



600 NE Grand Ave.  
Portland, OR 97232-2736

## Council meeting agenda

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**Thursday, December 17, 2020**

**2:00 PM**

**<https://zoom.us/j/615079992> or  
**888-475-4499 (toll free)****

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Please note: To limit the spread of COVID-19, Metro Regional Center is now closed to the public.

This meeting will be held electronically. You can join the meeting on your computer or other device by using this link: <https://zoom.us/j/615079992> or by calling 888-475-4499 (toll free).

If you wish to attend the meeting, but do not have the ability to attend by phone or computer, please contact the Legislative Coordinator at least 24 hours before the noticed meeting time by phone at 503-797-1916 or email at [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov).

### **1. Call to Order and Roll Call**

### **2. Public Communication**

Public comment may be submitted in writing and will also be heard by electronic communication (videoconference or telephone). Written comments should be submitted electronically by emailing [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Written comments received by noon on the day of the meeting will be provided to the council prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-797-1916 and providing your name and the agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda item on which you wish to testify to [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at [legislativecoordinator@oregonmetro.gov](mailto:legislativecoordinator@oregonmetro.gov). Individuals will have three minutes to testify unless otherwise stated at the meeting.

### **3. Consent Agenda**

- 3.1 Considerations of the Council Meeting Minutes for  
December 10, 2020

[20-5494](#)

Attachments: [Council Meeting Minutes for December 10, 2020](#)

- 3.2 Resolution No. 20-5141, For the Purpose of Amending the FY 2020-21 Unified Planning Work Program (UPWP) to Include Three Additional Planning Projects Funded Since the UPWP was Adopted [RES 20-5141](#)

Attachments: [Resolution No. 20-5141](#)  
[Exhibit A to Resolution No. 20-5141](#)  
[Exhibit B to Resolution No. 20-5141](#)  
[Exhibit C to Resolution No. 20-5141](#)  
[Staff Report](#)

#### 4. Resolutions

- 4.1 Resolution No. 20-5138, For the Purpose of Accepting the Findings in the Regional Framework for Highway Jurisdictional Transfer Study [RES 20-5138](#)

Presenter(s): Margi Bradway, Metro  
John Mermin, Metro

Attachments: [Resolution No. 20-5138](#)  
[Exhibit A to Resolution No. 20-5138](#)  
[Exhibit B to Resolution No. 20-5138](#)  
[Staff Report](#)

- 4.2 Resolution No. 20-5142, For the Purpose of Adopting Solid Waste Fees at the Metro Transfer Stations and the Regional System Fee for FY2021-22 [RES 20-5142](#)

Presenter(s): Brian Kennedy, Metro  
Cinnamon Williams, Metro

Attachments: [Resolution No. 20-5142](#)  
[Exhibit A to Resolution No. 20-5142](#)  
[Staff Report](#)  
[Attachment 1 to Staff Report](#)  
[Attachment 2 to Staff Report](#)  
[Attachment 3 to Staff Report](#)

#### 5. Ordinances & Resolutions (Deferred Vote from 12/10)

- 5.1 Resolution No. 20-5148, For the Purpose of Adopting the Supportive Housing Services Work Plan [RES 20-5148](#)
- Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro
- Attachments: [Resolution No. 20-5148](#)  
[Exhibit A to Resolution No. 20-5148](#)  
[Public Testimony on Exhibit A](#)  
[Staff Report](#)
- 5.2 Ordinance No. 20-1452, For the Purpose of Adding a New Title XI to the Metro Code and a New Chapter 11.01 “Supportive Housing Services Program” within that Title [ORD 20-1452](#)
- Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro
- Attachments: [Ordinance No. 20-1452](#)  
[Exhibit A to Ordinance No. 20-1452](#)  
[Staff Report](#)
- 5.3 Ordinance No. 20-1453, For the Purpose of Adding a New Metro Code Section 2.19.270 Establishing a Supportive Housing Services Regional Oversight Committee [ORD 20-1453](#)
- Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro
- Attachments: [Ordinance No. 20-1453](#)  
[Exhibit A to Ordinance No. 20-1453](#)  
[Staff Report](#)
- 5.4 Ordinance No. 20-1454, For the Purpose of Amending Metro Code Title VII to Add New Chapters 7.05 “Income Tax Administration for Personal and Business Taxes”, 7.06 “Personal Income Tax”, and 7.07 “Business Income Tax” [ORD 20-1454](#)
- Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro
- Attachments: [Ordinance No. 20-1454](#)  
[Exhibit A to Ordinance No. 20-1454](#)  
[Exhibit B to Ordinance No. 20-1454](#)  
[Exhibit C to Ordinance No. 20-1454](#)  
[Staff Report](#)
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6. Chief Operating Officer Communication
7. Councilor Communication
8. Adjourn

