health
22.	Derrick Olsen	Greater Portland Inc., VP Regional Strategy
23.	Jill Eiland	Intel, NW Region Corporate Affairs Director
24.	Gary Cardwell	NW Container Service, Divisional Vice President

*\* Italics means the member is unconfirmed or tentative to date.*

**Transportation Equity Work Group | as of 2/24/16**

	<b>Name</b>	<b>Affiliation</b>
1.	Grace Cho	Metro lead
2.	Scotty Ellis	Metro Diversity Equity Inclusion Program
3.	Jake Warr	TriMet
4.	Zan Gibbs April Bertelsen (alternate)	City of Portland
5.	Karen Savage Erin Wardell (alternate)	Washington County
6.	Jon Holan	City of Forest Grove
7.	Brad Choi Gregg Snyder (alternate)	City of Hillsboro
8.	Kelly Clarke	City of Gresham
9.	Jessica Berry	Multnomah County - Planning
10.	Steve Williams	Clackamas County
11.	Nancy Kraushaar	City of Wilsonville/Cities of Clackamas County
12.	Heidi Guenin	Sustainable Transportation Council/Community Member
13.	Aaron Golub	Portland State University
14.	Kay Durtschi	Community Member
15.	Corky Collier	Columbia Corridor Business Association
16.	Duncan Hwang	Asian Pacific American Network of Oregon (APANO)
17.	Jared Franz	Community member
18.	Andrea Hamberg	Oregon Health Authority
19.	Terra Lingley	Oregon Department of Transportation
20.	Cora Potter	Ride Connection - Paratransit transit provider
21.	Noel Mickelberry	Oregon Walks
22.	Kari Schlosshauer	National Safe Routes to School Partnership
23.	Sarah Armitage/Stephanie Caldera	Oregon Department of Environmental Quality
24.	Eddie Hill	Ground Work
25.	Nicole Phillips	OPAL/Bus Riders Unite
26.	<i>Bandana Shrestha</i>	<i>AARP</i>
27.	Brendon Haggerty	Multnomah County - Public Health

*\* Italics means the member is unconfirmed or tentative to date.*

**Finance Work Group | as of 2/24/16**

	<b>Name</b>	<b>Affiliation</b>
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5.	Nancy Young Eric Hesse (alternate)	TriMet
6.	Don Odermott Tina Bailey (alternate)	City of Hillsboro
7	Chris Deffebach Steve Kelley (alternate)	Washington County
8.	Nancy Kraushaar	City of Wilsonville
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10.	Karen Buehrig	Clackamas County
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13.	John Lewis	City of Oregon City
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8.	Don Odermott Christina Fera-Thomas (alternate)	City of Hillsboro
9.	Denny Egner	City of Milwaukie
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13.	Lynda David	Southwest Washington RTC
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18.	Chris Rall	Transportation 4 America
19.	Kelly Rodgers	Confluence Planning

*\* Italics means the member is unconfirmed or tentative to date.*

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	<b>Name</b>	<b>Affiliation</b>
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6.	Jeff Owen	TriMet
7.	Dyami Valentine Stacy Shetler (alternate)	Washington County
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10.	Joe Marek	Clackamas County
11.	Joanna Valencia	Multnomah County - Planning
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**Policy Actions Work Group | as of 2/24/16**

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6.	Chris Deffebach TBD (alternate)	Washington County
7.	Jon Holan	City of Forest Grove
8.	Laura Weigel	City of Hillsboro
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11.	Karen Buehrig Steve Williams (alternate)	Clackamas County
12.	Lidwien Rahman	Oregon Department of Transportation
13.	Joanna Valencia	Multnomah County – Planning
14.	Jae Douglas	Multnomah County – Public Health
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17.	Julia Hajduk	City of Sherwood
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*\* Italics means the member is unconfirmed or tentative to date.*

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13.	Stephanie Noll	Bicycle Transportation Alliance
14.	Zach Weigel	City of Wilsonville
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17.	Brendon Haggerty	Multnomah County – Public Health
18.	Bob Galati Julia Hajduk (alternate)	City of Sherwood
19.	John Boren	City of Hillsboro
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21.		<i>Clean Water Services</i>
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23.		<i>Oregon Walks</i>

*\* Italics means the member is unconfirmed or tentative to date.*





# STRATEGIC PLAN TO ADVANCE RACIAL EQUITY, DIVERSITY AND INCLUSION



## ACKNOWLEDGEMENTS

**This section is to be completed in the final  
drafted plan in spring 2016**

## FOREWORD

**This section is to be completed in the final  
drafted plan in spring 2016**



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## INTRODUCTION

### Why equity?

Metro works to improve the quality of life for the Portland metropolitan region's 1.5 million residents by providing land use and transportation planning; entertainment, educational and convention-related venues; parks, natural areas, cemeteries and outdoor recreation facilities; and recycling and garbage services. The data research for which Metro is known shows that, like most of the nation, the Portland region's communities are becoming more diverse. It is projected that by the year 2045, communities of color will be the majority.

Our current and future diversity will help the region develop and maintain sustainable economic growth *if* we proactively address the issue of equity. Research shows that regions that attain more economic growth are those with greater racial inclusion and smaller racial income gaps.<sup>1</sup> Unfortunately, most communities of color in the Portland metropolitan region currently experience the worst economic and social outcomes of any demographic group, due to a long history of exclusionary and discriminatory policies.

To prepare for a healthy and prosperous future, Metro, other jurisdictions, community organizations and the business and philanthropic communities are taking a long, hard look at equity. It's not only the right thing to do; it's the smart way to improve our present and plan for our future.

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<sup>1</sup> Treuhaft, S., Blackwell, A.G., & Pastor, M. (2012). America's Tomorrow: Equity is the Superior Growth Model. Retrieved January 2016: [http://www.policylink.org/sites/default/files/SUMMIT\\_FRAMING\\_WEB\\_20120110.PDF](http://www.policylink.org/sites/default/files/SUMMIT_FRAMING_WEB_20120110.PDF)

## Racial equity as Metro's strategic direction

The Strategic Plan to Advance Racial Equity, Diversity and Inclusion, referred to hereafter as the "Strategic Plan", is the culmination of Metro's efforts to articulate how the agency intends to advance equity in its crucial work in the Portland metropolitan region.

The strategic direction selected is to advance racial equity. Metro will concentrate on eliminating the disparities that the most vulnerable in

**Historically marginalized** - Groups who have been denied access and/or suffered past institutional discrimination in the United States.

the Portland metropolitan region, people of color, experience in all aspects of social well-being, especially in those related to Metro's policies, programs, services and destinations. People of color share similar barriers with other historically marginalized groups such as people with low income, people with disabilities, LGBTQ community, older adults and young people. **By addressing the barriers experienced by people of color, we will effectively also identify solutions and remove barriers for other disadvantaged groups.** The result will be that all people in the Portland region will experience better outcomes.

This strategic direction allows Metro the opportunity to make a difference in the lives of the most vulnerable communities while having a positive impact on the Portland region's overall quality of life.

## **Metro's commitment**

As a government agency, Metro is committed to advancing racial equity as the key strategic direction to eliminate the stark racial disparities in quality of life among the people who live in the Portland metropolitan region. The solutions identified by focusing on removing the barriers that affect people of color, the most vulnerable in the region, will also be effective to identify and remove barriers for other historically marginalized groups. The Strategic Plan will focus on removing barriers for people of color, and Metro's Diversity Action Plan, approved by Metro Council in 2012, will continue to remove barriers for low income, people with disabilities, LGBTQ community, older adults and young people.

The Diversity Action Plan and this Strategic Plan, both coordinated by Metro's Diversity, Equity and Inclusion (DEI) Program, will continue to coordinate efforts, create synergies and eliminate duplication to meet the agency's obligation to effectively serve all communities in the region.

This Strategic Plan intends to be iterative. The following sections contain Metro's current best effort to create the methodology and the practice of institutional and structural change to eliminate racial disparities. As the Strategic Plan is implemented, it will reveal further opportunities for adjustment and improvement. Future strategic plans will build on the successes and lessons of this first iteration, but Metro's commitment to advancing racial equity will remain constant.

## About this document

This Strategic Plan has several important elements:

1. *Theory of change*: Metro will utilize several interlocking strategies that will lead to long-term institutional and structural change.

**Structural** – The ways in which public policies, institutional practices, cultural representations and other norms interact.

**Institutional** – The ways in which policies and practices within and across an institution interact, intentionally or not.
2. *Goals, objectives, actions*: Five long-term goals that will advance racial equity at the institutional and structural level. Each goal contains several objectives that can be achieved within a five-year horizon. Each objective contains several related action items.
3. *Implementation vision*: A preliminary vision of an implementation structure that includes participation of community members and interdisciplinary and interdepartmental staff teams.
4. *Evaluation framework*: A proposed approach to measure outputs, outcomes and ultimately the impact of Metro's equity efforts in the lives of people in the Portland region. The evaluation framework includes mechanisms for community members to be more involved in the evaluation of Metro's equity efforts and uses a combination of quantitative and qualitative methods.
5. *Analysis and decision-support tool*: An outline of an analysis and decision-support tool that will be used to incorporate racial equity into existing and future policies, programs, procedures and services at Metro.
6. *Relationship between racial equity, diversity and inclusion*: Metro understands racial equity, diversity and inclusion to be interconnected strategies to ensure that all people in the Portland metropolitan region have the opportunity to reach their full potential. This section explains how this Strategic Plan relates to past efforts in these areas, such as the Diversity Action Plan adopted in 2012.

## WHERE IS METRO GOING?

### The destination

Metro is committed to inspire, teach and invite people, businesses, nonprofit organizations and public partners to arrive at a Portland region where:

- All individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources.
- Metro and other public agencies recognize that racial equity is a cornerstone of good governance to ensure the success of everyone, especially historically marginalized communities, by working together to end the avoidable inequities that prevent the realization of an individual's full potential and are detrimental to us collectively.
- We, as a metropolitan region, change our public structures, institutions and processes to address social and economic disparities for people of color that are rooted in our historical and public decision-making.
- Diversity is celebrated and all communities are meaningfully engaged in public decision-making.

**People of color and communities of color** - include Native Americans, African Americans, African and Slavic immigrants, Asian Americans and Pacific Islanders, and Latinos or Hispanics. The Slavic immigrant community has been included in this collective term because their overall well-being and health outcomes are experienced through a racial lens.

**Diversity** - The variance or difference amongst people. This variance includes race, ethnicity, gender, age, religion, nationality, language preference, socioeconomic status, disability, sexual orientation, gender identity and others. These differences are tied to a variety of other aspects of diversity such as experience, work styles, life experience, education, beliefs and ideas.



## Organizational goals

Metro is committed to ensuring that all people on the region have the opportunity to thrive in all aspects of social well-being, regardless of their background or zip code. This is Metro's overarching organizational goal, which is a moral imperative, an economic necessity, and the purpose of good government: to effectively serve all people. In order to achieve this overarching goal, Metro has identified racial equity as its strategic direction, and has developed this Strategic Plan to be the blue print for its implementation.

This Strategic Plan is built around five long-term goals. The goals are intentional guideposts that direct Metro in creating specific objectives, actions, and measures of evaluation and accountability as the agency works to help the Portland metropolitan region reach its equitable and prosperous destination. Each goal has several related objectives and action items, contained in the tables starting on page 21.

Metro has the authority and ability to address many of the goals, objectives and action items unilaterally. Others will require collaborative effort with partners.

In addition, some action items are implementable within Metro's current budget and work scope while others will require additional investment of resources, including staff time and funding. Items potentially requiring additional resources are flagged in the tables. Metro is committed to investing in the additional effort needed to turn this plan into a functional implementation framework.

The section titled "Metro department-specific action plans" on page 18 describes where much of the implementation thinking will take place. **Stakeholder comments on this discussion draft of the Strategic Plan will be vital to ensure that the final Strategic Plan lead Metro to implementation. Metro staff invites the readers to make suggestions on the value of potential actions, their relative priority, and potential resources that could be developed for their implementation.**

Evaluation is the final key element of this Strategic Plan. Metro will use an evaluation approach that brings together community members and Metro staff to identify qualitative and quantitative data measures for each of the five goals.

A high-level measure of the success of each goal will be included in the final version of this Strategic Plan.

The evaluation process will enable Metro to collect and analyze data on the condition of people of color and other historically marginalized groups in all issue areas identified in the goals and objectives of the Strategic Plan. These data will highlight who is experiencing disparity levels similar to communities of color, and provide a starting point for the Diversity Action Plan to continue to generate solutions to address the needs of all other historically marginalized groups.

#### **A. Metro convenes and supports regional partners to advance racial equity.**

*Metro brings together diverse partners from across the Portland metropolitan region to reduce racial disparities and improve outcomes in communities of color through coordinated and innovative approaches. Metro leads by convening decision-makers and providing research and technical support to assist local jurisdictions in equity initiatives.*

##### **What does this goal mean for the community?**

**Community** - All individuals who live, work, play or pray in the Portland metropolitan region.

As a regional government, Metro is in a unique position to bring together public, private, philanthropic, and community partners throughout the Portland region to coordinate efforts to advance racial equity. Key policy areas to address collaboratively include: improving access to government services and decision-making processes, building relationships, expanding workforce development to create strong employment pipelines for people of color, creating affordable housing to meet the urgent need for stable housing choices, ensuring accessible, safe and affordable options for travel, managing the regional solid waste system in ways that improve access to service and create benefits, and operating parks so that health-promoting natural areas are preserved and made culturally accessible for all.

##### **What does this goal mean for Metro staff and leaders?**

Metro will strengthen partnerships and take a leadership role in breaking down the silos between regional partners that prevent the coordinated advancement of racial equity in the areas of community involvement, workforce development, affordable housing, transportation, solid waste management and parks/natural areas. Metro staff will continue and increase their current work providing research and technical support to regional and local partners.

## **B. Metro meaningfully engages communities of color.**

*Community relationships based on trust, policies that strengthen community involvement and participatory accountability practices work to ensure that communities of color are meaningfully engaged and influence the Metro decisions and programs that impact their lives. Metro commits to co-creating with the community, learning from the collective wisdom and building the capacity of community leaders.*

### **What does this goal mean for the community?**

Metro will pass policies, create systems and invest resources to break down the social, historical and institutional barriers that prevent communities of color from meaningfully engaging in Metro decisions and policies, programs and plans design. Barriers include the time and location of meetings, the provision of childcare and language services, the financial cost for communities to participate, the community's authority to influence decisions and access decision makers, and the investment of Metro staff and community partners' time to build relationships. In partnership with communities, Metro will establish and continue to refine culturally informed involvement practices to ensure respectful and effective engagement of the Portland region's diverse communities. Additionally, Metro will strengthen and build lasting relationships and partnerships in order to foster greater understanding and capacity building in the community and internally. Metro will also work with the community to develop evaluation practices that increase public accountability.

### **What does this goal mean for Metro staff and leaders?**

Earning community trust and establishing strong community relationships will be a priority for all Metro staff and leaders. Supported with the necessary resources, Metro staff will also work to ensure that engagement efforts with communities of color are coordinated and culturally informed, to provide meaningful opportunities to shape decisions and designs. Also, engagement efforts will place importance on building relationships through meaningful, one-on-one or small-group dialogue sessions with community. Metro staff will be responsible for reporting how community feedback was used and its impact on decision-making. Metro will adopt a standard practice of partnering with community to co-design engagement and evaluation measures for Metro policies, practices and plans.

### **C. Metro hires, trains and promotes a racially diverse workforce.**

*Metro has an organizational culture that is welcoming and inclusive of all people of color. Through training and hiring practices that break down barriers for applicants of color, Metro will achieve a racially diverse workforce with opportunities for advancement and strong retention and promotion rates for staff of color. All Metro staff will receive the training and support necessary to become culturally proficient and equitably serve all residents of the Portland metropolitan region.*

#### **What does this goal mean for the community?**

Metro will have an organizational culture that makes all staff feel welcome and included, with a workforce that reflects the racial diversity of the Portland region. This diversity will be visible throughout all positions and leadership levels at Metro. Such a workforce will bring new, innovative ideas to guide policy direction and advance racial equity and produce more informed equity champions within Metro. It will also strengthen Metro's ability to provide effective and appropriate services to all communities to ensure equitable and culturally informed access to Metro resources. This diverse workforce will strengthen community connection with Metro to increase involvement in and awareness of Metro's programs, services, destinations and decisions.

#### **What does this goal mean for Metro staff and leaders?**

Metro's inclusive culture and hiring practices will result in diverse staff at all levels, an environment where diverse opinions are valued and increased connections with community. It will be a culture that actively encourages staff to take bold action to break down racial disparities, while members of management will be leading advocates for diversity, equity and inclusion. This culture will welcome and foster safe and authentic conversations around equity and staff will have the tools to more inclusively support communities and fellow staff members. Metro will continue to develop hiring policies and procedures to ensure staff diversity throughout all position levels and create opportunities for advancement through mentorship and training. Additionally, clear and intentional investments will be made in front-line, temporary, seasonal and part-time staff to advance their careers within Metro.

#### **D. Metro creates safe and welcoming services, programs and destinations.**

*Communities of color are aware of and feel welcome to access Metro's diverse services, programs and destinations. Through better understanding of the needs of culturally specific communities and the impacts of its programs and services, Metro will provide safe and welcoming environments and experiences that enrich the lives of community members.*

##### **What does this goal mean for the community?**

Metro will partner with communities of color to identify and break down barriers so that Metro programs and services match community needs. Communities of color will be better informed about the availability of Metro programs, services and venues through culturally appropriate communication channels and tools. Metro properties will welcome visitors with culturally informed and representative environments.

##### **What does this goal mean for Metro staff and leaders?**

Metro staff will work to ensure that diversity, equity and inclusion are foundational pieces that inform the provision of culturally appropriate services and programs. Metro will also strive to ensure that all its properties are welcoming to all communities by creating a culturally informed environment that is accessible by people with all kinds of needs and abilities. Each department and venue at Metro will develop its own equity action plan to best deliver its unique services and programs equitably to the community, based on the goals of this Strategic Plan.

## **E. Metro's resource allocation advances racial equity.**

*Metro advances economic opportunities for communities of color through various avenues including equitable contracting practices, distribution of investments, grant programs, apprenticeships and proactive convening of regional partners to support a racially diverse construction workforce.*

### **What does this goal mean for the community?**

By addressing barriers in its contracting processes, Metro will support and facilitate applications for Metro contracts by COBID-certified

**COBID certified firms** – State of Oregon's Certification Office of Business Inclusion and Diversity (COBID).

firms, community-based groups and nonprofit organizations. Metro will apply an equity decision-making tool to its allocation of resources, both human and financial, to ensure more equitable investment in communities of color. Additionally, Metro will assume a regional leadership role to bring together partners to coordinate investments and create new employment pipelines through internships, apprenticeships, resources and training, helping increase the number of minority-owned, women-owned and emerging small businesses in the Portland region, as well as skilled professionals of color in the construction trades.

