



## Metro | Agenda

Meeting: Metro Policy Advisory Committee (MPAC)  
Date: Wednesday, November 9, 2016  
Time: 5 to 7 p.m.  
Place: Metro Regional Center, Council Chamber

5:00 PM	1.	<b>CALL TO ORDER, SELF INTRODUCTIONS, CHAIR COMMUNICATIONS</b>	<b>Tim Clark, Chair</b>
5:05 PM	2.	<b>CITIZEN COMMUNICATIONS</b>	
5:10 PM	3.	<b>COUNCIL UPDATE</b>	<b>Metro Council</b>
5:15 PM	4.	<b>MPAC MEMBER COMMUNICATIONS</b>	
5:20 PM	5.	<b>CONSENT AGENDA</b>	
	*	• Consideration of October 12, 2016 Minutes	
	*	• MTAC Nomination	
	6.	<b>ACTION ITEMS</b>	
5:25 PM	6.1	* Appointment of MPAC 2 <sup>nd</sup> Vice Chair	
	7.	<b>INFORMATION/DISCUSSION ITEMS</b>	
5:30 PM	7.1	* Equitable Housing and Development Grants Recommendations	<b>Carlotta Collette, Metro Council</b> <b>Elissa Gertler, Metro</b> <b>Gerry Uba, Metro</b>
5:55 PM	7.2	* 2018 Regional Transportation Plan: Project Update and Background for Regional Leadership Forum #3 (Connecting Our Vision and Values to Our Priorities)	<b>Kim Ellis, Metro</b>
6:15 PM	7.3	* 2018 RTP: Regional Transit Strategy - Regional Transit Vision	<b>Jamie Snook, Metro</b>
7:00 PM	8.	<b>ADJOURN</b>	

\* Material included in the packet

# Material will be provided at the meeting

### **Upcoming MPAC Meetings:**

- Wednesday, December 14, 2016
- Wednesday, January 11, 2017
- Wednesday, January 25, 2017

For agenda and schedule information, please contact Nellie Papsdorf:  
503-797-1916 or [Nellie.Papsdorf@oregonmetro.gov](mailto:Nellie.Papsdorf@oregonmetro.gov).

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

## إشعار بالالتزام بي Metro من

تحتزم Metro الحقوق المدنية للبلد في كل شيء. إذا كان هناك شخص يعتقد أنه قد تعرض للتمييز على أساس العرق، اللون، الأصل القومي، الجنس، العمر أو الإعاقة، فيحق له تقديم شكوى. إن لم يتسبب حاجة إلى مساعدة في اللغة، فيجب عليك الاتصال قبل موعد الاجتماع 503-797-1890 (من الساعة 8 صباحاً حتى الساعة 5 مساءً أيام الإثنين إلى الأربعاء) قبل خمسة (5) أيام عمل من موعد الاجتماع.

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## 2016/2017 MPAC Work Program

**As of 11/02/16**

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

<p><b><u>Wednesday, November 9, 2016</u></b></p> <ul style="list-style-type: none"> <li>• Equitable Housing and Development Grants Recommendations – Information/Discussion (Gerry Uba, Metro; 25 min)</li> <li>• 2018 RTP: Project Update and Background for Regional Leadership Forum #3 (Connecting Our Vision and Values to Our Priorities) – Information/Discussion (Kim Ellis, Metro; 20 min)</li> <li>• 2018 RTP: Introduction to the Regional Transit Strategy Vision – Information/Discussion (Jamie Snook, Metro; 45 min)</li> </ul>	<p><b><u>Wednesday, November 23, 2016</u> – cancelled</b></p> <p><u>Dec. 2, 8am – 12pm (OCC):</u> RTP Regional Leadership Forum #3 (Connecting Our Vision and Values to Our Priorities)</p>
<p><b><u>Wednesday, December 14, 2016</u></b></p> <ul style="list-style-type: none"> <li>• <i>Legislative Update (Randy Tucker, Metro; TBD)</i></li> </ul>	<p><b><u>Wednesday, December 28, 2016</u> – cancelled</b></p>
<p><b><u>Wednesday, January 11, 2017</u></b></p>	<p><b><u>Wednesday, January 25, 2017</u></b></p> <ul style="list-style-type: none"> <li>• <i>2018 RTP: Project Update and Report Back on Regional Leadership Forum #3 – Information/Discussion (Kim Ellis, Metro; 45 min)</i></li> </ul>

<b><u>Wednesday, February 8, 2017</u></b> <ul style="list-style-type: none"> <li>• <i>Urban Growth Management: Summary of Proposed Work Program (Ted Reid, Metro; 45 min)</i></li> </ul>	<b><u>Wednesday, February 22, 2017</u></b> <ul style="list-style-type: none"> <li>• <i>2018 RTP: Regional Safety Crash Data Analysis (Lake McTighe, Metro; 30 min)</i></li> <li>• <i>2018 RTP: Priorities, Evaluation Framework, &amp; Call for Projects (Kim Ellis, Metro; TBD)</i></li> </ul>
<b><u>Wednesday, March 8, 2017</u></b> <ul style="list-style-type: none"> <li>• <i>2018 RTP: Priorities, Evaluation Framework, &amp; Call for Projects – Recommendation (Kim Ellis, Metro; TBD)</i></li> </ul>	<b><u>Wednesday, March 22, 2017</u></b>

**Upcoming events:**

- October 2017: RTP Regional Leadership Forum #4 (Drafting Our Shared Plan for the Region)
- June 2018: RTP Regional Leadership Forum #5 (Finalizing Our Shared Plan for the Region)

**Parking Lot:**

- Presentation on health & land use featuring local projects from around the region
- Greater Portland, Inc. update
- “Unsettling Profiles” presentation by Coalition of Communities of Color
- Washington County Transportation Futures Study in January or February 2017
- Missing middle housing walking tour with Eli Spevak
- System development charges (SDCs)
- City of Portland inclusionary housing



## Metro | Memo

Date: October 7, 2016  
To: MPAC Members, Alternates and Interested Parties  
From: Nellie Papsdorf, Metro  
Subject: 2017 Metro Policy Advisory Committee (MPAC) Meeting Schedule

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**Please mark your calendars with the following 2017 MPAC meeting dates. MPAC meetings will be held on the second and fourth Wednesdays of the month, from 5:00 p.m. to 7:00 p.m. in the Metro Council Chambers (unless otherwise notified):**

- January 11, 2017
- January 25, 2017
- February 8, 2017
- February 22, 2017
- March 8, 2017
- March 22, 2017
- April 12, 2017
- April 26, 2017
- May 10, 2017
- May 24, 2017
- June 14, 2017
- June 28, 2017
- July 12, 2017
- July 26, 2017
- August 9, 2017
- August 23, 2017
- September 13, 2017
- September 27, 2017
- October 11, 2017
- October 25, 2017
- November 8, 2017
- November 22, 2017
- December 13, 2017
- December 27, 2017



**Metro** | *Making a great place*

**METRO POLICY ADVISORY COMMITTEE (MPAC)**

Meeting Minutes

October 12, 2016

Metro Regional Center, Council Chamber

**MEMBERS PRESENT**

Sam Chase  
Tim Clark  
Betty Dominguez  
Andy Duyck  
Mark Gamba  
Jeff Gudman  
Gordon Hovies  
Dick Jones  
Renate Mengelberg  
Luis Nava  
Ty Stober  
Peter Truax  
Jerry Willey

**AFFILIATION**

Metro Council  
City of Wood Village, Other Cities in Multnomah Co.  
Citizen of Clackamas County  
Washington County  
City of Milwaukie, Other Cities in Clackamas Co.  
City of Lake Oswego, Largest City in Clackamas Co.  
Tualatin Valley Fire & Rescue, Special Districts in Washington Co.  
Oak Lodge Water District, Special Districts in Clackamas Co.  
City of Oregon City, Second Largest City in Clackamas Co.  
Citizen of Washington County  
City of Vancouver  
City of Forest Grove, Other Cities in Washington Co.  
City of Hillsboro, Largest City in Washington Co.

**MEMBERS EXCUSED**

Emerald Bogue  
Carlotta Collette  
John Hayes  
Bob Stacey  
Kent Zook

**AFFILIATION**

Port of Portland  
Metro Council  
Forest Grove School District, Governing Body of a School District  
Metro Council  
Gresham-Barlow School District, Governing Body of a School District

**ALTERNATES PRESENT**

John Griffiths  
Kathryn Harrington  
Carrie MacLaren  
Marc San Soucie

**AFFILIATION**

Tualatin Hills Park & Recreation District, Special Districts in Washington Co.  
Metro Council  
Oregon Department of Land Conservation and Development  
City of Beaverton, Second Largest City in Washington Co.

**OTHERS PRESENT:** Peter Brandon, Jennifer Donnelly, Tom Egleston, Dean Kampfer, Brenda Perry

**STAFF:** Roger Alfred, Jennifer Erickson, Ernest Hayes, Brian Harper, Shaina Hobbs, Nellie Papsdorf

## **1. CALL TO ORDER, SELF INTRODUCTIONS, CHAIR COMMUNICATIONS**

MPAC Chair Tim Clark called the meeting to order at 5:03p.m. All attendees introduced themselves.

Councilor Marc San Soucie gave a self introduction and informed MPAC members of his background in the software industry and Beaverton local government.

## **2. CITIZEN COMMUNICATIONS**

There were none.

## **3. COUNCIL UPDATE**

- Councilor Sam Chase noted that the Powell-Division Steering Committee was continuing to work toward a "locally preferred alternative" this autumn for the Portland-to-Gresham rapid bus line. He added that they were discussing the best way to improve service to Mt. Hood Community College and other locations that may not be served by bus rapid transit (BRT).
- Councilor Chase noted that Metro recently awarded \$205,000 in Nature in Neighborhoods grants for community restoration and stewardship programs. He added that some of the grant recipients included a program aimed at improving pollinator habitat and tree cover in Johnson Creek, a stewardship program at Tryon Creek, and a restoration and education program at Rinearson Creek in Gladstone.
- Councilor Chase noted that the Urban Growth Readiness Task Force met and had wide agreement on the concept of greater flexibility for the region to make modest Urban Growth Boundary (UGB) additions when city's request them. The Task Force members wanted additional work to better define key elements of the concept and would revisit the idea in a future meeting.

## **4. MPAC MEMBER COMMUNICATION**

- Mayor Willey acknowledged that the success of the Bridge Meadows program in Beaverton. Councilor San Soucie noted that the second construction was taking place in Beaverton.
- Mayor Mark Gamba congratulated Mayor Jerry Willey on being the 2016 recipient of the League of Oregon Cities James C. Richards Memorial Award.
- Ms. Carrie MacLaren congratulated Metro on an award from the Federal Transit Authority for the Southwest Corridor Project to work on housing and economic development opportunities.
- Chair Tim Clark asked MPAC members for feedback on the Regional Leadership Forum. Commissioner Renate Mengelberg noted that the takeaway of coalition-building from Mr. Denny Zane's was practical for the region.
- Mayor Jerry Willey recognized that California voters passed sales tax increases by margins of at least 67%, which allowed the region to secure funding for transportation projects. He noted that Washington County was working to widen the involvement of organizations to make the transportation funding discussion more inclusive.
- Mr. John Griffiths shared that the conversation focused largely on raising funds rather than whether the projects would be viable.

- Mayor Gamba stated that the region needed to think outside of the box for transportation funding solutions.
- Councilor Kathryn Harrington noted that many of the forum's attendees did not have a background in the previous Regional Transportation Plan (RTP) updates.
- Councilor Ty Stober noted that smart transportation is going to determine future planning endeavors. He explained that improvements in manufacturing technology may leave many Vancouver residents without employment.
- Ms. Betty Dominguez shared that she moved to the Portland metropolitan region from San Diego twenty years ago and Portland's highway congestion is beginning to feel similar to San Diego traffic.
- Councilor San Soucie shared that there was a recent publication about Miami-Dade County's investments in smart transportation infrastructure and recommended that MPAC members read the article.
- Chair Clark shared that he had been using the app called Waze and it made him think about future driving habits. Councilor Stober noted that the City of Boston had signed an agreement with Waze to share data.
- MPAC members discussed the benefits of video conferencing for committee meetings to avoid increasing traffic as congestion in the region continues to grow.
- Mr. John Williams thanked MPAC members for their feedback on the Regional Leadership Forum.
- Chair Clark shared that he wanted to convene the MPAC Nominating Committee to nominate a new 2<sup>nd</sup> Vice Chair. Councilor Marc San Soucie, Mayor Mark Gamba, and Mayor Jerry Willey all volunteered to choose a nominee to bring before MPAC at the November 9<sup>th</sup> meeting.

## 5. **CONSENT AGENDA**

- **Consideration of September 14, 2016 MPAC Minutes**

MOTION: Councilor Jeff Gudman moved, and Mayor Mark Gamba seconded, to adopt the consent agenda.

ACTION: With all in favor, the motion passed.

## 6. **INFORMATION/DISCUSSION ITEMS**

### **6.1 Solid Waste Roadmap: Food Scraps Program Update**

*Key elements of the presentation included:*

- Mr. Matt Korot shared that the Solid Waste Roadmap project staff would be going to Council on October 25<sup>th</sup>. He reminded MPAC of the Solid Waste Roadmap Initiative and added that the roadmap is ultimately about getting the most of the waste in the region.
- He stated that food is largest component of region's waste, about 18% of all discarded waste. He explained that through anaerobic digestion food recovery, agencies can create energy and agricultural products while preventing negative impacts, such as the creation of methane gas.

- He noted that several jurisdictions had been putting in policies to collect residential food waste.
- Ms. Jennifer Erickson shared that the project was aimed at securing a sustainable source of high quality recoverable material. She noted that a key barrier to the progress is securing private investment in a processing facility due to a lack of confidence in the supply of food scraps. She added that 50,000 tons is the required amount to be considered a secure supply.
- Ms. Erickson shared the several different options that would be brought before the Council as policy options for encouraging local food businesses to recover their food waste.
- Ms. Erickson gave an overview of potential financial incentives to encourage local businesses to recover their food waste, including subsidized collection rates and reduced food scraps tip fees at regional transfer stations. She noted that the strategy of choice was to combine business actions with financial incentives.
- Ms. Erickson shared that a large amount of stakeholder feedback was conducted across the region. He noted that local businesses expressed interest in assistance from local government in forms of training. She noted that local businesses expressed their concerns with program flexibility and costs.
- Ms. Erickson noted that after the October 25<sup>th</sup> Council Meeting, there would be updates to the process and additional stakeholder discussion.

*Member discussion included:*

- Mr. John Griffiths asked whether there were options to collect materials after collection. He asked what other jurisdictions were doing to recover food scraps. Ms. Erickson noted that it would be too difficult and costly to collect food scraps from a single stream. Ms. Erickson noted that there were 11 similar programs in North America.
- Chair Duyck asked what the long-term intent would be for the methane byproduct from anaerobic digestion. Ms. Erickson stated that in Junction City, Oregon, the produced methane was fired to create electricity. Chair Duyck noted that Clean Water Services has a methane production program but is quickly reaching the numbers at which it is considered an energy provider.
- Commissioner Renate Mengelberg shared concerns about constituents being upset by odors. She asked about the improving technology and their effects on odor. Mr. Matt Korot noted that a regional solution would be an enclosed anaerobic digester.
- Mayor Willey asked about the cost of an anaerobic digesting facility. Mr. Korot noted that the cost was about \$50 million to construct the facility and the additional collection services would be built into existing collection systems.
- Ms. Betty Dominguez asked about Metro's donation of food after public meetings. Ms. Erickson shared that the Oregon Convention Center had a relationship with Blanche House for food donations.

## **6.2 Metro Brownfields Recovery Project Update**

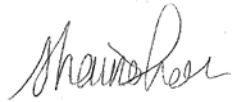
- Mr. Brian Harper shared that brownfields are properties with contamination or conceived contamination. He informed MPAC members that brownfields are harmful to the economy and pose a hazard to human health and safety.
- He noted that the full extent of the brownfields problem in the region is unknown as many property owners are unaware or don't want to disclose information on the conditions of their properties.

- Mr. Harper shared that EPA grant funding allowed for brownfield cleanups in Wood Village, Beaverton and Sherwood. He shared that the Brownfields Coalition has worked on creating a legislative agenda which included initiatives such as land banking and local tax incentives for brownfield cleanup.
- Mr. Harper noted that the coalition's 2017 legislative agenda was less lofty, with the coalition only seeking a brownfield tax credit study.
- The McLoughlin Corridor was chosen for an assessment grant because of the tremendous amount of local work. The grant awarded was for \$600,000, with \$300,000 for petroleum sites, \$300,000 for hazardous substance sites. The sites of the study are disbursed along the 9 mile stretch of the McLoughlin Corridor. He noted that the Willamette Falls Legacy Site was a key component in the grant application.
- Mayor Jerry Willey asked whether it was possible to apply for another EPA grant. Mr. Harper noted it's not possible for Metro to apply in the same 3 year cycle, but they can offer technical assistance to other jurisdictions.
- Ms. Carrie MacLaren asked about the characteristics of the brownfields sites and their potential uses. Mr. Harper noted that the brownfield report contains information about many of the sites. Councilor San Soucie noted that Beaverton received a brownfield grant from the EPA in 2013.

### **ADJOURN**

MPAC Chair Tim Clark adjourned the meeting at 6:54 p.m.

Respectfully Submitted,



Shaina Hobbs  
Recording Secretary



**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF OCTOBER 12, 2016**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DOC DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT No.</b>
<b>6.2</b>	Handout	10/11/16	Oregon Brownfields Coalition info sheet	101216m-01

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: Thursday, October 20, 2016  
To: Metro Policy Advisory Committee  
From: John Williams, MTAC Chair  
Subject: MTAC Nomination for MPAC Consideration

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We have received a new nomination for the Multnomah County position on MTAC.

Multnomah County has nominated Michael Cerbone as their new alternate. Adam Barber remains the primary member.

Please consider this nomination for MTAC nomination. Per MPAC's bylaws, MPAC may approve or reject any nomination submitted.

If you have any questions or comments, do not hesitate to contact me.

Thank you.



## Metro | Memo

Date: Wednesday, November 2, 2016  
To: MPAC Members and Alternates  
From: MPAC Nominating Committee  
Subject: Proposed MPAC 2<sup>nd</sup> Vice Chair

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Following a departure from MPAC, the committee's 2<sup>nd</sup> Vice Chair position is currently vacant. A nominating committee was convened to fill this vacancy at the October 12 MPAC meeting comprised of Councilor Marc San Soucie, Mayor Jerry Willey, and Mayor Mark Gamba.

The nominating committee has proposed that Mayor Denny Doyle, City of Beaverton, fill the vacancy.

The nomination will be reviewed and voted on at the MPAC meeting on November 9.

Thank you,

Councilor Marc San Soucie, City of Beaverton  
Mayor Jerry Willey, City of Hillsboro  
Mayor Mark Gamba, City of Milwaukie

# MPAC Worksheet

**Agenda Item Title:** Equitable Housing Planning and Development Grants Recommendations

**Presenter:**

- Metro Councilor Carlotta Collette, District 2: Metro Council Liaison to the Grants Screening Committee for Equitable Housing Planning and Development Grants
- Elissa Gertler, Planning and Development Department Director
- Gerry Uba, Community Planning and Development Grants project manager

**Contact for this worksheet/presentation:** Gerry Uba, 503-797-1737 or [gerry.uba@oregonmetro.gov](mailto:gerry.uba@oregonmetro.gov)

## **Purpose/Objective**

Provide the recommendations of the Metro Chief Operating Officer (COO) to Metro Council on the Equitable Housing Planning and Development Grants. The recommendations of the Grants Screening Committee are in Attachment C to the COO's recommendations.

## **Action Requested/Outcome**

Discussion and comments on the recommendations for Equitable Housing Planning and Development Grants.

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

NA

## **What packet material do you plan to include?**

1. Background Information on Equitable Housing Planning and Development Grants
2. Metro COO's Memo to Metro Council containing her recommendations on the Equitable Housing Planning and Development Grants

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: Monday, Oct. 31, 2016  
To: MPAC  
cc: Elissa Gertler, Planning and Development Department Director  
From: Gerry Uba, Community Planning and Development Grants program manager  
Subject: Background Information on Metro Equitable Housing and Development Grants

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On January 7, 2015 and February 16, 2016 Metro Council discussed possible uses of the unallocated \$230,000 construction excise tax revenue from Cycle 4 of the Community Planning and Development Grants (CPDG) recommended by the COO. The COO also considered additional construction excise collections during the cycle that could be used to boost funding for housing planning and development grants to ensure that the program is able to generate benefits across the region. After consultation with the Office of the Metro Attorney and guidance from the Equitable Housing Initiative Work Group, the COO recommended an initial budget of \$500,000.

The Metro Council created the Equitable Housing Planning and Development Grants program as a subset of the CPDG program to use additional, unallocated funds to inspire and foster innovative local planning projects that support the creation of equitable housing – defined as *diverse, quality, physically accessible, affordable housing choices with access to opportunities, services, and amenities*. The Equitable Housing Grants are intended to specifically support local governments and their partners in eliminating barriers to equitable housing development—while also helping to build a body of housing-related projects that support regional innovation and knowledge sharing. Consistent with previous recommendations from evaluations of applications for the CPDG program, Equitable Housing Grants applications were evaluated on their ability to achieve the goals of the Regional Framework Plan, which identifies regional policies to implement the 2040 Growth Concept.

Seven local governments submitted eight applications by the August 12, 2016 deadline. In total, the eight applications requested \$680,936. The proposed projects will support planning activities that will lead to such outcomes as eliminating barriers to housing development on a specific site, changes to zoning and permitting, and creation of incentives to support equitable housing at the jurisdiction scale.

Metro's COO appointed six individuals with experience in a variety of fields relating to housing development and planning to the Equitable Housing Grants Screening Committee. The Screening Committee evaluated the applications and developed funding recommendations. While originally the Council had approved \$500,000 of funding to be awarded for Equitable Housing Grants, one Cycle 4 CPDG Grant recipient elected not to proceed with their grant project, which added an additional \$75,000 of funding which could potentially be awarded for Equitable Housing Grants if the Council elected to do so. Therefore the Screening Committee delivered recommendations to Metro COO with two funding options:

- recommended funding package at \$500,000
- recommended funding package at \$575,000

In addition, the Screening Committee recommended funding conditions and performance measures and provided feedback on the criteria and evaluation process to inform program evaluation and possible future grant cycles.