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### Thông báo về sự Metro không kỳ thị của

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### Metro 的不歧視公告

尊重民權。欲瞭解Metro民權計畫的詳情，或獲取歧視投訴表，請瀏覽網站 [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)。如果您需要口譯方可參加公共會議，請在會議召開前5個營業日撥打503-797-1700（工作日上午8點至下午5點），以便我們滿足您的要求。

### Ogeysiiska takooris la'aanta ee Metro

Metro waxay ixtiraamtaa xuquuqda madaniga. Si aad u heshid macluumaad ku saabsan barnaamijka xuquuqda madaniga ee Metro, ama aad u heshid warqadda ka cabashada takoorista, booqo [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Haddii aad u baahan tahay turjubaan si aad uga qaybqaadatid kullanka dadweynaha, wac 503-797-1700 (8 galka hore illaa 5 galka dambe maalmaha shaqada) shan maalmaha shaqo ka hor kullanka si loo tixgaliyo codsashadaada.

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### សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានកម្មប្រតិបត្តិការរើសអើងសម្រាប់សេចក្តីណែនាំ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

### إشعار بعدم التمييز من Metro

تحتزم Metro الحقوق المدنية. للمزيد من المعلومات حول برنامج Metro للحقوق المدنية أو لإيداع شكوى ضد التمييز، يُرجى زيارة الموقع الإلكتروني [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). إن كنت بحاجة إلى مساعدة في اللغة، يجب عليك الاتصال مقدماً برقم الهاتف 503-797-1700 (من الساعة 8 صباحاً حتى الساعة 5 مساءً، أيام الاثنين إلى الجمعة) قبل خمسة (5) أيام عمل من موعد الاجتماع.

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### Notificación de no discriminación de Metro

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Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntawv tsis txaus siab, mus saib [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1700 (8 teev sawv ntxov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lwm ua ntej ntawm lub rooj sib tham.

**Television schedule for Metro Council meetings**

<p><b>Clackamas, Multnomah and Washington counties, and Vancouver, WA</b>  Channel 30 – Community Access Network  <i>Web site:</i> <a href="http://www.tvctv.org">www.tvctv.org</a>  <i>Ph:</i> 503-629-8534  Call or visit web site for program times.</p>	<p><b>Portland</b>  Channel 30 – Portland Community Media  <i>Web site:</i> <a href="http://www.pcmtv.org">www.pcmtv.org</a>  <i>Ph:</i> 503-288-1515  Call or visit web site for program times.</p>
<p><b>Gresham</b>  Channel 30 - MCTV  <i>Web site:</i> <a href="http://www.metroeast.org">www.metroeast.org</a>  <i>Ph:</i> 503-491-7636  Call or visit web site for program times.</p>	<p><b>Washington County and West Linn</b>  Channel 30– TVC TV  <i>Web site:</i> <a href="http://www.tvctv.org">www.tvctv.org</a>  <i>Ph:</i> 503-629-8534  Call or visit web site for program times.</p>
<p><b>Oregon City and Gladstone</b>  Channel 28 – Willamette Falls Television  <i>Web site:</i> <a href="http://www.wftvmedia.org/">http://www.wftvmedia.org/</a>  <i>Ph:</i> 503-650-0275  Call or visit web site for program times.</p>	

**PLEASE NOTE: Show times are tentative and in some cases the entire meeting may not be shown due to length. Call or check your community access station web site to confirm program times.** Agenda items may not be considered in the exact order. For questions about the agenda, call the Metro Council Office at 503-797-1540. Public hearings are held on all ordinances second read. Documents for the record must be submitted to the Regional Engagement and Legislative Coordinator to be included in the meeting record. Documents can be submitted by e-mail, fax or mail or in person to the Regional Engagement and Legislative Coordinator. For additional information about testifying before the Metro Council please go to the Metro web site [www.oregonmetro.gov](http://www.oregonmetro.gov) and click on public comment opportunities.