### **What does this goal mean for Metro staff and leaders?**

Metro staff will continue to assess and strengthen contracting processes to ensure the removal of barriers and increased support for COBID- certified firms, community-based groups and nonprofit organizations. Staff will receive support in using an equity decision-making tool to assess and allocate resource investments in programs and services, including grants. Additionally, Metro will assume a leadership role in strengthening cross-regional partnerships to create new employment pipelines that expand the number of minority-owned, women-owned and emerging small businesses in the Portland region, as well as skilled professionals of color in the construction trades.

## Metro department-specific action plans

The following section presents several proposed actions to move the agency toward reaching each of the five goals presented above. The actions listed are centered on agency-wide practices involving areas such as engagement, procurement, resource allocation, communications, hiring, retention and accessibility of facilities.

These actions are not focused on specific programs, projects or services because a major recommendation of this Strategic Plan is for each Metro department to develop its own equity action plan within 18 months of the adoption of this Strategic Plan. Directors and staff in each Metro department and venue are best positioned to identify implementable actions that will have the greatest impact on racial equity, diversity and inclusion related to each of their programs, projects, services and plans.

**Recommendation** – Each Metro department will develop its own equity action plan within 18 months of the adoption of this Strategic Plan.

Guided by the toolkit in Appendix F and supported by staff from Metro's Diversity, Equity and Inclusion Program (DEI), the development of each department and venue's action plan will be a multistep process involving staff and community stakeholders. Each action plan will ultimately be a list of concrete actions that the department and venue will commit to implementing and evaluating over the next five years.

Departments and venues will also use the [Equity Framework Report](#) to guide the development of their action plans. The Equity Framework Report was a Metro-commissioned, community-led report resulting from a yearlong collaborative effort conducted by six community-based organizations: Adelante Mujeres, Asian Pacific American Network of Oregon, Center for Intercultural Organizing, Coalition for a Livable Future, OPAL – Environmental Justice Oregon and the Urban League of Portland. The report presents foundational definitions and information that will support each department and venue in more fully understanding its roles and responsibilities to address the barriers faced by communities and staff of color.

## **Metro's five-year objectives and action items**

Each of the five goals in this Strategic Plan encompasses several specific objectives with an associated list of action items. Each objective is set along a five-year horizon for completion, although there will likely be additional work remaining at the end of that period. The detailed lists of organizational goals, objectives and actions are summarized in the tables on pages 21 to 30.

These objectives and actions were identified and distilled from the results of the community, stakeholder and staff engagement conversations conducted by Metro councilors and staff, in partnership with community-based organizations.

These objectives and actions are agency-wide. Assisted by DEI Program staff, the development of additional department- and venue-specific strategic plans during the implementation phase will provide more informed objectives, actions and timelines than can be provided in this agency-wide strategic direction.

Reflecting Metro's desire to be a continuous learning organization, this Strategic Plan's goals, objectives and actions will be periodically updated and modified as needed according to the results they achieve and evolving conditions in the Portland metropolitan region, future changes within Metro and other unforeseen events. The entire Strategic Plan will be updated in 2021, to coincide with the five-year implementation horizon of this initial plan.

*NOTE: This discussion draft of the strategic plan may contain more action items than can feasibly be accomplished in a five-year time frame. Staff has intentionally left action items broad to allow community members, local partners and other stakeholders the opportunity to help prioritize the actions during the public comment period. A final list of action items will be included in the final version of the plan.*



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The table below contains more action items than may feasibly be accomplished in a five-year time frame. This has been intentionally done to allow community members, local partners and other stakeholders the opportunity to help prioritize the actions during the public comment period. A final list of action items will be included in the final version of the plan.

## GOAL A

### Metro convenes and supports regional partners to advance racial equity.

Using a racial equity approach to:

- Increase regional collaboration to improve public engagement in the region
- Invest in more stable and affordable housing choices
- Ensure the provision of accessible, safe and affordable transportation options
- Ensure the provision of welcoming and inclusive parks and natural areas
- Ensure equitable practices in the solid waste system and reduce amount and toxicity of waste

### Goal Statement

*Metro brings together diverse partners from across the Portland metropolitan region to reduce racial disparities and improve outcomes in communities of color through coordinated and innovative approaches. Metro leads by convening decision-makers and providing research and technical support to assist local jurisdictions in equity initiatives.*

### Objectives and Actions

#### Objective 1

Convene regional partners to advance coordinated regional equity efforts.

Issue	Actions
Limited opportunities for jurisdictional partners to come together to work collaboratively to advance equity.	Work with jurisdictional partners to advance racial equity efforts throughout the region. ✓
Limited opportunities for jurisdictions to work together to reduce engagement burdens on communities.	Implement one-stop forums to connect CBOs to resources, engagement opportunities, contracting opportunities, and staff at Metro and other public agencies across the region. \$
Limited opportunities for jurisdictional, business and community partners to share best practices, tools for evaluation and other resources.	Convene regional partners to share best practices related to: <ul style="list-style-type: none"> <li>•public engagement - sharing of community input, best practices, tools for evaluation and other resources.</li> <li>•stable and affordable housing</li> <li>•welcoming and inclusive parks and venues</li> <li>•accessible, safe and affordable transportation</li> <li>•equitable practices in the solid waste system</li> <li>•expand economic opportunity for communities of color through local government contracts and projects. \$</li> </ul>

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required

**Objective 2**

Provide technical support to regional jurisdictions to advance equity efforts.

Issue	Actions	
Limited resources for jurisdictional, business and community partners to conduct technical analyses to advance equity.	Work with jurisdictional staff to identify and provide technical support that can assist in advancing racial equity efforts.	Provide technical support to assist in expanding: <ul style="list-style-type: none"><li>•stable and affordable housing</li><li>•welcoming and inclusive parks and venues</li><li>•accessible, safe and affordable transportation</li><li>•equitable practices in the solid waste system</li><li>•expand economic opportunity for communities of color through local government contracts and projects. ✓</li></ul>

**Objective 3**

Produce and provide research and information to support regional jurisdictions in advancing equity efforts.

Issue	Actions	
Limited resources for jurisdictional, business and community partners to conduct research to advance equity.	Work with jurisdictional staff, community based organizations and businesses to identify research and information that can assist in advancing racial equity efforts.	Provide research and information support to expanding: <ul style="list-style-type: none"><li>•stable and affordable housing</li><li>•welcoming and inclusive parks and venues</li><li>•accessible and safe transportation</li><li>•equitable practices in the solid waste system</li><li>•expand economic opportunity for communities of color through local government contracts and projects. ✓ \$</li></ul>

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required

The table below contains more action items than may feasibly be accomplished in a five-year time frame. This has been intentionally done to allow community members, local partners and other stakeholders the opportunity to help prioritize the actions during the public comment period. A final list of action items will be included in the final version of the plan.

## GOAL B

### Metro meaningfully engages communities of color.

#### Goal Statement

*Community relationships based on trust, policies that strengthen community involvement and participatory accountability practices work to ensure that communities of color are meaningfully engaged and influence the Metro decisions and programs that impact their lives. Metro commits to co-creating with the community, learning from the collective wisdom and building the capacity of community leaders.*

#### Objectives and Actions

##### Objective 1

Establish and strengthen relationships with communities of color.

Issue	Actions		
Lack of consistent Metro investment to support community leadership development.	Partner and invest in existing community leadership programs. \$		
Engagement is often transactional instead of long-term and culturally appropriate.	Work with CBOs to increase small-group sessions with communities of color to better develop relationships. \$	Work with communities to co-create community-specific public engagement plans. \$	Design and implement a workshop series for Metro staff on how to strengthen relationships and improve culturally informed engagement. \$
Communities are over-burdened by engagement processes.	Develop resources and a system to increase staff engagement with CBOs and communities of color and better coordinate engagement across Metro. This system should include the maintaining of a record of community-based organizations' involvement with Metro to support relationship continuity. ✓ \$		

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required



**Objective 2**

**Increase accountability by ensuring community involvement in the evaluation and implementation efforts.**

Issue	Actions		
Lack of resources for Metro staff to help ensure that equity informs the development of programs, policies and plans .	DEI program provides support to each department to customize and employ the Racial Equity Analysis and Decision-Support Tool. ✓		
Lack of Metro accountability to the community related to agency-wide equity efforts.	Create a Metro Council-appointed body to provide community oversight on the implementation of the Strategic Plan.	DEI program creates, publishes and submits annual equity report to leadership. Leadership annually presents this report to the region.	Create mechanism to involve the community in the implementation and evaluation of the Strategic Plan. \$
Lack of Metro accountability to the community related to department-specific equity efforts.	Departments add a new category in their quarterly management report, or other tool, to identify their equity actions and investments.		

**Objective 3**

**Increase participation of communities of color in Metro decision-making.**

Issue	Actions		
Public engagement meetings may not be supportive or conducive to participation.	Identify, assess and remove barriers to participation for communities of color. Barriers include: public meeting times and locations, lack of food and childcare, and location of meetings. \$		
Lack of direct interaction with decision-makers.	Create opportunities within public engagement activities for emerging community leaders to work side by side with decision makers to help drive plan, policy and program outcomes.	Create opportunities within public engagement activities for decision-makers to receive direct community input and to meaningfully consider and discuss what they've heard.	Create supported seats on advisory boards and committees for youth of color, community members, and CBO representatives. \$
Lack of simple and easy ways for communities to become aware of engagement opportunities.	Improve digital tools for communities of color to get involved including employment, volunteer, contract, committee, and public engagement opportunities.	Create a resource for community-based organizations and residents on how to get involved in Metro's work and participate in the decision-making process. \$	
Lack of longstanding, direct Metro investment to support community engagement.	Metro departments set aside resources for contracting and partnering with CBOs or communities for engagement.		

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required

The table below contains more action items than may feasibly be accomplished in a five-year time frame. This has been intentionally done to allow community members, local partners and other stakeholders the opportunity to help prioritize the actions during the public comment period. A final list of action items will be included in the final version of the plan.

## GOAL C

### Metro hires, trains and promotes a racially diverse workforce.

#### Goal Statement

*Metro has an organizational culture that is welcoming and inclusive of all people of color. Through training and hiring practices that break down barriers for applicants of color, Metro will achieve a racially diverse workforce with opportunities for advancement and strong retention and promotion rates for staff of color. All Metro staff will receive the training and support necessary to become culturally proficient and equitably serve all residents of the Portland metropolitan region.*

#### Objectives and Actions

##### Objective 1

Metro's culture supports staff's ability to advance regional equity.

Issue	Actions		
Limited resources for staff to participate in diversity, equity and inclusion work at Metro.	Include equity, diversity and inclusion as a job duty for every staff member and as part of the performance management review (PACE).		Build equity, diversity and inclusion time into staff work scope.
Equity is not perceived by all to be a central priority at Metro.	Adopt policy that Metro management positions must attend required DEI related trainings.	Reassess Metro values to include equity.	Incorporate equity discussions into all Metro advisory committees to ensure that these bodies uphold the same commitment to equity.
Limited opportunities for Metro staff to hold safe, honest and open conversations about equity.	Create opportunities for staff across the entire organizational structure to discuss how to improve the organizational equity structures at Metro, without fear of retribution.		
Barriers for staff to access tailored trainings on how to advance equity in their work.	Utilize a variety of learning methods and trainings to reach all regular status staff. \$		
Lack of consistently explicit and clear direction to advance equity from Metro leadership.	Develop an internal and external communication strategy to convey Metro's leadership commitment to diversity, equity and inclusion.		Leadership demonstrates a commitment to ensure that staff engages in equity, diversity and inclusion work.
Lack of opportunity to collaborate between Metro staff members.	Create opportunities for staff across Metro to develop and deepen relationships in formal and informal settings.		

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required



**Objective 2**

Increase the skills of staff in advancing regional equity.

Issue	Actions
Limited understanding, skills and resources for Metro staff to advance equity in their work.	Prioritize and provide tailored trainings for all staff on how racial equity can be applied and on the use of the equity analysis and decision-support tool <del>lens</del> in budgeting and other decisions. \$
Barriers for staff to access tailored trainings on how to advance equity in their work.	Increase accessibility of DEI trainings for venue staff and temporary/seasonal/part-time/graveyard staff. \$

**Objective 3**

Racial makeup of Metro staff at every level more closely resembles the demographics of the region.

Issue	Actions
Lack of diversity of Metro hiring committees.	Diversify hiring committees by department including considering gender, age and cultural group. Include community members where appropriate. Increase cultural proficiency and remove unconscious bias in hiring committees through training.
Limited equity direction regarding opportunities for community members to gain work experience at Metro.	Create clear agency-wide internship policies regarding intern diversity and compensation. Further the job market preparation of interns by providing skill building opportunities. ✓
Limited partnerships with community-based organizations to advance Metro's diversity efforts.	Partner and invest in local communities of color and CBOs to attract diverse applicant pools. ✓ \$ Hire additional HR recruitment staff to improve recruitment and First Opportunity Target Area (FOTA) announcements. ✓
Unintentional barriers in the Metro application process that limit application pool diversity.	Review recruitment processes and questions to include value on skills and abilities beyond purely technical skills. Expand hiring interview format options for increased cultural sensitivity (e.g. panel, 1-1). Reframe criteria for job announcements including knowledge, skills and abilities and use more accessible language. Create new opportunities for potential applicants to learn more about job positions and speak to staff.
Lack of ladders for staff advancement at Metro.	Develop succession plan and career ladders for all levels in organization including temporary and seasonal employees. ✓ \$ Create a professional mentorship program to cultivate front-line staff of color for leadership positions. ✓ Enhance the "out of class" policy to increase utilization and communicate to staff the pathways to work out of their position / department. Develop agency-wide standards in relation to job-required training and professional memberships.
Limited understanding, skills and resources for Metro hiring managers to advance equity through their hiring process.	Provide support and training for hiring managers to access job requirements and understand the value of diverse hiring. ✓
Limited community relationships prevent knowledge of and willingness to promote employment opportunities at Metro.	Provide resources for Metro staff to act as ambassadors in the community. Examples include recruitment, contracting and volunteer opportunities. Provide HR with additional resources to focus on relationship building with community-based organizations to generate applications from people of color. ✓ \$

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required

The table below contains more action items than may feasibly be accomplished in a five-year time frame. This has been intentionally done to allow community members, local partners and other stakeholders the opportunity to help prioritize the actions during the public comment period. A final list of action items will be included in the final version of the plan.

## GOAL D

### Metro creates safe and welcoming services, programs and destinations.

#### Goal Statement

*Communities of color are aware of and feel welcome to access Metro's diverse services, programs and destinations. Through better understanding of the needs of culturally specific communities and the impacts of its programs and services, Metro will provide safe and welcoming environments and experiences that enrich the lives of community members.*

#### Objectives and Actions

##### Objective 1

Increase the number of individuals of color who access Metro services and facilities.

Issue	Actions
Limited awareness of resources for Metro staff to advance equity at facilities and through services.	Communicate available language resources and translation tools to staff and the public.
Lack of diverse, cultural events held for communities at Metro destinations.	Celebrate diverse array of cultural holidays at all properties (e.g. Día de los Muertos). \$
Lack of community awareness of Metro's services, programs and destinations.	Create new opportunities for communities of color to learn about Metro programs and services. \$
Limited staff awareness of the communities who are utilizing services, programs and destinations.	Use newly standardized demographic questions across the agency and establish methods for aggregating results for agency-wide public engagement efforts.

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required



**Objective 2**

Metro's properties are more welcoming and reflective of all cultures.

Issue	Actions		
Limited acknowledgement of community, historical and cultural significance of Metro destinations.	Recognize the connection of Metro destinations to specific communities of color and acknowledge traumatic historical events associated with those destinations (e.g. significance of Metro parks and natural areas for the local Native American community). \$		
Metro facilities and destinations may not be welcoming to all.	Improve wayfinding at all Metro destinations, customized to the facility and the audience. \$	Involve communities of color in the feasibility and space study for the Metro Regional Center and other facilities.	Reassess the guidelines for availability and usage of Metro properties for community-based organizations, and create awareness of those guidelines to communities of color. \$

**Objective 3**

Increase the accessibility and relevance of Metro's programs and services to communities of color.

Issue	Actions
Lack of strategic equity direction in each of Metro's departments.	With the support of the DEI program, all departments and venues will develop a specific plan of action to advance equity within their programs, services, plans, and policies within 18 months of this plan's adoption. ✓ \$
Lack of culturally specific promotion of Metro programs and services.	Communicate program and service announcements using culturally specific language and channels. \$

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required

The table below contains more action items than may feasibly be accomplished in a five-year time frame. This has been intentionally done to allow community members, local partners and other stakeholders the opportunity to help prioritize the actions during the public comment period. A final list of action items will be included in the final version of the plan.

## GOAL E

### Metro's resource allocation advances racial equity.

#### Goal Statement

*Metro advances economic opportunities for communities of color through various avenues including equitable contracting practices, distribution of investments, grant programs, apprenticeships and proactive convening of regional partners to support a racially diverse construction workforce.*

#### Objectives and Actions

##### Objective 1

Advance social equity contracting at Metro.