The COO reviewed the recommendations of the Screening Committee and prepared her own recommendations for the Metro Council, based on the Screening Committee's recommendations, the grant evaluation criteria set forth in the Administrative Rules, and the grant applications themselves. On November 1, 2016 the COO was joined by the Screening Committee to present their recommendations to the Metro Council.

After taking public testimony at the December 1<sup>st</sup> meeting, the Metro Council may adopt by resolution all of the COO's recommendations, or may change some of them. The Metro Council will make the final decision regarding the grants.

#### **SCHEDULE**

- Metro Council work session --- November 1, 2016
- MPAC update --- November 9, 2016
- Metro Council decision on grant awards --- December 1, 2016
- Metro and grantees negotiate intergovernmental agreements --- December 2016 through March 2017

Date: October 20, 2016  
To: President Tom Hughes, Metro Council  
From: Martha Bennett, Chief Operating Officer  
Subject: 2016-17 Equitable Housing Planning and Development Grants

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I am pleased to present my recommendations for the 2016-17 Equitable Housing Planning and Development Grants, a subset of the Community Planning and Development Grant (CPDG) program. Since the Metro Council established the CPDG program with funding from the construction excise tax, it has helped many communities turn potential into vision and vision into action for local and regional plans and policies.

This past spring, after learning that construction excise tax revenue was projected to exceed the grant amounts awarded during Cycle 4 of the CPDG program, the Council instructed staff to develop an Equitable Housing Grant program to help communities undertake planning efforts that will facilitate the creation of equitable housing—defined as *diverse, quality, physically accessible, affordable housing choices with access to opportunities, services and amenities*.

Staff held a pre-application meeting in May; in June, we received eight letters of interest from seven jurisdictions regarding potential projects. Staff provided feedback on letters of interest, and jurisdictions submitted full applications in August.

In July, I appointed a seven-member Grants Screening Committee with varied expertise and backgrounds in the private, nonprofit and public sectors. The Committee reviewed the eight applications submitted by seven jurisdictions, and I asked them to develop recommendations for two funding scenarios: \$500,000 (the amount initially discussed by the Council during the decision to create the program) and \$575,000 (the initial amount plus \$75,000 from the Cycle 4 CPDG grant that was awarded to Multnomah County but that did not move forward because the County returned the funds). The Committee submitted its recommendations to me on October 13, 2016, recommending that seven of the eight proposed projects be fully or partially funded under both the \$500,000 and the \$575,000 scenarios.

The Committee's recommendations are outlined in [Attachment A](#). In accordance with the Committee's recommendations, and to ensure that reduced funding levels do not compromise projects, I recommend total funding of \$575,000, consistent with the Committee's recommendations. Because the \$75,000 that was returned from Multnomah County was for a project dealing with equitable housing issues (barriers to shelter siting), it seems appropriate that this funding be re-allocated to another housing-related project. In addition to the Committee's recommendations, I have proposed some additional funding conditions (in addition to those put forth by the Screening Committee) for the approved projects; you will find these in [Attachment B](#). The full recommendations of the Committee are in [Attachment C](#).

All seven of the projects recommended by the committee for funding meet the requirements of the construction excise tax code and the administrative rules governing the CPDG program. The projects are diverse, ranging from those focused on eliminating barriers to development on specific sites to corridor-, district-, or jurisdiction-wide policy and strategy efforts. These projects will develop and produce policies and plans that will become the foundation for public, private and nonprofit investments in equitable housing. As the first round of CPDG grants specifically focused

on housing equity, this portfolio of projects will also yield valuable insights and lessons to help inform future funding for similar work.

One project, the City of Portland's proposal for Terminal One, was not recommended for funding by the Committee. Given the legal and political challenges that exist with the site—including but not limited to its designation as a Metro Title 4 Regionally Significant Industrial Area (RSIA)—I agree with the Committee's recommendation not to invest these resources in a study for a proposal that appears to have feasibility barriers that are unlikely to be overcome. However, recognizing the tremendous challenge our region faces with regard to homelessness, I also recommend that Metro continue exploring ways to partner with the City of Portland, Multnomah County, and other jurisdictions to find policy solutions for addressing barriers to shelter siting and evaluating the viability of potential solutions, such as the Trail of Hope/Haven of Hope concept.

A binder containing the applications submitted by local governments will be delivered to you. After reading the applications, I believe you will share with me an appreciation for the high quality of local planning and development work in our region, and the creative approaches jurisdictions have developed to tackle equitable housing in a way that works for their communities. Please let me or Equitable Housing Initiative Project Manager Emily Lieb know if you have any questions.

Thank you.

Attachments

cc: Elissa Gertler, Planning and Development Department Director  
Gerry Uba, CPDG project manager



**Attachment A: (COO Recommendations to Metro Council)  
2016-2017 Equitable Housing Planning and Development Grants**

**Projects Recommended for Funding**

<b>Project</b>	<b>Funding Request</b>	<b>Recommended Funding @ \$500,000</b>	<b>Recommended Funding @ \$575,000</b>
<b>Portland</b> Equitable Housing Strategy for the Southwest Corridor	<b>\$100,000</b>	\$86,207	\$100,000
<b>Tigard</b> Southwest Corridor Affordable Housing Predevelopment Analysis	\$50,000	\$43,104	\$50,000
<b>Beaverton</b> Anti-Displacement Housing Strategy	\$100,000	\$86,207	\$100,000
<b>Washington County</b> Affordable Housing Site Evaluation, Barriers & Solutions	\$100,000	\$86,207	\$97,500
<b>Oregon City</b> Equitable Housing	\$100,936	\$86,207	\$100,000
<b>Milwaukie</b> Cottage Cluster Feasibility Analysis	\$65,000	\$56,035	\$65,000
<b>Wilsonville</b> Equitable Housing Strategic Plan	\$65,000	\$56,035	\$62,500
		<b>\$500,001</b>	<b>\$575,000</b>

**Projects Recommended for No Funding**

Portland Terminal One (Feasibility assessment of Terminal 1)	\$100,000
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## **Attachment B: COO recommended funding conditions in addition to Grants Screening Committee recommendations**

### *Funding conditions recommended for all projects:*

- *Engagement:* Within the negotiation of IGAs, it is important to distinguish outreach for site-specific elements of projects from outreach for policy projects. Outreach for site-specific projects or milestones should be focused on property owners (both of the site and its surroundings) and surrounding residents, as well as any development partners and potential target populations that would be served by a site. Outreach and engagement to inform broader policy outcomes should, on the other hand, be more expansive, and should also include specific efforts to reach underrepresented populations and communities of color.
- *Application of “equity lens”:* The screening committee recommended that each project should describe, as a condition for funding, how an equity lens will be applied throughout the project. I would like to propose some more specific guidance regarding equity in light of Metro’s recently adopted Equity Strategy—namely, that all grantees address the following question within their scope of work: *Do we have barriers in our current code that create impediments to housing for communities of color?* Jurisdictions may address this question in a way that makes sense for them. Metro staff will be available to provide technical assistance and, as available, research and data. In addition, grantee jurisdictions within Clackamas County may benefit from the County’s recent Fair Housing Assessment, which is the first assessment of its kind completed in our region under the new federal guidelines for Affirmatively Furthering Fair Housing.

### *Funding conditions recommended for specific projects:*

- *Milwaukie / Cottage Cluster Feasibility Analysis:* The scope needs to be refined to ensure that the code audit happens before any site-specific feasibility analysis. The scope should include robust outreach to ensure that property owner support is secured prior to undertaking any site-specific work.
- *City of Portland / Equitable Housing Strategy for the Southwest Corridor:* The project should be closely coordinated with the recently awarded FTA TOD Grant for the Southwest Corridor Equitable Development Strategy.
- *Wilsonville / Equitable Housing Strategy:* The scope needs to be refined to be more specific and more targeted to reflect different market contexts in the Downtown and Frog Pond areas. The refined scope should lay out 3-5 specific policy strategies focused on multifamily infill development that will be explored for the Downtown area, and 3-5 specific policy strategies to be explored with the aim of increasing affordable homeownership options and “missing middle” housing in the Frog Pond area. Further, the City should commit to implementing a specific number of policies as an outcome of the grant.

## **Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO**

**Date:**           **October 13, 2016**

**To:**             **Martha Bennett, Metro Chief Operating Officer**

**From:**       **Alisa Pyszka and Leila Aman, Co-Chairs, Equitable Housing Planning and Development Grants Screening Committee**

**Subject:**      **Equitable Housing Grants Screening Committee Recommendations**

As co-chairs of the Equitable Housing Planning and Development Grants Screening Committee, we are pleased to present our recommendations for the 2016-17 Equitable Housing Planning and Development Grants awards.

Before we present the recommendations, we think it important to give you an overview of our committee's work. You appointed our committee in July 2016. Our discussions were guided by the overarching direction in the Administrative Rules for the Construction Excise Tax Funding for Community Planning and Development Grants (CPDG), which includes the Equitable Housing Grants program. Additional guidance for the committee was provided in the Equitable Housing Grants Application Handbook, including:

- the program's goal to fund projects that will remove barriers to equitable housing development
- planning activities supported by the grant
- criteria for evaluating the applications

Our committee met two times between September and October to review the eight applications submitted by seven local governments. Staff had previously reviewed and provided feedback on letters of interest.

We were impressed with the diversity of proposals and with the range of communities that applied, and we believe this round of grants will yield important lessons for how the region responds to the current housing crisis. Some of the proposed projects will support planning activities focused on eliminating barriers to development on a specific site, leading to formal development commitments and development agreements that will result in near term on-the-ground development. Others focus on policy development and strategic planning that will eventually lead to development.

The diverse backgrounds of the committee members created very lively and thorough discussions of the strengths and weaknesses of each of the applications. Although we did not come to consensus in every case, committee members generally agreed about which projects should be recommended for funding, and how much.

## Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO

### Funding Recommendations:

The total funding requested for the eight projects was \$680,936. Staff advised the committee that Metro Council had previously discussed making \$500,000 available for the project, but that the COO also planned to recommend allocating an additional \$75,000 in funding from an approved Cycle 4 Community Planning and Development Grant (CPDG) project that did not move forward to the funding allocation for the Equitable Housing Grants 2016-17 allocation. For that reason, the committee developed two sets of recommendations: one for a \$500,000 total funding package, and one for a \$575,000 total funding package, summarized below.

Our committee recommends funding for all but one of the projects: the City of Portland's Terminal One proposal. In order to develop recommendations for a \$500,000 funding recommendation package, the committee recommended an across-the-board 13.8% cut to the seven projects recommended for funding. This approach reflects the importance and the merit of the all the projects that were recommended for funding. For the \$575,000 funding recommendations package, the committee recommended slight cuts to two of the projects: Washington County and Wilsonville.

### *Summary of Funding Requests and Recommendations for \$500,000 and \$575,000 Funding Scenarios*

Project	Funding Request	Rec'd Funding @ \$500,000	Rec'd Funding @ \$575,000
Beaverton Anti-Displacement Housing Strategy	\$100,000	\$86,207	\$100,000
Milwaukie Cottage Cluster Feasibility Analysis	\$65,000	\$56,035	\$65,000
Oregon City Equitable Housing	\$100,936	\$86,207	\$100,000
Portland Terminal One	\$100,000	\$0	\$0
Portland Equitable Housing Strategy for the Southwest Corridor	\$100,000	\$86,207	\$100,000
Tigard Southwest Corridor Affordable Housing Predevelopment Analysis	\$50,000	\$43,104	\$50,000
Washington County Affordable Housing Site Evaluation, Barriers & Solutions	\$100,000	\$86,207	\$97,500
Wilsonville Equitable Housing Strategic Plan	\$65,000	\$56,035	\$62,500
	<b>\$680,936</b>	<b>\$500,001</b>	<b>\$575,000</b>

Committee members expressed mixed reactions to the Terminal One proposal. Some committee members felt the project had strong merits. Although individual committee members did not agree on all of the merits and weaknesses of the Terminal One proposal, the committee did reach consensus on the recommendation not to recommend funding for this project, given that it ranked the lowest in the committee's evaluation, and given staff direction regarding maximum available resources for the grant program.

## Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO

*Appendix* contains a summary of committee comments, including positive comments, concerns, and suggestions for how applicants should adjust their scope of work in order to realize the intended outcomes of their projects. Not all committee members agreed with each of the positive comments or concerns in the summary, and in a few cases, comments may reflect an individual committee member's perspective.

### Additional Comments and Suggestions for Future Funding Cycles

Our Committee also recommends the following actions to improve the Equitable Housing Grants program for future funding allocations:

- **Site specific proposals should have potential for impact that is much broader than simply achieving development on a single site.** For example, site-specific projects could be used to identify broader policy or administrative changes that could help to eliminate barriers to development; they could be catalytic in supporting overall goals for achieving the region's 2040 vision; or they could be significant in that they are addressing a critical need, such as affordable housing development.
- **Although the program is focused on "equitable housing," the application requirements and evaluation criteria could provide more specificity about the definition of "equity" in this context, and could elevate the focus on equity within the evaluation criteria.** The current description of "equity" within the evaluation criteria, as described in the Equitable Housing Grant Application Handbook, states that "Equity exists relative to the benefits and burdens of growth and change to the region's communities, and the proposed project will facilitate investments that address the needs of underserved and underrepresented groups. Applicants are encouraged to think about how their project supports efforts to 'Affirmatively Furthering Fair Housing'." However, equity is listed only under the "regional significance" criteria as one of six desired outcomes. Metro should consider making equity a separate criterion and/or providing more guidance regarding how applicants should demonstrate the use of an equity lens both in evaluating the potential outcomes of the project and/or engagement components.
- **Metro's program should encourage local strategies focused on preserving existing affordable housing.** The preservation of existing affordable housing (both regulated and non-regulated) is widely recognized as an important strategy that needs to be expanded to address our region's housing needs. Preservation is generally more cost effective than new development, and if we aren't able to preserve existing affordable housing, many affordable housing experts believe we will never be able to "build" our way out of the affordable housing crisis. The City of Beaverton's Equitable Housing Grant proposal included (along with elements focused on eliminating barriers to new development of equitable housing) a component focused on exploring strategies for the preservation of "naturally occurring" or non-regulated affordable housing—something we saw as an innovative and regionally significant approach and therefore recommended for funding. Given that Metro code states that the construction excise tax should be used "to provide funding for regional and local planning that is required to make land ready for development

## Attachment C: Equitable Housing Grants Screening Committee Recommendations to COO

after its inclusion in the Urban Growth Boundary,” it may be helpful for Metro to consider whether this language is still relevant for achieving the original intent of the program. From our perspective, supporting the preservation of existing affordable housing is compatible with the overall goal of achieving the six desired outcomes for the 2040 Growth Vision adopted by Metro Council.

- **The lessons learned from projects approved for funding through the 2016-17 Equitable Housing Grant program should be used to help provide more direction for future funding cycles.** The eight applications we reviewed represent a wide range of approaches, presenting an opportunity for learning about what kinds of approaches are most effective in yielding significant policy outcomes and on-the-ground development. One thing Metro could explore in future modifications of the program would be to develop a checklist of the different kinds of planning efforts (i.e., housing needs analysis, code audit, opportunity site inventory, funding/incentive analysis, etc.) local jurisdictions should undertake to identify problem statements and develop approaches to addressing them. Staff could also consider developing more prescriptive templates for effective scopes of work that would meet the funding criteria, as well as case study examples of successful projects based on the 2016-17 funding cycle. This could help eliminate some of the barriers smaller jurisdictions may face in completing the application process, which is fairly involved. Additionally, it would help ensure that the applications Metro receives encompass the kinds of activities necessary to achieve the desired outcomes of the program.
- **Require applicants to provide more specific information about deliverables and how they will be shared with Metro and other stakeholders across the region.**

We will be happy to join you in presenting all of these recommendations to the Metro Council on November 1 if you so desire.

On behalf of the members of our Equitable Housing Grants Screening Committee, we want to thank you for giving us the opportunity to participate in this process and assist Metro in funding projects that eliminate barriers to equitable housing development.

**APPENDIX (Co-Chairs Aman and Pyszka Recommendations to COO)**

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR 2016-17 EQUITABLE HOUSING  
GRANT APPLICATIONS**

**Oct. 12, 2016**

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**2016-17 EQUITABLE HOUSING PLANNING AND GRANT APPLICATIONS**

**TABLE OF PROJECTS**

**PROJECTS**

City of Beaverton / Anti Displacement Strategy .....	1
City of Milwaukie / Cottage Cluster Feasibility Analysis .....	2
City of Oregon City / Oregon City Equitable Housing .....	3
City of Portland / Portland Housing Bureau / Terminal One .....	4-5
City of Portland / Portland Planning and Sustainability / Equitable Housing Strategy for the SW Corridor .....	6
City of Tigard / SW Corridor Affordable Housing Predevelopment Project.....	7
City of Wilsonville / Equitable Housing Strategic Plan .....	8
Washington County / Equitable Housing Barriers and Solutions .....	9-10



**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Beaverton / Anti Displacement Strategy	
<b>Requested Grant</b> \$100,000	<b>Recommendation options:</b> If \$575,000 in total funding: \$100,000 If \$500,000 in total funding: \$86,207
<b>Total Project Cost</b> \$116,832	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$16,832
<b>Project Description</b>	The City of Beaverton requests \$100,000 to create an Anti-Displacement Housing Strategy. The City will hire a consultant to work with the city to a) map all current unregulated affordable housing (below 80% AMI) and developable properties, and b) identify strategies the city and the housing partners can implement to preserve and/or develop new affordable housing going forward.
<b>Project Location</b>	City of Beaverton (citywide)
<b>Partners</b>	Community Housing Fund, Network for Oregon Affordable Housing (NOAH), Washington County Housing Authority

**Positive Comments**

- High regional significance due to potential to generate lessons learned; focus on preserving “naturally occurring” affordable housing is innovative
- Strong potential for partnerships with interested funders
- Strong commitment for action; city has already allocated funding for acquisition of “naturally occurring” affordable housing
- Explicit focus on anti-displacement reflects commitment to equity

**Concerns**

- Community engagement component is not as strong as other applications
- Some questions as to the project team’s capacity to manage the project; specific staff were not noted because the city was in the process of hiring for the project manager position

**Conditions for Funding**

- Verify planning staff capacity.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee (MTAC), peer jurisdiction staff, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Milwaukie / Cottage Cluster Feasibility Analysis	
<b>Requested Grant</b> \$65,000	<b>Recommendation options:</b> If \$575,000 in total funding: \$65,000 If \$500,000 in total funding: \$56,035
<b>Total Project Cost</b> \$77,000	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$12,500
<b>Project Description</b>	The City of Milwaukie requests \$65,000 to conduct a feasibility analysis and preliminary site design work for four sites to examine their potential for a cottage cluster development that can provide equitable housing opportunities to a variety of groups identified by community partners, including affordable housing, workforce housing, senior housing, and special needs housing.
<b>Project Location</b>	Four sites located within the City of Milwaukie's medium density residential zones (r-2, R-2.5, and R-3). Exact sites to be determined as part of the proposal.
<b>Partners</b>	Northwest Housing Alternatives, Providence Milwaukie Hospital, and Clackamas County Health, Housing and Human Services

**Positive Comments**

- Potential for regional significance given ability to generate lessons learned regarding cottage clusters
- Strong potential for partnerships

**Concerns**

- Code barriers to cottage clusters need to be addressed before development could move forward.
- The city notes in their application that their initial outreach was not successful in identifying any interested property owners.
- The scope is more narrow than some other projects.

**Conditions for Funding**

- City should confirm property owner interest before moving forward with a feasibility analysis on any site.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include for how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Oregon City / Equitable Housing	
<b>Requested Grant</b> \$100,936	<b>Recommendation options:</b> \$575,000 in total funding: \$100,000 \$500,000 in total funding: \$86,207
<b>Total Project Cost</b> \$124,650	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$23,714
<b>Project Description</b>	The City of Oregon City requests \$100,936 to work with a network of local partners to evaluate the process for constructing equitable housing and remove barriers to development as well as implement incentives to facilitate and encourage new equitable housing in Oregon City.
<b>Project Location</b>	The project area is city-wide, although emphasis will be placed on specific development areas and zones through the analysis of site background information and mapping.
<b>Partners</b>	Clackamas County Health, Housing and Human Services; Northwest Housing Alternatives, Citizens Involvement Committee, Main Street Oregon City, Oregon City Chamber of Commerce, Oregon City Business Alliance

**Positive Comments**

- Strong potential for leverage given other economic development initiatives underway in Oregon City.
- Good combination of breadth and specificity.
- Proposed project addresses a very real need to eliminate code barriers to development, so potential for tangible impact is high.

**Concerns**

- Description of equity components of the grant is vague.
- Proposed “partners” and public involvement plan consists mostly of technical advisors; not enough outreach to disadvantaged groups or collaboration with community-based organizations.
- Important to have clearly defined outcomes; unclear whether and how the proposed scope would lead to ongoing activity.

**Conditions for Funding**

- Clarify roles of partner organizations beyond serving in a technical advisory capacity.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

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- Specify income-based performance measures related to number of units envisioned to be created.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Portland / Terminal One	
<b>Requested Grant</b> \$100,000	<b>Recommendation options:</b> \$575,000 in total funding: \$0 \$500,000 in total funding: \$0
<b>Total Project Cost</b> \$265,000	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$165,000
<b>Project Description</b>	PHB requests \$100,000 for a feasibility assessment of Terminal 1 related to the proposed Oregon Trail of Hope concept, a multi-service center providing shelter, services, and housing for people experiencing homelessness. The 12-month project will fund a consultant to conduct analysis of the site and produce outcomes in phases of: Visioning, Feasibility Analysis, and Master Plan development.
<b>Project Location</b>	Terminal 1 (2400 NW Front Avenue, Portland, OR 97209) is 14.48 acres with a 96,000 sq. foot warehouse in downtown Portland on the Willamette River.
<b>Partners</b>	Joint Office of Homeless Services (Multnomah County), Oregon Trail of Hope (nonprofit)

*Note: Individual committee members had very different opinions about this proposal. Many of the comments summarized below do not reflect a majority perspective, and some may reflect individual committee members' perspectives.*

**Positive Comments**

- Homelessness is a region-wide issue, and Portland has taken on a disproportionate burden. There is potential for this concept to relieve pressure on other parts of the region by siting a shelter in a location with higher real estate values rather than in an area with lower income areas (e.g., East Portland).
- There is a huge shortage of shelter beds and the overall concept is worthy of studying.
- Project includes strong matching funds and partner support.
- The proposal is innovative in that it seeks to use an integrated, comprehensive approach, modeled on a national best practice.