Agenda Item No. 3.1

**Consideration of the Council Meeting Minutes for December 10, 2020**

*Consent Agenda*

Metro Council Meeting  
Thursday, December 17, 2020

# **Metro**

*600 NE Grand Ave.  
Portland, OR 97232-2736  
oregonmetro.gov*



**Metro**

## **Minutes**

**Thursday, December 10, 2020**

**2:00 PM**

**<https://zoom.us/j/615079992>**

**<https://zoom.us/j/615079992> or 888-475-4499 (toll free)**

**Council meeting**



**1. Call to Order and Roll Call**

**Present:** 7 - Council President Lynn Peterson, Councilor Sam Chase, Councilor Shirley Craddick, Councilor Craig Dirksen, Councilor Bob Stacey, Councilor Christine Lewis, and Councilor Juan Carlos Gonzalez

**2. Public Communication**

There was none.

**3. Consent Agenda**

**A motion was made by Councilor Craddick, seconded by Councilor Dirksen, to adopt items on the consent agenda.**

**The motion passed by the following vote:**

**Aye:** 6 - Council President Peterson, Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Lewis, and Councilor Gonzalez

**Abstain:** 1 - Councilor Stacey

- 3.1 Considerations of the Council Meeting Minutes for December 3, 2020
- 3.2 Resolution No. 20-5145, For the Purpose of Confirming the Appointments of Jessica Stetson, Wilson Munoz and Yousif Ibrahim as Community Representatives to the Transportation Policy Alternatives Committee.
- 3.3 Resolution No. 20-5150, For the Purpose of Accepting the November 3, 2020, General Election Abstract of Votes for Metro

**4. Resolutions**

- 4.1 Resolution No. 20-5143, For the Purpose of Metro Council's Acceptance of the Results of the Independent Audit for Financial Activity During Fiscal Year Ending June 30, 2020.

Presenter(s): Brian Evans, Metro  
Brian Kennedy, Metro  
Ashley Osten, Moss Adams

President Peterson introduced Brian Evans, Brian Kennedy, Ashley Osten, Jim Lanzarotta and Janel Smoot to present Resolution No. 20-5143. Mr. Lanzarotta reviewed the five key auditing areas of the 2020 Audit Report. Ms. Osten

summarized the required communications that took place between the Metro Audit Committee and Moss Adams. Ms. Snoot reviewed the best practice recommendations and updates to the recommendations from last year's report. Ms. Osten provided an accounting update and shared two new standards: GASB 96 and GASB 97.

Mr. Kennedy explained that this audit included the regional investment strategy and the financial impact the Covid-19 pandemic had on Metro-specifically the dramatic decline of revenue from our visitor venues.

*Council Discussion*

There was none.

**A motion was made by Councilor Lewis, seconded by Councilor Gonzalez, that this item be approved. The motion passed by the following vote:**

**Aye:** 7 - Council President Peterson, Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Stacey, Councilor Lewis, and Councilor Gonzalez

- 4.2 Resolution No. 20-5149, For the Purpose of Directing that Willamette Cove be Included in the List of Metro Parks and Natural Areas Eligible for 2019 Bond Funding and Development of a Plan for Public Engagement

Presenter(s): Marissa Madrigal, Metro  
Jon Blasher, Metro

President Peterson introduced Marissa Madrigal (COO) and Jon Blasher (Director of Parks and Nature) to present on Resolution No. 20-5149. Ms. Madrigal summarized the goals and actions stated in the Parks and Nature Bond.