Issue	Actions			
Lack of data on regional conditions regarding social contracting needs.	Undertake a procurement disparity study that identifies the contracting needs for firms in the region. \$			
Barriers in Metro contracting processes prevent COBID certified firms and community partners from realizing contracting opportunities.	Continue the social equity contracting program that focuses on the removal of barriers and the creation of accessible contracting opportunities for vulnerable business communities.	Create an equity tool to legally determine waivers for contract insurance.	Involve the COBID contractors in the development of RFP's and grants to increase accessibility as long as they do not bid.	
Diversity, equity and inclusion are not consistently central priorities for Metro contracts.	Build equity, diversity and inclusion metrics into contract proposal evaluation.	Require project managers to attend procurement training on developing RFPs.	If applicable, establish a process that requires an explanation as to why a COBID contractor was not utilized.	
Limited community relationships prevent knowledge of and willingness of communities to promote contract opportunities at Metro.	Provide resources and training to Metro staff to cultivate partnerships with existing and potential COBID contractors.	Increase intentional outreach to communities and community-based organizations regarding contracting opportunities, working through business partners. \$	Increase Metro staff participation in professional networking opportunities for communities of color.	
Limited opportunities for potential contractors to learn how to strengthen their firm and become COBID certified.	Continue to invest in providing regular and accessible trainings that assist companies to become certified as COBID and help COBID vendors apply for RFP's. \$			

Legend: ✓ = Additional personnel resources required

\$ = Additional financial resources required

COBID = Certification Office of Business Inclusion and Diversity

**Objective 2****Increase the utilization of equity criteria in resources allocation**

Issue	Actions
Lack of an equity lens that can be applied to Metro resource allocation.	Develop a budget tool to make decisions and evaluate investments including contracts, grants, and sponsorships from a racial equity lens. \$
Lack of simple and easy ways for communities to become aware of financial opportunities (e.g. grants and contracts).	Create a “one-stop” tool to communicate all financial opportunities at Metro to communities of color. (e.g. a page in the Metro website, and a weekly email message sent to an interested parties list) \$
Lack of an agency-wide coordinated approach to tracking community investment.	Create a system to track resource investments in CBOs and grant sponsorship contracts. \$

**Objective 3****Work with regional partners to increase the utilization of local minority, women, and emerging small businesses and the number of skilled construction tradespeople of color.**

Issue	Actions
Lack of data on regional conditions regarding the racial demographic makeup of the construction trades workforce.	Conduct a market study to better understand the current composition of the construction trades workforce. \$
Lack of a coordinated regional effort to create a pipeline to increase the number of skilled construction tradespeople of color.	<p>Convene regional partners to discuss solutions to increase the number of skilled construction tradespeople of color available to work on large projects. This would include the following topics:</p> <ul style="list-style-type: none"> <li>• Enhancing apprenticeships</li> <li>• Identify technical and resources needs</li> <li>• Continuing to invest in and convening the Workforce Diversity Summit</li> </ul> <p>✓ \$</p>
Persistent underutilization of local MWESB firms in governmental contracts throughout the region.	Convene regional partners to discuss solutions to increase the participation of local minority, women and emerging small businesses (MWESB) in government contracts (e.g. create joint workshop to advance COBID certification of MWESB firms). ✓ \$

Legend: ✓ = Additional personnel resources required      \$ = Additional financial resources required  
**COBID** = Certification Office of Business Inclusion and Diversity

## WHAT PATH IS METRO USING TO GET THERE?

### The Strategy

Metro will utilize several interlocking approaches that will lead to long-term institutional and structural change:

- **Leading with race:** Focusing on eliminating the disparities that people of color experience in all aspects of social well-being, especially in those related to Metro's policies, programs, services and destinations.
- **Targeted universalism:** Addressing the disparities that affect the most vulnerable will generate solutions to address the needs of all other vulnerable groups.
- **Building infrastructure:** Creating the frame and space for Metro councilors, directors, staff and other stakeholders to normalize the conversation about race, operationalize changes at the institutional level and organize for structural change.
- **Generating support:** Working with internal stakeholders and regional partners to promote an equity approach that creates institutional and structural change.
- **Partnering with communities of color:** Ensuring that members of these communities are involved in Metro's equity efforts to create greater trust and accountability.
- **Measuring progress:** Measuring and recognizing milestones and significant developments to increase and maintain momentum along the route to greater racial equity and change.



## Racial equity

This Strategic Plan envisions a Portland region where conditions enable all individuals and communities to participate and prosper. To get to this destination, Metro believes it is time to use a strategy founded on **racial equity**.

A racial equity strategy focuses on “closing the gaps” so that race does not predict one’s success. To do so, Metro has to target strategies to focus improvements for the most vulnerable, moving beyond services to work on changing policies, institutions and structures.

To this end, this Strategic Plan intentionally focuses on the barriers that affect people of color. People of color share similar barriers with other historically marginalized groups such as people with low income, people with disabilities, LGBTQ community, older adults and young people. **By addressing the barriers experienced by people of color in the Portland metropolitan region, we will effectively also identify solutions and remove barriers for other disadvantaged groups. The result will be that all people in the region will experience better outcomes.**

### **Metro’s working definition of equity**

Our region is stronger when all individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources that enhance our quality of life.

We share a responsibility as individuals within a community and communities within a region. Our future depends on the success of all, but avoidable inequities in the utilization of resources and opportunities prevent us from realizing our full potential.

Metro will continue to remove barriers for the disadvantaged groups mentioned above through the implementation of its Diversity Action Plan, which was approved by Metro Council in 2012.

**Equity and Equality** – Not everyone needs glasses to see. Those that do require glasses need specific prescription levels to enable them to see.

Equality: Believing that everyone should get the same glasses regardless of need or level of prescription.

Equity: Understanding that some have greater visual difficulties than others, therefore only those that need glasses get them, with the prescription that fits each person's specific needs.

The solutions identified through the Strategic Plan will strengthen Metro's ability to serve and benefit all people in the region. For example, when the Metro Council "banned the box" that asked employment applicants to disclose prior criminal convictions on job applications, it eliminated a barrier that disproportionately affects people of color, who are incarcerated at much higher rates than whites<sup>2</sup>. But this action also benefits people with criminal convictions from all communities, who often struggle to find employment.

Another possible action calls for reducing barriers for communities of color to participate in Metro meetings and events – things like time, location, availability of child care, transit access and so on. Addressing these barriers will improve the ability of other community members to attend as well. Similarly, creating inclusive and welcoming environments will ensure that all people will feel comfortable accessing all Metro venues and facilities, whether for entertainment or educational purposes, to seek services or to participate in the agency's decision-making process.

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<sup>2</sup> Curry-Stevens, A., Cross-Hemmer, A., & Coalition of Communities of Color (2010) Communities of Color in Multnomah County: an Unsettling Profile. <http://www.coalitioncommunitiescolor.org/ccs-dataresearch>

The Portland region's population is growing and changing. People of color have the highest rates of population growth.

Additionally, economists and researchers continue to illustrate that equity and economic growth are complementary. Regions with greater racial inclusion and smaller racial income gaps are more primed for economic growth.<sup>3</sup> Research also points out that:

- the public sector plays an important role in enhancing local economy
- deconcentrating poverty has positive impacts on the regional economy
- having large immigrant populations enhances economic growth
- having an influential minority middle class can help regions combine the interest in prosperity and the commitment to fairness
- efforts to create shared social norms through ongoing dialogue are crucial for the vibrancy and vitality of regions<sup>4</sup>

**Inclusion** - The degree to which diverse individuals are able to participate fully in the decision-making process within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive."

There is no need to choose between equity and economic growth in the Portland region. Equity and community diversity are positive influential factors and therefore have become the superior economic growth model for regions across the country.

Therefore, Metro will use a racial equity approach and apply racial equity decision-making tools and evaluation metrics to the objectives, action items and outcomes in this plan. By addressing barriers and evaluating outcomes for communities of color, Metro intends to improve outcomes for all underserved or marginalized communities.

<sup>3</sup> Treuhaft, S., Blackwell, A.G., & Pastor, M. (2012). America's Tomorrow: Equity is the Superior Growth Model. Retrieved: [http://www.policylink.org/sites/default/files/SUMMIT\\_FRAMING\\_WEB\\_20120110.PDF](http://www.policylink.org/sites/default/files/SUMMIT_FRAMING_WEB_20120110.PDF)

<sup>4</sup> Benner, C., Pastor, M. (2015). *Equity, growth, and community: What the nation can learn from America's Metro areas*. Oakland, CA. University of California Press.

## **Implementation**

This section will describe the proposed plan for Metro to implement the recommendations and actions within the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. It will include a description of the resources needed as well as the agency structure required.

**This section is to be completed in the final draft plan in spring 2016.**

## **Evaluation**

The evaluation plan is a partnership between Metro staff and the regional community to create and implement tools that will measure the progress of the five-year objectives. This process is fundamental to the implementation of this Strategic Plan and is guided by principles of accountability, participation and community. This section will describe the evaluation approach and process timeline.

**This section is to be completed in the final draft plan in spring 2016.**



## Racial equity analysis and decision-support tool

Developing a racial equity analysis and decision-support tool is an important component of this Strategic Plan. This tool is intended to help the agency proactively filter out unconscious bias and institutional racism, and counteract policies and practices that inadvertently maintain inequity.

**Unconscious Bias** - Unconscious attitudes and stereotypes toward individuals and social groups that affect our understanding, actions, and decisions.

Government agencies working to advance racial equity use evaluation tools, often referred to as “equity lenses,” that are customized to meet their specific goals and needs. In some large agencies, such as the City of Seattle and the City of Portland, specific departments or programs have customized the equity lens for their own specific purposes.

Successful racial equity analysis and decision-support tools are used within the context of a larger racial equity strategy. Staff is trained on the appropriate way to use the tools. Facilitators are available to help staff utilize the tools and engage in the intentional dialogue on racial equity that the tools set up. Facilitators also assist staff in incorporating the findings made through the use of the tools into the agency’s policies, procedures, services and decisions to ensure that the needs of historically underserved populations are fully vetted and considered throughout the planning and implementation phases.

Engagement with the communities most impacted by the policies, procedures, services and decisions being analyzed is another important step in the correct utilization of these tools.

According to the Resource Guide for Advancing Racial Equity & Transforming Government<sup>5</sup>, there are four major components of an effective racial equity tool:

- It proactively seeks to eliminate inequities and advance equity.
- It has identified clear goals, objectives and measurable outcomes.
- It poses questions about who would benefit or be burdened by a given decision, the potential unintended consequences of the decision, and who has been involved with developing the proposal and will be involved with implementation.
- It develops mechanisms for successful implementation.

<sup>5</sup> Government Alliance on Race and Equity. (2015) Advancing Racial Equity and Transforming Government: A resource guide to put ideas into action.

Used without the required training, facilitation and community engagement, however, the tools could become a simplistic exercise of answering a set of decontextualized questions without the proper support to implement the ideas and innovations that may come to light during the process.

In general, successful racial equity analysis and decision-support tools:

1. Promote a racially inclusive collaborative process.
2. Use data to set and monitor goals to achieve equity, and promote accountability and transparency.
3. Integrate program and policy strategies to implement resulting pro-equity actions.
4. Work across sectors, not just inside institutions, through partnerships to create lasting change.
5. Educate and communicate about racial equity to continuously raise racial equity awareness.

Metro's racial equity analysis and decision-support tool will include the three elements mentioned above: training and support for staff to successfully use the tool, the questionnaire that guides the incorporation of equity into the agency's activities, and community engagement to ensure that the people most affected by the agency's activities have the opportunity to shape those activities.

Training on the appropriate use of the racial equity analysis and decision-support tool will be included as part of the diversity, equity and inclusion curriculum created by DEI Program staff. Training for volunteer facilitators of the tool implementation will also be offered. DEI Program staff will coordinate the deployment of trained facilitators and help troubleshoot the customization and utilization of the tool by Metro staff. Training on the tool will be complemented by the unconscious bias training series that DEI Program staff will implement in 2016 for all Metro staff.

DEI Program staff has developed a draft 13-point questionnaire to guide the analysis of existing policies, procedures, programs and services to determine how well they advance or hinder the practice of racial equity in the agency. The 13-point questionnaire is also intended to help staff ensure that new policies, procedures, programs and services fully consider and incorporate racial equity. The questionnaire can be customized during the implementation phase of this Strategic Plan by individual departments, divisions, programs and venues to meet their specific needs.

The draft racial equity analysis and decision support tool includes the following questions:

1. Identify the established racial equity-related outcome desired by the policy/procedure/program/service/decision that will undergo the application of this tool.
2. Describe the policy/procedure/program/service/decision that will undergo the application of this tool.
3. Describe the existing data or information that will guide this policy/procedure/program/service/decision. If no relevant data is currently collected, describe the data that should be collected and identify ways to do so.
4. Describe the historic and current inequities and disparities related to this policy/procedure/program/service/decision.
5. Identify what individuals, groups or communities will benefit from this policy/procedure/program/service/decision.
6. Identify what individuals, groups or communities will be burdened by this policy/procedure/program/service/decision.
7. Identify the factors that may be causing and maintaining the benefits and burdens on the individuals, groups and communities identified above.
8. Engage the individuals, groups or communities that are most impacted by this policy/procedure/program/service/decision to learn from their lived experience and enhance value and impact of the application of this tool.
9. Describe the geographic distribution of public resources or investments associated with this policy/procedure/program/service/decision.
10. Identify how this policy/procedure/program/service/decision can mitigate its disproportionate burdens and enhance its positive benefits.

For decision-support applications of the tool:

11. Describe how the decision about this policy/procedure/program/service will be made, including:
  - a. Who will make the ultimate decision?
  - b. Who will be consulted about the decision?
  - c. Who could be missing in the decision-making process? And how can they be included in it?
12. Identify and describe the barriers that staff, community members and decision-makers may encounter to make changes in the policy/procedure/program/service to advance racial equity.
13. Describe the action plan to remove the barriers in decision-making to advance racial equity through this policy/procedure/program/service.

The customization of the questionnaire and the overall tool for each department and venue's specific needs will include additional participation of community members. They can inform and enrich the process by providing the perspective from their lived experience and particular expertise.

This racial equity analysis and decision-support tool will be most effective if it is first used in a few test cases within each department, division, program or venue. The results of the tool's application in those cases will then be vetted in a process led by DEI Program staff in order to make adjustments and changes to questionnaire, concurrently with the customization of the tool by each department. The continuous application and refinement of this frame will reinforce Metro's commitment to being a learning organization where continuous improvement and innovation are valued and practiced.

## Diversity Action Plan integration

The Metro Council adopted Metro's Diversity Action Plan in 2012. The plan identifies and implements strategies and actions to increase diversity and cultural competence at Metro in four key areas: internal awareness and diversity sensitivity, employee recruitment and retention, public involvement and citizen advisory committee membership, and procurement.

Metro recognized the interconnectedness of equity, diversity and inclusion, so it brought these three functions together to create the Diversity, Equity and Inclusion Program (DEI) in September 2014. For DEI, equity is the *Why*, diversity is the *Who*, and inclusion is the *How* it should do its work.

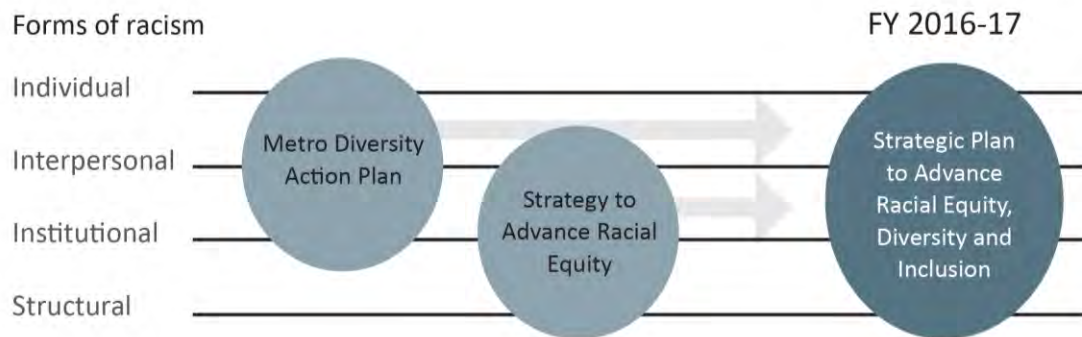
The Diversity Action Plan focuses primarily on addressing issues at the interpersonal level, while also confronting some issues at the individual and institutional levels. On the other hand, Metro's approaches to advancing equity and inclusion largely focus on issues related to institutional and structural racism, while also addressing some areas of interpersonal racism.

**Individual Racism:** Refers to an individual's assumptions, beliefs or behaviors.

**Interpersonal Racism:** Refers to directly perceived discriminatory interactions between individuals whether in their institutional roles or as public and private individuals.

**Institutional Racism:** Policies, practices, and procedures that work better for white people than for people of color, often unintentionally.

**Structural Racism:** A history and current reality of institutional racism across all institutions, combining to create a system that negatively impacts communities of color.



The overlap between the Diversity Action Plan and this Strategic Plan falls within the interpersonal and institutional levels. Artificially separating these two plans could create a troubling disconnect between them, potentially leading to agency-wide inconsistencies in approaches, unnecessary redundancy or competition of resources and staff time. However, the definition of diversity in the Diversity Action Plan is much broader than just racial diversity, so taking a racial equity approach while ensuring diversity and inclusion efforts target all marginalized groups will take some time to sort out. To ensure successful outcomes and a thoughtful process, DEI staff recommends developing an approach on how to most effectively integrate the Diversity Action Plan with this Strategic Plan during the first year of implementation.

In integrating the two efforts together, the structure for the Diversity Action Plan can be adjusted to incorporate content from this Strategic Plan. This would allow for the quicker implementation of the actions recommended here, which may have originally fallen outside the scope of the Diversity Action Plan.

**Recommendation** - Develop an approach on how to most effectively integrate the Diversity Action Plan with the Strategic Plan to Advance Racial Equity, Diversity and Inclusion during the first year of implementation.

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## WHAT ARE THE HISTORICAL AND CURRENT CONDITIONS?

### Racial Disparities

As the Portland metropolitan region's demographics change, Metro needs to plan for the future by addressing long-standing institutional barriers that inhibit success for all. Through its programs, policies and services, Metro is committed to creating conditions which allow everyone to participate and enjoy the bounty of the region for generations to come.

This commitment is tempered with the recognition that people of color across the country experience the most disparate outcomes in nearly every category of social well-being, including housing, transportation, access to nature, education and health.

This situation is no different for the communities in the Portland metropolitan region. Sources such as the Regional Equity Atlas<sup>6</sup>, A Community of Contrasts<sup>7</sup>, Communities of Color in Multnomah County: an Unsettling Profile<sup>8</sup>, the Greater Portland Pulse<sup>9</sup>, and the State of Black Oregon<sup>10</sup> clearly show the extent of these disparities, from educational to health outcomes.

Unfortunately, data alone cannot encapsulate the experience of what it is like to live in the Portland region as a person of color. Further, often data aren't disaggregated by race, ethnicity or language.

#### MEAN PER CAPITA INCOME

American Indian or Alaskan Native	\$19,232
Black or African American	\$19,264
Native Hawaiian or Pacific Islander	\$16,663
Asian	\$29,054
Hispanic or Latino	\$14,591
White	\$33,510
Two or more races	\$16,021
Some other race alone	\$13,667

#### PERCENT BELOW POVERTY LEVEL

American Indian or Alaskan Native	27%
Black or African American	34.1%
Native Hawaiian or Pacific Islander	23.4%
Asian	12.5%
Hispanic	27.6%
White	10.9%
Some other race	31.7%

Data: Portland Metropolitan Region  
2009-2013 ACS 5-year

*DATA NOTE: Due to the general nature of the race/ethnicity categories developed by the U.S. Census Bureau, some categories may misrepresent actual circumstances.*

*One category in particular that demonstrates this issue is the "Asian" category. Due to the fact that the "Asian" category compiles many different communities and cultures into one category, the resulting data output will be an underrepresentation of the burdens faced.*

<sup>6</sup> Coalition for a Livable Future (2010) Regional Equity Atlas 2.0. <https://gis.oregonmetro.gov/equityAtlas/>

<sup>7</sup> Asian Americans Advancing Justice (2015) A Community of Contrasts. [http://www.apano.org/wp-content/uploads/2015/10/AAAJ\\_Western\\_Dem\\_2015.pdf](http://www.apano.org/wp-content/uploads/2015/10/AAAJ_Western_Dem_2015.pdf)

<sup>8</sup> Curry-Stevens, A., Cross-Hemmer, A., & Coalition of Communities of Color (2010) Communities of Color in Multnomah County: an Unsettling Profile. <http://www.coalitioncommunitiescolor.org/cc-c-data-research>

<sup>9</sup> Portland State University. Greater Portland Pulse. <http://portlandpulse.org/>

<sup>10</sup> Urban League of Portland (2015). State of Black Oregon. [http://ulpdx.org/programs/advocacy-and-civic-engagement/advocacy-and-public-policy/publication\\_archive/state-of-black-oregon-2015/](http://ulpdx.org/programs/advocacy-and-civic-engagement/advocacy-and-public-policy/publication_archive/state-of-black-oregon-2015/)



Structural racism is at the heart of these inequalities and continues to create unsettling levels of disparity in social well-being. This multi-generational trauma is the culmination of the negative impacts produced by previous discriminatory practices and policies and perpetuated by existing racist systems that people of color face every day. Previous exclusionary practices include redlining or voter discrimination. Current systems create gentrification and displacement, utilize racial profiling and impose unfair school discipline practices for students of color. Although racism often occurs at an interpersonal level, institutional and structural forms of racism create profound disparities and trauma in communities that last many generations. Trauma directly impacts the emotional, psychological, physical and economic well-being of an individual. It is an additional burden shouldered by people of color.