**Concerns**

- Concerns about the legal and political viability of the site, due to recent state land use decisions clearly prohibiting use of industrial land for mass shelters and anticipated political challenges of a zoning change on the Terminal One site.
- Studying a homeless shelter does not fit with the grant program criteria or program goals.
- Concept could equate to “warehousing” approach; placing people on an industrial site that isn’t integrated into communities and neighborhoods.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**  
**October 12, 2016**

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- Unclear how this proposal fits with Metro's role of shaping a long-term vision of integrated land use and transportation.

**Conditions for Funding**

- Funding not recommended

**Additional Comments:**

- The committee recommends that the applicant consider the following potential changes to the scope for future grant cycles:
  - Conduct a broader analysis of zoning barriers to shelter siting
  - Conduct a broader analysis of the proposed homeless campus concept, including criteria for identifying appropriate sites

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Portland / Equitable Housing Strategy for the Southwest Corridor	
<b>Requested Grant</b> \$100,000	<b>Recommendation options:</b> \$575,000 in total funding: \$100,000 \$500,000 in total funding: \$86,207
<b>Total Project Cost</b> \$120,000	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$20,000
<b>Project Description</b>	The City of Portland requests \$100,000 to set a target for affordable housing preservation and production as part of the Southwest Corridor transit project, estimate potential funding sources and funding gap to meet targets and build a community coalition to support inclusion of affordable housing as part of Southwest Corridor transit investment.
<b>Project Location</b>	One-half mile buffer around Barbur Blvd from the Barbur/Naito South Portland District to downtown Tigard via the Tigard Triangle
<b>Partners</b>	City of Tigard will serve as primary project partner. Additional collaborators include: Community Housing Fund, Community Partners for Affordable Housing (CPAH), Organizing People/Activating Leaders (OPAL), and the Washington County Housing Authority

**Positive Comments**

- Creating an affordable housing strategy in advance of a major regional infrastructure investment is an innovative approach with the potential to generate valuable lessons for the rest of the region
- Strong regional significance, including inter-jurisdictional collaboration (partnership with Tigard)
- Strong public involvement and partnerships with nonprofits

**Concerns**

- Unclear from the proposal what income levels would be served by the project
- Unclear from the proposal what kinds of implementation tools and tangible outcomes are most likely

**Conditions for Funding**

- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

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- Clarify how equity lens will be applied to shape the project.
- Specify income-based performance measures related to number of units envisioned to be created or preserved.



**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Tigard / SW Corridor Affordable Housing Predevelopment Project	
<b>Requested Grant</b> \$50,000	<b>Recommendation options:</b> \$575,000 in total funding: \$50,000 \$500,000 in total funding: \$43,104
<b>Total Project Cost</b> \$73,080	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$23,080
<b>Project Description</b>	The City of Tigard requests \$50,000 for the SW Corridor Affordable Housing Predevelopment project, which will mitigate the effects of potential market displacement of affordable housing residents in Tigard's Town Center by: identifying opportunity sites for housing relocation and preservation; developing a funding analysis to support an anti-displacement strategy; and engaging with affordable housing residents on equitable solutions.
<b>Project Location</b>	Tigard Town Center (Downtown Tigard and Tigard Triangle)
<b>Partners</b>	Community Partners for Affordable Housing (CPAH), 1,000 Friends of Oregon, Community Housing Fund, Unite Oregon, City of Portland

**Positive Comments**

- Creating an affordable housing strategy in advance of a major regional infrastructure investment is an innovative approach with the potential to generate valuable lessons for the rest of the region
- Strong regional significance, including inter-jurisdictional collaboration (partnership with Portland)
- Strong nonprofit partners

**Concerns**

- Unclear from the proposal what income levels would be served by the project

**Conditions for Funding**

- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Performance measures should specify income-based performance measures related to number of units created or preserved.
- Clarify how equity lens will be applied to shape the project.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> City of Wilsonville / Equitable Housing Strategic Plan	
<b>Requested Grant</b> \$65,000	<b>Recommendation options:</b> \$575,000 in total funding: \$63,500 \$500,000 in total funding: \$56,035
<b>Total Project Cost</b> \$76,235	<b>Financial Match: n/a</b> <b>In-kind Match: \$11,235</b>
<b>Project Description</b>	Wilsonville is proposing to research, develop, adopt, and begin implementation of an Equitable Housing Strategic Plan that identifies and prioritizes policies and programs for the City to implement that address current needs and gaps in Wilsonville's housing market.
<b>Project Location</b>	This project encompasses all of the City of Wilsonville with a special focus on the Frog Pond and Town Center areas.
<b>Partners</b>	n/a

**Positive Comments**

- High opportunity area with strong potential for regionally significant impact.

**Concerns**

- Some of the research components seem duplicative of Metro's Equitable Housing report, Metro's housing needs analysis, and the City's 2013 housing needs analysis.
- Value of the proposed housing summit and resource fair is unclear; engaging employers might be a more impactful approach.
- Description of equity components of the grant is vague; proposal indicates openness to different housing options, but they are not necessarily affordable.

**Conditions for Funding**

- Engagement strategy should specifically identify collaborators, including nonprofits and employers.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.
- Clarify how market research will build on previous analyses, and how it will be targeted toward evaluating feasibility and impact of specific investment and policy tools.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

<b>Applicant/Project</b> Washington County / Equitable Housing Barriers and Solutions	
<b>Requested Grant</b> \$100,000	<b>Recommendation options:</b> \$575,000 in total funding: \$97,500 \$500,000 in total funding: \$86,207
<b>Total Project Cost</b> \$150,000	<b>Financial Match:</b> n/a <b>In-kind Match:</b> \$50,000
<b>Project Description</b>	Washington County requests \$100,000 to identify 3-5 potential affordable housing development (AHD) sites, evaluate AHD site suitability and key barriers through code and financial feasibility analysis, and then draft and evaluate potential solutions. It is expected to lead to community plan and/or code amendments, and pre-development work on at least one site.
<b>Project Location</b>	Potential affordable housing development sites within Washington County's Metro-designated Corridors, Centers, State Areas or Main Streets, including County-owned property at Cornell Road and Murray Boulevard.
<b>Partners</b>	Community Partners for Affordable Housing (selected developer for the County-owned Cornell-Murray property)

**Positive Comments**

- Strong partnerships with nonprofits
- Strong potential to link site-specific projects to more flexible regulations that eliminate barriers to equitable housing development

**Concerns**

- Proposed budget allocation for staff is higher than other applications
- Description of equity components of the grant is vague, and the proposal does not include a plan for how to reach out to disadvantaged populations.
- Only one of five sites is identified.
- Application does not describe the project team.
- Application does not provide examples of potential implementation strategies.

**Conditions for Funding**

- Clarify who serve on the project team.
- Clarify potential implementation strategies to be explored and how the scope will address them.
- Engagement strategy should specifically identify target participants, including income levels/types of residents to be engaged.
- Scope of work should include how the city will share best practices and lessons learned with interested stakeholders, including Metro, Metro Technical Advisory Committee, staff of other jurisdiction, and other identified stakeholders.
- Scope of work should include how the city will communicate information about projects more broadly with interested regional stakeholders (e.g., project website, etc.).
- Clarify how equity lens will be applied to shape the project.

**COMBINED SCREENING COMMITTEE COMMENT SUMMARY AND CONCERNS FOR EQUITABLE HOUSING GRANTS**

**October 12, 2016**

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- Specify income-based performance measures related to number of units envisioned to be created or preserved.

# MPAC Worksheet

**Agenda Item Title:** 2018 Regional Transportation Plan: Project Update and Background for Regional Leadership Forum #3 (Connecting Our Vision and Values to Our Priorities)

**Presenter:** Kim Ellis, Project manager

**Contact for this worksheet/presentation:** Kim Ellis, 797-1617, kim.ellis@oregonmetro.gov

## Purpose/Objective

- Update MPAC on project accomplishments and the third Regional Leadership Forum planned for December 2, 2016.

## Action Requested/Outcome

Staff is seeking feedback regarding the following:

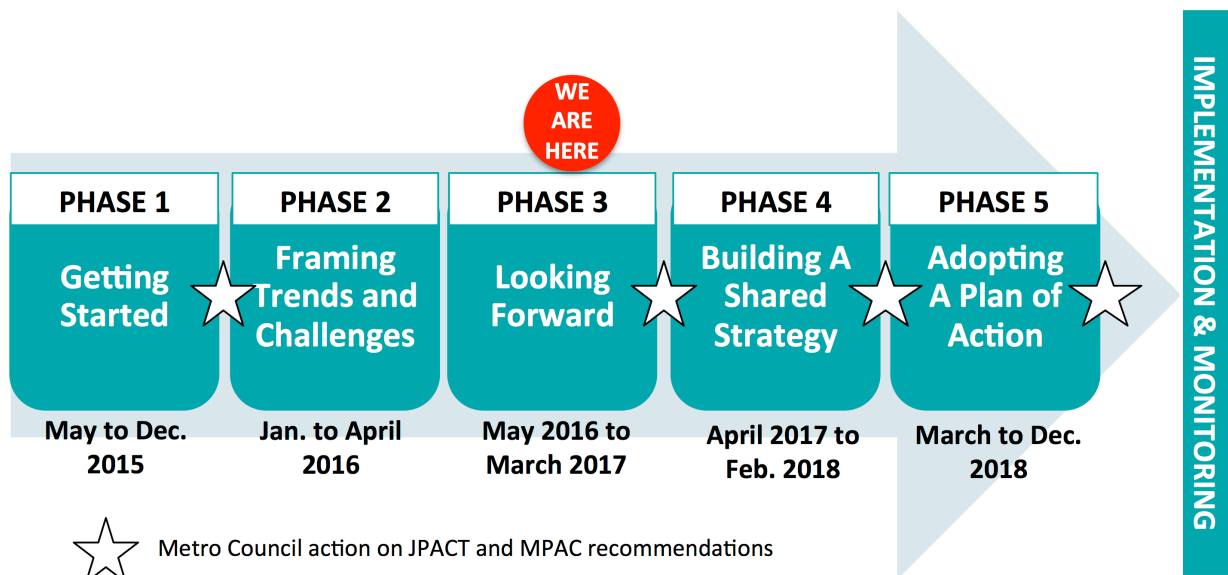
- Do you have any comments or suggestions that may help us plan the Dec. 2 forum?
- Do you have any comments or suggestions on other elements of the 2018 RTP update?

## Background and context

Our region's economic prosperity and quality of life depend on a transportation system that provides every person and business in the Portland metropolitan region with access to safe, reliable, affordable and healthy ways to get around. A half-million new residents are expected to live in the Portland area by 2040, and our transportation needs continue to outpace available resources – particularly as the purchasing power of existing revenues continues to be eroded by inflation, fuel efficiency, and alternative fuels.

Through the 2018 Regional Transportation Plan (RTP) update, the Metro Council is working with communities throughout the region to plan the transportation system of the future. The update will define a shared transportation vision and investment strategy for the next 25 years.

## Timeline for 2018 Regional Transportation Plan Update



## Growing needs, limited revenues

A history of leadership and collaboration has kept our system of roads, bridges, bikeways, sidewalks and transit ahead of the national curve. In general it serves us well, but there is more to be done. The system is aging and not keeping up with growth and changing travel needs. People

and businesses are concerned about traffic congestion, safety, affordability, climate change, community health and other challenges. Many residents – especially those of low income and people of color – are underserved and have difficulty getting to jobs, training and other services.

To stay ahead of future growth and take care of the transportation investments we have already made, our region's elected, community and business leaders must work together to define what transportation investments are most needed, how much we can afford, and how we will pay for them over the next 25 years.

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

Since the last update to MPAC in June, staff continued to implement the adopted work plan and public engagement plan. A summary of accomplishments and activities that are underway follows.

- On September 23, 2016, the Metro Council convened more than 70 leaders and 80 stakeholders from across the Portland metropolitan area to continue shaping a bold vision for the future of travel in the region. A **short summary of key takeaways** is provided in **Attachment 1**. The summary is posted on the project website at [www.oregonmetro.gov/rtp](http://www.oregonmetro.gov/rtp) and will be distributed to forum participants, regional committees, and RTP interested parties.
- In order to take advantage of and leverage other engagement efforts, staff hosted a **30-day online survey** to seek input on regional transportation priorities from October 7 to November 7 as a question added to the comment map tool for the regional flexible funds proposed projects. A summary of responses will be available in late November.
- Planning is underway for the next **regional leadership forum, scheduled for Dec. 2, 2016**. The forum will be held from 8 AM to noon at the Oregon Convention Center. The **Dec. 2 forum** will focus on **discussing the region's vision for the future, defining regional priorities given the region's current funding reality and work ahead to build a path to new funding**. The forum discussions will shape the direction the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT) provide next year (tentatively March 2017) on updating the RTP policies, projects and programs and work ahead to build a path to new funding. The draft agenda for the Dec. 2 Regional Leadership Forum in **Attachment 2**. The schedule of all Regional Leadership Forums is provided in **Attachment 3**.
- Staff continued convening six **technical work groups** to develop information to support the update related to transportation equity, outcomes-based evaluation framework, transportation finance, safety, transit and freight. Regional technical advisory committees began reviewing the information this summer. All work group materials are available on the project website.
- Staff prepared an updated schedule of key work plan activities, milestones and deliverables that is provided in **Attachment 4**. An overview of key work plan elements and deliverables is summarized in **Attachment 5**. Reflecting the work plan adopted by the Metro Council, Attachment 5 describes how each element will be incorporated into the 2018 Regional Transportation Plan and supports future regional funding discussions.

### **Next steps**

Over the next several months, Metro staff will be completing a number of activities to inform and support updating the region's investment priorities and subsequent evaluation of investments. More information will be provided at future briefings of MPAC. MPAC will be asked to make a recommendation to the Metro Council in March 2017.

### **What packet material do you plan to include?**

Attachment 1. Regional Leadership Forum 2 Summary (*Oct. 26, 2016*)

Attachment 2. Draft Regional Leadership Forum 3 Agenda (*Oct. 26, 2016*)

Attachment 3. Regional Leadership Forums Schedule (*Oct. 26, 2016*)

Attachment 4. RTP Work Plan Overview (*Oct. 28, 2016*)

Attachment 5. 2018 RTP Update: Key Work Plan Elements and Deliverables (*Oct. 28, 2016*)

Attachment 6. 2018 RTP Update: community Engagement Activities for 2015- 2016 (*Oct. 28, 2016*)



Getting there with a connected region



## 2018 REGIONAL TRANSPORTATION PLAN UPDATE Regional Leadership Forum 2 summary

### Building the Future We Want

The region is looking ahead to how our transportation system will accommodate future growth and change – and what investments we should make over the next 25 years to build a transportation system that provides every person and business with access to safe, reliable, affordable and healthy ways to get around.

#### What did leaders say?

*Technology is a tool, not a solution.*

*There are people who are not in rooms like this who depend on the conversation.*

*People will support what they help create.*

On Sept. 23, 2016, the Metro Council convened more than 70 leaders and 80 stakeholders from across the Portland metropolitan region to discuss the role of technology in our transportation system and to learn about successful transportation funding campaigns in Los Angeles, the Bay Area and Seattle.

City, county, regional and state policymakers and business and community leaders came together to explore what the future of transportation might look like from local and national leaders actively engaged in envisioning the future with their communities. Forum participants came from established and emerging businesses, business alliances, workforce partnerships, skilled trades organizations, and community-based organizations working on transportation advocacy, environmental justice, housing, community design, workforce equity, environmental protection and issues impacting youth and older adults.

Bringing these diverse perspectives to the conversation prompted a call for greater representation from communities whose quality of life and economic prosperity are most often impacted by our region's transportation system.



“For folks from different walks of life, from different income levels, and different parts of the region, if there isn’t a way for them to remain connected and a way for the transportation system to be efficient, they really fear for their future.”

—Cyrenea Boston Ashby, COO, Oregon Public Health Institute

## Attachment 1 Five key takeaways



### 1. Technology and data are tools, not solutions.

Innovative technologies, ranging from car sharing and ridesharing services to electric cars and self-driving vehicles, are fundamentally changing how we travel. We need to enact thoughtful policies that deliver helpful technology, while ensuring these new tools and services benefit all residents and businesses and support our vision for the future.

### 2. We need to keep people and goods connected and moving with smart investments and measurable results.

Transportation investments support our region's economic prosperity and quality of life. Investments should safely and reliably connect people work, school, services and other opportunities; maximize use of existing infrastructure; and promote greater use of efficient travel modes for both people and goods. This includes keeping our existing transportation system in good repair and using technology and other tools to achieve greater efficiencies. An essential step is providing more and better travel options and greater access to transportation services for everyone.

### 3. We must take steps to strengthen public confidence and demonstrate the benefits of transportation investments.

Building the future we want means prioritizing transportation investments that support our vision and holding ourselves accountable by measuring how investments support the desired outcomes identified in our vision. It's important that we demonstrate to the public that taxpayer dollars are being spent wisely.

### 4. Coalitions need strong leadership and leaders need strong coalitions.

The region's government, business and community leaders need to work together to agree on a bold vision for the future that reflects what people and businesses value and want in the region's transportation system. We need to welcome new voices and leaders to the table to help identify solutions to address the challenges we face. This can build broad support for the solutions and help make the case more funding to build the future we want for our region.

### 5. People will support what they help create.

It will take more than having diverse perspectives at the table to get us to the future we want. Building deeper relationships with community and business coupled with meaningful engagement opportunities will help shape policy and investment decisions. The degree to which we invest in these relationships reflects our level of commitment to providing a transportation system that meets the needs of all communities and businesses.

## More information

News coverage of the forum is available at [oregonmetro.gov/forum2recap](http://oregonmetro.gov/forum2recap).

Materials and presentations from the forum are available at [oregonmetro.gov/event/building-future-we-want](http://oregonmetro.gov/event/building-future-we-want).

Find out more about the 2018 RTP update at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).



Getting there with a connected region

**DRAFT AGENDA****2018 REGIONAL TRANSPORTATION PLAN****REGIONAL LEADERSHIP FORUM 3****Connecting our vision and values to our priorities**

8:30 a.m. to noon, Friday, Dec. 2, 2016

Oregon Convention Center, Rooms F149-152

**THREE REASONS TO ATTEND**

**ENGAGE** in a candid conversation about our transportation funding reality

**TAKE A STAND** on our Big Vision for the future of transportation – does it reflect the future we want?

**LEAD** and help define the region's priorities to get us to the future we want

8:00 a.m.	Registration, light breakfast and networking	
8:30 a.m.	Welcome	Metro Councilor Craig Dirksen, JPACT Chair
8:40 a.m.	Quick poll 1: Who is in the room?	
8:45 a.m.	The challenge: Does the draft vision reflect the future we want?	<i>Presenter TBD</i>
8:55 a.m.	Quick poll 2: Shaping our shared vision and priority outcomes	
9:00 a.m.	Report back and group discussion	
9:20 a.m.	BREAK	
9:35 a.m.	Federal and state funding reality	<i>Presenter TBD</i>
10:00 a.m.	Our regional funding reality	<i>Presenter TBD</i>
10:15 a.m.	Questions and group discussion	
10:25 a.m.	Small group discussion Part 1: Shaping the RTP investment priorities given our funding reality	
11:00 a.m.	Small group discussion Part 2: Growing the pie to accelerate our priorities to achieve our vision	
11:35 a.m.	Report back and large group discussion	
11:55 a.m.	Next Steps: Where are we headed in 2017?	<i>Presenter TBD</i>
Noon	Adjourn	

Getting there with a connected region



Safe • Reliable • Affordable • Healthy

2018 REGIONAL TRANSPORTATION PLAN

Regional Leadership Forums

The Metro Council will convene MPAC, JPACT, state legislators and invited community and business leaders in a series of discussions to foster regional leadership and collaboration to address regional transportation challenges.

Working together across interests and communities can help ensure every person and business in the Portland metropolitan region has access to safe, reliable, affordable and healthy ways to get around.

Find out more at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).

1

April 22, 2016  
8-11 a.m.

2

Sept. 23 2016  
8-11:30 a.m.