Mr. Blasher reviewed the history and cultural significance of the Willamette Cove natural area. He explained that the Willamette Cove Project falls under the "Taking Care of Existing Metro Parks" program area from the 2019 Parks and Nature Bond. Mr. Blasher summarized the following goals of Resolution 20-5149: Include Willamette Cove property to Exhibit # of 2019 parks and nature bond

resolution, affirm support to explore passive recreation, trail development and habitat restoration, direct staff to create engagement plan to identify community priorities and to continue to engage with tribal leaders throughout this project.

Council President Peterson opened the public comment portion of Resolution No. 20-5149.

Public Comment:

Art McConville, NiiMiiPuu, City of Portland: Mr. McConville as an elder of the Nez Perce and Cayuse tribes, expressed his concern with the efficacy of the clean-up portion of the project. He explained that if the clean-up is not sufficient because the area is susceptible to flooding and earthquakes the contaminants in that area can spread and do further harm to other natural areas.

Cassie Cohen, City of Portland: Ms. Cohen as the Director of the Portland Harbor Community Coalition, explained the cultural significance of this site and the importance of completely ridding the area of all contaminants. She asked Council to consider Councilor Chase's amendment and commit to a full clean-up of Willamette Cove.

Jeff Lang, City of Portland: Mr. Lang representing North Portland Greenway, shared North Portland Greenway's support of Resolution No. 20-5149. He expressed his support of the PHCC Commission's amendment to the resolution and urged Metro to commit to including Tribal leadership and groups like the Diversity and Environmental Equity at the decision table. Mr. Lang encouraged Metro to think long term and holistically while implementing this project.

Bob Sallinger, City of Portland: Mr. Sallinger as the

Conservation Director for the Portland Audubon Society, expressed his overall support of the resolution, but expressed his concerns with the shortcomings of the clean-up proposal. He explained that with the current clean-up plan, will leave 23% of the area contaminated. Mr. Sallinger asked Council to support option 3b which includes a total removal of contaminants from the site. He made the following requests of the Metro Council: to work with DEQ to incorporate a total clean-up in their plan, have staff review public comments, amend Councilor Chase's amendment to the resolution and to release the confidential agreement with the Port of Portland to the public.

Elijah Cetas, City of Portland: Mr. Cetas representing the Portland Harbor Community Coalition and the Sunrise Movement explained the cultural importance of this area and expressed his concern with an incomplete clean-up. He expressed Metro's duty to uphold tribal obligations to the tribes of the Willamette River and explained that the Confederate tribes of the Yakima nation are calling for the full clean-up of the site. Mr. Cetas requested Council to share the confidential agreement with the Port of Portland with the public, agree to Councilor Chase's amendment and to commit to a complete clean-up of the site.

Laura Feldman: Ms. Feldman expressed her concern with an incomplete clean-up effort and encouraged council to incorporate Councilor Chase's amendment to the resolution.

Alvey Seeyouma, City of Portland: Mr. Seeyouma as a member of the Southwest Nations, expressed his concern with the lack of transparency in the process and the importance of a complete clean-up of the Willamette Cove natural area.

Michael Pouncil, City of Portland: Mr. Pouncil as the chair of

Portland Harbor Community Coalition Advisory Group, highlighted the importance of this project and strongly encouraged Council to incorporate Councilor Chase's amendment to Resolution No. 20-5149. He shared that his community and organization will continue to reject any contaminants left after a clean-up project.

Willie Levenson, City of Portland: Mr. Levenson representing the Human Action Project, expressed his solidarity with other community groups such as the Portland Harbor Community Coalition and the Portland Audoban Society in their work of pushing for a complete clean-up of the site. He shared his frustration with the lack of transparency throughout this project and the decision to not do a total clean-up of the natural area. Mr. Levenson thanked Council for their work and encouraged them to release the agreement with the Port of Portland.

Alex Lopez, City of Portland: Mr. Lopez as state of Oregon registered geologist, expressed his concern with the current proposed clean-up plan. He encouraged Council to accept Councilor Chase's amendment in support of a more thorough clean-up of Willamette Cove.