#### HOMEOWNERSHIP BY RACE AND INCOME



Data: Portland Metropolitan Region  
2010 U.S. Census Bureau

*DATA NOTE: Due to the general nature of the race/ethnicity categories developed by the U.S. Census Bureau, some categories may misrepresent actual circumstances.*

*One category in particular that demonstrates this issue is the "Asian" category. Due to the fact that the "Asian" category compiles many different communities and cultures into one category, the resulting data output will be an underrepresentation of the burdens faced.*

Since the landmark civil rights legislation of the 1960s, government has primarily used a color-blind approach to combat racial discrimination and establish a race-blind standard.

**Color-blind:** The racial ideology that posits the best way to end discrimination is by treating individuals as equally as possible, without regard to race, culture, or ethnicity. It focuses on commonalities between people, such as their shared humanity.

This approach is founded on the well-intended idea of equality, which means that everyone receives the same treatment. Unfortunately, equality assumes sameness – that everyone faces the same barriers. Equality does not take into account historical or

current forms of discrimination that are present in our public institutions and structures, such as redlining, which prevented many people of color from owning property and accruing wealth, or predatory lending practices targeting communities of color.<sup>11</sup> As a result, these policies have contributed to the current situation, where people of color continue to experience the worst outcomes.

Metro is committed to arriving at an equitable and prosperous Portland region where everyone has opportunities to enjoy a strong quality of life. Taking a racial equity approach by removing the barriers of our most adversely impacted communities is the most intentional and effective path to get there.

<sup>11</sup> Badger, E (May 28, 2015). Redlining: Still a thing. *The Washington Post*. Retrieved: [www.washingtonpost.com/news/wonk/wp/2015/05/28/evidence-that-banks-still-deny-black-borrowers-just-as-they-did-50-years-ago/](http://www.washingtonpost.com/news/wonk/wp/2015/05/28/evidence-that-banks-still-deny-black-borrowers-just-as-they-did-50-years-ago/)

## WHAT INFORMATION IS GUIDING THIS STRATEGY?

This section describes each aspect of the multi-pronged engagement and research effort that Metro has conducted to inform the direction of this Strategic Plan. DEI Program staff created various points of input to collect diverse feedback from community members and staff to ensure the development of a strategic direction that will provide Metro with the greatest opportunity to reach its equity goals and vision.

### Community Engagement

Beginning in spring 2015, DEI Program staff sought the advice of local elected officials, government staff and business and philanthropy leaders throughout the Portland region. Metro councilors and staff held more than 50 meetings in a three-month period, with three objectives:

1. Inform key regional stakeholders of the development of the Strategic Plan.
2. Elicit feedback into critical regional equity issues and potential roles for Metro to help advance equity throughout the Portland metropolitan region.
3. Cultivate regional partners to work with Metro on the implementation of the Strategic Plan.

In addition to this initial engagement, Metro partnered with a local community-based consulting firm, MultiCultural Collaborative, to help organize, recruit, facilitate, record and summarize comments from 18 discussion groups with communities of color, youth and experts in the fields of transportation, parks and housing. These discussions, divided into two rounds of nine sessions each in June and October 2015, were led by culturally-specific community-based organizations. In all, more than 250 individuals participated in these discussion groups.

The first round of discussion groups, held in June 2015, focused on gathering input on potential programs, policies and initiatives that Metro could implement to increase equity, and to address regional or community-specific disparities, barriers and opportunities to increase long-term, meaningful engagement with Metro. The results of these discussions were approximately 140 ideas related to strategies and actions that Metro could pursue (Appendix B).

In October 2015, Metro staff, community-based organizations and MultiCultural Collaborative held a second round of discussions with the same nine groups that participated in the first round. The objectives of these follow-up discussions were:

1. Ensure that Metro correctly captured the comments, feedback and insight of each stakeholder group.
2. Identify any new ideas that may have not been collected during the first round of discussions.
3. Enlist community insight into prioritizing the ideas captured during the first discussion groups.

The second round of discussions uncovered several new actions and strategies, and consistent priorities across the groups (Appendix C). The identified actions, strategies and suggested priorities were foundational to the development of this Strategic Plan and will continue to help inform Metro's equity actions.

### **Metro staff engagement**

Building off the recommendation from the Equity Framework Report, Metro also engaged in a community-led internal equity assessment. Continuing its collaboration with the six community-based organizations that comprised the Equity Baseline Workgroup, Metro contracted with them to design and facilitate a three-month internal staff engagement effort to better understand Metro's roles and responsibilities to advance equity in the Portland metropolitan region and the authority it has to impact existing disparities.

Collaborating with representatives from the Equity Strategy Advisory Committee (ESAC), the community-based organizations created a four-step staff engagement process to achieve the desired outcomes of the internal assessment:

**Step 1:** Preparation survey — Each staff participant completed a survey that assessed their current level of awareness and understanding of the term “equity” and provided initial opportunities to share insight related to Metro's role and authority to advance equity in the Portland region.

**Step 2:** Kick-off meetings — Each participant attended a kick-off meeting that provided standard baseline information, definitions, and context related to the Strategic Plan. These meetings' purpose was to ensure that each participant felt prepared for subsequent equity discussions.

**Step 3:** Small group engagement sessions — Over a two-month period, 10 small group meetings were held to gather ideas, insights, suggestions and direction on how Metro could address current equity issues or expand its equity efforts. Each small group meeting was facilitated by two representatives of community-based

organizations or ESAC and involved five to 14 staff members representing various departments and programs throughout Metro.

**Step 4:** Optional closing survey — To provide additional opportunities for staff to share suggestions or insight, each participant received an optional survey at the end of each small group discussion.

More than 80 staff members from every Metro department and division participated in this internal engagement effort. The consistent themes elicited from the small group discussions and surveys were compiled and used to inform the direction of this Strategic Plan (Appendix D).

### **Organizational Self-Assessment Related to Racial Equity**

Upon recommendation from the Equity Strategy Advisory Committee, DEI Program staff decided to use the Tool for Organizational Self-Assessment Related to Racial Equity as a crucial input to inform this Strategic Plan. Developed by local organizations Coalition of Communities of Color and All Hands Raised, the tool is designed to gather a holistic snapshot of an organization's practices and policies as they relate to racial equity.

In summer 2015, DEI staff assembled a workgroup of 15 Metro staff members representing different departments and venues of the organization to answer questions posed in the tool, identify gaps and make recommendations.

This workgroup met in September and October 2015 and jointly answered questions to assess racial equity in three major organizational categories:

1. **Organizational commitments**, which includes the areas of leadership and governance; racial equity policies and implementation practices; workforce composition and quality; and resource allocation and contracting practices.
2. **Customer and client service**, which includes the areas of service-based equity, service-user voice and influence; and data metrics.
3. **Community interface**, which includes the areas of organizational climate, culture and communications; community collaboration; and continuous quality improvement.

DEI Program staff also engaged with additional Metro staff of color, who discussed the following questions from the self-assessment tool:

- Do the organization's senior leaders act consistently around racial equity, for example by allocating sufficient resources for equity initiatives, making racial justice a standing agenda item at key meetings, and ensuring people of color are decision-makers?
- Does your organization encourage or support difficult conversations about race in a safe, confidential, private space?
- Describe your organization's primary physical space (Metro Regional Center) and what it may communicate to diverse stakeholders. Is it welcoming and accessible? Consider the use of height, open spaces, natural or artificial light, art, signage and visual representations and facilities such as gender neutral bathrooms and lactation rooms.
- Describe whether, and how, the Metro Regional Center's entrance area is welcoming and supportive of diverse individuals and families. For example, is there comfortable seating and supports for those with children?
- Please provide a couple of examples of how your organizational meetings that involve the public are conducted in a manner that supports equity and inclusion, and values diverse ways of speaking, thinking, debating, reflecting and making decisions.
- Are racial equity and cultural competency training and capacity-building made available to your workforce?

The overall analysis and the resulting report identified progress and gaps (Appendix E). The recommended actions to fill these gaps have also helped guide this Strategic Plan.

## Agency-wide plans and initiatives

Over the past decade, many Metro divisions and programs have prioritized diversity, equity or inclusion efforts. Much of this work has been successful and, in some cases, has guided the practices of other government agencies throughout the country. A major intent of this Strategic Plan is to build off past success and provide a space to highlight the full extent of the diversity, equity and inclusion work already taking place within the agency.

To ensure that this strategy is guided by past efforts and accounts for ongoing ones, DEI Program staff completed a multi-step process. First, staff worked to identify past, current and future work related to diversity, equity and inclusion by hosting more than a dozen meetings and discussions with various department staff and leadership throughout the agency.

Once these past and ongoing efforts were identified, DEI Program staff used them to guide and frame the direction of this Strategic Plan. Additionally, the recommendations and actions from these efforts are incorporated into the objectives and actions outlined on pages 21 to 30.

The following Metro plans, programs and initiatives inform the Strategic Plan to Advance Racial Equity, Diversity and Inclusion:

- Affirmative Action Plan (2015)
- Diversity Action Plan (2012)
- Environmental Literacy Framework (2016)
- Equitable Housing Initiative (2016)
- Limited English Proficiency Plan (2015)
- Oregon Innovation Award (2016)
- Parks System Plan (2016)
- Public Engagement Guide (2015)
- Regional Transportation Plan (2014)
- Six Desired Outcomes (2010)
- Title VI Plan (2012)

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DRAFT

## GLOSSARY

**Color-blind** - The racial ideology that posits the best way to end discrimination is by treating individuals as equally as possible, without regard to race, culture or ethnicity. It focuses on commonalities between people, such as their shared humanity.

– Wise, T. J. (2010). *Colorblind: the rise of post-racial politics and the retreat from racial equity*. San Francisco, CA: City Lights Books.

**Community** - All individuals who live, work, play or pray in the Portland metropolitan region.

**Communities of Color** - “Communities of color” and “people of color” include Native Americans, African Americans, African and Slavic immigrants, Asian Americans and Pacific Islanders, and Latinos or Hispanics. Although “officially” identified as White by the United States Census, the Slavic immigrant community has been included in this collective term because their overall well-being and health outcomes are experienced through a racial lens.

**Cultural proficiency** - A comprehensive collection of behavior, attitudes, practices and policies that creates an inclusive environment for people of diverse backgrounds. Culturally proficient organizations have the awareness, knowledge base and learned skills to effectively and sensitively work with and provide services to people of diverse backgrounds.

– Metro (2012). Diversity Action Plan.

**Culture** - A social system of meaning and custom that is developed by a group of people to assure its adaptation and survival. These groups are distinguished by a set of unspoken rules that shape values, beliefs, habits, patterns of thinking, behaviors and styles of communication.

– Maguire, John, Sally Leiderman, and John Egerton (2000). *A Community Builder’s Tool Kit – 15 Tools for Creating Healthy, Productive, Interracial/Multicultural Communities*. Claremont, CA: The Institute for Democratic Renewal and The Project Change Anti-Racism Initiative.

**Diversity** - The variance or difference amongst people. This variance includes race, ethnicity, gender, age, religion nationality, language preference, socioeconomic status, disability, sexual orientation, gender identity and others. These differences are tied to a variety of other aspects of diversity such as experience, work styles, life experience, education, beliefs and ideas. Honoring these differences while upholding our value for respect is central to our diversity philosophy.

– Metro (2012). Diversity Action Plan.



**Equity** - Metro's working definition of equity reads:

"Our region is stronger when all individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources that enhance our quality of life.

We share a responsibility as individuals within a community and communities within a region. Our future depends on the success of all, but avoidable inequities in the utilization of resources and opportunities prevent us from realizing our full potential.

Our region's population is growing and changing. Metro is committed with its programs, policies and services to create conditions which allow everyone to participate and enjoy the benefits of making this a great place today and for generations to come."

**Historically marginalized** - A limited term that refers to groups who have been denied access and/or suffered past institutional discrimination in the United States and, according to the Census and other federal measuring tools, includes African Americans, Asian Americans, Hispanics or Chicanos/Latinos and Native Americans. This is revealed by an imbalance in the representation of different groups in common pursuits such as education, jobs, housing, etc., resulting in marginalization for some groups and individuals and not for others, relative to the number of individuals who are members of the population involved.

Other groups in the United States have been marginalized and are currently underrepresented. These groups may include but are not limited to other ethnicities, adult learners, veterans, people with disabilities, lesbian, gay, bisexual, and transgender individuals, different religious groups and different economic backgrounds.

- University of California, Berkeley (2015). Berkeley Diversity – Glossary of Terms.

**Inclusion** - Inclusion refers to the degree to which diverse individuals are able to participate fully in the decision-making process within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive."

- Metro (2012). Diversity Action Plan.

**Individual racism** - Refers to an individual's assumptions, beliefs or behaviors.

– Henry, F., & Tator, C. (2006). The colour of democracy: Racism in Canadian society . 3rd Ed. Toronto: Nelson.

**Institutional racism** - Policies, practices, and procedures that work better for white people than for people of color, often unintentionally.

– Government Alliance on Race and Equity (2015) Advancing racial equity and transforming government: A resource guide to put ideas into action. [http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource\\_Guide.pdf](http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource_Guide.pdf)

**Interpersonal racism** - Refers to directly perceived discriminatory interactions between individuals whether in their institutional roles or as public and private individuals.

– Krieger N. (1999). Embodying inequality: A review of concepts, measures, and methods for studying health consequences of discrimination. International Journal of Health Services.

**Social equity contracting** – Removing barriers and creating accessible contracting opportunities for vulnerable business communities.

**Structural racism** - A history and current reality of institutional racism across all institutions, combining to create a system that negatively impacts communities of color.

– Government Alliance on Race and Equity (2015) Advancing racial equity and transforming government: A resource guide to put ideas into action. [http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource\\_Guide.pdf](http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource_Guide.pdf)

**Unconscious bias (or implicit bias)** - Unconscious attitudes and stereotypes toward individuals and social groups that affect our understanding, actions and decisions..

– Adapted from the Center for Social Inclusion (2015). Talking about Race Toolkit.



## Metro | Memo

Date: Friday, Feb. 19, 2016  
To: Transportation Policy Alternatives Committee  
From: Clifford Higgins, Planning & Development Communications; Daniel Kaempff, regional flexible funds project manager  
Subject: Public feedback to inform regional flexible funds policy

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From Jan 14 through Feb. 16, Metro hosted an online questionnaire to garner public feedback on a policy approach for the regional flexible funds allocation process. In addition to the questionnaire, stakeholders were also invited to review staff's memo to JPACT, dated Nov. 30, 2015, and provide written comments.

As outlined in the above memo, the questionnaire asked one question related to the flexible funds policy, specifically asking feedback on whether the "Step 2" process should continue to have a split between active transportation and freight projects or whether those projects should compete in one category. The full text of the flexible funds question is below. The questionnaire also included questions that will inform the development of the 2018 Regional Transportation Plan; the strategic plan to advance racial equity, diversity and inclusion; and the equitable housing program.

### Participation

**We had 7885 people start the poll, with more than 5800 working through into the questions.**

We had expected between 1500 to 2000 participants for the online poll. Because of wide distribution (thanks to city, county and community partners), 7885 participants entered the poll (put in their ZIP codes); 1337 saw the first question on the RFFA issue and decided not to continue (so 6548 continued from that first question); 717 dropped out after seeing the second question on emerging transportation trends; after that, people mostly continued well into the questions.

### Response to the regional flexible funds question

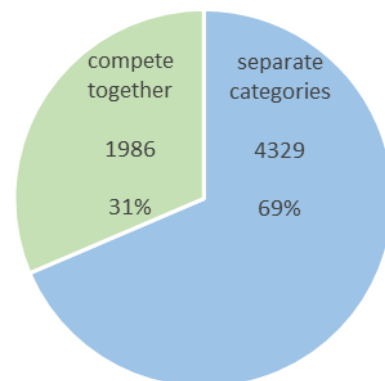
Which option for deciding how projects compete for this money do you support?

- Set aside some dollars for walking and biking improvements and some for freight improvements, and then let projects compete in separate categories.
- Let all potential walking, biking and freight projects compete together.

Respondents: 6315

1) separate categories: 4329 (69%)

2) compete together: 1986 (31%)



### Additional comments

Participants were asked at the end of the questionnaire if they had additional comments about the topics addressed. Eleven comments specifically addressed the flexible funds policy.