3

Dec. 2, 2016  
8-noon

4

Nov./Dec. 2017

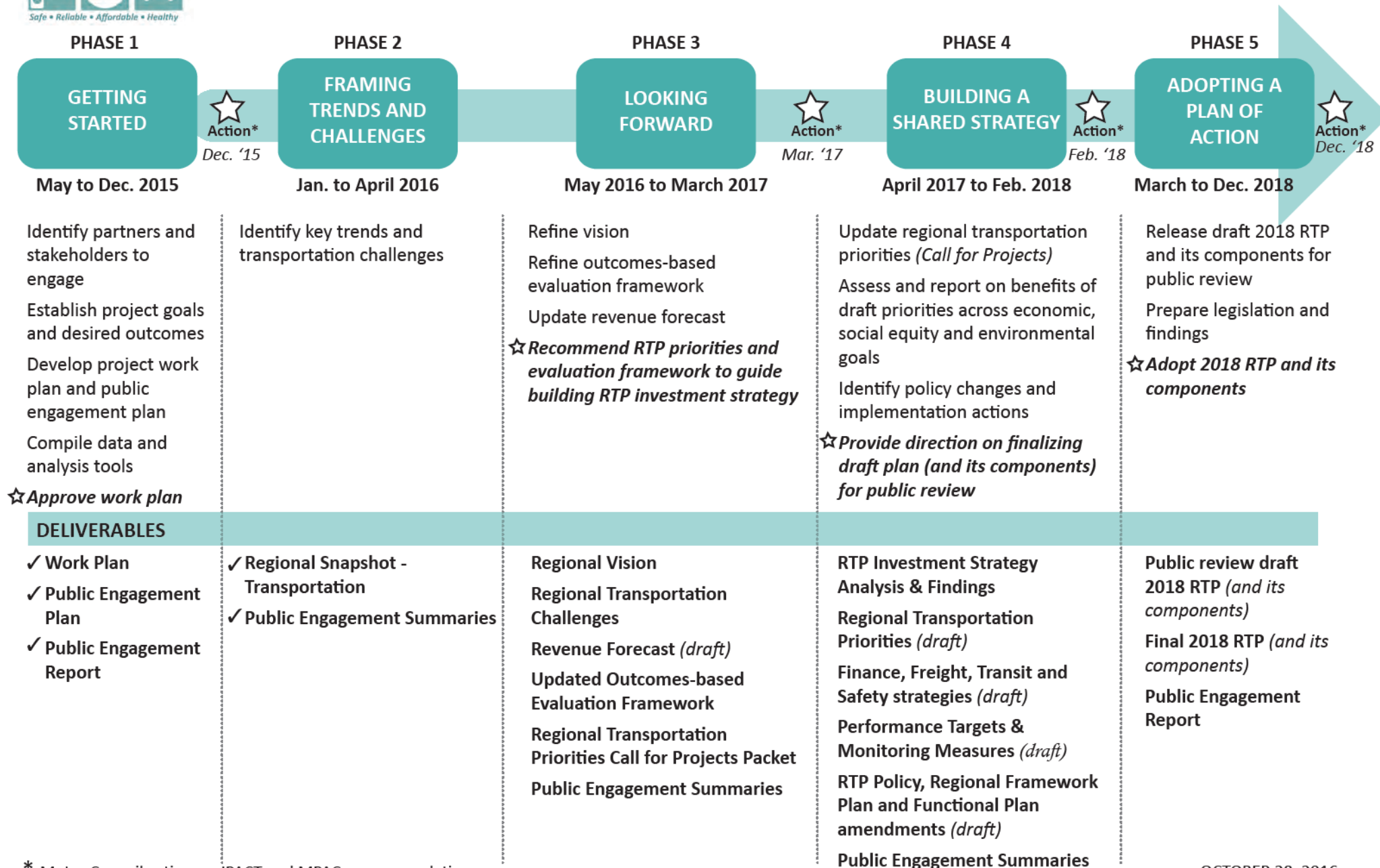
5

June/July 2018



# 2018 REGIONAL TRANSPORTATION PLAN WORK PLAN

*Getting there with a connected region*



\* Metro Council action on JPACT and MPAC recommendations

OCTOBER 28, 2016





## 2018 Regional Transportation Plan Update Key Work Plan Elements & Deliverables

*(reflects work plan adopted by the Metro Council by Resolution No. 15-4662)*

**What:** Strategic update to the Regional Transportation Plan (RTP) that provides an updated vision and sharpened investment strategy for advancing the Region 2040 plan and meeting the transportation challenges of a growing region.

**How:** An inclusive, place-based approach to:

- tell the story of our changing region and funding realities
- better connect plan outcomes to the values and experiences of people living and working in the region
- ground policy development and implementation in community values
- strengthen public confidence and demonstrate the need for increased investment to achieve healthy, equitable communities and a strong economy
- increase regional collaboration and coordination
- build new partnerships and strengthen existing ones to inspire innovative solutions to social, economic and environmental challenges facing the region.

Key Work Plan Elements	How will this element be incorporated into the RTP?	How does this element support regional funding discussions?
<b>Transportation Equity Analysis</b>	Applies an equity focus on key areas of the RTP, including: <ul style="list-style-type: none"> <li>• Community engagement</li> <li>• Project and program evaluation</li> <li>• Policy development</li> <li>• Implementation</li> </ul>	Engages new health, academic and community partners.  Provides a vetted set of priority outcomes to inform identifying near and long-term transportation investment priorities to advance equity.
<b>Regional Transit Strategy</b>	Provides an updated transit vision for the region, including: <ul style="list-style-type: none"> <li>• Updates High Capacity Transit (HCT) System map</li> <li>• Integrates Enhanced Transit Corridors (ETC) concept and identifies potential corridors</li> <li>• Updates transit system expansion policy to inform near-term and long-term HCT and ETC investment priorities</li> <li>• Incorporates TriMet's Service Enhancement Plans,</li> </ul>	Engages new community, business and transit partners.  Provides a comprehensive, vetted system of near and long-term transit service and investments.

Key Work Plan Elements	How will this element be incorporated into the RTP?	How does this element support regional funding discussions?
	<p>SMART Master Plan and City of Portland Streetcar expansion plans into the RTP definition of the regional system</p> <ul style="list-style-type: none"> <li>• Defines transit supportive investments to improve transit access, speed and reliability</li> <li>• Identifies near and long-term investment priorities</li> </ul>	
<b>Regional Freight Plan Update</b>	<p>Provides an updated freight vision for the region, including:</p> <ul style="list-style-type: none"> <li>• Updates regional freight network</li> <li>• Identifies key freight trends and challenges (including bottlenecks)</li> <li>• Identifies near and long-term investment priorities</li> </ul>	<p>Engages new freight, business and community partners.</p> <p>Provides an updated, vetted set of near and long-term freight investments.</p>
<b>Regional Transportation Safety Plan Update</b>	<p>Formally adopts and incorporates an updated Regional Transportation Safety Plan as an element of the RTP, including:</p> <ul style="list-style-type: none"> <li>• Identifies high-injury corridors for the region</li> <li>• Defines what constitutes a “safety project”</li> <li>• Creates a regional zero death and serious injury goal</li> <li>• Updates the safety action plan for the region, including recommendations on near- and long-term investment priorities</li> </ul>	<p>Engages new health and community partners.</p> <p>Helps create consensus and a shared vision of how to achieve aggressive safety targets through investments in the transportation system.</p> <p>Defines high-injury corridors as the vetted priority areas to inform near and long-term safety investments.</p>
<b>Designing Livable Streets Update</b>	<p>Updates regional street design element of the RTP, including:</p> <ul style="list-style-type: none"> <li>• Updated program of best practices for trail and roadway design</li> <li>• Updated design policy for local plans and RFFA allocations</li> </ul>	<p>Engages new community partners.</p> <p>Establishes vetted design expectations for federally- and regionally-funded projects that reinforce 2040 Growth Concept land use and transportation</p>

Key Work Plan Elements	How will this element be incorporated into the RTP?	How does this element support regional funding discussions?
	<ul style="list-style-type: none"> <li>Builds local partnerships and support for advancing best practices on-the-ground</li> </ul>	<p>outcomes.</p> <p>Creates consensus on design that is needed to build support for funding projects in the region.</p>
<b>Regional Finance Strategy</b>	<p>Forecasts transportation revenues to:</p> <ul style="list-style-type: none"> <li>Identify expected federal, state, regional and local transportation funding through 2040 based on current revenue trends</li> <li>Forecast future operations and maintenance costs through 2040. Identify strategies to stabilize existing funding sources</li> <li>Consider new funding sources needed to address forecast funding shortfall</li> </ul>	<p>Engages local, regional and state governmental partners responsible for transportation finance.</p> <p>Provides a factual and vetted foundation of funding realities facing the region and possible avenues for addressing expected funding constraints.</p>
<b>Project &amp; Program Investments &amp; Outcomes-Based Performance Evaluation</b>	<p>Informs updates to near- and long-term investment priorities for the regional system within revenue forecasts, responding to regional policy through an outcomes-based performance evaluation framework. This includes:</p> <ul style="list-style-type: none"> <li>Financially-constrained system of investments that reflects current funding realities</li> <li>Priority system of projects needed to more fully address regional transportation challenges if more funding were available</li> </ul>	<p>Provides a vetted, comprehensive menu of near-term and long-term active transportation, arterial, freight, ITS, regional programs, safety, throughway, and transit investments.</p>
<b>Digital Mobility</b>	<p>Expands the transportation system management and operations (TSMO) policy</p>	<p>Engages new partners.</p> <p>Provides a policy framework</p>

Key Work Plan Elements	How will this element be incorporated into the RTP?	How does this element support regional funding discussions?
	<p>framework in the RTP to:</p> <ul style="list-style-type: none"> <li>• more directly support public and private investments in new technologies and digital mobility</li> <li>• ensure that new technologies continue to support 2040 outcomes</li> <li>• integrate federal Smart Cities initiative digital tools and technologies to inform identifying near- and long-term investment priorities</li> </ul>	<p>that addresses emerging technologies, including self-driving vehicles, car share and rideshare services and transportation electrification.</p> <p>Defines near-term and long-term operational investment priorities that maximize system efficiency, thereby preserving limited transportation funds for capital projects and potentially deferring the timing and/or need for some capital projects, allowing for others to be advanced more quickly.</p>
<b>Resilience</b>	<p>Identifies potential risks and vulnerability of the regional transportation system:</p> <ul style="list-style-type: none"> <li>• Seismic and natural hazards</li> <li>• Climate change and extreme</li> <li>• Extreme weather events</li> </ul>	<p>Engages new community and academia partners.</p> <p>Provides a vetted policy framework for investments that respond to these emerging areas of concern.</p>





## 2018 Regional Transportation Plan Update

# Community Engagement Strategy for 2015-16

This document summarizes community engagement activities completed to date, consistent with the public engagement plan adopted by the Metro Council by Resolution No. 15-4662.

## 1. Outcomes identified in 2018 RTP update public engagement plan for providing meaningful public engagement and demonstrating how input has influenced the decision

### a) Demonstration of how decision-making process operates and where/when to provide input

- Pre-forum community leader meetings where decision-making process is reviewed
- [proposed strategy] Schedule of policy and technical meetings where conversation will continue after Forum 3 and identify opportunities for public comment at these meetings

### b) Outreach that is early and often in planning and decision-making process to shape policies and outcomes

#### SCOPING PHASE 2015

##### *Stakeholder interviews*

- 13 community leaders, 10 business leaders, and 9 elected leaders [October]

##### *Online survey*

- 1,824 respondents to quick poll on transportation issues most impacting quality of life [July 17 to Aug. 15, 2015]

##### *Discussion groups (participants self-selected through community partners)*

- Questions on transportation issues most impacting quality of life with 140 participants from six culturally specific community based organizations [Spring and Fall 2015]

#### UNDERSERVED COMMUNITIES FOCUSED ENGAGEMENT 2016

##### *Focus groups (participants randomly selected through research firm)*

- Three focus groups of 7-12 participants each [June 2016]
  - One each for Asian Americans, African Americans, Latinos
  - Questions on transportation issues most impacting quality of life

##### *Discussion groups (participants self-selected through community partners)*

- Two discussion groups of 15-20 participants each [June 2016]
  - One each facilitated by Momentum Alliance and Native American Youth and Family Center
  - Questions on transportation issues most impacting quality of life

##### *Online survey*

- 321 respondents to survey focused on “minority voices” on transportation issues and priorities [June 26 to Sept. 17, 2016]

**FORUMS 2016**

- **Forum 1, April 22, 2016:** 11 community leaders/10 business leaders invited
  - **Forum 2, Sept. 23, 2016:** 18 community leaders/16 business leaders invited
  - **Forum 3, Dec. 2, 2016:** Focus on improving attendance of those invited, strategically adding both community and business leaders
- c) Tracking of, and follow-up with participants on, how input is considered by decision-makers and impacts final action or outcome of decision**
- *Under development for end of update process*
- d) Public evaluation of public engagement experience**
- Poll of community leaders *prior to forum* on their measures of success for participation
    - Adjustments made in response to input to forum format, agenda prior to forum
  - Poll of community leaders *after forum* about extent to which forum delivered those measures
    - Adjustments made in response to input to future forum format, agenda
  - Debrief with select community leaders after forums
  - Evaluation survey distributed to all participants after each forum
- e) Monitoring of success in reaching historically underserved communities as well as youth and older adults**
- Incorporation of Strategic Plan to Advance Racial Equity, Diversity and Inclusion objectives from Goals A and B in forum planning and implementation
  - *Under development for end of update process*

**2. RTP Pilot Financial Partnership Program**

- Metro seeks to engage experts and stakeholders from the broader community to help guide, inform, and improve our projects, policies, programs and plans.
- Recognizing that attending engagement opportunities during typical working hours are a barrier for some community members to participate in events where their community expertise, input and perspectives are requested, Metro entered into a limited form of financial partnerships with individuals representing community-based organizations for forums 1 through 3.
- Stipends of \$90 per forum provided for invited community leaders
  - Forum 1, four community leaders received stipends
  - Forum 2, 12 community leaders received stipends



## MPAC Worksheet

**Agenda Item Title:** 2018 RTP: Introduction to the Regional Transit Strategy Vision

**Presenter:** Jamie Snook, Metro

**Contact for this worksheet/presentation:** Jamie Snook, Metro staff (jamie.snook@oregonmetro.gov)

### **Purpose/Objective**

The purpose of this presentation is to provide an introduction to the regional transit vision and the emerging transit concepts for the regional transit vision.

The Regional Transit Strategy will serve as the transit component of the 2018 Regional Transportation Plan update and will provide a coordinated vision and strategy for transit in the Portland metropolitan region. The plan will be developed building off the Climate Smart Strategy and in coordination with the Future of Transit vision being developed by TriMet through its Service Enhancement Plans, the South Metro Area Regional Transit (SMART) Master Plan, Portland Streetcar expansion and other transit planning efforts around the region.

### **Action Requested/Outcome**

No formal action is required. Staff is seeking feedback from MPAC member regarding the following issues:

- Identifying priorities for the Regional Transit Vision
- Updating the High Capacity Transit (HCT) Plan, and
- Integrating the Enhanced Transit Corridors concept into the Regional Transit Strategy (RTS)

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

Metro, TriMet and SMART staff presented to MPAC, in summer of 2015, at the beginning of the Regional Transit Strategy and 2018 Regional Transportation Plan process. Metro staff and partners from around the region have been working together to create a clear Regional Transit Vision and develop transit specific system-wide performance measures.

### **What packet material do you plan to include?**

- Regional Transit Vision Memorandum (October 31, 2016)
- 2009 Adopted High Capacity Transit System Map
- Draft Enhanced Transit Corridors Concept Paper (October 4, 2016)
- Draft Enhanced Transit Corridors Typologies (October 4, 2016)
- Regional Transit Strategy Factsheet (Fall 2016)

# Memo

Date: Monday, October 31, 2016  
To: Metro Policy Advisory Committee (MPAC) and interested parties  
From: Jamie Snook, Principal Planner  
Subject: 2018 RTP: Regional Transit Strategy Vision

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## **Purpose**

The purpose of this memorandum is to provide an overview and status of the regional transit strategy (RTS) and vision. The RTS will serve as the transit component of the 2018 Regional Transportation Plan (RTP) update and will provide a coordinated vision and strategy for transit in the Portland metropolitan area.

This is a critical time to consider how transit fits into our larger regional goals. The Climate Smart Strategy, adopted in 2014, demonstrated clear direction to invest more in our transit system in order to meet regional goals and objectives related to sustainability and carbon emissions. Current growth rates will require us to expand transit service in order to minimize provide people with transportation options and minimize congestion. Transit also helps the region meet its equity and access goals as it is a primary mode of transportation for people with disabilities and youth, getting them to work, school, and helping to attain access to daily needs. Investments in the transit system should focus on reducing peak hour congestion, improving air quality, and enabling more efficient freight movement within and through the region.

The RTS is being developed in coordination with the Future of Transit vision developed by TriMet through its Service Enhancement Plans, the South Metro Area Regional Transit (SMART) Master Plan and . The RTS also includes updating the Regional High Capacity Transit (HCT) System Plan and the Transit System Expansion Policy, adopted in 2010. By coordinating these efforts, the RTS will guide investments in the region's transit service, capital investments and transit supportive elements. The plan will provide local and regional partners with a blueprint for prioritizing transit and transit-supportive improvements that support the regional transit vision.

## **Action Requested**

Staff is seeking feedback from MPAC members regarding the following issues:

- Identifying priorities for the Regional Transit Vision
- Updating the High Capacity Transit (HCT) Plan, and
- Integrating the Enhanced Transit Corridors concept into the Regional Transit Strategy (RTS).

## **Regional Transit Vision**

This is an important time to update the Regional Transit Vision. With continued regional growth come challenges such as more congestion, higher housing prices, and strained access to employment. Residents, elected officials, and community organizations view increased transit service as a critical part of the overall solution to these challenges. If we want to become the region we laid out in our 2040 Growth Concept, we must continue improving transit's accessibility, service, reliability, and reach.

Through the RTS, we are engaging community leaders and transit providers, serving the region, to develop a shared vision and investment strategy. Building off of the Climate Smart Strategy, the regional transit vision is: ***to make transit more frequent, convenient, accessible and affordable.*** . Investments in the transit system should help achieve the following outcomes:

- **Frequent:** Align frequency and type of transit service to meet existing and projected demand and in support of local and regional land use and transportation visions.
- **Convenient:** Make transit more convenient and competitive with driving by improving transit speed and reliability through priority treatments (e.g., signal priority, bus lanes, queue jumps, etc.) and other strategies. Improve customer experience by ensuring seamless connections between various transit providers, including transfers, information and payment.
- **Accessible:** Provide safe and direct biking and walking routes and crossings that connect to stops to make transit more accessible. Expand the system to improve access to jobs and essential destinations/daily needs.
- **Affordable:** Ensure transit remains affordable, especially for those dependent upon it.

The Regional Transit Vision will be comprised of three components:

1. **Transit service improvements:** local and regional transit service improvements designed to meet current and projected demand in line with local and regional visions.
2. **Capital investments:** new enhanced transit strategies such as signal priority, queue jumps, etc or high capacity transit options such as bus rapid transit or light rail.
3. **Transit supportive elements:** including policies such as Travel Demand Management and physical improvements such as sidewalks, crossings and complementary land uses.
- 4.

As we explore our region's transit needs, it is important to remember that limited funding is a challenge faced by regions and transit providers throughout the country. Many jurisdictions have taken to raising funds at the local level as a means to leverage the limited federal funds available. While our region is potentially preparing for a funding measure to support specific transit capital improvements, this will not address additional needs identified by stakeholders in the regional transit vision, nor will it support increased operations or service investments.

### **Regional Transit Vision – Transit service improvements**

These include the planned local and regional transit service improvements being developed by transit providers throughout the region. Examples include: TriMet's Service Enhancement Plans, SMART Master Plan, and future Portland Streetcar service lines. These service improvements will be incorporated into a regional transit service typology that reflects the varying needs for different types of transit service throughout the region based on demand and geography, and aligns them with existing and proposed local and regional land use and transportation visions.

### **Regional Transit Vision – Capital investments**

The capital investment component of the regional transit vision includes two types of investments: High Capacity Transit (HCT) and Enhanced Transit Corridors (ETC). These investments are intended to connect regional centers, town centers, and to improve the speed and reliability of major transit lines. Transit providers throughout the region are collaborating on a coordinated transit vision which includes transit service improvements and capital investments

### **High Capacity Transit (HCT)**

In 2009, the region concluded a process to create the first high capacity transit system plan since the 1980s. This plan defined a tiered list of HCT corridors for prioritization, which was adopted into the RTP in 2010. Since the HCT plan adoption, the region has moved forward with the top two priorities: Southwest Corridor and Powell-Division Corridor. *See attached HCT System map.*

Since 2009, a number of changes have occurred that necessitate updating the HCT plan. For example in 2009:

- The Lake Oswego Transit and I-5 Bridge Replacement projects were identified as moving forward toward project development at the time of approval. However, these projects are currently on hold;
- An HCT line was identified that connected the town center of Damascus, which recently voted to disincorporate; and
- The Division bus rapid transit project is moving forward and will meet some critical near term needs in one part of the Powell-Division corridor; the Powell corridor HCT needs remain unmet.

These changes, as well as other regional developments, should be reflected in the newest HCT plan.

### **Enhanced Transit Corridors**

The Enhanced Transit Corridors (ETC) concept was developed as a way to increase speed, capacity and reliability in congested and heavy used transit corridors, which have been consistently eroding as the region continues to grow and congestion worsens in these key corridors. These improvements tend to be relatively low cost, context sensitive, and quickly deployed when compared to HCT projects. This concept is not necessarily new, but helps provide a framework for advancing a toolkit of improvements to transit corridors where they would provide the greatest benefit. These tools include technological improvements, such as next-generation, connected vehicle-based Transit Signal Improvement, and off-board payment to infrastructural improvements, such as queue jumps and transit-only rights of way.

While there are numerous possible packages of investment that could be implemented, Enhanced Transit Corridors could be grouped into two major categories (Levels 1 & 2), based on the type, intensity, and extent of the investments deployed and requested by the partner jurisdiction. The key distinctions between the two typologies are the intensity of improvements and potential funding mechanisms.

The ETC concept builds off of the Service Enhancement Plan (SEP) to restore and expand transit service or could be prioritized through the updated System Expansion Policy. The ETC is an opportunity to provide speed and reliability to corridors that need it most.

**ETC Level 1** consists of smaller scale enhanced transit improvements, most likely ranging from \$10-\$50 million. These are lower intensity investments that could include spot improvements on more than one line, modest improvements throughout a corridor or focused investments on key segments of a corridor. Typical ETC Level 1 improvements could include:

- More frequent service
- Wide stop spacing
- Improved stops with shelter amenities, bike racks, real-time arrival information, and improved lighting
- Next-generation transit signal priority
- Right-turn-except-bus lanes or Business Access and Transit (BAT) lanes where feasible/needed

**ETC Level 2** consists of medium to large scale enhanced transit improvements, likely to include FTA as a funding partner and range from \$50 - \$300 million (FTA Capital Investment Grant, Small Starts maximum funding levels). These are higher intensity levels of investments in infrastructure treatments to meet corridor-wide transit needs. Projects identified here would need to meet the

System Expansion Policy criteria and FTA Capital Investment Grant Small Starts requirements. Typical ETC Level 2 are inclusive of the Level 1 improvements, but also may include:

- Longer articulated buses and in some cases streetcar
- Level or near-level boarding platforms
- Exclusive transit lanes / grade separation crossings where feasible/needed

See attached description of Enhanced Transit Corridors for more detailed information.