Dishaun Berry, City of Portland: Mr. Berry expressed the importance of fully preserving natural sites and shared his concern that the Willamette Cove project won't be complete without a total clean-up.

Steven Glickman, City of Portland: Mr. Glickman expressed his concern around a partial clean-up and urged Council to amend Resolution 20-5149 to reflect a total clean-up.

Doug Larson, City of Portland: Mr. Larson expressed his concern about contaminants remaining in Willamette Cove and stressed the importance of preserving natural areas within the Portland area.

Ona Golonka, City of Portland: Ms. Golonka stressed the importance of having natural areas in the Portland area and the importance of a total clean-up of Willamette Cove.

Matt Stein, City of Portland: Mr. Stein expressed his support of Councilor Chase's amendment and urged Council to support a total clean-up.

Lukas Angus, Red Spike Elk, City of Portland: Mr. Angus as a member of the Nez Perce tribe and Seven Waters Canoe, shared the cultural and historical significance of the Willamette River and his opposition to a partial clean-up.

Damon Motz-Storey, City of Portland: Mr. Motz-Storey representing Oregon Physicians for Social Responsibility (PSR), expressed PSR's support of a total clean-up of the site.

Scott Mizze, City of Portland: Mr. Mizze urged Council to support Councilor Chase's amendment to do a full clean-up of Willamette Cove. He explained the importance of the preservation of this natural area.

Mark Whitcome, City of Portland: Mr. Whitcome representing the Willamette River Advocacy Group, asked Council to release the agreement between Metro and the Port of Portland and to support Councilor Chase's amendment to do a full clean-up of Willamette Cove.

#### *Council Discussion*

Councilor Chase proposed the following amendment: Metro Council shall convene a Work Session within 30 days of the issuance of the DEQ record of decision Willamette Cove, to discuss additional and voluntary actions that Metro could take at the site to further improve its environmental

condition. He explained that this amendment does not require Metro to commit to a full clean-up but to commit to review all clean-up options before making a final decision.

Councilor Craddick thanked the public for their testimony and highlighted the importance of creating greater access to waterways.

Councilor Lewis expressed her support of the 115 viewers who sat in on the meeting and their shared goal of creating stronger access to nature. She thanked the community partnerships that have pushed for this important work. Councilor Lewis stressed the urgency of this project and the health of the Willamette River.

Councilor Dirksen shared that Resolution 20-5149 makes Willamette Cove eligible to be funded by the 2019 Parks and Nature Bond. He explained that DEQ's decision will provide the minimum standard of clean-up under Oregon law and that Metro should have further discussion on what they want to do after reviewing DEQ's minimum requirements. Councilor Dirksen expressed the importance of making the Willamette River accessible to the public and that it should be a priority of the Metro Council.

Councilor Gonzalez shared his thanks to the public who gave testimony and highlighted the importance of their guidance and passion for Willamette Cove and preservation. He thanked staff and Councilor Chase for their work on the project. Councilor Gonzalez expressed his confidence in staff, Council and the public in ensuring the work is done correctly.

Councilor Stacey thanked Councilor Chase for his work on the project and highlighted the importance of access to the Willamette River.

Councilor Chase expressed his appreciation to the community and advocates of this project. He thanked staff and Councilors for their continuous work on this project.

President Peterson thanked Council and Councilor Chase's work on this project. She expressed her shared vision of a safe natural area for the community to access the Willamette River.

**A motion was made by Councilor Dirksen, seconded by Councilor Stacey, that this item be approved as amended. The motion passed by the following vote:**

**Aye:** 7 - Council President Peterson, Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Stacey, Councilor Lewis, and Councilor Gonzalez

4.3 Resolution No. 20-5139, For the Purpose of Adopting the National Incident Management System

Presenter(s): Courtney Patterson, Metro

President Peterson introduced Courtney Patterson to present Resolution No. 20-5139. Ms. Patterson summarized why the region needs the National Incident Management System (NIMS) and how Metro incorporated this framework in the response to wildfires this summer and the Pandemic.

*Council Discussion*

There was none.