ZIP code	County	Additional comments about these topics or this questionnaire
97219	Multnomah	Reducing the funding for active transportation by changing the 75% / 25% funding split for regional flex funds is inconsistent with Metro policy expressed in the Metro Climate Smart Strategy and Regional Active Transportation Plan. Freight improvements have always been prioritized and funded at higher levels through other funding sources. Please do not reduce the funding percentage for active transportation in the next round of regional flex funds.
97221	Multnomah	The question about how to allocate RFFA funding was handled poorly because you relayed some information, but didn't show how pitifully small the current regional transportation budget is for pedestrian and bicycle improvements. Dan Kaempf showed a bar chart to the Portland Bicycle Advisory Committee earlier this week, which summarized where the funding goes, and it showed how auto/freight gets about 2/3, transit 1/3 and ped/bike about 2%-3%. A primary source of funding available for ped/bike is RFFA, of which 60% is pulled off the top for transit and other stuff. Then ped/bike projects get to compete with freight for the remaining crumbs? Also, the survey should have noted the difficulty of ranking totally different projects. How do you really compare a freight project in Rivergate with a neighborhood greenway? All you'll get will be responses from people who are poorly informed, but I suspect that's what you want so you can just keep on going the course we always have.
97267	Clackamas	\$38 million dollars is not enough money to hardly anything for Freight. Region wide we have a very good bike system. \$38 million dollars can do lot of sidewalks. Most or all of the money should be used for sidewalks.
97219	Multnomah	We don't need to worry about freight, just eliminate congestion. We need to stop subsidizing single-occupancy vehicle use and parking. If we eliminate all of the backwards incentives and deferred costs, it will be easier to prioritize transportation in an equitable way: starting with the most basic needs to be able to walk and bike in your own neighborhood. Next, a grid of frequent-service transit (grid, not a hub+spoke star), then freight, carpools, and finally single-occupancy vehicles. We need safe routes to school, starting immediately with enforcement of traffic laws (crosswalks, stop signs, passing distance), which already reserve space and safe right-of-way for people walking and biking. Neighborhood streets require strict speed limit enforcement and elimination of cut-through auto traffic. The routes to schools connect everything -- if every kid can bike to school, everyone can bike everywhere.
27405	Guildford Co, NC	Freight movement has nothing to do with transportation choices. Only a car-centric organization would ever connect the two. Which makes me wonder about Metro.
97217	Multnomah	I greatly appreciate this survey. However, I do have an issue with the question asking whether funds for bike/pedestrian funding should be separate, or compete with freight projects. This questions does not provider survey takers with enough context in order to express their values. It is not clear that the status quo protects 75% of flexible funds for bike/ped, and that the alternative, competing with freight, could very likely reduce that percentage. The question should provide the

		current allocation of funds, and the proposed future allocation of funds. The impact of this choice is unclear.
97217		Please dedicate \$15 million in funding for Safe Routes to School. Please preserve or increase the 75% dedication for active transportation.
97213	Multnomah	An earlier question pertained to your having umpteen million dollars at your disposal and how best to spend it. Wouldn't a better question be: what do we need most and how much money would be required to accomplish those needs? Otherwise, it seems to me, people will just be spending money for the sake of spending money. As a taxpayer, I find the idea of just handing out money, without a predefined goal in mind, somewhat repugnant. Mind you, I value the transportation system here in Portland. I use it frequently. But face it: it's a bureaucracy at heart and prone to wasting money if the money is just sitting there waiting to be spent.
97267	Clackamas	Please allocate as close to 100% of the regional flexible funds for active transportation. Freight projects already have access to substantial pools of funds where active transportation does not. Please dedicate these funds where they'll do the most good: we are all pedestrians at one time or another, but we are not all freight. Please prioritize funds to fully complete sidewalk networks along frequent transit routes such as Mcloughlin Blvd in Oak Grove and Jennings Lodge.
97217	Multnomah	One item that was difficult to address in the survey: lumping "bicycle/pedestrian" projects together is a real problem. Bicycles and pedestrians navigate the city in very different ways, and cyclists have a strong lobby within the city so any funds for "bike and ped" work seem to go to bike lanes, bike lights, and related projects. Meanwhile I can't walk home from work without having to worry about my safety. For example, pedestrian crosswalk lights are often poorly timed, making it difficult even for an able-bodied person such as myself to make it across a wide street. This is a real issue of equity for older or lower income residents who use transit and have to walk from transit to their homes or places of work.
97062	Washington	The initial question asked how different projects should be categorized to compete with each other. I don't understand why you are focusing on competition instead of cooperation to increase efficiency and decrease waste. I feel like there are already a lot of programs designed to help minorities and low income families, and while these are certainly a good thing, I think there are a lot of people who are just barely above the "low income" range who end up facing the biggest challenges because they are not eligible for programs, and housing is so expensive.

### Written comments

Two written comments were received between Jan. 14 through Feb. 16 from:

- Portland Pedestrian Advisory Committee
- Portland Bicycle Advisory Committee

These comments are attached.

### Online participant demographics

Participants were asked to provide demographic information to help Metro know if we are hearing from people across all races/ethnicities, ages and income levels on these important decisions.

*Ethnicity*

Respondents were asked to pick all that apply and choose “other” or offer more specificity.<sup>1 2</sup>

Respondents (5200) minus “prefer not to answer” or similar comment (501): 4699

4070 (87%) White alone<sup>3</sup>

96 ( 2%) Black or African American

142 ( 3%) American Indian or Alaska Native

167 ( 4%) Asian

33 ( 1%) Pacific Islander

226 ( 5%) Hispanic

126 ( 3%) other or more specificity

*Gender*

Respondents (5209) minus “prefer not to answer” or similar comment (300)<sup>4</sup>: 4909

2698 female

2153 male

16 transgender female

12 transgender male

58 other identification

*Age*

Respondents (5222) minus “prefer not to answer” (223): 5199

8 younger than 18

125 18 to 24

829 25 to 34

1049 35 to 44

1009 45 to 54

1073 55 to 64

726 65 to 74

180 75 and older

*County of residence*

Respondents: 5177

558 (11%) Clackamas

3382 (65%) Multnomah

1098 (21%) Washington

139 ( 3%) other

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<sup>1</sup> “Other” responses were reviewed to provide consistent tallies in the other categories. For instance, if someone stated “White/Latina” in the other/more specificity space, staff verified that tallies were entered in the “White” and “Hispanic, Latino or Spanish origin.”

<sup>2</sup> Sixty-seven comments questioned this question were removed from the “other” category, including “human” or the like, and were added as tallies to “prefer not to answer,” as appropriate. Responses such as “American,” “Conservative Christian” or “Midwesterner” were left as self-identified ethnicities in the “other” tally.

<sup>3</sup> Since the ethnicity question is asked to determine if Metro is reaching diverse communities, responses were reviewed to calculate the number of respondents who were white and no other ethnicity.

<sup>4</sup> Thirty-four respondents expressed dissatisfaction with the question or the inclusion on non-(cisgender) male/female options.

*Income*

Respondents: 5110 minus “don’t know/prefer not to answer” (709): 4501

169	less than \$10,000
251	\$10,000 to \$19,999
329	\$20,000 to \$29,999
1583	\$30,000 to \$49,999
913	\$50,000 to \$74,999
719	\$75,000 to \$99,999
862	\$100,000 to \$149,999
537	\$150,000 or more

**Question to inform the regional flexible funds policy**

The following is the full text from the questionnaire that was open from Jan. 14 through Feb. 16.

Metro and its partners are discussing how to best spend about \$38 million over the next few years on biking, walking and freight projects. Projects ideas will compete next year based on one of two options:

1) Set aside some dollars for walking and biking improvements and some for freight improvements, and then let projects compete in separate categories.

[Advantage: Targets projects that best meet the goals set for each category and provides clear direction on amount of funds to be spent on each type of project.]

2) Let all potential walking, biking and freight projects compete together.

[Advantage: Creates opportunity for projects that are both good for walking and biking and good for freight movement (though not necessarily “the best” at meeting the goals for biking/walking and freight as separate categories).]

*[The following section (in grey) only appeared if the participant chose the option to “learn more” before making a selection.]*

Transportation funding overview:

The Portland metropolitan region (the tri-county area from Forest Grove to Oregon City, from Wilsonville to Troutdale) should expect to receive approximately \$300 to 400 million in federal and state aid over the next three years for transportation projects targeting road maintenance and expansion (and walking and biking facilities related to those road projects) and \$10 million specifically for bicycle and pedestrian projects. TriMet and SMART expect to receive approximately \$160 million of state and federal funding during these three years (plus \$300 million in payments toward the Milwaukie light rail project) and will raise additional funds locally, primarily through passenger fares and the payroll tax. Cities and counties raise and spend additional resources to build and maintain the transportation system.

Flexible federal funds:

We also expect to receive about \$126 million over three years from federal programs that offer more flexibility in how the dollars are spent. Due to the flexibility in the potential uses of the funds, previous investments include roadway improvements, transit projects, sidewalks and other pedestrian improvements, freight movement improvements and bicycle facilities. Other uses include region-wide programs to improve the management and flow of the transportation system, educate residents about available travel options and pay down bonds on high capacity transit (e.g., light rail) and related investments in priority transportation corridors.

About \$38 million of these funds in this cycle will go specifically to things like sidewalks, crosswalks, bike lanes and trails or projects to improve freight movement to help the regional economy.

\$38 million sounds like a lot, but many transportation projects are expensive. For comparison, here are some examples of other recent transportation projects in the region:

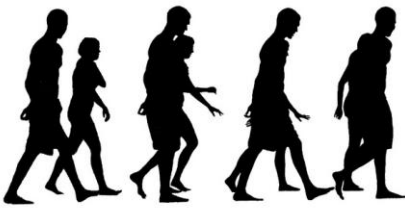
- Sellwood Bridge replacement: \$307 million
- Sunrise Corridor first phase – a new 2.5-mile 4-lane highway in Clackamas County, plus one new I-205 overpass and several related improvements to intersections, drainage, etc.: \$139 million
- Adding one lane each way to U.S. 26 for 2 miles in Washington County: \$33 million
- Flashing beacons at 18 crosswalks in East Portland: \$1.9 million

The needs for the region's transportation system range from building sidewalks where they don't exist, to maintaining roadways, to providing more transit service. Transportation funding from the federal, state, and local governments all help, but the long list of needs continues to grow, and the available funding continues to shrink. These regional flexible funds represent just a small piece of this shrinking pie, but can still achieve a lot if used wisely.

**Which option for deciding how projects compete for this money do you support?**

- Set aside some dollars for walking and biking improvements and some for freight improvements, and then let projects compete in separate categories.
- Let all potential walking, biking and freight projects compete together.





## Portland Pedestrian Advisory Committee

1120 SW 5th Avenue, Suite 800

Portland, OR 97204

February 16, 2016

### Chairs

Rebecca Hamilton, Co - Chair

Roger Averbeck, Co - Chair

### Members-At-Large

Chase Ballew

Anthony Buczek

David Crout

Mandia Gonzales

Arlene Kimura

Doug Klotz

Scott Kocher

Brenda Martin

Rod Merrick

Eve Nilenders

Elaine O'Keefe

Suzanne Stahl

SUBJECT: Support for Maintaining Current Percentage Split for Regional Flexible Funds

The City of Portland Pedestrian Advisory Committee (PAC) strongly supports maintaining the 75% active transportation - 25% freight split for Metro's Regional Flexible Funds (RFF). RFF are one of the few resources currently available for funding critically needed active transportation projects. If the active/freight split is changed as some have proposed, it is highly likely that many of these regionally important projects will lose their already meager financial support. It is our opinion that removing the current funding split is a short-sighted strategy that the region will come to regret. It would have only a minor impact on freight transportation needs, but a profound effect on the region's environmental, economic and social well-being.

A robust active transportation network is critical to our regional health. Safe crossings and a comfortable walkways are essential to creating walkable neighborhoods that support transit, pedestrian and bicycle options. Neighborhoods with poor pedestrian, bicycle and transit circulation struggle to attract and sustain businesses and services vital to the community; this is especially true in low-income areas. Further, active transportation options are critical to a large segment of the region's most vulnerable populations. The very young and the very old, people living with disabilities, and low income residents especially rely on pedestrian, bicycle and transit facilities for their basic needs. It is the responsibility of elected leaders to prioritize these populations in their funding models.

Further, active transportation is critical to the region's economy. Metro's own resources indicate that the entire 300+ mile bikeway network cost about \$60 million to construct, which is approximately the cost of a single freeway.

There are few other investments that can produce such significant improvements, both social and economic, so it is for these reasons that we strongly urge Metro to continue the existing 75% / 25% split for these vitally important regional flexible funds.

Sincerely,

Rebecca Hamilton  
PAC Co-Chair

Roger Averbeck  
PAC Co-Chair

# Portland Bicycle Advisory Committee

*Working to Make Bicycling a Part of Daily Life in Portland*

1120 SW 5<sup>th</sup> Avenue, Room 800  
Portland OR 97204



February 10, 2016

To: Joint Policy Advisory Committee on Transportation and  
Metro Council  
From: City of Portland Bicycle Advisory Committee  
Subject: Regional Flexible Fund Allocation

Thank you for the opportunity to comment on regional policy considerations for the Regional Flexible Fund Allocation; specifically on consideration of maintaining the 75:25 split in Step 2 funding for active transportation/green freight/economy. The Portland Bicycle Advisory Committee is a City-Council appointed volunteer committee charged with advising the City of Portland on matters related to bicycling. As regional considerations have great impact on Portland's transportation funding we feel obliged to offer our comments to JPACT and the Metro Council on this matter.

In short, our recommendation is to at least maintain the 75:25 split as currently provided and, ideally, to provide 100 percent of available Step 2 funding to active transportation. As we are aware about regional conversations about \$12 million in "extra" Step 1 funding we also recommend that significant funding be provided from that to active

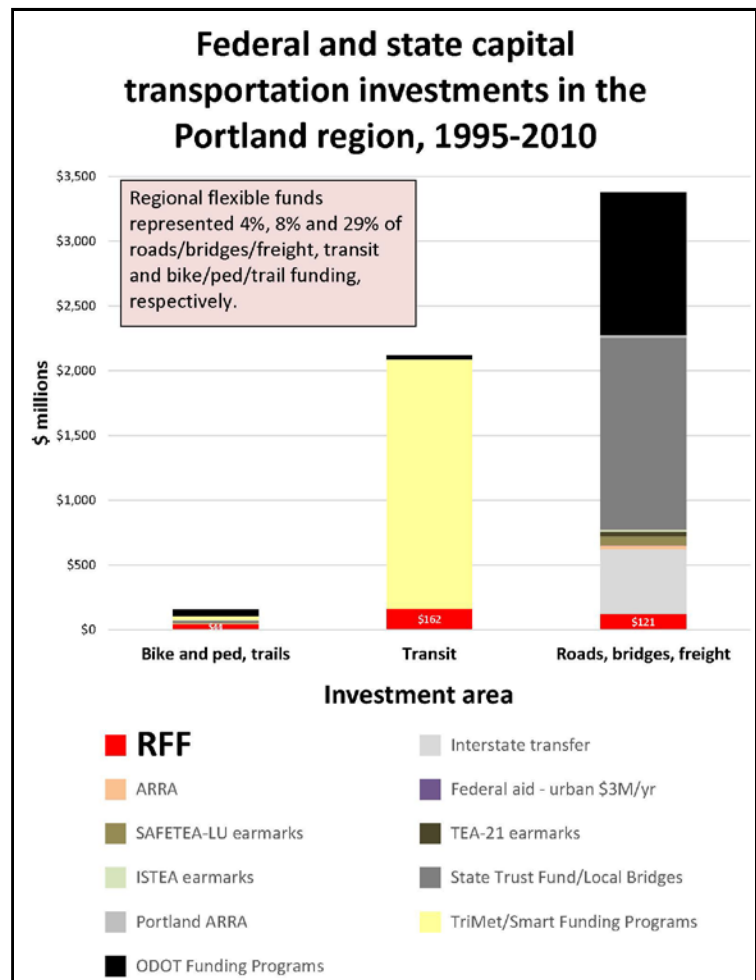
transportation, either through a proposed regional transportation bond or through transfer to Step 2. Our position is based on three pertinent pieces of information:

1. The relative importance of Regional Flexible Funds to overall regional funding for active transportation
2. The timeline by which various elements of the Regional Transportation Plan are expected to be completed, and
3. The regional performance of bicycle transportation since 2000 and its contribution to adopted regional goals and policies.

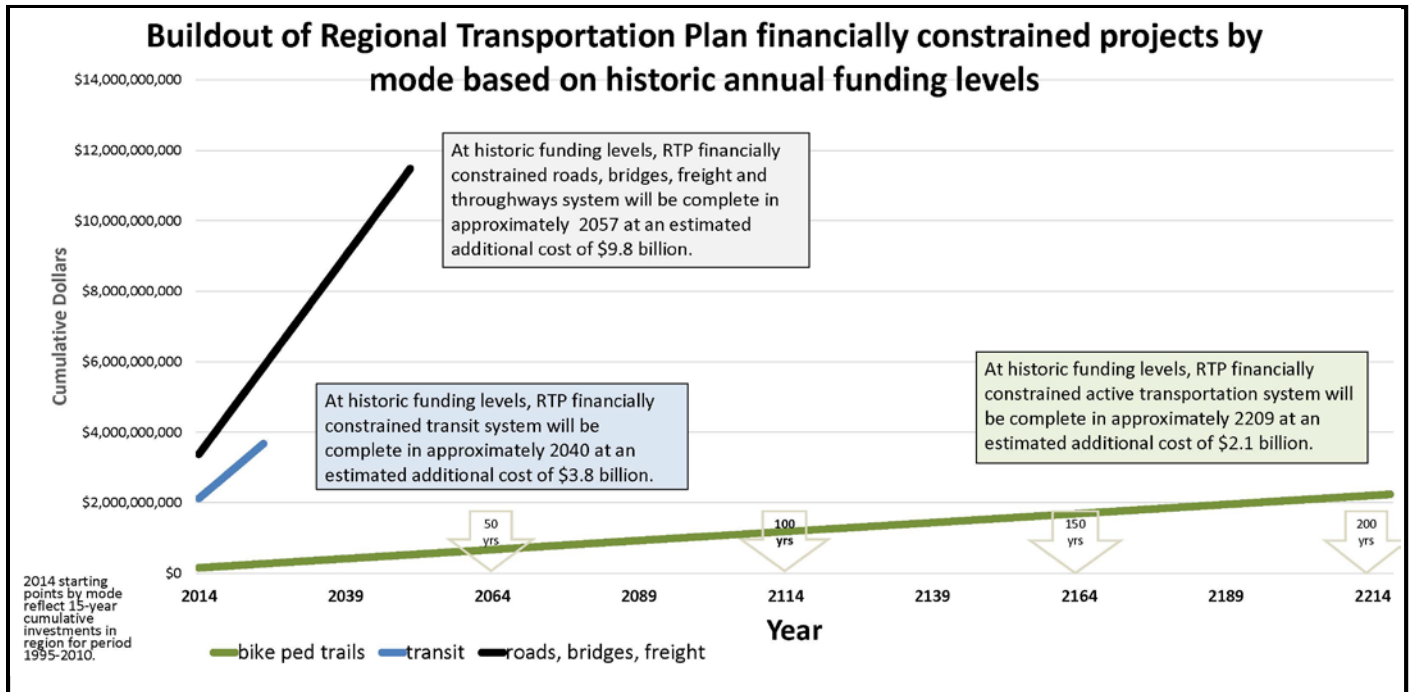
This letter addresses these three points.

## **Importance of RFF to active transportation**

The graph to the right is based on information in Metro's Regional Active Transportation Plan (Appendix 5). It demonstrates two things. First is the small amount of funding that has been spent in the region on active transportation. Second is that Regional Flexible Funds represent fully 29% of all funding spent



on active transportation in the period 1995-2010. Regional Flexible Funds are the most important, reliable source of funding for regional active transportation capital projects.