### **Transit vision – transit supportive elements**

The regional transit vision also includes transit supportive elements. These are infrastructural improvements, programs, policies, and strategies that bolster demand for and improve access to transit in the region. These supportive elements include efforts such as Travel Demand Management (TDM) strategies such as individualized and employer-based travel training, mixed use and higher intensity development with managed parking, improved pedestrian and bicycle safety and connections, integrated trip planning and payment systems, and transit signal priority.

### **Transit vision - implementation**

There are different ways in which the transit vision will be implemented. First, prioritizing and implementing transit service improvements are the responsibility of the transit provider, though they also rely on regional/local partnerships that demonstrate support for increased transit demand and improved performance. Transit service improvements are programmed on an annual basis through the Annual Service Plan process, which is tied to the service providers' annual budget processes, though service improvements may themselves be implemented at multiple times during the year.

Through the Regional Transit Strategy, we will be updating the Transit System Expansion Policy to provide a clear and transparent process for prioritizing and implementing capital investments related transit capital improvements. The updated System Expansion Policy will provide the framework and guidance to help answer the question "What are the region's next priorities?". The update will include an analysis of how funding and policies have changed locally, regionally, and federally. This, in turn, will allow for an update to the process to prioritize projects on readiness and merit. This would apply to any project seeking regional support to pursue FTA Capital Investment Grants such as Small Starts, New Starts or Core Capacity funding.

### **Next Steps**

We have a lot of work ahead of us and we are continuing to work with regional partners through the Transit Work Group to help define the Regional Transit Vision in more detail as well as develop a clear and transparent Regional Transit Strategy implementation process. Below is a short list of next steps:

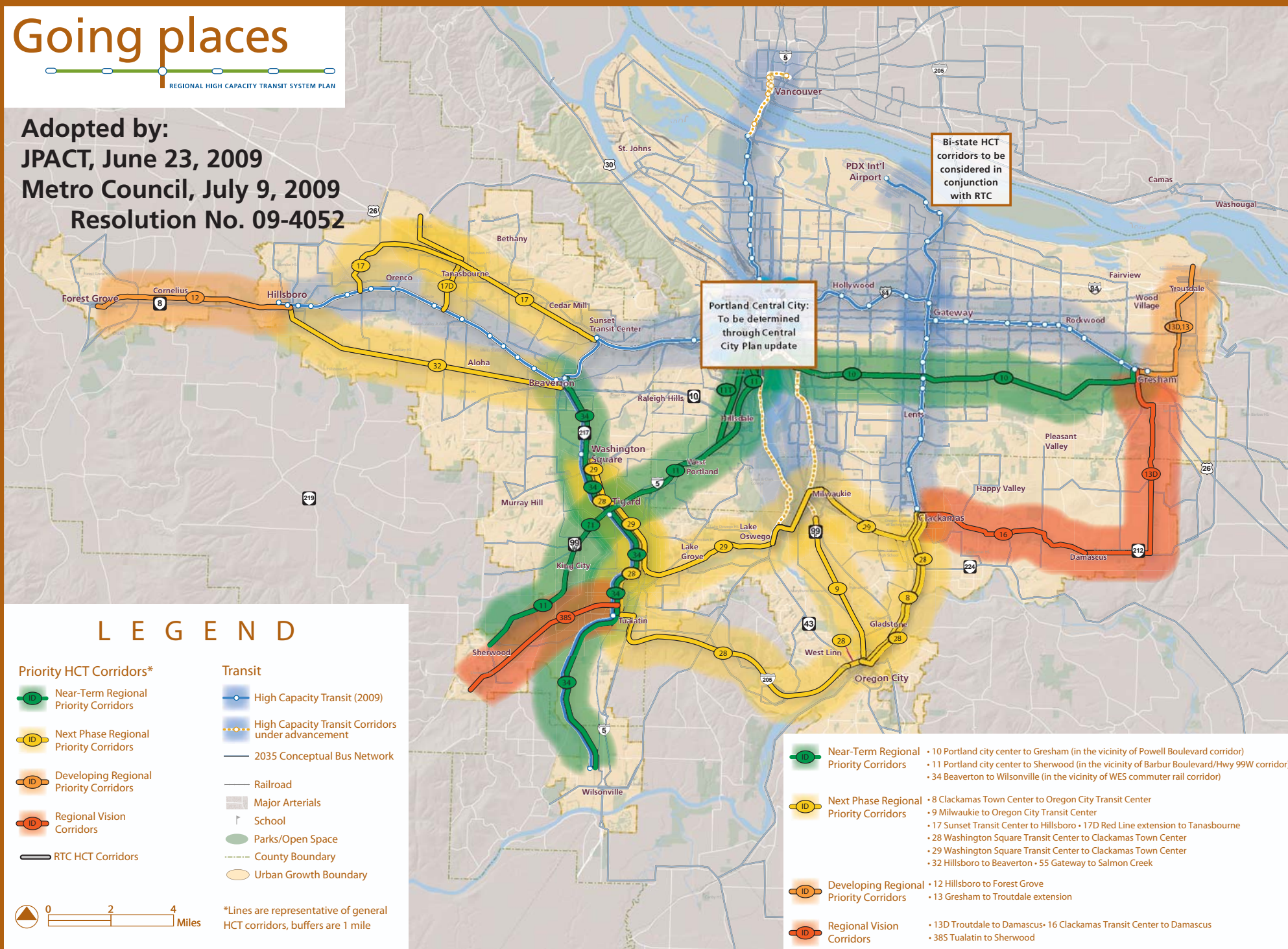
- Develop a **Regional Transit Vision**, including service improvements and transit-supportive elements (Fall 2016/Winter/Spring 2017)
- **Update High Capacity Transit plan** (Fall 2016/Winter 2017)
- Refine Enhanced Transit Corridors concept and incorporate into Vision if supported (Winter/Spring 2017)
- **Update Transit System Expansion Policy** and implementation process (Winter/Spring 2017)
- Provide coordination between RTS and RTP working groups and products (ongoing)



# Going places



Adopted by:  
JPACT, June 23, 2009  
Metro Council, July 9, 2009  
Resolution No. 09-4052





# Enhanced Transit Corridors

**Concept:** In order to meet the Portland Metro region’s environmental, economic, livability and equity goals as we grow over the next several decades, we need new partnerships to produce transit service that provides increased capacity and reliability yet is relatively low-cost to construct, context-sensitive, and able to be deployed more quickly throughout the region where needed. Producing this “Enhanced Transit,” through the co-investment of multiple partners could be a major improvement over existing service, including our region’s best Frequent Service bus lines, but less capital-intensive and more quickly implemented than larger scale high capacity transit projects the region has built to date. Investments would serve our many rapidly growing mixed-use centers and corridors and employment areas that demand a higher level of transit service but are not seen as good candidates for light rail, or larger bus rapid transit with fully dedicated lanes.

Enhanced Transit partnerships could also create quicker, higher quality transit connections to connect low-income and transit-dependent riders to jobs, school and services. It would allow for a more fine-grained network of higher-quality transit service to complement our high capacity transit investments, relieve congestion and grow ridership throughout the region in response to the region’s rapid growth.

**Enhanced Transit Toolbox:** Enhanced Transit service could include elements such as:

- More frequent service
- Longer articulated buses, and in some corridors, streetcar
- Wider stop spacing
- Improved stops with shelter amenities, weather protection, real-time arrival information, bike racks, improved lighting
- Level or near-level boarding platforms
- Off-board electronic fare payment with all-door boarding
- Next-generation transit signal priority
- Intersection treatments such as queue jumps
- Intersection treatments such bus-only signals, and bypass lanes
- Right-turn-except-bus lanes or Business Access and Transit (BAT) lanes
- Exclusive transit lanes where feasible
- Access to Transit investments including sidewalks and pedestrian crossings
- Policy commitments to support transit ridership (TDM Programs, adopted policies to prioritize transit reliability)

**Enhanced Transit Corridor “Levels:”** While there are numerous possible packages of investment using the toolbox listed above, projects could be grouped into two major categories or Levels, based on the type, intensity and extent of the toolbox elements deployed. See attached table for potential descriptions.

**Level 1: Smaller Scale Enhanced Transit (\$10-50 Million)**

**Level 2: Medium to Large Scale Enhanced Transit with FTA funding partnerships (\$50-300 Million)**

**Implementation:** Implementation of this new program would need to occur region-wide to identify co-investment opportunities for TriMet service increases and develop a comprehensive, prioritized investment pipeline of Enhanced Transit Corridors ready to be included in regional plans and upcoming funding requests. Timing is perfect as TriMet has recently begun implementing its Service Enhancement Plan service improvements and should be leveraging partnerships with local jurisdictions in that investment. Development of the higher level corridors now is also crucial to ensure that Enhanced

Transit is able to receive funding in upcoming regional and state funding opportunities and to establish eligibility for federal funding where appropriate.

DRAFT

Enhanced Transit Corridors Typologies  
DRAFT: 10/4/2016

	Level	Potential Improvements	Potential Funding	Rough Cost Range
Foundation	TriMet Service Enhancement Plan Partnerships with Local Jurisdictions Projects prioritized through TriMet's Service Enhancement Plan process in coordination with jurisdiction(s).	<ul style="list-style-type: none"><li>• More frequent service, increased span, route restructuring or new service coverage</li><li>• Intersection treatments such as queue jumps</li><li>• Improved stops with basic amenities</li><li>• Access to Transit investments including sidewalks and pedestrian crossings</li><li>• Policy commitments to support transit ridership (TDM Programs, adopted policies to prioritize transit reliability)</li></ul>	TriMet Service Local Jurisdiction(s) Institutional or Private Partner(s)	\$2-10 Million
	1 Level 1 Enhanced Transit Lower intensity of investment, infrastructure treatments may be focused as follows: - Modest investments throughout a corridor - Focused investments on key segments of a corridor - Spot improvements on more than one line.  Cost range driven primarily by number and type of investments.  Projects prioritized through TriMet's Service Enhancement Plan process in coordination with jurisdiction(s) proposing project. Projects identified as Enhanced Transit Corridors in RTP, with RTP project description and cost defined by project partners.	<ul style="list-style-type: none"><li>• More frequent service</li><li>• Wider stop spacing</li><li>• Improved stops with shelter amenities, bike racks, real-time arrival information, and improved lighting</li><li>• Next-generation transit signal priority</li><li>• Intersection treatments such as queue jumps where feasible</li><li>• Intersection treatments such bus-only signals, and bypass lanes where feasible</li><li>• Right-turn-except-bus lanes or Business Access and Transit (BAT) lanes where feasible</li><li>• Potentially longer articulated buses in some corridors</li><li>• Access to Transit investments including sidewalks and pedestrian crossings, ADA treatments</li><li>• Policy commitments to support transit ridership (TDM Programs, adopted policies to prioritize transit reliability)</li></ul>	TriMet Service Local Jurisdiction(s) Institutional or Private Partner(s) State (Connect Oregon, STIP, Transportation Package, ODOT Region 1) Regional Funding Measure TriMet Capital TIGER	\$10-50 Million
	2 Level 2 Enhanced Transit Higher intensity of investment, infrastructure treatments within a corridor and includes new vehicles.  Projects likely to seek and qualify for FTA Small Starts program grants. Projects prioritized through Regional Transit System Expansion Policy criteria.  Level 2 projects will likely fall within Sub-levels, based on type, extent and intensity of investments. The proposed sub-levels A-C correspond to the FTA Project Justification Warrants, which are based on total project capital cost and existing weekday transit trips in the corridor. These Warrants represent corridor performance at levels that would receive sufficient ratings under the Small Starts program for the project to qualify for the program.	<ul style="list-style-type: none"><li>• More frequent service, at least meeting Federally required minimums</li><li>• Longer articulated buses, and in some corridors, streetcar, including unique branding</li><li>• Wider stop spacing</li><li>• Improved stops with shelter amenities, bike racks, real-time arrival information, improved lighting</li><li>• Level or near-level boarding platforms</li><li>• Off-board electronic fare payment with all-door boarding</li><li>• Next-generation transit signal priority</li><li>• Intersection treatments such as queue jumps where feasible</li><li>• Intersection treatments such as bus-only signals, and bypass lanes where feasible</li><li>• Right-turn-except-bus lanes or Business Access and Transit (BAT) lanes where feasible</li><li>• Exclusive transit lanes where feasible</li><li>• Grade separated crossings where needed</li><li>• Access to Transit investments including sidewalks and pedestrian crossings, ADA treatments</li><li>• Policy commitments to support transit ridership (TDM Programs, adopted policies to prioritize transit reliability)</li></ul>	<b>FTA Small Starts</b> TriMet Service TriMet Capital Local Jurisdiction(s) Institutional or Private Partner(s) State (Connect Oregon, Transportation Package, STIP, ODOT Region 1) Regional Funding Measure	A) \$50-100 Million*  B) \$100-175 Million*  C) \$175 Million-\$300 (maximum allowed under Small Starts grant program;* requires significant local funds to overmatch, given FTA funding structure )

\*Use Small Starts Warrants to help inform project evaluation and prioritization



## 2018 Regional Transit Strategy

*Working together, we can create a shared vision and investment strategy that helps partners prioritize transit and transit-supportive investments over the next 25 years.*

The Portland region is growing as more people are attracted to our quality of life. Transit is a key component of that quality of life and a crucial piece of our transportation system.

A collaborative approach builds on good transit planning around the region to create a single coordinated vision: to make transit more frequent, convenient, accessible and affordable.



*“The greatest barriers to the use of public transportation are time and reliability. If people can’t count on transit to get them there at a specific time, they’re not going to use it.”*

*—Adria Decker Dismuke, Milwaukie resident*

### Partnerships and leadership will create a great future

The Regional Transit Strategy engages community leaders and all transit providers serving the region to define a shared vision and investment strategy for transit in the region. Together we can develop a clear path towards implementation that can be embraced by a wide coalition of users and stakeholders.

### Transit providers involved

- Canby Area Transit
- South Clackamas Transportation District
- Clackamas Community College Shuttle
- C-TRAN
- Portland Streetcar Inc
- Ride Connection
- Salem-Keizer Transit
- Sandy Area Metro
- SMART
- TriMet
- Yamhill County Transit Area



Whether your roots in the region run generations deep or you moved to Oregon last week, you have your own reasons for loving this place – and Metro wants to keep it that way. Help shape the future of the greater Portland region and discover tools, services and places that make life better today.

#### **Metro Council President**

Tom Hughes

#### **Metro Council**

Shirley Craddick, District 1  
Carlotta Collette, District 2  
Craig Dirksen, District 3  
Kathryn Harrington, District 4  
Sam Chase, District 5  
Bob Stacey, District 6

#### **Auditor**

Brian Evans

Metro Regional Center  
600 NE Grand Ave.  
Portland, OR 97232-2736

## **Contact**

Contact Metro regional transportation planning to receive periodic email updates and notices of public comment opportunities:

503-797-1750  
[trans@oregonmetro.gov](mailto:trans@oregonmetro.gov)  
[oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).



September 2016

## **Why this, why now?**

The region's Climate Smart Strategy demonstrated a clear consensus to invest more in our transit system, and now is the time to build on that momentum. This transit strategy will be a key component of the 2018 Regional Transportation Plan, which will update the region's shared vision and investment strategy for all of the ways people and businesses get around.

## **Solutions to meet growing challenges**

Transit service must expand to keep pace with growth, and an integrated system will help our communities grow the way they want to. Providing frequent and convenient transit gets employees to work and customers to businesses, supporting economic growth while reducing impacts to our natural environment.

Transit investments reduce peak hour congestion, creating less delay for people driving and freight movement. Transit is crucial for seniors, people with disabilities and youth, getting them to work, school or other places they need to go.

Building on the direction from the region's Climate Smart Strategy, the Regional Transit Strategy will define a shared vision that includes:

- local and regional transit service improvements
- new transit enhancement strategies, such as transit signal priority, queue jumps, etc.
- high capacity transit investments, such as light rail and bus rapid transit
- additional capacity and reliability improvements on our existing transit system
- transit supportive elements such as sidewalks, crossings and complementary land uses.

Funding is limited, and we have multiple transportation priorities. But if not addressed, the challenges of growth will compromise our region's economic prosperity and quality of life. Acting together, the region will build a clear vision for the Portland region's transit service and a policy foundation for getting there.

The MAX carries nearly **1 in 3** Sunset/Banfield commuters during rush hour.

Residents of the region take over **100 million** rides on transit every year.

“Better reliability in transit time is also a key factor. Without it folks get anxious, trains get crowded and people have an additional concern when making the decision on how to get somewhere.” –Survey response, February 2016

## **What's next?**

- fall/winter 2016: regional transit vision
- spring 2017: shared transit investment strategy

**Find out how to be involved – and more – at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).**



Materials following this page were distributed at the meeting.



# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: November 8, 2016  
To: Metro Council  
Cc: Urban Growth Readiness Task Force  
From: Ted Reid, Principal Regional Planner  
John Williams, Deputy Director of Planning and Development  
Subject: Urban Growth Readiness Task Force recommendations

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## **Background on Task Force**

As part of its 2015 urban growth management decision, the Metro Council expressed its intent to work with its partners to explore possible improvements to the region's urban growth management processes. Specifically, the Metro Council seeks more flexibility to respond to city proposals for modest residential urban growth boundary (UGB) expansions into urban reserves. Council President Hughes has convened an Urban Growth Readiness Task Force that has met four times since May to develop recommendations to achieve that flexibility.

The Task Force, which in addition to President Hughes includes Councilors Collette and Chase, found consensus around several recommendations.<sup>1</sup> This memo provides an overview of the Task Force's consensus recommendations and next steps for advancing them. These recommendations advance the Council's direction that it will take an outcomes-based approach to growth management decisions and that urban reserves represent the maximum anticipated urban footprint for the region through the year 2060.

## **Overview of concepts recommended by the Task Force**

The Task Force recommends three concepts to implement this program in the nearer term. The Task Force recommends making a fourth concept (UGB exchanges) a longer-term discussion item. The three recommended concepts are generally described as follows:

### **1. Clarify expectations for cities proposing modest residential UGB expansions**

The Task Force has recommended that cities that propose residential UGB expansions should make the case that they are implementing best practices for providing needed housing in their existing urban areas as well as in the proposed expansion area. The Task Force has recommended that staff continue to work with the Metro Technical Advisory Committee (MTAC) to achieve a balance between certainty and flexibility in proposed Metro code amendments.

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<sup>1</sup> The Task Force agreed that "consensus" meant they could all live with the recommendations even if they may individually prefer something different.

2. Seek greater flexibility for determining regional housing needs

The Task Force has recommended pursuing changes to state law to allow for a mid-cycle growth management decision process that would be capped at a total of 1,000 gross acres of expansion per mid-cycle decision. The Task Force also recommended that mid-cycle decisions be made three years after the completion of a decision under the standard six-year cycle (one mid-cycle decision per six-year cycle).

3. Seek greater flexibility when choosing among urban reserves for UGB expansion

The Task Force has recommended that the Council have the flexibility to choose among the urban reserves being proposed for expansion by cities rather than being required to assess all urban reserves. The Task Force further recommends that this flexibility be limited to mid-cycle decisions.

**Next steps for development of the Task Force's recommended concepts**

Some of the Task Force's recommendations require changes to Metro code or decision-making processes while others require changes to state law:

	<b>Changes to Metro decision making processes</b>	<b>Changes to Metro code</b>	<b>Changes to state law</b>
Concept 1 - Clarify expectations for cities proposing expansions	x	x	
Concept 2 - Seek greater flexibility for determining regional housing needs	x	x	x
Concept 3 - Seek greater flexibility when choosing among urban reserves for UGB expansion	x	x	x
Concept 4 – Facilitate UGB exchanges	Recommended for longer-term discussion		

Changes to decision-making processes:

Changes to Metro decision-making processes can help to implement concepts 1, 2 and 3. Council has directed staff that it intends to make its next urban growth management decision – based on a new urban growth report (UGR) – by the end of 2018. In early 2017, Metro staff plans to bring to a Metro Council work session a draft work program that provides an overview of the proposed process that will lead to a Council growth management decision in late 2018. That work program will describe how the process will incorporate the Task Force's recommendations as well as previous direction from the Metro Council, which integrates well with the Task Force's recommendations.

The Metro Council has previously directed that it will take an outcomes-based approach to decision making. A basic conceptual underpinning of this approach is that growth could be accommodated in a number of ways that may or may not involve UGB expansions and that each alternative for accommodating growth presents considerations and tradeoffs. For instance, different decisions could lead to different numbers of households choosing to locate inside the Metro UGB versus neighboring



cities such as Newberg or Battle Ground. An outcomes-based approach also acknowledges that housing development will only occur when there is adequate governance, infrastructure finance, and market demand, and therefore any discussion of adding land to the UGB should focus on identifying areas with those characteristics.

Generally – pending Council direction – the proposed process would be conducted as follows in upcoming growth management decisions:

- Acknowledged urban reserves represent the maximum anticipated urban footprint for the region through the year 2060. For this process to function properly, urban and rural reserves need to be acknowledged in all three counties.
- The Metro Council's urban growth management decisions would respond to actual expansion proposals from cities, moving away from some of the more abstract ideological debates that have occurred in the past.
- Metro would maintain the existing six-year urban growth management decision cycle that involves the completion of a new UGR that assesses regional growth capacity. Per previous Council direction, the next UGR and growth management decision will be considered by Council in 2018. During this and future decisions, the Metro Council would give additional policy consideration to whether proposed residential UGB expansions would help to attract more housing growth to the UGB that may otherwise locate in neighboring cities outside the UGB.
- Cities proposing expansions into acknowledged urban reserves would be expected to make a compelling case that the expansion would advance local and regional desired outcomes. Metro code amendments will seek to clarify those expectations. Cities would have opportunities to make their case to MPAC and the Metro Council.
- The draft 2018 UGR – to be released in summer 2018 – will present analyses of the how several growth management options could perform. These analyses will be grounded in the actual expansion proposals being made by cities as well as analysis of how a decision not to expand the UGB could perform. The draft UGR will stop short of identifying housing capacity gaps or surpluses, but will instead focus on regional outcomes of different options.
- During the fall of 2018, the Metro Council – with the Metro Policy Advisory Committee's (MPAC) advice – will provide direction to staff on whether there is a compelling regional need for proposed expansions. Likewise, the Council will choose a point forecast within the range forecast. Based on this direction, staff will complete a final housing needs analysis for Council consideration in the winter of 2018. That Council decision may also include UGB expansions into urban reserves, if needed.
- In addition to the six-year cycle, the Metro Council would consider mid-cycle city proposals for modest residential UGB expansions into acknowledged urban reserves. Mid-cycle UGB expansions would be handled by a Metro Council decision to make minor amendments to the most recent UGR to recognize city proposals that address housing needs that were not previously anticipated. The first possible mid-cycle decision could occur in 2021, three years after the 2018 UGR.