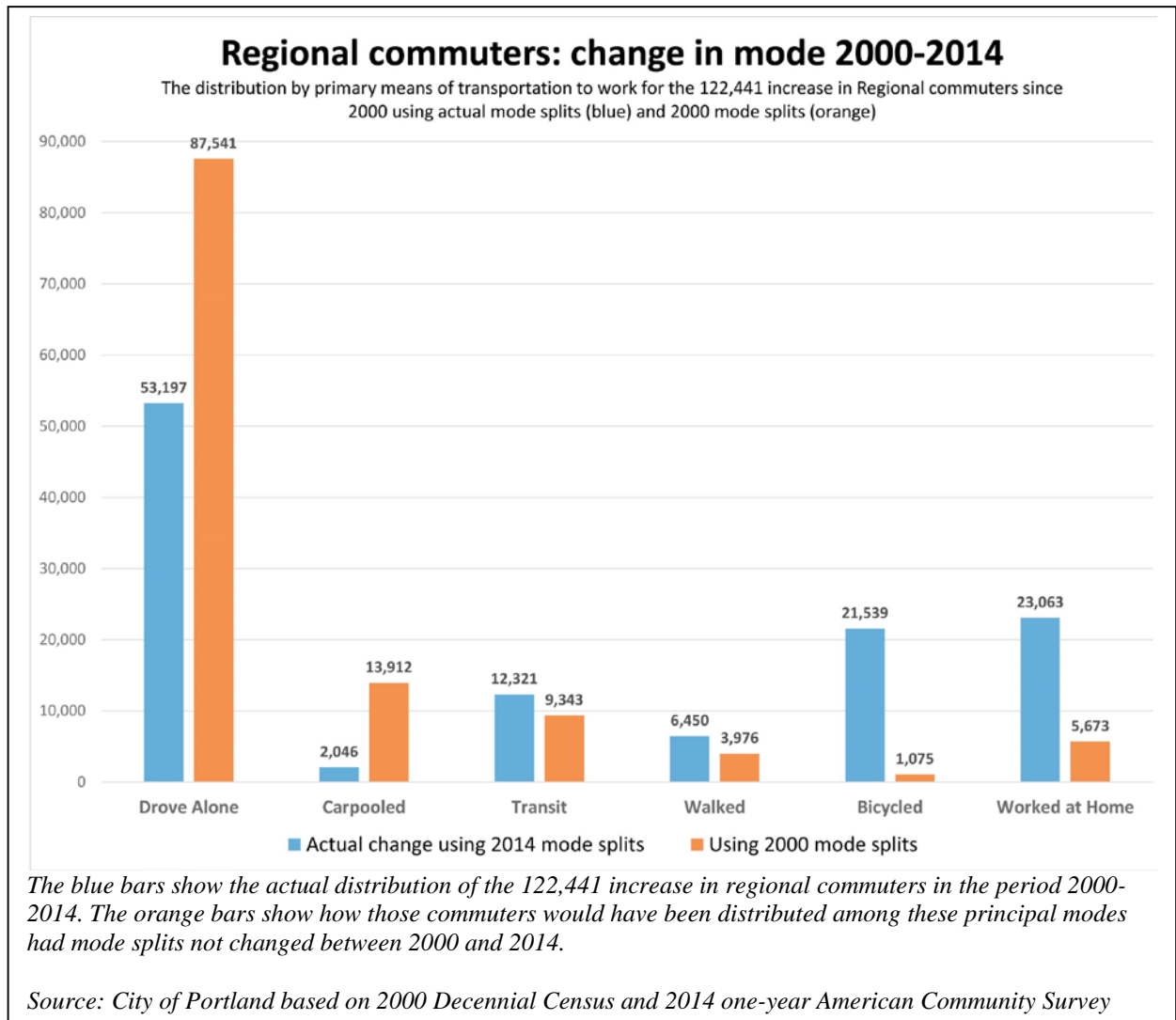
### Existing slow timeline for completion of regional active transportation networks

The above graph is also based on information from Metro's Regional Active Transportation Plan (Table 10 in the plan). It shows that the 2014 financially constrained RTP projects for transit, roads-bridges-freight-throughways, and active transportation will require 27 years, 44 years and 208 years, respectively to complete at current funding levels. As will be demonstrated below, bicycle transportation has been instrumental in achieving many of the region's goals. Because of that, this timeline—and anything that threatens to further slow it down—is a disservice to achieving adopted regional goals.

### Since 2000 bicycle transportation has been the principal means of transportation limiting drive-alone commuting

Before changing a funding program it is appropriate to ask how well the current program has performed. Data provided by Portland's Bicycle Coordinator—displayed below—suggests that the relatively small investments made regionally in active transportation have had the highest return on investment for all modes.

The data demonstrates that bicycle transportation is the principal means of transportation that has minimized the potential number of drive alone commuters. Regionally, the number of commuters increased by more than 122,000 in the period 2000-2014. Of that increase, only 53,000 were drive-alone commuters. More than 21,000 were bicycle commuters (with another 26,000 who worked at home). Had mode splits in 2014 been what they were in 2000, then the number of drive alone commuters would have increased by 87,500. Bicycle transportation was the means of transportation that contributed the most during this time period to limit drive alone commuters to only 43 percent of the total increase in commuters.



Minimizing drive alone commuting is consistent with the region's Six Desired Outcomes and many of our Climate Smart Strategies. We encourage JPACT and the Metro Council to work toward increased funding for bicycle transportation and to not just preserve the existing Regional Flexible Fund split, but to instead expand it to provide all funding to active transportation. That includes considerations about the "extra" \$12 million currently in Step 1 funding. That is consistent with the Region's goals.

Respectfully submitted on behalf of Portland's Bicycle Advisory Committee,

Heather McCarey, Vice Chairperson  
Portland Bicycle Advisory Committee

C: Commissioner Steve Novick, Portland City Council  
Director Leah Treat, Portland Bureau of Transportation

Materials following this page were distributed at the meeting.

## Proposed Projects for 2015-2018 STIP

Projects in bold funded through FAST Act freight formula funds

Region	Project	Notes	Allocation
1	<b>I-5 SB: Hwy 217 - I-205 auxiliary lane</b>	<b>Leverage with existing auxiliary lane project</b>	<b>\$13M*</b>
	<b>I-205 Stafford - Oregon City (development)</b>		<b>\$2.5M*</b>
	<b>I-5 Rose Quarter (development)</b>		<b>\$2.5M</b>
2	<b>I-5 NB third lane Commercial-Kuebler</b>	<b>Leverage interstate paving project</b>	<b>\$14.5M*</b>
	<b>I-5 add third lane Salem-Albany (development)</b>		<b>\$3.0M</b>
3	<b>I-5 NB climbing lane Roberts Mountain</b>	<b>Leverage interstate paving project</b>	<b>\$7.0M</b>
	Sutherlin jurisdictional transfer of Hwy 138		\$2.4M
4	Hwy 97 Seismic I-84 – Hwy 58 (Bundles 1 and 2)	Leverage JTA savings at Biggs Junction; design funded	\$8.6M
	I-84 cable barrier	Comply with SB 921	\$3.5M
	Hwy 97 Crescent passing lanes	Savings from Hwy 97 Wickiup Junction project (2015-2018 Enhance Discretionary)	\$2.25M
5	I-84 cable barrier	Comply with SB 921	\$10.7M
	<b>I-84 Ladd Canyon EB climbing lane</b>	<b>Leverage various Fix-It projects</b>	<b>\$7.4M*</b>

\*Project or phase not fully funded at this level; will seek additional funding from other sources.

### Freight Projects Considered but not Selected

- I-205 Stafford to Oregon City PE/Design \$13M
- I-5 Rose Quarter PE/Design \$12M
- I-205 NB auxiliary lane at Sunnybrook \$15M
- I-5 Widening Salem – Albany PE/Design \$15M
- I-5 NB auxiliary lane I-205 – Nyberg \$5M
- I-5 SB third lane Kuebler – Commercial \$25M
- I-5 Southern OR climbing lanes \$10M
- Design for 11 climbing lanes



**Enhance 150% Project List  
Adopted by R1ACT on 2/1/16**

<b>Rank</b>	<b>Project</b>	<b>Requested Funds</b>	<b>Matching Funds</b>	<b>State System</b>
<b>1</b>	Highway 8 Safety and Access to Transit II	\$2,690,000	\$310,000	On
<b>2</b>	Seventies Neighborhood Greenway	\$2,500,000	\$2,510,706	Off
<b>3</b>	Stark Street Multimodal Connections	\$2,907,457	\$960,000	Off
<b>4</b>	Highway 43 Multimodal Transportation Project	\$3,000,000	\$1,300,000	On
<b>5</b>	Tillamook-Holiday-Oregon-Pacific Bikeway (T-HOP)	\$3,122,600	\$2,118,400	Some
<b>6</b>	May St. Elevated Sidewalk Replacement	\$1,390,815	\$159,185	Off
		<b>\$15,610,872</b>		

19-21 Region 1 Enhance Bike/Ped/Transit Allocation = **\$10,680,000**



# MAKING A GREAT PLACE TOGETHER



## Strategic Plan to Advance Racial Equity, Diversity and Inclusion



# Racial Equity Approach

- ▶ Equity vs. Equality
- ▶ Why racial equity?
- ▶ Barriers vs. service
- ▶ Economic strategy for prosperous region



# Informed Approach

- ▶ Community Engagement
- ▶ Staff Engagement
- ▶ Organizational self-assessment related to racial equity



# Recommendations

- ▶ Goals, 5-year objectives and action items
- ▶ Creation of an equity analysis and decision-support tool
- ▶ Evaluation foundation
- ▶ Integration with the Diversity Action Plan
- ▶ Department-specific equity action plans



## 5 Goals

### **A. Metro convenes and supports regional partners to advance racial equity**

#### Identified Issues:

- ▶ Limited opportunities for jurisdictional partners to come together to work collaboratively to advance equity.
- ▶ Limited resources for jurisdictional, business and community partners to conduct technical analyses and/or research to advance equity.



# 5 Goals

## **B. Metro meaningfully engages communities of color**

### Identified Issues:

- ▶ Engagement is often transactional instead of long-term and culturally appropriate.
- ▶ Lack of direct interaction for community members with decision-makers.
- ▶ Lack of Metro accountability to the community related to agency-wide equity efforts.



# 5 Goals

## **c. Metro hires, trains and promotes a racially diverse workforce**

### Identified Issues:

- ▶ Limited partnerships with community-based organizations to advance Metro's diversity efforts.
- ▶ Lack of ladders for staff advancement at Metro.
- ▶ Limited understanding, skills and resources for Metro staff to advance equity in their work.
- ▶ Limited resources for staff to participate in diversity, equity and inclusion work at Metro.



# 5 Goals

## **D. Metro creates safe and welcoming services, programs and destinations**

### Identified Issues:

- ▶ Lack of diverse, cultural events held for communities at Metro destinations.
- ▶ Lack of acknowledgement of community, historical and cultural significance of Metro destinations.
- ▶ Lack of culturally specific promotion of Metro programs and services.

# 5 Goals

## **E. Metro's resource allocation advances racial equity**

### Identified Issues:

- ▶ Barriers in Metro procurement processes prevent MWESB firms and community partners from realizing contracting opportunities.
- ▶ Lack of simple and easy ways for communities to become aware of financial opportunities (e.g. grants and contracts)
- ▶ Lack of a coordinated regional effort to create a pipeline to increase the number of skilled construction tradespeople of color.





## Next steps

Public comment and discussion period late February to mid-March

Final plan developed for review by advisory committees, Metro Council and MERC in May

Council action proposed in June



# Questions?

Do you have comments?

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

Do you have suggestions of key stakeholders to engage during the public review of the plan?



# Contact the DEI Team

- ▶ **Juan Carlos Ocaña-Chíu**
  - ▶ [Juan.carlos.Ocana-chiu@oregonmetro.gov](mailto:Juan.carlos.Ocana-chiu@oregonmetro.gov)
  - ▶ Ext. 1774
- ▶ **Scotty Ellis**
  - ▶ [Scotty.ellis@oregonmetro.gov](mailto:Scotty.ellis@oregonmetro.gov)
  - ▶ Ext. 1917



# 2019-21 Regional Flexible Funds Allocation: Public Input & Process



Dan Kaempff, Metro  
Ted Leybold, Metro



Presentation to TPAC  
February 26, 2016



Metro | *Making a great place*



# Today's presentation

- Review input received to date on RFFA policy update
- Discuss policy proposal framework to prep for March TPAC discussion

# What JPACT & Metro Council are considering





# RFFA policy objectives (1/3)

1. Select projects from around the region; but no sub-allocation or commitment to a particular area
2. Honor previous funding commitments
3. Address air quality requirements
4. Achieve multiple transportation policy objectives





# RFFA policy objectives (2/3)

5. Allow and look for large-scale projects that can leverage other funding sources
6. Efficient and cost-effective use of federal funds
7. Recognize the difference in needs relative to an area's stage of development





# **RFFA policy objectives (3/3)**

8. Identify project delivery performance issues
9. Ensure agencies have qualifications for leading federal aid transportation projects
10. Identify opportunities for leveraging, coordinating, and collaboration



# Regional investment strategy

- Adopted as MTIP financial strategy (2009)
- Match identified needs with most appropriate funding source
- RFFA uses:
  - Active Transportation
  - High Capacity Transit capital costs
  - Freight Arterial small improvements
  - Trans. System Mgmt & Ops (TSMO)
  - Regional Travel Options (RTO)
  - Transit-Oriented Development (TOD)



# **Conversations:**

## **April – December 2015**

To define 2019-21 RFFA Policy priorities, we held:

- Series of public workshops
- Meetings with stakeholder groups
- Discussions with TPAC/JPACT/Metro Council



# **What we heard:**

## **April – December 2015**

- Affirm Climate Smart Strategies policy
- Desire to implement Safe Routes to School
- Continue investment in High Capacity Transit
- Leverage other funding opportunities
- Public question: Revisit Step 2 funding split

A blue-tinted map of a region, likely the San Francisco Bay Area, showing major highways and geographical features. The map is positioned on the left side of the slide, partially obscured by the text.

# Public input via online survey

- January 14 – February 16, 2016
- Multiple topics – RTP, performance measures, equitable housing, equity, & RFFA
- RFFA question asked respondents what their priorities were related to how flexible funds should be spent:
  - set aside dollars for freight and AT in separate categories
  - have one category where projects compete against each other

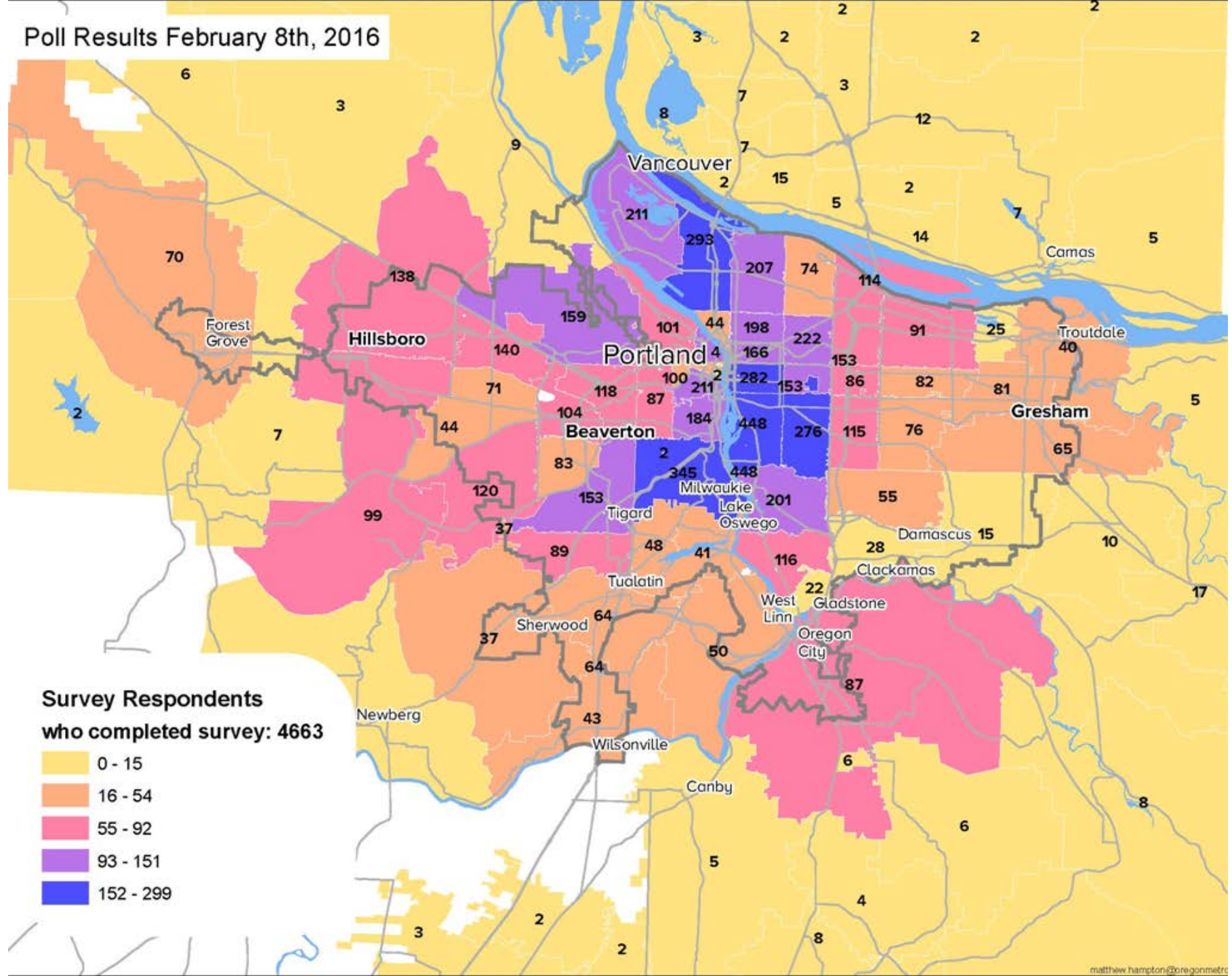


# Strong public response

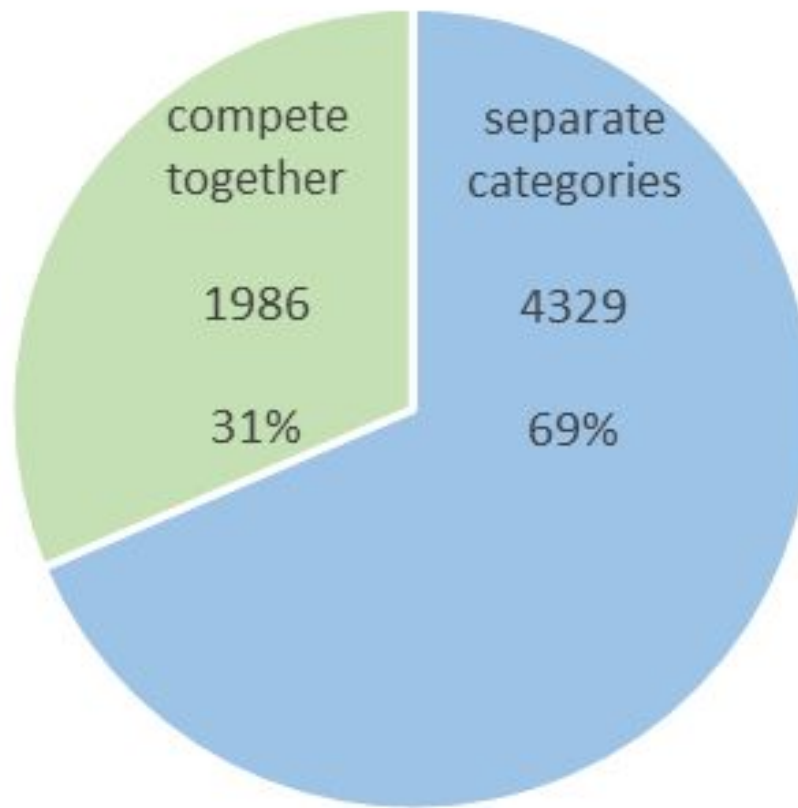
- 1,500 – 2,000 anticipated responses
- 7,885 people started the poll
- **6,315 answered the RFFA question**
- 13 additional comments and letters



# Poll Results February 8th, 2016



# 2:1 margin – “Maintain separate project categories”

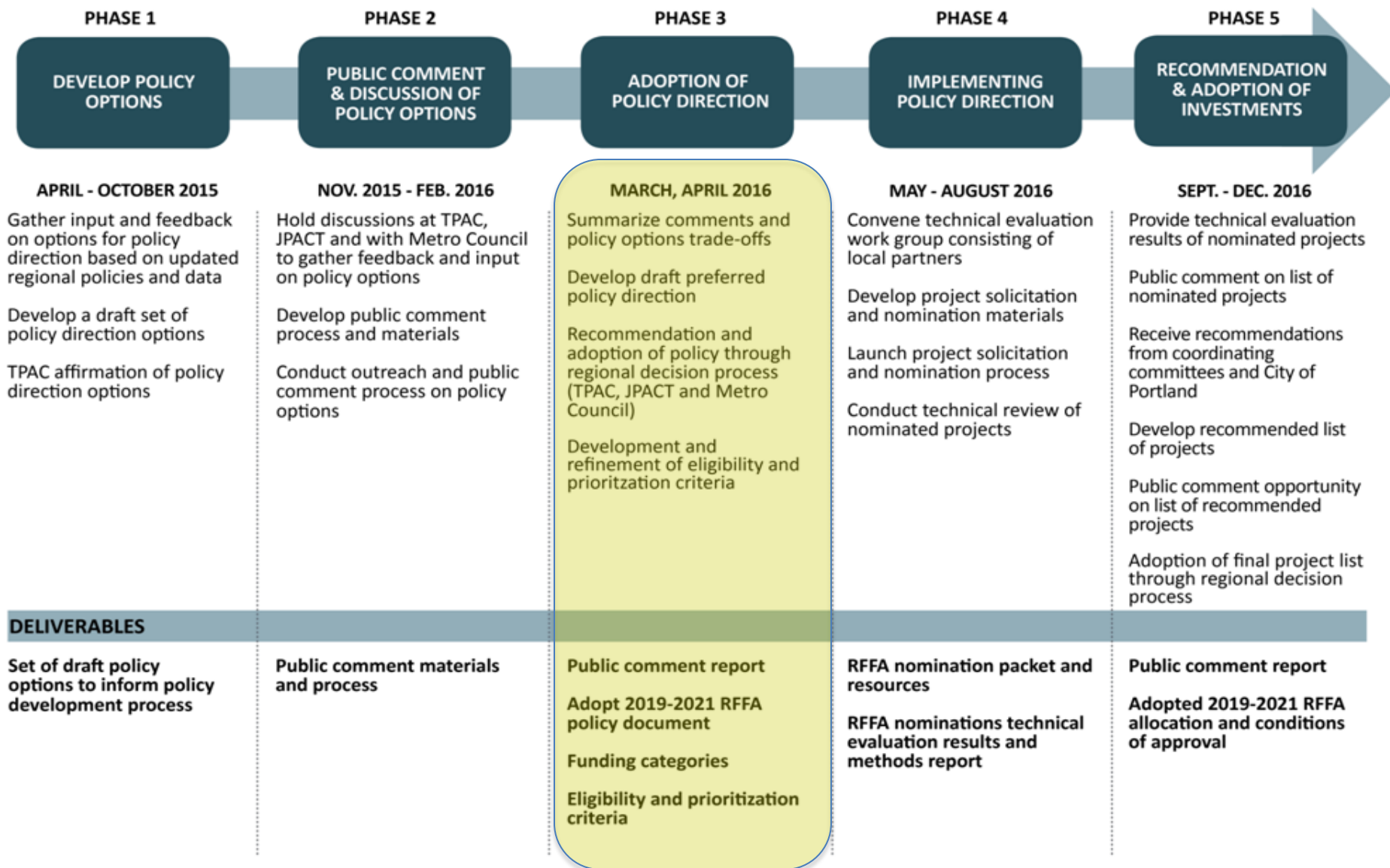






# 2019-2021 REGIONAL FLEXIBLE FUND ALLOCATION

## Policy Update and Implementation Timeline





# Policy package elements

1. Investment in Safe Routes to School
2. Investment in regional corridors (SW Corridor and Powell/Division)
3. Project development on regionally significant throughways
4. Climate Smart Strategies investments in RTO & TSMO
5. Continue development of Active Transportation network

A blue-tinted map of a region, likely in the San Francisco Bay Area, showing major highways (94, 92, 43, 25, 30) and geographical features like Lake Tawango. The map is positioned on the left side of the slide.

# 1. Safe Routes to School

Significant regional interest in prioritizing safety improvements around schools and developing programs

- Increase to RTO program, targeted towards investing in programs at schools – add \$350-700K/yr
- Review and refine Step 2 project criteria to support SRTS



## 2. Increase HCT bond

Provide initial local funding commitment to leverage additional sources to develop and build two new high capacity transit lines:

- SW Corridor
- Powell/Division



### 3. Project development

Are there new ways we can be creative in looking at how we can help improve regionally significant roads?

- Regional partnership in looking at ways to position for other sources of funding
- Need to consider potential strategies, and associated trade-offs if we wanted to invest in regional corridors & major throughways





## 4. Climate Smart Strategy

CSS policy included investments in these two areas as being low-cost/high-ROI; able to do with existing (RFFA) funding.

Policy direction to develop proposals for:

- Regional Travel Options (RTO) general proposal – add \$50-100K/yr
- Transportation System Management and Operations (TSMO) proposal – add \$50-100K/yr



## 5. Continue investment in Active Transportation

Maintain current funding level

- Public input widely in favor of continuing dedicated funding (2:1 margin)
- Completes a well-rounded funding package
- Consider ways to focus on SRTS needed infrastructure?

A blue-tinted map of a region, likely the San Francisco Bay Area, showing major highways and geographical features. The map is positioned on the left side of the slide, partially obscured by the text.

# What we get now...

- Continued investment in active transportation
- Improve safety on arterials
- Create regional Safe Routes to School investment strategy
- Follow through on our commitment to Climate Smart Strategies





# ...and in the future

- Move fwd on two new transit investments
- Improve freight mobility
- Create a suite of regionally significant projects that can potentially leverage additional funding sources

# Next steps

March, April

- Develop, consider, adopt RFFA policy document around these five investment areas

May - August

- Criteria development
- Metro/TriMet staff develop funding proposals, project applications submitted
- Regional technical review

September - December

- Sub-regional priorities identified
- Consideration of proposed investments
- Adoption of final investment list



# Discussion

As we work to develop and document this policy proposal, what additional information do you need in order to make a recommendation to JPACT?

# Regional Travel Options: Connecting People to Place



Annual  
Report  
2013-2015

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DRAFT  
1.28.16



# Introduction

## CREATING SAFE, VIBRANT AND LIVABLE COMMUNITIES

After decades of careful planning and investment, our transportation system has grown to be one of the best in the country. Most people in our region have the option of taking transit, biking, walking or ridesharing to get where they need to go without always using their car. These options have equipped the region for growth, provided economic opportunity and helped maintain open space priorities.

But it's not enough just to build a system with travel options. People need to know how to use them and understand the benefits. That's where Metro's Regional Travel Options (RTO) program comes in.





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Our mission is to make the Portland Metro Region a great place by working with local and regional partners to promote travel options that support economically vibrant communities, increase active transportation, and are environmentally sustainable.

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### INCREASED OPPORTUNITIES THROUGH OPTIONS

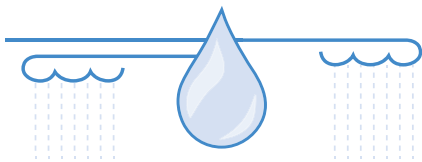
The RTO program works to increase the use and awareness of other ways to travel besides driving alone. This makes best use of the region's existing transportation infrastructure and reduces the money spent on new and costly infrastructure improvements.

These investments to reduce single occupancy vehicle trips contribute to the health and prosperity of the region in many ways, including:

- 
- ▶ Reducing traffic congestion.



- 
- ▶ Reducing greenhouse gas emissions, water pollution and improving air quality.



- 
- ▶ Providing affordable transportation options for all residents, helping them save money and improve their health.



The program achieves these goals by:

- 1 Providing federal funding through competitive and strategic investments that support partner groups encouraging the use of travel options.
- 2 Coordinating marketing and outreach efforts with state and regional partners to effectively reach key audiences with messages and tools for using travel options.
- 3 Playing a lead role in developing and shaping policies that support increased options for people to walk, bike, take transit and rideshare in our region.
- 4 Evaluating the program on a biennial basis to ensure it is meeting regional economic, environmental and social equity goals.

# Who We Are



## THE BASICS

The RTO program, housed within the Planning and Development department of Metro, is guided by a strategic plan, approved and adopted by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council. The current RTO Strategic Plan defines a mission, a set of goals and objectives, and a five-year plan to support a regional travel options program that helps to achieve regional air quality, transportation, and livability goals.

The RTO Program is funded through the region's allocation of federal transportation funding. Known as the Regional Flexible Funds, these transportation dollars are used to complete local and regional transportation priorities in Clackamas, Multnomah and Washington counties.

The majority of the program's work is undertaken by partner agencies. Metro acts both as grant maker to these partners as well as performance evaluator, to measure the effectiveness and public awareness of the program's investments in helping the public use all of their travel options.

Information and feedback gained through this measurement process is then used to help inform the next strategic plan update.

The program accounts for only one half of one percent of the region's transportation budget, but its impacts are large. In 2015, RTO funded 18 non-profits, local jurisdictions, and transit providers that assist residents in making travel decisions, which helped to lower vehicle miles traveled by between 77 and 123 million miles.

## THE STRATEGIC PROCESS

The RTO program supports the goals, objectives and performance measures found in the Regional Transportation Plan (RTP). The strategic plan forms the basis of the RTO grant criteria, provides more specific direction for how the RTO funds and other program funds are invested. Every few years, as the RTP is updated, the program strategic plan is also updated to ensure it keeps pace with new policy direction, adjusts to incorporate new technology and communications tactics, and continues to meet the changing needs of the traveling public.



# What We Do



## 1 PROVIDING FEDERAL FUNDING THROUGH COMPETITIVE GRANTS AND STRATEGIC INVESTMENTS THAT SUPPORT PARTNER GROUPS ENCOURAGING THE USE OF TRAVEL OPTIONS

### COMPETITIVE GRANTS

The RTO program harnesses the creativity and connections of the region's local governments, transportation service providers, educational institutions and community organizations to provide residents the tools, skills and information they need to use travel options.

Every two years, the RTO program solicits project proposals, which are scored and ranked against criteria to carry out the goals and objectives of the RTO strategic plan. In 2014, RTO awarded \$2.1 million in federal funds to 18 organizations throughout the region through a competitive grant process.

The competitive process, ranked and scored by regional industry experts, ensures that effective programs are implemented and program goals are met. Grantees accomplish this through a variety of approaches, including research and planning, public education and outreach, incentive and training programs, Safe Routes to School projects, wayfinding signage, and end-of-trip facilities.

In the most recent round of funding, programs are helping:

- ▶ Children get to school more safely in Portland, Tigard and Beaverton
- ▶ Community college students discover new transportation options for getting to class
- ▶ Provide information and technical services to employers to support and reward employees who commute using travel options
- ▶ Elderly and disabled people get to stores and medical appointments more easily via transit
- ▶ Make neighborhoods throughout the region safer and easier to navigate for people walking and bicycling

### INVESTMENTS

Through RTO direct funding allocations, TriMet and Wilsonville SMART implement programs that encourage employees to use commute options. The programs have made significant progress with reducing drive-alone trips and increasing the use of commute options in the region. Since 1996, the programs have served businesses of all sizes with parking management strategies, transportation program assistance, transit pass programs, and surveys to comply with state air quality rules. These programs are in place for approximately one-third of the region's workforce.





## 2 COORDINATING MARKETING AND OUTREACH EFFORTS WITH STATE AND REGIONAL PARTNERS TO EFFECTIVELY REACH KEY AUDIENCES WITH MESSAGES AND TOOLS FOR USING TRAVEL OPTIONS

Providing information and creating enthusiasm for travel options is the task of a variety of organizations in our region, united in the idea that when more people travel by foot, bike, transit and rideshare it can have profound benefits for everyone.

The Collaborative Marketing Group provides a platform and structure for Metro and partners to work collectively to reach residents with similar messages and themes from multiple outlets and voices. This in turn reinforces and normalizes ideas and attitudes around travel options. The group, led by RTO staff and contractors, creates communication assets that bolster these relationships and assist in reaching new audiences under the statewide Drive Less Save More (DLSM) brand, and direct residents to trusted, local resources that help them make travel decisions.

Metro receives and matches funding to implement a variety of marketing and educational efforts with partners. These campaigns include:

- ▶ Engaging residents throughout the region with topical written and visual content, marketing materials and outreach activities that change attitudes, increase awareness and provide resources to ease participation in travel options
- ▶ Working with nonprofit, service providers and government agency partners in the Portland metropolitan region and surrounding rural providers to increase connections and collaboration between agencies
- ▶ Providing unique tools to residents that make it easier and more convenient to get around by bike, walking, taking transit and ridesharing
- ▶ Leading a regional rideshare program that makes carpooling safer and easier and helps people with limited transit access have options to get around
- ▶ Implementing individualized marketing projects in select areas. Projects aim to capitalize on recent and upcoming infrastructure investments in travel options
- ▶ Coordinating regional participation in the statewide Oregon Drive Less Challenge

This combination of outreach efforts is delivered to audiences identified in the RTO Travel and Awareness Survey. Targeted audience identification ensures that the small amount of funds dedicated to the effort is used to engage those most likely to participate in behavior change.

The bi-yearly telephone survey asks residents living in the Portland region about their use and knowledge of RTO programs, measures satisfaction with using transportation options, examines travel information tools and resources, and gauges motives for switching travel modes. The survey provides a comparison of awareness and attitudes to previous years, and assists in finding audiences most likely to reduce single-occupant vehicle trips in the region based on their past experiences and willingness to try travel options.



### **3 PLAYING A LEAD ROLE IN DEVELOPING AND SHAPING POLICY THAT SUPPORT RTO GOALS OF INCREASED OPTIONS FOR PEOPLE TO WALK, BIKE, TAKE TRANSIT AND RIDESHARE IN OUR REGION**

The role of the RTO program is rooted in the Regional Transportation Plan, as part of the vision for how the region manages and operates the transportation system (2.5.6, policy 4). By ensuring that the public has awareness of all the travel options available to them, and is encouraged to use them, fewer automobile trips will result. This helps the function of the existing road system and maximizes the investments in transit, bicycle and pedestrian infrastructure.

In 2014, the region adopted the Climate Smart Strategy. This strategy identified nine key policy recommendations to help the region achieve a 29 percent reduction in per capita greenhouse gas emissions. Investing in the RTO program was one of these nine policy recommendations (#6). Among the findings which led to this recommendation was the relative low cost/high return on investment nature of the RTO program.

### **4 EVALUATING THE PROGRAM ON A BIENNIAL BASIS TO ENSURE IT IS MEETING REGIONAL ECONOMIC, ENVIRONMENTAL AND SOCIAL EQUITY GOALS**

RTO programs go beyond the ‘build it and they will come’ assumption to generate greater use of our transportation investments. Data from Metro and nationally show that many people who have travel options readily available to them still don’t use them, often because of lack of knowledge, familiarity or habit. Through RTO programs, we have shown that if we build it - and you tell them about it - even more people will come.



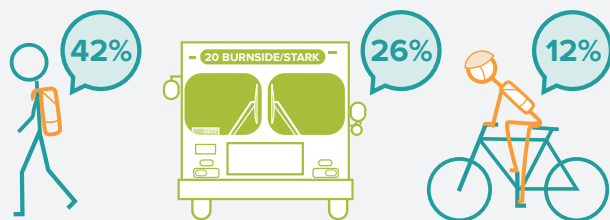
Metro produces a biennial study, conducted by an independent contractor that analyzes outcomes of RTO investments, including grant funded projects, Metro-led

projects and partner-led collaborations, such as TriMet’s Be Seen Be Safe campaign. Findings show that RTO programs, along with the infrastructure investments they support, have better equipped residents and visitors to make travel choices, saved our region time and money, reduced pollution and provided opportunities for people to live healthier lives.

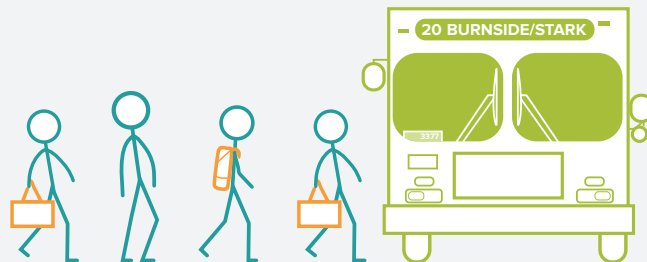
As a result of this consistent cycle of self-evaluation, unique to RTO, the program remains cost-effective, efficient and current to resident trends and needs.

While the evaluation report highlights successes, it also points out that the programs have reached a plateau of growth, largely due to a flattening of funding levels and an inability to increase the numbers of partners delivering RTO programs. Current programs have primarily achieved success by engaging “the low hanging fruit” of the population; those most likely and able to change how they travel. The report suggests additional resources and innovative strategies will be needed to reach communities with barriers to using travel options and continue to produce significant increases in participation.

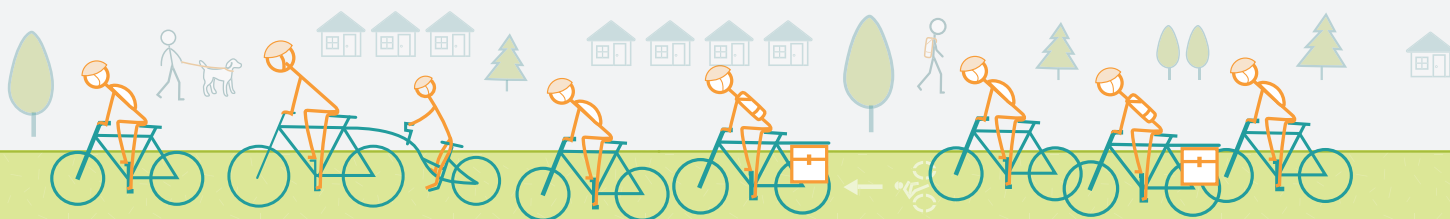
# What We've Achieved



While a majority of residents drive alone every month – they also walk, bike and take transit to get places. 90% drive – but **42% WALK, 26% TAKE TRANSIT AND 12% BIKE FOR SOME OF THEIR TRIPS.**<sup>1</sup>



Since tracking of the program began in 1997, the use of walking, biking, transit and rideshare at businesses that work with RTO partners has **RISEN FROM 19 PERCENT TO 39 PERCENT,** far above the national average.