- Mid-cycle UGB expansions into acknowledged urban reserves would be limited to a region-wide maximum of 1,000 gross acres per mid-cycle decision. Within the 1,000-acre total cap, there would be no cap on how much acreage could go to an individual city.

#### Changes to Metro code:

Changes to Metro code can help to implement concepts 1, 2 and 3. The Task Force has requested that staff work with MTAC to begin drafting possible code amendments. This work is already underway. At its fourth meeting, the Task Force reiterated the need to balance flexibility and certainty in these code requirements. Reconciling those two objectives will take place through MTAC, MPAC and Council discussions.

Pending what happens in the legislature and pending region-wide acknowledgement of urban and rural reserves, potential changes to Metro code would come before MPAC and Council around the fall of 2017. However, these improvements can be fully implemented only when urban and rural reserves are acknowledged region-wide.

#### Changes to state law:

Changes to state law can help to implement concepts 2 and 3. The Task Force recommends that Metro staff work with the regional public agency lobbyist group and other stakeholders to develop legislative concepts. The Task Force recommends forming a coalition to advocate for these changes to state law and intends to meet again in January 2017 to organize for that effort. At their most recent meeting, Task Force members agreed that their consensus recommendation included a commitment not to oppose this legislation. However, the Task Force recognizes that legislative proposals may change as they are discussed in Salem and that individual Task Force members reserve the right to withdraw support if proposals veer too far from the Task Force's recommendations.

#### **Suggested overall timeline for implementing these concepts**

Fall 2016:	Task Force makes recommendations to the Metro Council
Fall 2016:	Metro Council provides direction on its 2017 legislative agenda.
January 2017:	Task Force reconvenes to review progress and organize a coalition for the 2017 session.
Early 2017:	Metro Council provides direction on a work program for the 2018 growth management decision.
Spring 2017:	Metro region coalition pursues legislative agenda.
Summer 2017:	MPAC recommends Metro code amendments based on Task Force suggestions. <sup>2</sup>
Fall 2017:	Metro Council considers changes to Metro code as recommended by MPAC.
Summer 2018:	Metro releases draft 2018 Urban Growth Report.
Fall 2018:	Metro Council, with MPAC's advice, provides initial direction on 2018 decision.
Winter 2018:	Metro Council, with MPAC's advice, makes 2018 urban growth management decision.
Winter 2021:	Metro Council, with MPAC's advice, considers mid-cycle city requests for UGB expansions.

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<sup>2</sup> To ensure that the Metro code works with possible changes to state law, the Metro Council would not take action on its code amendments until after the 2017 state legislative session.

# Regional Snapshot

# HOUSING

YOU ARE  
HERE

*With a growing economy and a high quality of life, the greater Portland area has attracted thousands of new residents in the past decade. Our popularity has strained our limited housing supply, however, and prices have soared while builders scramble to catch up to the demand.*

*Here are some things to know about housing affordability in the Portland region today.*

## Building homes, but playing catch-up

38



Average new dwellings constructed daily in 2015

120K



New households added in the past 10 years

20%

more new households than new housing permits



2006-2015

## The price squeeze

Renter incomes have not kept pace with rising rents

Percent increase, 2006 - 2015



72



Hours of work per week required to afford a one-bedroom apartment for a worker making minimum wage

*"You can work really hard and play by the rules and still not make anywhere near the money you need to live in this city... It's not a moral failure to need affordable housing in a city."*

Michael Parkhurst,  
Meyer Memorial Trust

## Where we stand

In 2015, greater Portland ranked

11th of 100

US metros in the cost to buy a home based on price-to-income ratios, up from 15th in 2014

Housing in Portland is the least expensive of major West Coast cities.



## A public need

14,300

Section 8 housing vouchers are in use in the four-county region



80,000

affordable housing units are needed to meet current demand in the area



*"If we want to have equitable schools, if we want to have equitable neighborhoods, if we want to have an equitable justice system, first and foremost, people have to have a place to go home."*

Prof. Marisa Zapata  
Portland State University



For more information and the rest of the story, visit:  
[oregonmetro.gov/snapshot](http://oregonmetro.gov/snapshot)

Data Sources: US Census Bureau; Johnson Economics; Greater Portland Pulse; Oregon Economics Department; 2015 Affordable Housing Inventory, Metro (2015).

2018 Regional Transportation Plan

# Building the Future We Want

JPACT briefing

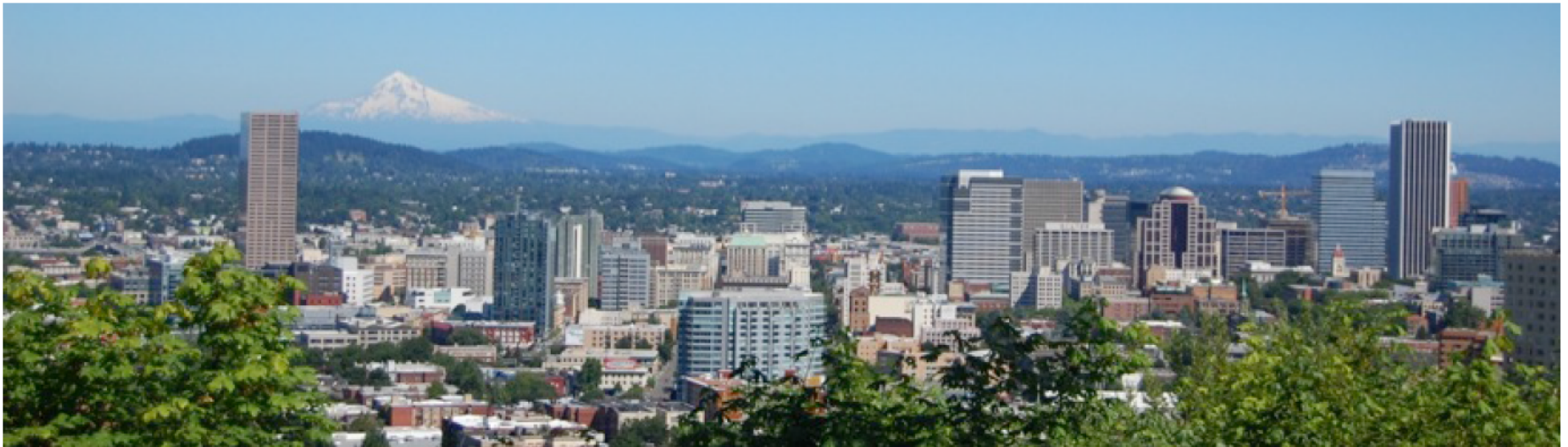
November 10, 2016



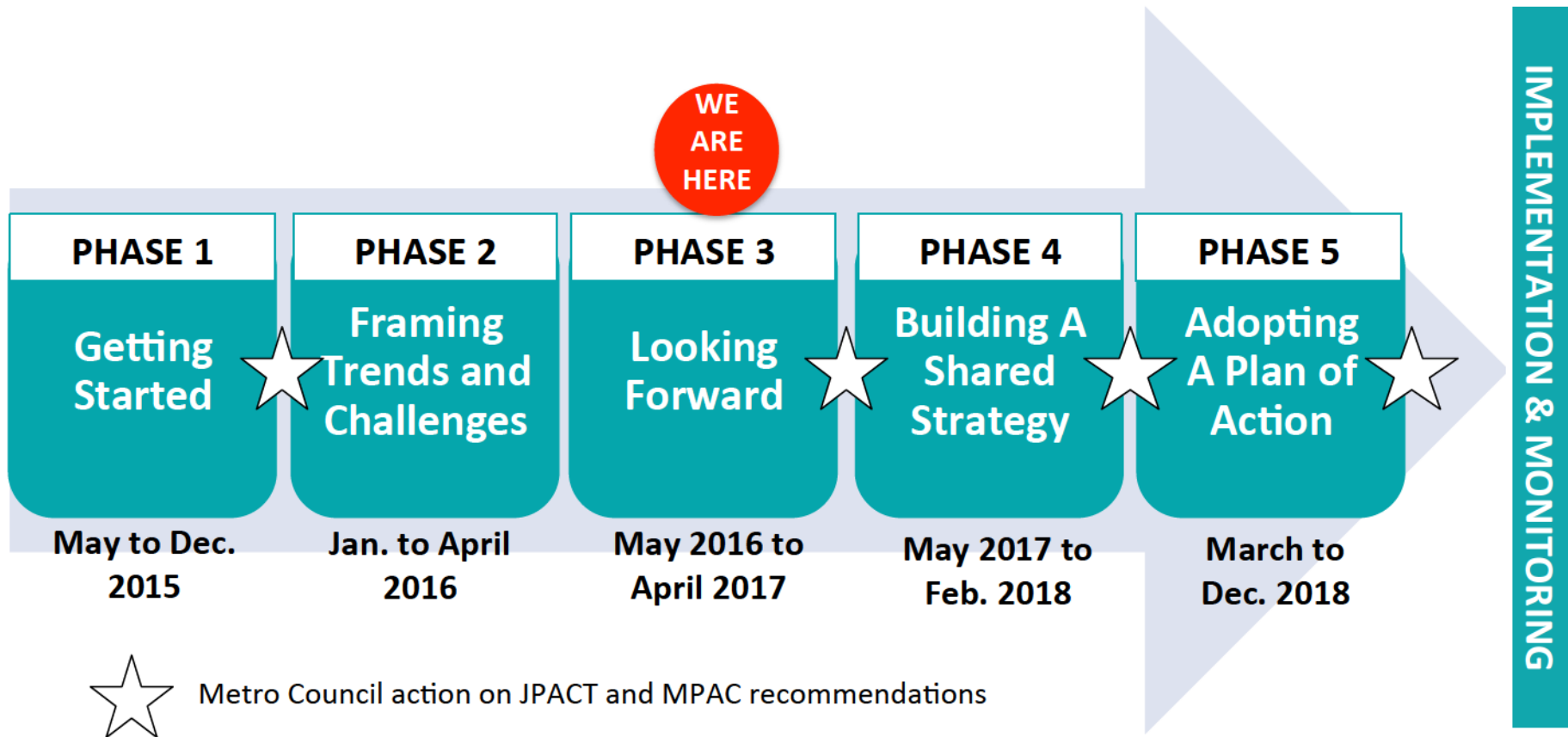


# Key outcomes for today

- Provide project update
- Preview Regional Leadership Forum 3



# Project timeline



# 2018 Regional Transportation Plan

Inclusive, collaborative

Engages new voices & partners

Builds on past efforts & actions

Continues focus on outcomes

Builds a path to future funding





# Challenges to our economic prosperity and quality of life

- Growth
- More congestion – people and goods
- Crashes and fatalities
- Aging infrastructure
- Earthquake vulnerability
- Shifts in technology
- Social disparities
- Gaps in transit, biking and walking connections
- Public health impacts
- Housing and transportation affordability and displacement
- Climate change and air quality



2018 RTP Quick Poll Surveys (2015 and 2016), Regional Snapshot on Transportation (2016), technical work group discussions (2016) and Regional Leadership Forums 1 and 2 (2016)



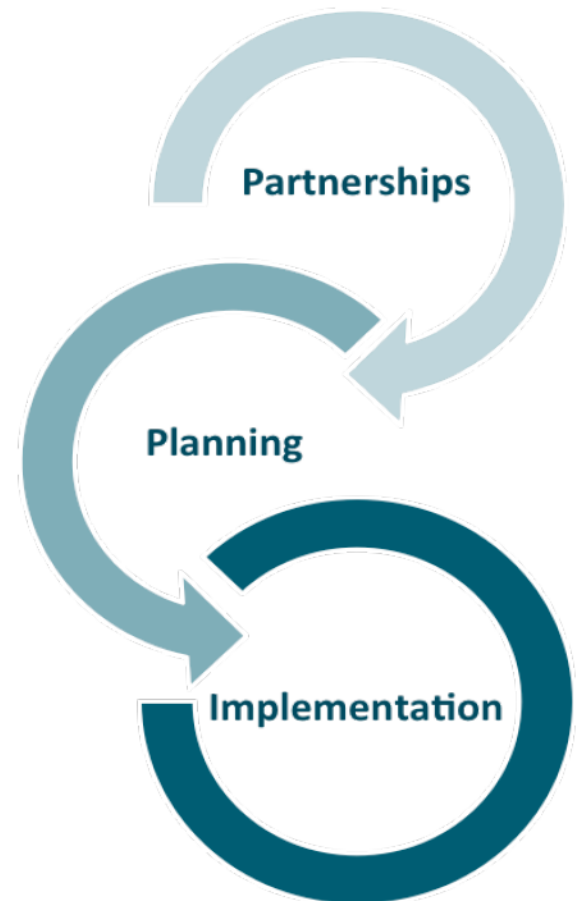
# Positioning the region for 2040

Our needs continue to outpace funding

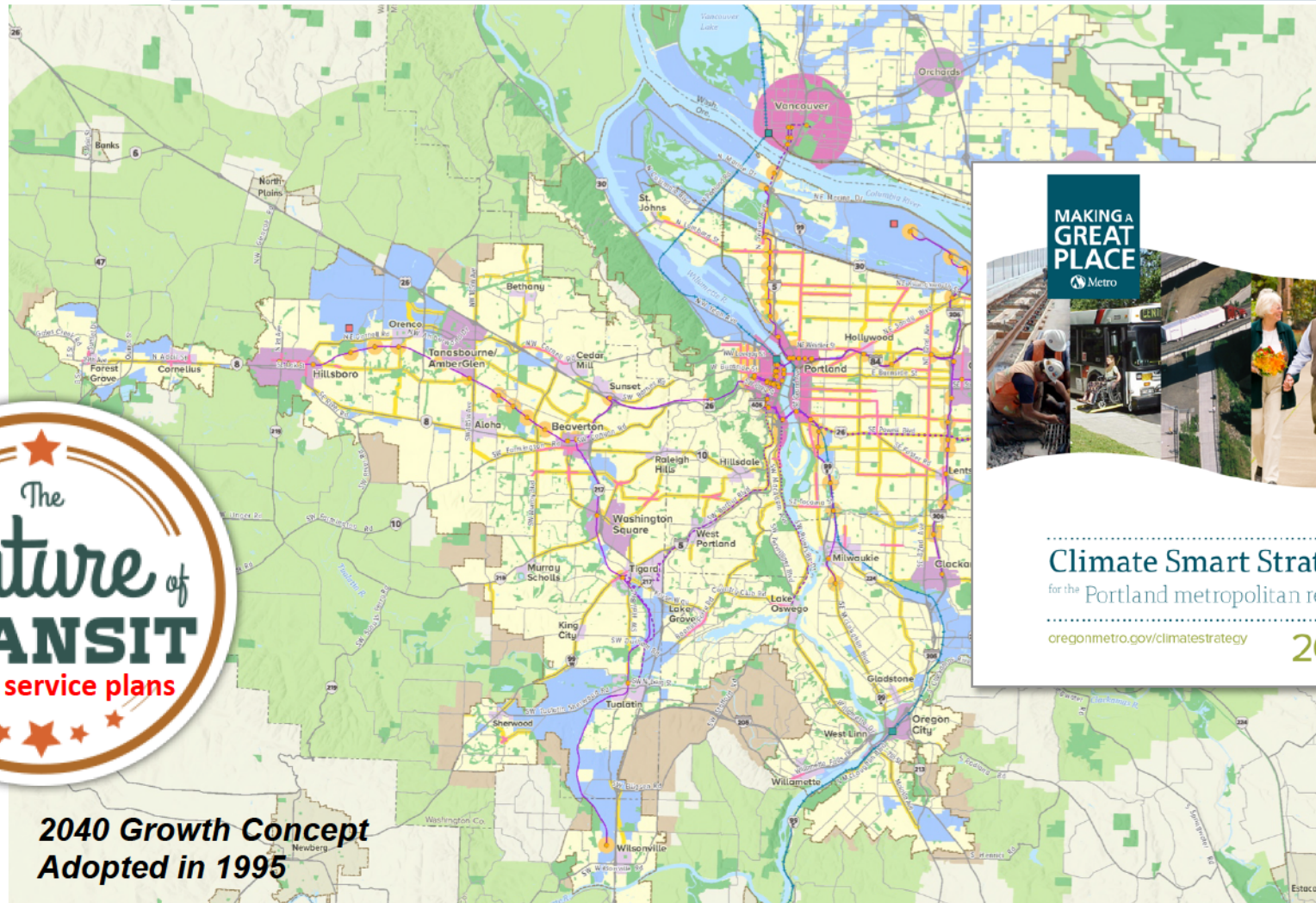
Our region's competitive advantage and success depend on how well we work together to build a path to future funding

This is an opportunity to continue being forward-thinking and innovative as we work toward the future we want

Now is the time to set a bold vision and clear priorities, and demonstrate the value of investing in transportation



# 2040 Growth Concept is our foundation



# Adopted policy goals

RTP Goals (first adopted in 2010 and amended in 2014)

## WHAT WE WANT TO ACHIEVE

Vibrant communities

Economic competitiveness

Transportation choices

Travel efficiency

Safety and security

Environmental stewardship

Public health

Reduced greenhouse gas emissions

## HOW WE GET THERE

Equity

Sustainability

Accountability



# Partner and public engagement

- ✓ Regional leadership forums
- ✓ Technical work groups
- ✓ Snapshot speakers series
- ✓ Briefings and stakeholder meetings/workshops
- ✓ Community tours and stories
- ✓ Project website
- ✓ Online polls
- ✓ Social media
- ✓ Newsfeeds and e-news



# Regional leadership forums

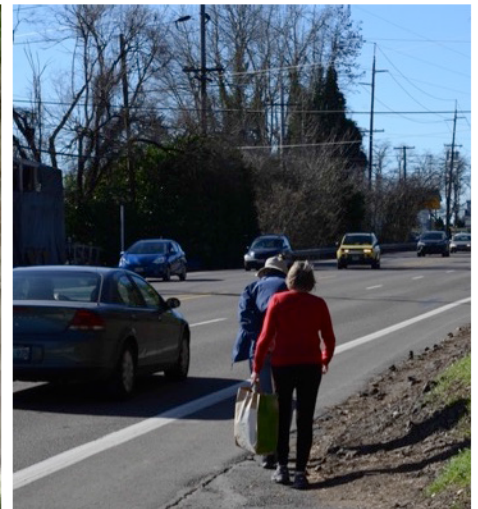
- 1 Exploring Big Ideas for Our Transportation Future 4/22/16 ✓
- 2 Building the Future We Want 9/23/16 ✓
- 3 Connecting Our Priorities to Our Vision 12/2/16
- 4 Drafting Our Shared Plan for the Region Dec. 2017
- 5 Finalizing Our Shared Plan for the Region June 2018



# DRAFT Vision for the future of transportation

Our region's shared economic prosperity and quality of life are sustained by a transportation system that provides every person and business in the region access to safe, reliable, affordable and healthy ways to get around.

*Compiled from Regional Leadership Forums 1 & 2 and RTP engagement activities*

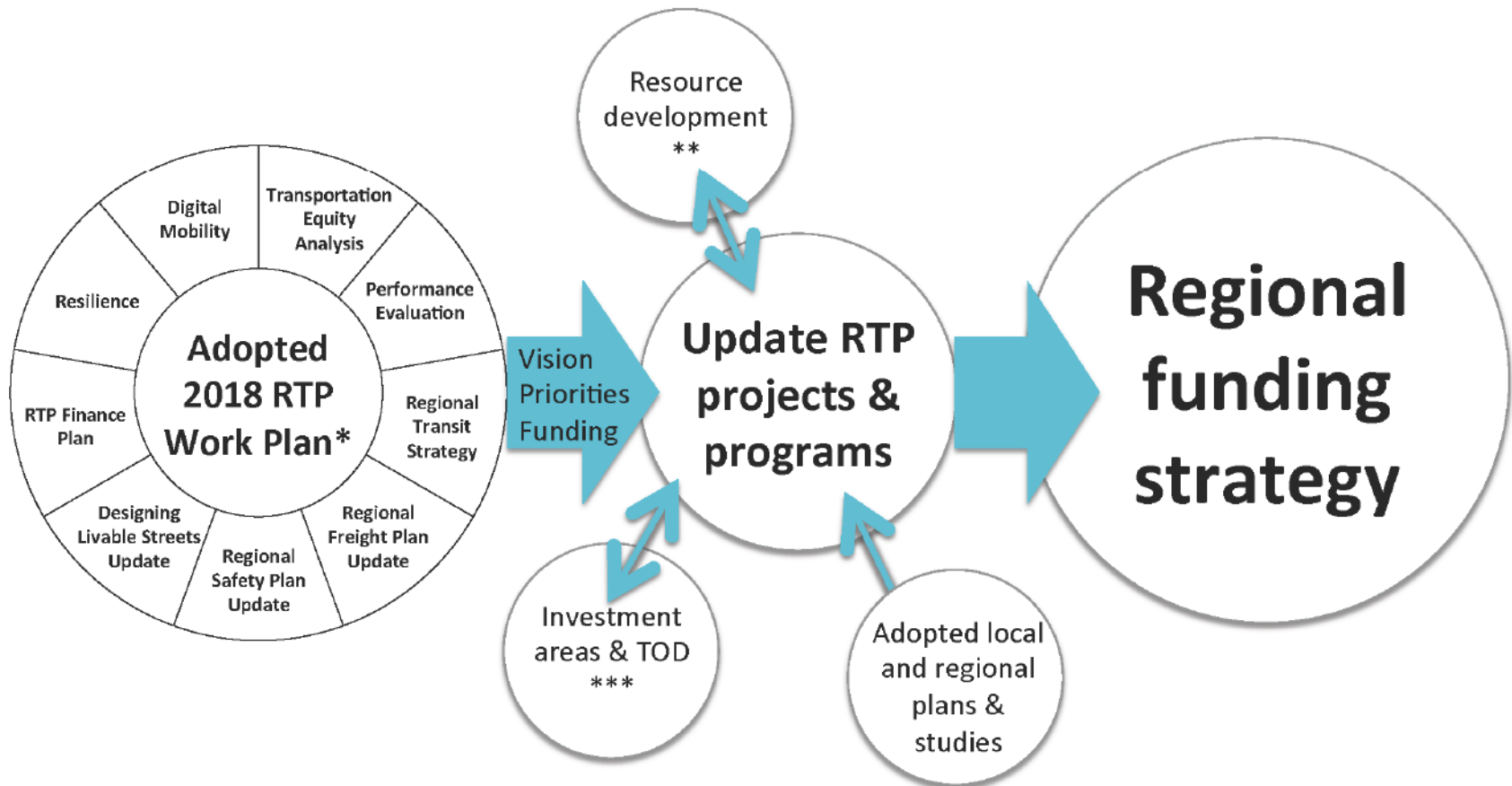




# The opportunity before you to build a compelling plan

1. Better link investment priorities with our vision and funding reality as we address regional transportation challenges and public priorities
  - 10-year priorities (2018 to 2027)
  - longer-term priorities (2028 to 2040)
2. Demonstrate the region's commitment to:
  - transparency and outcomes-based, performance-driven decisions
  - Climate Smart Strategy and RFFA "Big Five" and active transportation, including Safe Routes to Schools, Southwest Corridor and Powell-Division BRT
3. Build stronger partnerships, momentum and broad support for a compelling plan that can be funded and built:
  - advance state, regional, and local priorities
  - successfully compete for state and federal grants
  - attract and leverage future funding opportunities

# Building the RTP Investment Strategy and path to future funding



- \* Areas of focus identified during adoption of 2014 RTP, 2014 ATP and 2014 Climate Smart Strategy
- \*\* 2019-21 Regional Flexible Funds Allocation and project development activities
- \*\*\* Southwest Corridor Plan, Powell-Division BRT and transit-oriented development program activities



# Next steps

Dec. 2, 2016	Leadership Forum 3 on funding reality & priorities
Feb. to April 2017	Council, MPAC and JPACT discussions on building RTP investment strategy
April 2017	MPAC and JPACT recommendations on building RTP investment strategy
April 2017	Council direction on building RTP investment strategy
May 1 to June 23, 2017	RTP Call for Projects <i>(subject to Council action)</i>



# Questions for JPACT

Questions or comments on:

- Dec. 2 Regional Leadership Forum?
- 2018 RTP update?