Three percent of all trips in the region are made by bike. That may not sound like much, but it equates to **OVER 450,000 MILES OF BIKE TRIPS.**<sup>2</sup>

The 2015 Bicycle Transportation Alliance's Bike Commute Challenge had **10,500 RIDERS PEDALING NEARLY 1.25 MILLION MILES TO WORK.**



Thanks to the RTO program, from 2011 to 2013, over **84,000 PEOPLE REDUCED THEIR DRIVING BY 47 MILLION MILES ANNUALLY.**

That's the equivalent of 1.7 million trips from Beaverton to Gresham that didn't happen with help from RTO programs.



**\$17 MILLION PER YEAR IS RETURNED TO THE LOCAL ECONOMY**

from reduced driving and 18,881 fewer tons of carbon per year goes into the environment.<sup>3</sup>

<sup>1</sup> 2014 Regional Travel Options Travel and Awareness Survey

<sup>2</sup> 2011 Oregon Household Activities Survey

<sup>3</sup> Regional Travel Options 2011-2013 program evaluation

# Milestones



**Drive less.  
Save more.**  
[www.DriveLessSaveMore.com](http://www.DriveLessSaveMore.com)



- 1991** A federal transportation bill created a funding program to help cities reduce congestion and air pollution called the Congestion Mitigation and Air Quality Improvement Program (CMAQ).
- 1992** Metro creates the Transportation Demand Management (TDM) Subcommittee of the Transportation Policy Alternatives Committee (TPAC), to oversee CMAQ funding of regional TDM investments.
- 1997** TriMet and the Department of Environmental Quality (DEQ) became the region's key partners in providing compliance assistance to employers and local jurisdictions for regulatory requirements such as the Employee Commute Option (ECO) Rule.
- 2003** First RTO Strategic Plan developed. First regional TDM (later RTO) grants awarded, totaling \$118,000. The projects largely focused on commute trip reduction efforts.
- 2005** Drive Less Save More campaign launch is led by the Oregon Department of Transportation (ODOT). Metro acts as the Region 1 lead for implementation.
- 2006** RTO Program oversight responsibilities shift from TriMet to Metro.
- 2009** RTO grant awards total \$525,000. Significant projects funded include Portland Sunday Parkways, Community Cycling Center's Understanding Barriers to Cycling/ Communities in Motion (first equity-focused project) and TriMet's Multi-Modal Trip Planner.
- 2013** The RTO Subcommittee is eliminated and oversight duties are returned to TPAC. Dedicated funding for TMAs is eliminated. Created \$2.1 million grant opportunity; \$3.7 million in requests.
- 2015** RTO grant solicitation results in \$4.8 million in requests for \$2.1 million of available funds.



# Examples of Work

## GETTING AROUND

A majority of the trips residents make throughout the day are for shopping or leisure activities, and begin and end at home. Beginning in the 2000s, the RTO program began incorporating non-commute trips into program goals. This shift recognizes that many audiences, such as women, communities of color and low-income communities, have bigger and/or different barriers to using travel options for the trip to work and brings value to the thousands of trips made using travel options. Focusing on these trips also allowed the opportunity to work with a wider variety of community partners serving culturally specific and underserved communities, helping to reach Metro's equity goals.

Safe Routes to School efforts are happening across the metro area, with RTO supported projects in Portland, Beaverton and Tigard. Encouraging children to walk, bike or roll to school can benefit neighborhoods and school communities by promoting safe travel, healthy exercise, traffic congestion reduction and air quality improvements around schools. Safe Routes to School coordinators help school districts and local planning departments prioritize travel options for students and help parents find the best route to get their kids to school.

## GETTING TO WORK

A variety of organizations work to make the commute trip easier. Transportation management associations (TMA) are organizations that focus on particular business districts or large employers to reduce drive alone trips.

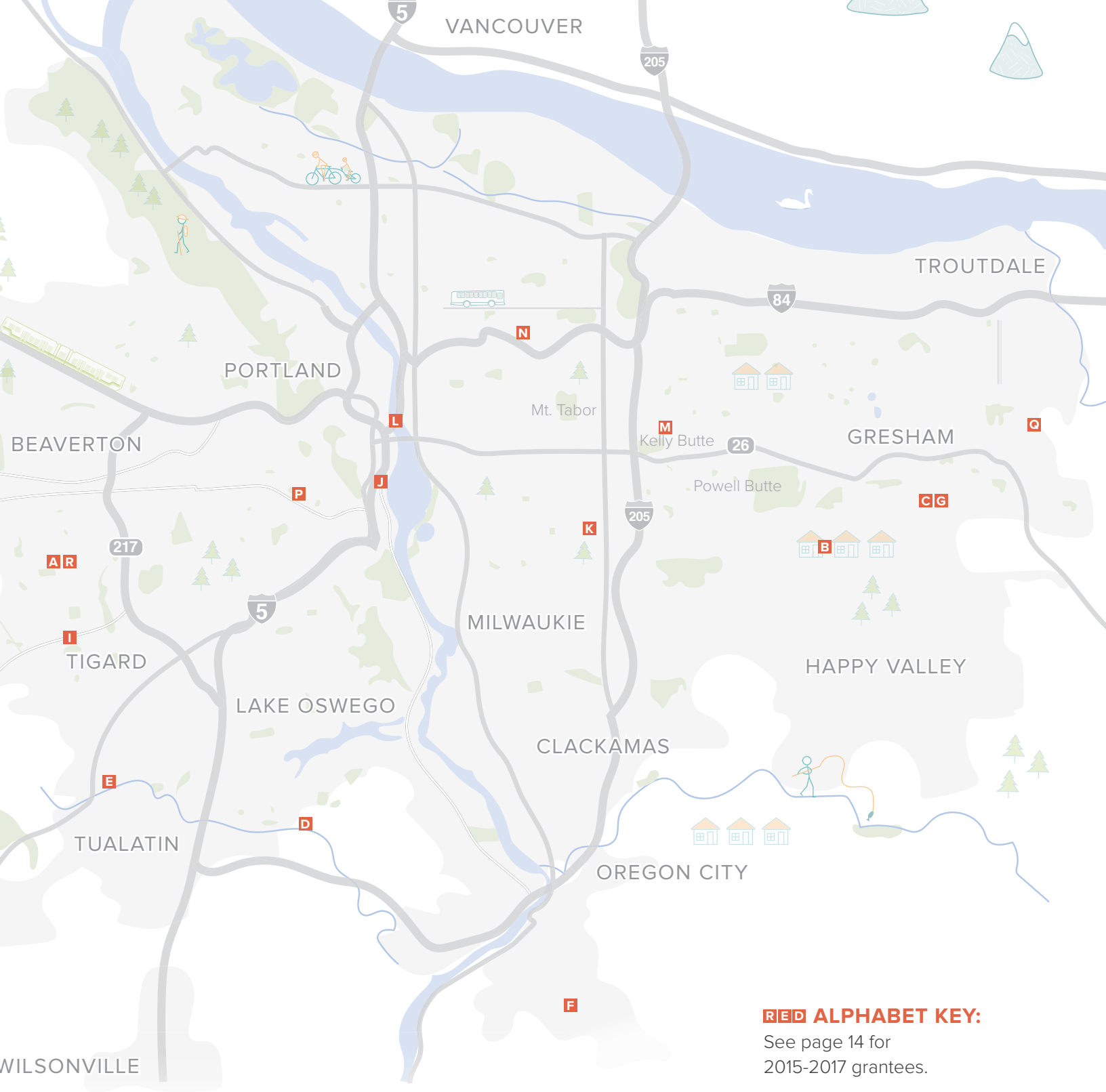
The Swan Island Transportation Management Association brings together area employers and regional agencies to expand transit service, improve pedestrian and bicycle access, and increase rideshare opportunities for employees in an effort to reduce traffic on the island. The TMA worked with Daimler, the nation's largest heavy-duty truck manufacturer, to help them become a local leader in bike commuting. The TMA's advocacy also led to more TriMet buses reaching the island, with their routes better coordinated to match shift changes at various employers on the island.

## MARKETING AND OUTREACH - ENCOURAGEMENT

Metro and partners employ a variety of techniques including targeted advertising, events, custom maps and how-to guides, and person-to-person assistance.

Individualized marketing (IM) is a personalized outreach approach designed to promote transportation options to people within a geographic target area and/or a demographic target audience. IM projects are unique – and successful in creating behavioral change - by focusing resources and effort on people who have stated their interest in using travel options. They are most effective when combined with transportation improvements, such as new MAX lines or bike greenways. The projects consistently reduce drive-alone trips by five to nine percent in the target areas.

In collaboration with the Oregon Department of Transportation, Metro is leading Drive Less Save More: Milwaukie, a transportation options IM and community outreach campaign to support new and existing travel options infrastructure in Milwaukie and Clackamas County, including the MAX Orange Line and Trolley Trail. A combination of direct mail, events, media and personal delivery of custom travel kits have resulted in nearly 1,000 participants signing up for travel kits, a 20% participation rate for the area. The project will run through September of 2017, giving a year of localized outreach to residents surrounding the last three stops of the Orange Line.



## PLANNING & ENHANCEMENT

Creating the foundation for local jurisdictions to plan the programs and necessary investments to help their residents be aware of their travel options, RTO Planning grants are smaller funding opportunities that are an important part of engaging new partners and building capacity. Funding enables government agencies to make the move from travel option concepts in their local transportation system plan to an implementation action plan.

Small infrastructure projects, such as bicycle parking or wayfinding signage/street markings make travel option trips more comfortable, safer and convenient. RTO funding allows local organizations and jurisdictions to leverage existing transportation infrastructure, increasing the likelihood that they will continue to walk, bike, use transit or rideshare to get to their destination.

# Equity



Recognizing that the region's transportation does not serve everyone equally, especially with regards to infrastructure that makes walking, biking and taking transit safe and convenient, RTO is committed to supporting projects that improve access and education to underserved communities.

Supporting travel options for all residents of our region improves community and individual health by improving air quality and helping people reach daily activity recommendations through active travel options. Cost-effective travel options, such as biking and walking, also help put money back into people's budgets, which can then be spent in the local economy.

Metro works to ensure that the RTO program continues to address and adapt to the needs of communities through analysis and modification of grant criteria, increased funding opportunities and direct outreach to residents.

**EXAMPLE:** In 2013, Verde, a non-profit organization empowering low-income people and people of color to drive environmental resources into their neighborhoods, received the largest equity-focused grant awarded by the RTO program and set the framework for other organizations to pursue the same resource.



The Cully neighborhood of NE Portland suffers from historic under-investment and poor infrastructure, in particular a lack of sidewalks and street connectivity. As a result, residents have few

choices when it comes to actively getting to work, needed services and parks. In response, Verde initiated Living Cully Walks, an effort to address this inequity that affects the lives of thousands of low-income, people of color in the neighborhood. The project secured funding from multiple sources, including the RTO program, to respond to the community's desire to access parks and open spaces. Over the last two years they have successfully engaged over 400 low-income and people of color residents in accessing existing and planned parks and open spaces, identifying barriers to accessing those places and creating a wayfinding system to enable residents to safely access those places by foot, bike or transit.



# A Changing Landscape and a Changing Program



The travel options landscape is continually evolving and the RTO program strives to evolve with it. In the past 10 years, our region has seen the rapid adoption of mobile technology, rise of on-demand transportation services and dramatic increases in people getting around by bike. Other changes will certainly occur. By evaluating the results of each grant cycle and incorporating improvements, Metro ensures that the program and our partners will be prepared to meet the changing needs of the future.

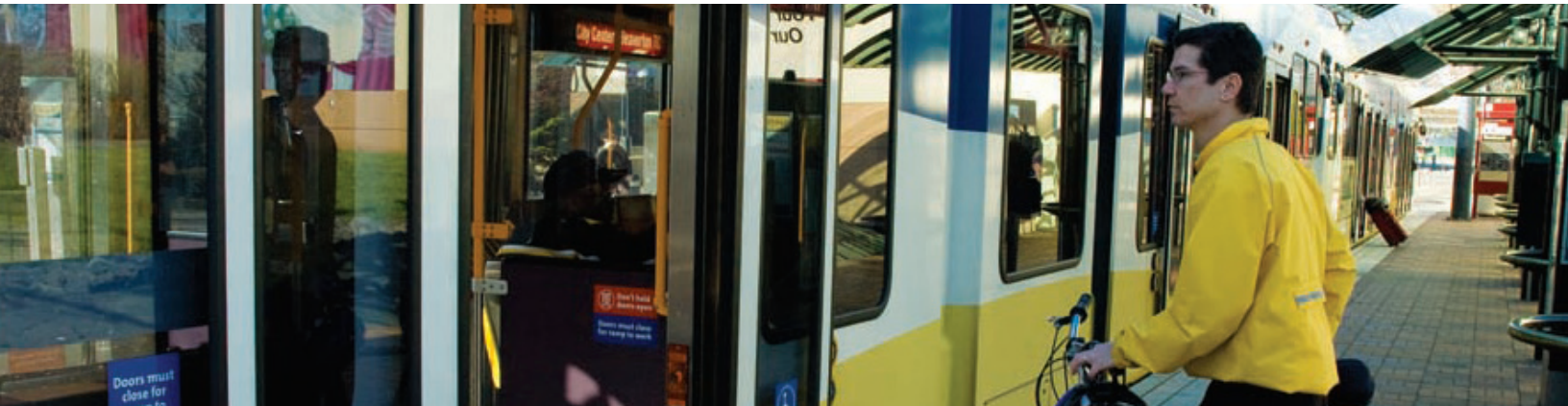
## SHAPE THE FUTURE OF METRO

The Metro area population is expected to grow significantly in the near future. The investments made in travel options will be pivotal in responding to this growth. The RTO program will cost-effectively ensure that the residents of the Metro area get the most out of these investments.

Metro relies on local community leaders to help chart a wise course for the future while protecting what we love about this place. To learn more about being a part of that effort, please go to [oregonmetro.gov/RTO](http://oregonmetro.gov/RTO).



# 2015-2017 Grantees



The grantees for the travel options program's 2015-2017 cycle, listed alphabetically (see map on page 10 for locations), are as follows:

**A Beaverton School District, Safe Routes to School Program**

**\$158,000** | The Beaverton School District will reignite its Safe Routes to School program by hiring a program coordinator.

**B Bicycle Transportation Alliance, Expanding Access to Bicycling**

**\$155,040** | The Bicycle Transportation Alliance seeks to build on its successful Bike Commute Challenge program, expanding to include more women and residents in East Multnomah County.

**C City of Gresham, Gresham Sharrows**

**\$62,260** | This project will plan, design and install two sharrow bikeway corridors in Gresham's Rockwood Neighborhood.

**D City of Lake Oswego, Active Transportation Counters**

**\$14,000** | Lake Oswego looks to strategically increase active transportation options, prioritize maintenance and restoration projects and make more efficient use of staff and volunteer time through a system of permanent and mobile pedestrian and bicycle counting devices.

**E City of Tigard, Safe Routes to School Coordinator**

**\$150,000** | This project will fund a fulltime Safe Routes to School coordinator position in Tigard.

**F Clackamas Community College, Student Transportation Initiative**

**\$85,018** | The goal of this position is to encourage alternatives to driving alone among students and staff.

**G Gresham Chamber of Commerce, East Multnomah County Bicycle Tourism Initiative**

**\$50,000** | This initiative will provide safe and convenient bike parking, marketing and education and engagement with local businesses and events, which will attract local and regional visitors, boost the economy and increase

use of bicycling for transportation for local and regional trips.

**H Housing Authority of Washington County, Aloha Park Bike Shelters**

**\$15,000** | This project will remove existing inadequate bike parking and install secure, covered bike parking in three locations on the property.

**I National Safe Routes to School Alliance, Regional Safe Routes to School Planning**

**\$25,000** | This grant supports the work needed to complete a Regional Safe Routes to School Framework Plan.

**J Portland Bureau of Transportation, Active Portland: Open Streets, Connected Communities**

**\$465,000** | Active Portland will successfully help thousands of people incorporate walking, bicycling and transit into their daily lives. The project will also help underserved residents lay the foundation for healthy communities by using walking, bicycling, and transit



as a springboard to greater civic engagement around important neighborhood transportation issues.

**K Portland Community College, Transportation Demand Management Coordinator and Bicycle Improvements**

**\$156,822** | The project creates a college-level Active Transportation Coordinator to perform outreach to students and staff, promote options to decrease driving alone and serve as a liaison to relevant groups.

**L Portland Public Schools, Healthy Travel Options to School**

**\$125,000** | The Healthy Travel Options to School Action Plan will close infrastructure equity gaps, overcome cultural barriers to walking or biking to school, reduce school site vehicle trip generation and increase safety within the Portland Public Schools student active transportation network.

**M Ride Connection, RideWise Urban Mobility Support and Training**

**\$222,233** | The RideWise Travel Training & Mobility Support program helps older adults, people with disabilities and low-income individuals who would otherwise travel by private automobile or ADA paratransit access navigate public transit. These reductions in on-demand rides provide \$1.37 million in cost savings annually to TriMet. Participants receive information, support and training related to the least restrictive mode of transport available to them based on factors such as ability level, mobility goals, proximity to transit and path of travel examination.

**N Verde, Living Cully Walks, Phase 2**

**\$102,127** | By concentrating environmental investments at the neighborhood scale and braiding those investments with traditional community development resources, Living Cully helps children and families overcome barriers to travel options in their neighborhood.

**O Washington County, Washington County Travel Options Planning**

**\$50,000** | This project will provide a framework for developing and integrating transportation demand management (TDM) strategies into planning, project development and investment decision making.

**P Washington Park Transportation Management Association, Transit to Trails Wayfinding**

**\$10,000** | This project will install trail signage directing people from the Washington Park MAX station to the other end of the park to access the Japanese Garden and Rose Garden.

**Q West Columbia Gorge Chamber of Commerce, Gorge Hubs and Business Outreach**

**\$50,000** | This project enhances traveler amenities for cyclists and pedestrians, including tourists and local residents, through an Oregon Department of Transportation-sponsored program called the “Gorge Hubs” project; and it provides alternative transportation options to regional employers and their employees through a “final-mile” transportation analysis.

**R Westside Transportation Alliance, Westside Transportation Demand Management**

**\$203,500** | Westside Transportation Alliance is the transportation management association serving Washington County. Through business services, an Open Bike Initiative pilot and a bike parking program WTA will increase awareness of travel options and reduce single-occupant vehicle commuting.



*Metro works with communities, businesses and residents in the Portland metropolitan area to chart a wise course for the future while protecting the things we love about this place.*

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