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Metro

*Getting there*



*by transit*

# Regional Transit Strategy

*a component of the 2018 RTP*

JPACT briefing

November 10, 2016



# Regional Transit Strategy

Collaborative effort

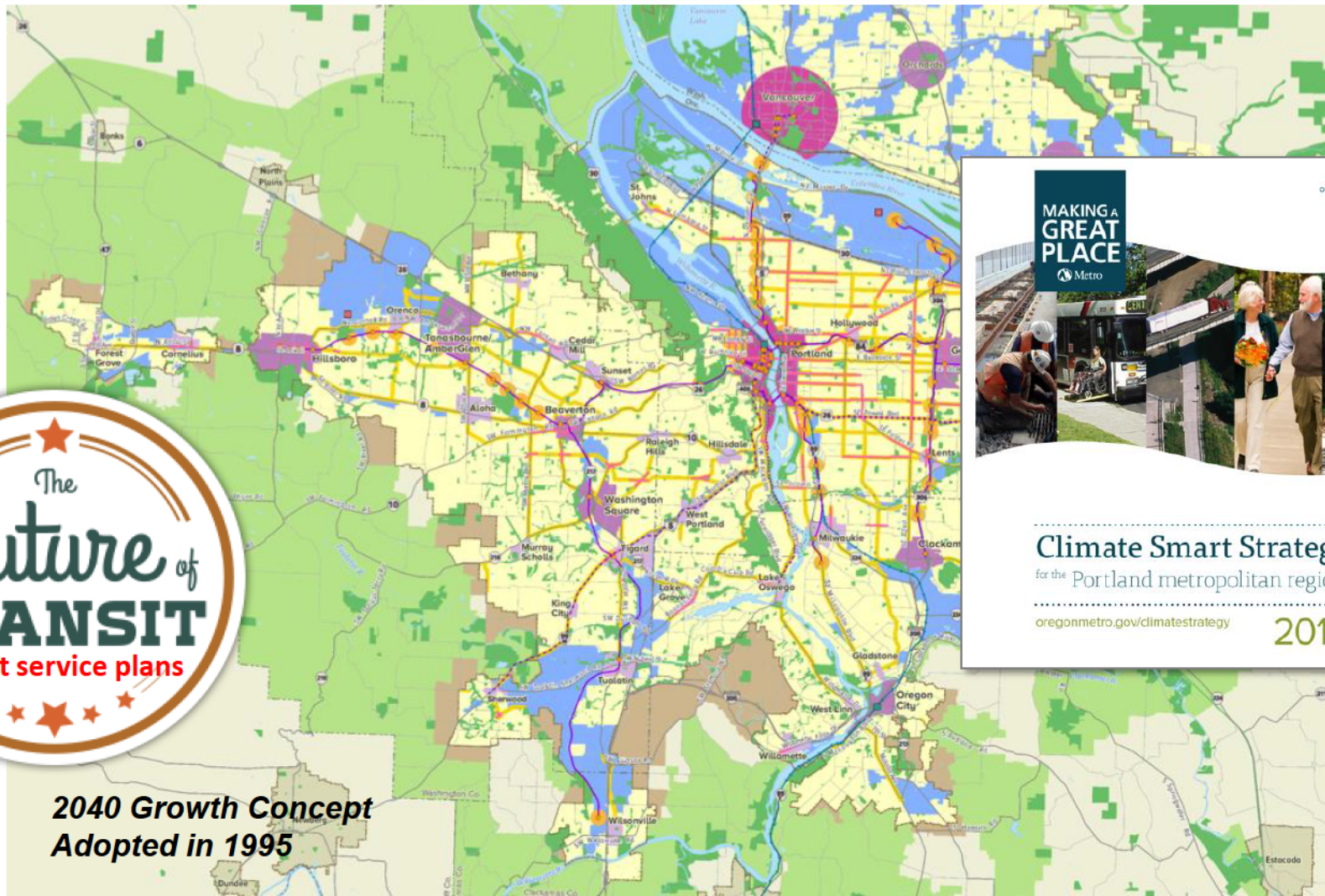
Building off past efforts

Path towards implementation

Transit component of the RTP



# 2040 Growth Concept is our foundation



**2040 Growth Concept  
Adopted in 1995**





# We are growing...



Portland region nears 2.4 million residents, growing by 41,000 last year

# Top 10 transit lines

## 2015 Top 10 transit lines (by ridership)

Number of boarding rides



1. MAX Blue Line



2. MAX Green Line



3. MAX Red Line



4. 4-Division/Fessenden



5. 72-Killingsworth/  
82nd Avenue



6. MAX Yellow Line



7. Portland Streetcar



8. MAX Orange Line



9. 20-Burnside/Stark



10. 75-Cesar Chavez/  
Lombard



# Connecting the strategy to our needs

Local & regional bus	Express bus, frequent bus, enhanced transit, streetcar	Bus rapid transit, light rail
Less frequent		More frequent
Less capacity		More capacity
Operates in mixed traffic		All/majority of operation in exclusive guideway
Streetscape doubles as stop or station		High investment in station access
Supports linear development		Supports nodal development
Connects home, work, school and play		Connects regional and town centers
Locally funded		Federally funded

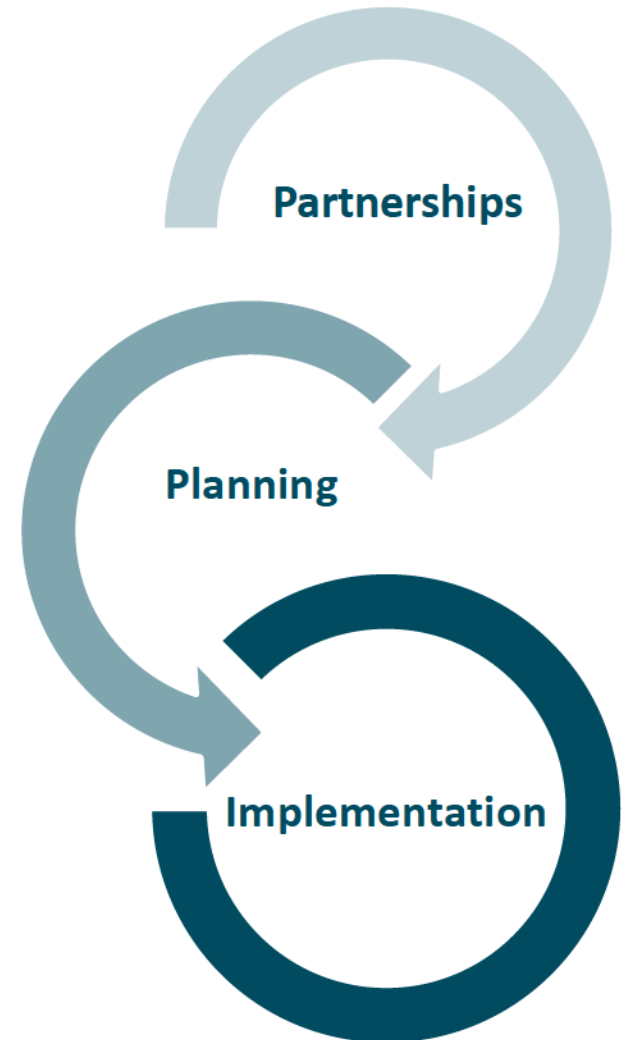
# Connecting the strategy to our needs...

Figure 3.9: Station area density targets for high capacity transit modes



# Regional Transit Vision

To make transit more  
frequent, convenient,  
accessible and  
affordable



# Regional transit vision

## Transit service

- TriMet
- SMART
- Portland Streetcar
- Ride Connection
- CTRAN
- CAT
- SAM
- Salem-Keizer
- Other transit providers
- CTP

## Capital investments

- Enhanced transit corridors
- High capacity transit

## Transit supportive elements

- Bike/pedestrian improvements
- First/last mile
- TOD investments
- Affordable housing strategy
- Land use plans
- ITS/technology
- Shared mobility

# Regional transit vision

## Transit service

- TriMet
- SMART
- Portland Streetcar
- Ride Connection
- CTRAN
- CAT
- SAM
- Salem-Keizer
- Other transit providers
- Coordinated Transportation Plan





# Regional transit vision



## Capital investments

- High Capacity Transit
- Enhanced Transit Corridors

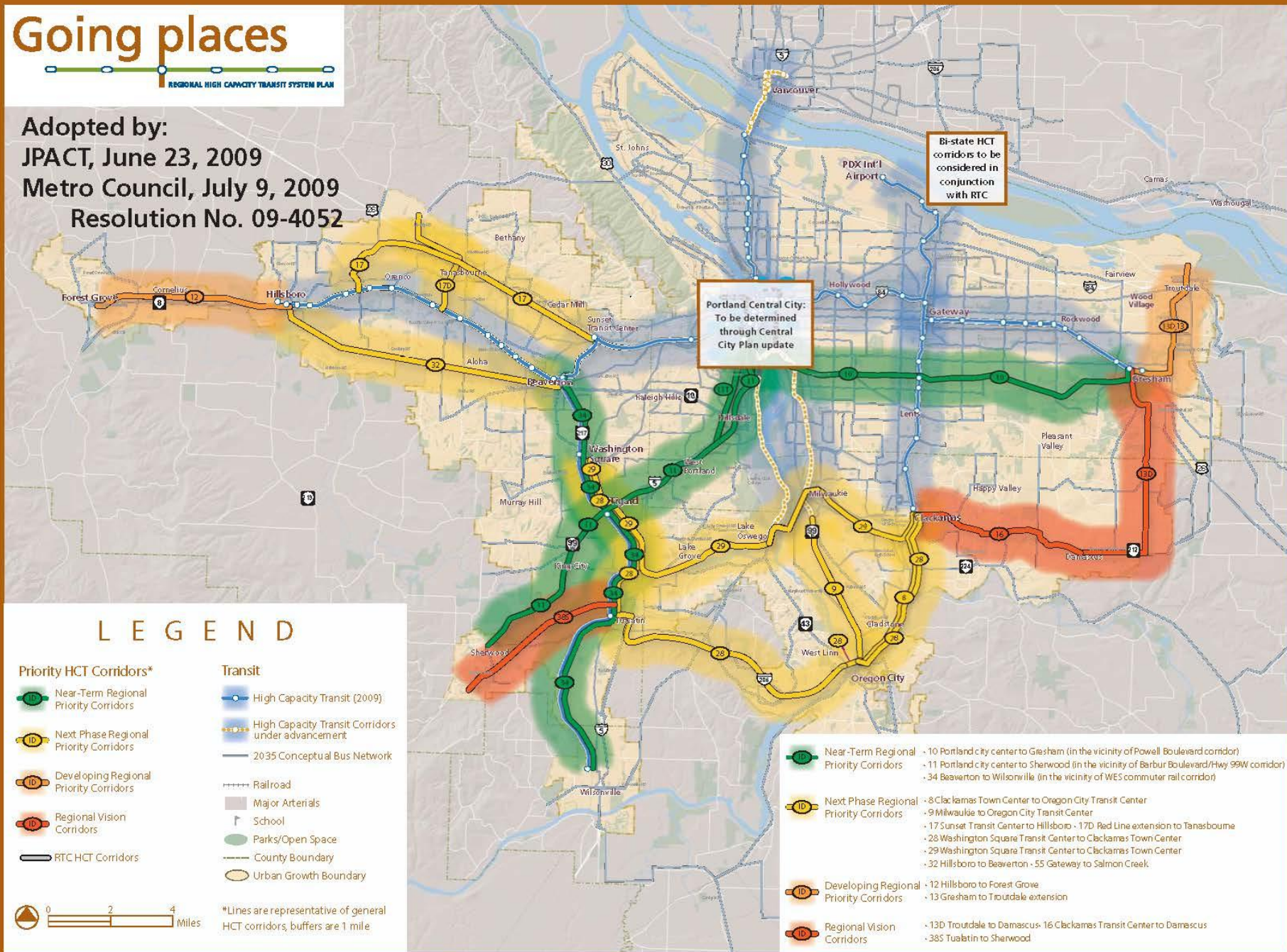




# Going places



Adopted by:  
JPACT, June 23, 2009  
Metro Council, July 9, 2009  
Resolution No. 09-4052



# Enhanced transit corridors...

Increase capacity and reliability

Relatively low cost and context sensitive

Deployed quickly





# Enhanced transit corridors...

Enhanced Transit service could include elements such as:

More frequent service

queue jumps

Articulated buses or streetcar

bus-only signals, and bypass lanes

Wider stop spacing

Right-turn-except-bus lanes or Business Access and Transit (BAT) lanes

Improved shelters and amenities

Exclusive transit lanes where feasible

Level or near level boarding

Access to Transit investments

Transit signal priority

Policy commitments to support transit ridership

# Enhanced transit corridors...

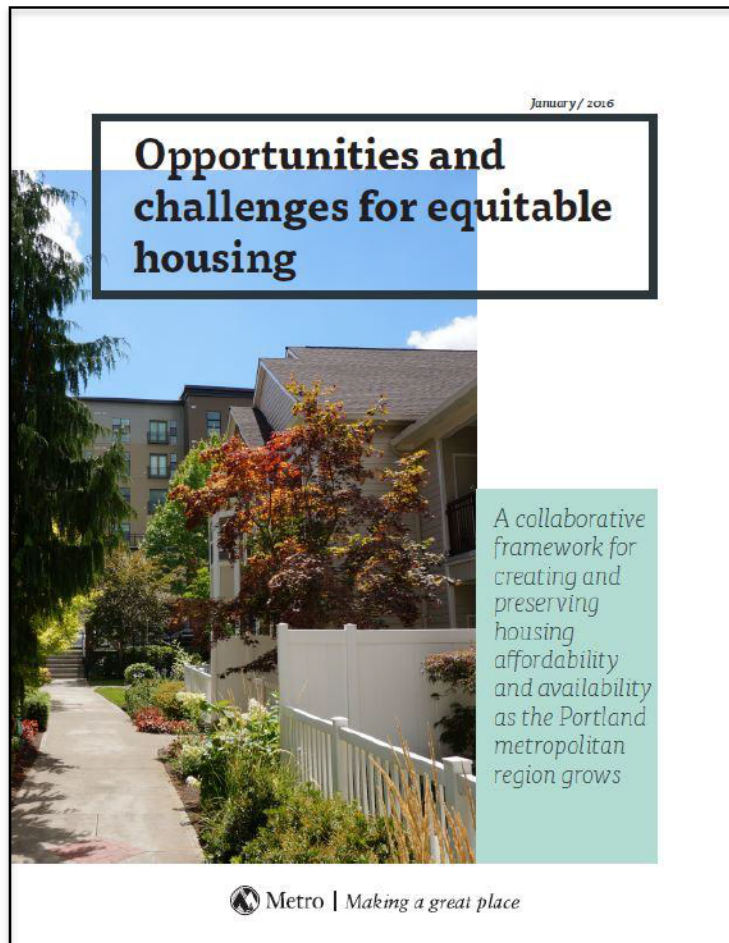
Building off of the Service Enhancement Plans...

Enhanced Transit Corridor “Levels:”

Level 1: Smaller Scale Enhanced Transit (\$10-50 Million)

Level 2: Medium to Large Scale Enhanced Transit with FTA funding partnerships (\$50-300 Million)

# Regional transit vision



## Transit supportive elements

- Bike/pedestrian improvements
- First/last mile
- TOD investments
- Affordable housing strategy
- Land use plans
- ITS/technology
- Shared mobility

# Regional transit vision

## Transit service

- TriMet
- SMART
- Portland Streetcar
- Ride Connection
- CTRAN
- CAT
- SAM
- Salem-Keizer
- Other transit providers
- CTP

## Capital investments

- Enhanced transit corridors
- High capacity transit

## Transit supportive elements

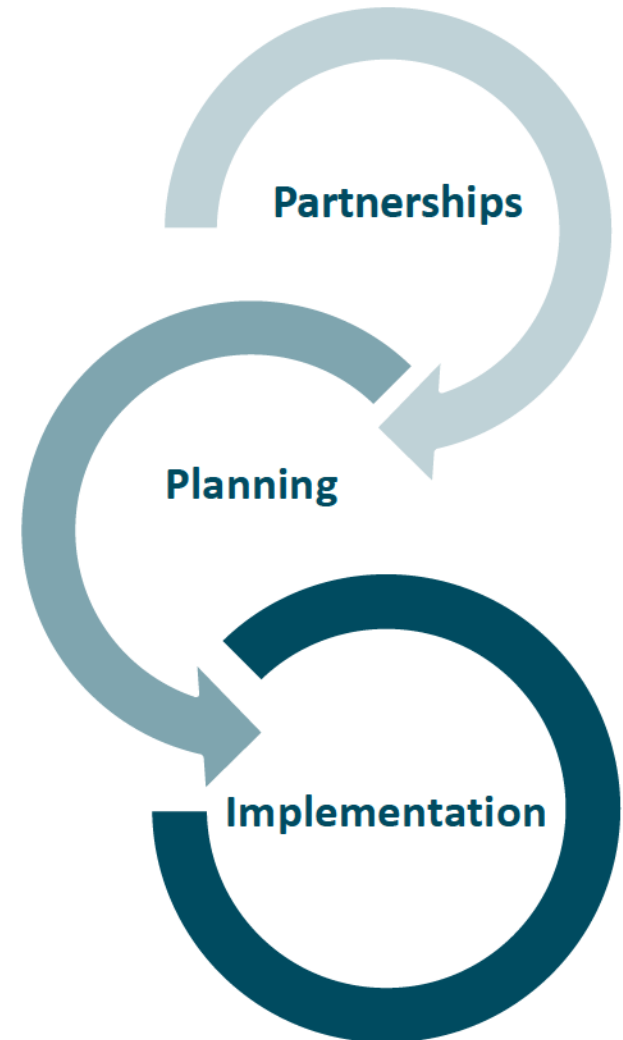
- Bike/pedestrian improvements
- First/last mile
- TOD investments
- Affordable housing strategy
- Land use plans
- ITS/technology
- Shared mobility

# Vision - implementation

The Plan: VISION



IMPLEMENTATION



# Implementation/policy framework

## Transit Vision

Transit service

ETC/HCT

Transit supportive  
elements




## Implementation

Service planning by transit  
providers

Transit Providers/ Transit  
System Expansion Policy

Local & regional efforts/  
System Expansion Policy

# What's next?

 We are here...

Fall 2015 to  
2016

Phase 1:  
Vision/  
Partnerships

2016-2017

Phase 2:  
Planning/  
Policy

2017

Phase 3:  
Transit  
Investment  
Strategy

2018

Phase 4:  
Adoption/  
Implementati  
on

# Next steps

Developing a regional transit vision and maps (Fall 2016 – Spring 2017)

Updating the System Expansion Policy (Winter 2016-Spring 2017)

Supporting the 2018 RTP (ongoing)





# Discussion

- Priorities for the Regional Transit Vision
- Approach to updating the HCT Plan
- Integrating the enhanced transit corridors concept



# Thank you



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Metro

# Parks and Nature

2015-16 Annual Report





## Building on Metro's unique park system – with nature at its heart

Ask anybody in the greater Portland region what makes this place special, and many people will mention nature and opportunities to enjoy the outdoors.

Metro operates a unique park system, one with nature at its heart. Thanks to two decades of voter investments, Metro manages 17,000 acres of parks, trails and natural areas across every community in the region – from Chehalem Ridge on the west to the Sandy River Gorge on the east, from Blue Lake and Smith and Bybee Wetlands on the north to Graham Oaks on the south.

In 2015, Metro celebrated its 25th year as a parks provider. After creating a world-class regional parks and nature system, the natural next step was to develop a long-term strategic plan to guide the future of the treasured regional network.

The Parks and Nature System Plan, approved by the Metro Council in February 2016, lays out Metro's mission and role, the state of the portfolio, trends that will shape this work and a slate of strategies to guide the future. By providing clarity on Metro's direction, the plan is intended to support Metro's partners and strengthen relationships – complementing the broader regional network of parks, trails and natural areas.

Since the plan was approved, Metro has been working to bring it to life, focusing on conserving natural resources, developing and operating welcoming and inclusive parks and incorporating equity across the Parks and Nature portfolio.

The plan also provides strategic direction in investing the money that voters have approved through two regional bond

measures and a levy – more than \$400 million to date – to protect water quality, fish and wildlife habitat, and provide people with opportunities to experience nature close to home.

To see the impact of these investments and the opportunities ahead, listen to the stories from people on the ground. Learn more about how your tax dollars were spent from July 2015 to June 2016 to return a former gravel mine to its wild roots, provide opportunities for diverse communities to access nature, make much-needed improvements to popular parks – and much more.

Get the whole report online with more photos, stories and details at  
[oregonmetro.gov/parksandnature2016](http://oregonmetro.gov/parksandnature2016)



# Access to nature

Metro is expanding opportunities to hike, explore, see wildlife and learn about the landscape at voter-protected natural areas. From Newell Creek Canyon to Killin Wetlands, new destinations are taking shape.

Work is also underway to improve parks and facilities that more than 1.3 million visitors a year already enjoy. Projects focus on upgrading aging facilities, improving sustainability, and enhancing safety and security – such as new

boat docks at Chinook Landing, new restrooms and entryway at Blue Lake and a safe, scenic overlook at Canemah Bluff.

## Legend

- Current destination
- Design or construction
- Planning underway
- Future projects





# Diversity, equity and inclusion

Metro's park system will be truly successful only if everybody in the community feels welcome in the outdoors and can reap the health rewards and other benefits of nature.

Thanks in particular to money from the 2013 levy, Metro is providing more nature programming to underrepresented communities, planning more inclusive parks, working to support more minority-owned, women-owned and emerging small businesses – and more.

In the first year of the levy, a new effort called Partners in Nature piloted projects with several groups to co-create relevant programming tailored to each community. These programs provided guided opportunities for diverse community members to enjoy the outdoors, introduced young people to potential careers in conservation, and nurtured a growing comfort and passion for nature. Partners in Nature continues to grow, with several new partnerships kicking off during 2015 and 2016.

Another initiative called Connect to Nature is contracting with Verde, a community-based organization, to develop a new approach to designing parks that are welcoming to diverse communities. It's getting a tryout starting in 2016 as Metro and the City of Gresham launch an effort to plan for public access at Gabbert Butte.



## Partnership with Centro Cultural helps shape Chehalem Ridge, connect Latinos with nature

On Chehalem Ridge, high above Gaston, nine people stand in tall grass. Their eyes are closed, palms raised and fingers outspread. Each time they hear a sound, they fold one finger down. After 10 sounds they open their eyes and gaze at the blue hills in the distance.

Finally, their tour guide, Juan Carlos Gonzalez, breaks the silence. "What did you hear?"

Three different kinds of bird. The wind through the grass. Someone cracking their knuckles.

Gonzalez is development director at Centro Cultural de Washington County, an education, social services and economic development nonprofit that is helping Metro bring the Latino community into the planning process

for a future nature park at Chehalem Ridge, a 1,200-acre site 15 minutes south of Forest Grove. In summer and fall 2016, Centro leaders are offering bilingual tours of the site and leading other outreach efforts with the Latino community.

The work with Centro Cultural is just one of a number of collaborations through Partners in Nature, Metro's program with culturally specific organizations throughout the region to better connect diverse communities with nature. The partnership will help make Chehalem Ridge more welcoming to the region's increasingly diverse residents. At the same time, it will help Centro Cultural build capacity and allow staff to gain experience and expertise in engaging the community.

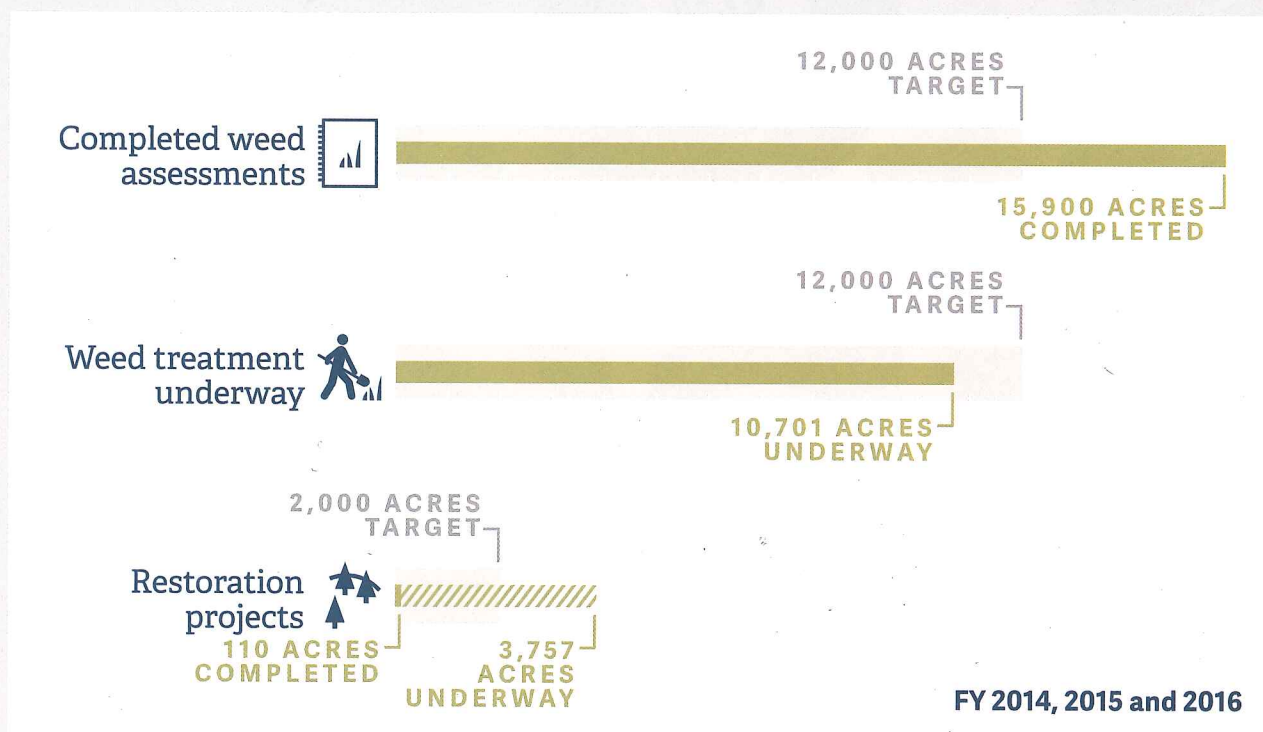


# Restoration and maintenance

At the core of Metro's parks and nature mission is protecting water quality and fish and wildlife habitat.

About half of the money from the 2013 levy is dedicated to protecting water quality and habitat, including controlling invasive weeds, boosting native plants and animals, and improving habitat for fish and wildlife.

After Metro acquires a property, a stabilization plan is drawn up as the first step of the restoration process. Invasive weeds start getting treated. After stabilization, a site conservation plan is developed to restore a site to its natural state. Restoration work can take years to complete, after which a site transitions to long-term maintenance.



## River Island restoration helps the Clackamas River heal

Four great blue herons interrupted the stillness of a blazing summer afternoon on the Clackamas River, their giant wings flapping gracefully off into the horizon. A whitetail dragonfly flitted about, dancing and weaving

essential habitat for fish and decommissioning two sections of gravel roads close to the water.

Work continued throughout the winter with the planting of native trees and shrubs. In summer 2016, crews began to restore the natural area on the north side of the river.

"This restoration project will not only benefit

# Nature education and volunteering

There's more to parks and nature than just native plants and wildlife – it's the people who make truly special, memorable places. Providing meaningful experiences for people of all races, ages and abilities to connect with nature is critical to nurture the next generation of conservation leaders.

Thanks to money from voter investments, expanded nature education programming has provided groups and individuals more opportunities to learn from Metro naturalists, including school field trips, free guided nature walks, survival skills classes and other activities.

Volunteering also helps people build connections with the nature around them.



## Graham Oaks provides habitat for pollinators – and students

Early on a spring morning, first-grade students filed out from Boones Ferry Primary School for a field trip to the park they visit monthly. But for these students, it doesn't take a bus to get there. Graham Oaks Nat



through waist-high grasses.

The scene seemed straight out of a nature documentary, except for two hints suggesting otherwise. The dry, cracked riverbed on one side hearkened to a former life of the river, a life abruptly ended. On the other side of the river, a little ways upstream, came the faint mechanical noises of two excavators, hard at work building a new future for this area.

Decades of gravel mining and devastating floodwaters in 1996 changed the course of the Clackamas River and left their mark on River Island, a 240-acre natural area just upstream from Barton Park. Metro acquired the main part of the site in 1999 and added to it over the years with money from Metro's two voter-approved bond measures. In summer 2015, work began on a two-year, large-scale restoration effort that will return River Island to a more natural, healthier state and help improve water quality in a river that provides drinking water to nearly 400,000 people.

In summer 2015, restoration work on the south side of the river included removing concrete and asphalt from the riverbank, creating

fish and wildlife, but also people, said Brian Vaughn, a senior natural resources scientist at Metro who is leading the River Island restoration project. "Fish need logs and boulders and places to hide to get away from predators and to find food and shelter. The river is also a scenic corridor, and rafters and boaters who use this section of the river will see an improved shoreline and healthy riparian forest."

River Island also includes significant open water ponds, oak savanna and upland forest habitat that support Western painted turtles, bald eagles, deer, and a variety of birds and wildlife.

Over the years, crews treated invasive weeds and stabilized the site. Metro's voter-approved bond and levy, along with grant funding, have made it possible to pursue a large-scale restoration project.

The project is possible thanks to partnerships with the Clackamas River Basin Council, Oregon Department of Fish and Wildlife, U.S. Forest Service, Portland General Electric and others.



Park is located right next to their school.

Because the school and nature park are so close, Metro and the West Linn-Wilsonville School District have partnered to use Graham Oaks as an educational environment for the students, where they can explore and participate in service learning projects regularly.

"We've been doing stuff throughout the year," said Bonnie Shoffner, volunteer coordinator for Metro. "At our last monthly field trip, they planted native shrubs in a hedgerow for pollinators."

On this visit, the students, teachers and parent-helpers gave those pollinators houses.

"Mason bees typically would be in hollow stems of bushes and trees," Shoffner said. "But because they need a little help, people put wooden boxes out with holes in them."

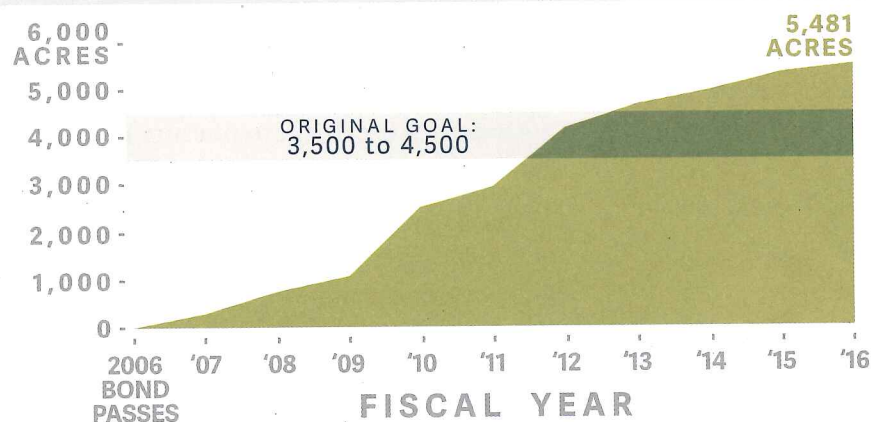
As the kids got into groups, the adults nailed the boards and boxes to snags near the hedgerow. The students also learned about the life cycle of plants and sang a song to remember the parts of insects.

Rachael Romanouk, 7, has high hopes for the bees. "They might be cute! I love cute things," she said. Rachael was also pleased to hear that mason bees rarely sting.

Graham Oaks provides an excellent learning opportunity for the students, who benefit from participating in restoration projects at the park, said Bob Carlson, director of the West Linn-Wilsonville School District's Center for Research in Environmental Sciences and Technologies – which is next to the park.

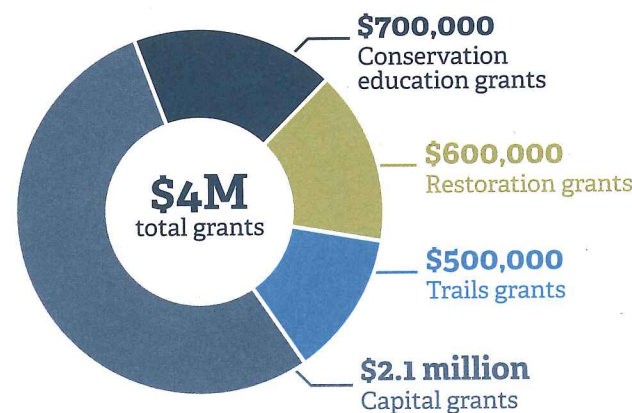
"The school district really appreciates the partnership and sees it as a really valuable thing," Carlson said.





### Land acquisition with 2006 bond measure (CUMULATIVE)

The biggest portion of the 2006 bond measure earmarked \$168 million for land acquisition from willing sellers. More than 5,400 acres have been acquired and protected – significantly surpassing the original goal. Thanks to voters, Metro has been able to conserve some of the last swathes of native prairies, wetlands and other valuable habitat – home to rare plants and endangered or threatened fish and wildlife. Other properties fill key gaps in regional trails, providing connections for commuters, bicyclists and joggers.



### Nature in Neighborhoods grants FY 2016

Direct community investments, such as Nature in Neighborhoods grants, are one of the most popular and important parts of the Parks and Nature portfolio. Through the 2006 bond measure and the 2013 levy, four types of grants gave a collective \$4 million boost to innovative projects across the region this year. Partners are restoring salmon habitat, protecting land, improving parks, connecting diverse communities with nature and much more. In 2016, trail grants were awarded for the first time.

## Promises made, promises kept

Metro's system of parks, trails and natural areas is the demonstration of a quarter century of commitment, action and investment by the region.

### Parks and Nature spending\* FY 2016

	General fund	2013 parks and natural areas levy	2006 natural areas bond	Total
Restoration/maintenance of parks and natural areas	\$1,947,065	\$3,720,019	\$3,528,194	\$9,195,278

Two decades of voter investments have protected 17,000 acres. These are the places where endangered fish and wildlife are able to thrive, where family outings happen, where memories are made.

Spending from the 2006 natural areas bond measure is winding down, though money remains to acquire and protect more land and support locally significant projects.

The last two years of the 2013 levy will build upon the successes in the first three years. More sites will be restored to their wilder, natural roots. New parks will open while existing ones will see more upgrades. And there will be more opportunities for people to experience nature.

More work remains. Stay tuned for next year's annual report to track improvements in parks and nature throughout the region.



Metro Council at Blue Lake Regional Park's nature play area, from left: Councilors Bob Stacey, Kathryn Harrington, Carlotta Collette, Shirley Craddick, Craig Dirksen and Sam Chase and Metro Council President Tom Hughes

Access to nature	\$1,038	\$1,133,448	\$266,778	\$1,403,284
Park improvements and operations	\$6,378,634	\$2,636,722	\$0	\$9,015,356
Cemeteries	\$801,431	\$0	\$0	\$801,431
Conservation education and volunteer programs	\$110,255	\$297,582	\$0	\$407,837
Community investments	\$60,410	\$1,288,103	\$1,773,619	\$3,122,132
Land acquisition/stabilization	\$0	\$0	\$6,879,450	\$6,879,450
Administration**	\$810,749	\$4,445,036	\$3,885,965	\$9,141,750
<b>Total</b>	<b>\$10,109,602</b>	<b>\$13,522,910</b>	<b>\$16,334,006</b>	<b>\$39,966,518</b>

\* Unaudited

\*\* Administration spending includes expenses for department administration and support services, such as the Office of the Metro Attorney, the Data Resource Center and Communications.

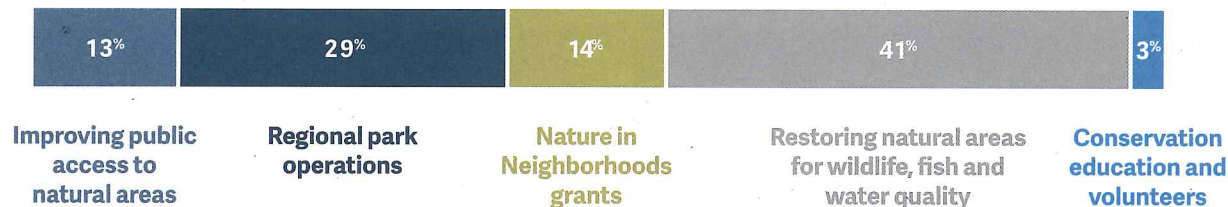
## 2013 Parks and natural areas levy

### Promised to voters



### Actual levy spending

THROUGH JUNE 2016



To learn more about voter investments, including a report from the Natural Areas Program Performance Oversight Committee, visit [oregonmetro.gov/nature](http://oregonmetro.gov/nature). To receive updates about Parks and Nature news, classes and events, or to sign up for Our Big Backyard quarterly magazine, visit [oregonmetro.gov/parksandnaturenews](http://oregonmetro.gov/parksandnaturenews).







## November hotsheet

### ***Parks and nature***

*Metro's parks and natural areas preserve more than 17,000 acres of our region for recreational enjoyment and environmental protection. Supported through voter-approved bond measures and a 2013 property tax levy, Metro's parks and natural areas attract hundreds of thousands of visitors from around our region.*

The **Willamette Falls Legacy Project** team will unveil design alternatives for a public riverwalk during a Nov. 17 community event at Clackamas Community College. At the event, the riverwalk design team will make a short presentation and participants will be invited to share feedback about the design options. An online survey will also be available at [rediscoverthefalls.com](http://rediscoverthefalls.com). The project is a collaboration between Metro, Oregon City, Clackamas County and the State of Oregon. The riverwalk is intended to provide public access to Willamette Falls and spur economic redevelopment of the former Blue Heron paper mill site. Contact: Brian Moore, 503-797-1761

Planning continues for the future nature park at **Chehalem Ridge**, a 1,200-acre site in Washington County about 15 minutes south of Forest Grove and Cornelius. A draft concept plan for the site will be shared with community members at two events in December. At the two events, staff members will share a draft proposal for trails, parking, park uses and other improvements. Community members will be asked to provide input that will help shape the final proposed plan for the park. The Metro Council is expected to decide on a plan for Chehalem Ridge Nature Park during summer 2017. Contact: Karen Vitkay, 503-797-1874.

### ***Waste reduction and management***

*Metro manages the Portland region's garbage, recycling and compost systems, and encourages residents and businesses to make the most of what they don't want.*

Metro is undertaking a **health impact assessment** to understand potential risks and benefits of sending a portion of garbage from the Portland region to the Covanta Marion waste-to-energy facility near Brooks. Metro held a scoping meeting with public health, environmental, and equity stakeholders to help ensure a broad set of factors is evaluated. The completed assessment will be shared with the Metro Council in Spring 2017. Contact: Rob Smoot, 503-797-1689, [rob.smoot@oregonmetro.gov](mailto:rob.smoot@oregonmetro.gov).

The Metro Council has directed staff to explore policy options to require some Portland-area businesses to **separate food scraps from the garbage**. Options should consider incentives and support for businesses, as well as costs. Staff will come back to Council with further information in the spring. The Council also directed staff to issue an RFP for food scraps processing services aimed at nine pre-qualified firms. Contact: Matt Korot, 503-797-1760, [matt.korot@oregonmetro.gov](mailto:matt.korot@oregonmetro.gov).



## ***Land use and transportation***

*Working together, our region can reduce traffic, improve our economy and maintain what make this region a great place. Metro works with 24 cities and 3 counties to protect local values and preserve our region's farms and forests.*

**Regional Flexible Funds:** TPAC and JPACT will consider public comments along with technical evaluations and other factors this fall as they seek to develop a final project list to recommend to the Metro Council in January. \$33 million in federal transportation dollars will be spent to improve walking, biking and moving freight. Contact: Cliff Higgins, 503-797-1932.

The **Urban Growth Readiness Task Force** has agreed on a proposal to send to the Legislature to improve flexibility in managing the UGB. The proposal would allow the Metro Council to add up to 1,000 acres to the UGB in between the six-year cycle for comprehensive review of the region's growth. Contact: Andy Shaw, 503-797-1763.

The **Southwest Corridor Plan** steering committee meets Nov. 14 to discuss comments received during the recent 31-day comment period and hear staff's recommendations on which light rail alignments and related bike, walk and roadway projects to study in federal environmental review. The committee will meet again Dec. 12 to take action on the staff recommendations. Contact: Eryn Kehe, 503-797-1881.

**Equitable Housing grants:** On Nov. 1, the Metro Council will discuss the Metro COO's recommendations for up to \$575,000 in grants to help communities around the region reduce barriers to creating more housing choices for people of all incomes. Agreeing with a screening committee's recommendations, the COO recommended total or partial funding for grants in seven communities. The council will make a grant award decision on Dec. 1. Contact: Craig Beebe, 503-797-1584.

The **Powell-Division Transit and Development Project** steering committee meets Nov. 7 in East Portland. They are expected to recommend a Locally Preferred Alternative for a bus rapid transit line between Portland and Gresham. Their recommendation would need to be approved by project partners. Contact: Noelle Dobson, 503-797-1745.

Metro's **Transit-Oriented Development Program** marks the opening of Slate, a new mixed-use building at the Burnside Bridgehead in Portland on Nov. 17. The 10-story development includes housing, creative offices and retail space at the intersection of two major transit corridors. Metro partnered with Beam Development and Urban Development Partners, contributing \$500,000 to the \$35 million project. Program contract: Jon Williams, 503-797-1931.

Metro's **Regional Snapshots** program released its fifth installment on Oct. 27. The content package focuses on housing affordability trends and opportunities in Greater Portland. Contact: Craig Beebe, 503-797-1584.