**A motion was made by Councilor Craddick, seconded by Councilor Stacey, that this item be approved. The motion passed by the following vote:**

**Aye:** 7 - Council President Peterson, Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Stacey, Councilor Lewis, and Councilor Gonzalez

**5. Ordinances (Second Reading)**

5.1 Ordinance No. 20-1451, For the Purpose of Updating Metro Code Chapter 5.10 to Improve Clarity, Remove Outdated Sections and Align with the



Regional Waste Plan and to Add a New Metro Code Chapter 5.15 and to Update Definitions in Metro Code Chapter 5.00

Presenter(s): Jennifer Erickson, Metro

President Peterson introduced Jennifer Erickson to present on Ordinance No. 20-1451. Ms. Erickson summarized Ordinance No. 20-1451.

*Council Discussion*

There was none.

**A motion was made by Councilor Stacey, seconded by Councilor Gonzalez, that this item be approved. The motion passed by the following vote:**

**Aye:** 7 - Council President Peterson, Councilor Chase, Councilor Craddick, Councilor Dirksen, Councilor Stacey, Councilor Lewis, and Councilor Gonzalez

- 5.2 Ordinance No. 20-1452, For the Purpose of Adding a New Title XI to the Metro Code and a New Chapter 11.01 "Supportive Housing Services Program" within that Title

Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro

**This item was continued.**

- 5.3 Ordinance No. 20-1453, For the Purpose of Adding a New Metro Code Section 2.19.270 Establishing a Supportive Housing Services Regional Oversight Committee

Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro

**This item was continued.**

- 5.4 Ordinance No. 20-1454, For the Purpose of Amending Metro Code Title VII to Add New Chapters 7.05 "Income Tax Administration for Personal and Business Taxes", 7.06 "Personal Income Tax", and 7.07 "Business Income Tax"

Presenter(s): Jes Larson, Metro

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Rachael Lembo, Metro

President Peterson introduced the Metro Attorney Carrie MacLaren, Metro Finance Manager Rachael Lembo and Supportive Housing Services staff to present Ordinance No. 20-1454.

Ms. MacLaren reviewed Metro’s taxing authority independent of the state and explained why the Office of the Metro Attorney believes Metro does not have to comply with ORS 268.505.

Rachael Lembo presented on the policy options presented in Ordinance No. 20-1454. Ms. Lembo reviewed the advantages and disadvantages of each policy option presented in Ordinance No. 20-1454.

*Council Discussion*

Councilor Lewis moved to amend sections 7.060.40 (c), 7.060.70 (a) and 7.060.70 (b) of the personal income tax and Exhibit B of Ordinance 214-54.

Council moved to move the vote for Ordinance’s No. 20-1452, 20-1453, 20-1454 and Resolution No. 20-5148 to the following Council Meeting, Thursday December 17.

**This item was amended.**

- 5.5 Resolution No. 20-5148, For the Purpose of Adopting the Supportive Housing Services Work Plan

Presenter(s): Jes Larson, Metro  
Rachael Lembo, Metro

**This item was continued.**

**6. Chief Operating Officer Communication**

There was none.

**7. Councilor Communication**

Councilor Gonzalez announced that the Hillsboro Hawks

have advanced to the Single A advanced league, increasing their season games.

**8. Adjourn**

Seeing no further business, Council President Lynn Peterson adjourned the Metro Council work session at 4:46 p.m.

Respectfully submitted,

*Pilar Karlin*

Pilar Karlin, Council Policy Assistant

**ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF DECEMBER 10, 2020**

<b>ITEM</b>	<b>DOCUMENT TYPE</b>	<b>DOC DATE</b>	<b>DOCUMENT DESCRIPTION</b>	<b>DOCUMENT NO.</b>
<b>3.1</b>	Minutes	12/10/20	Council Meeting Minutes for December 03, 2020	121020c-01
<b>4.1</b>	PowerPoint	12/10/20	Audit Results Presentation	121020c-02
<b>4.2</b>	PowerPoint	12/10/20	Willamette Cove Presentation	121020c-03
<b>4.2</b>	Written Testimony	12/10/20	Written Testimony from various Portland Residents and Community members.	121020c-04
<b>4.3</b>	PowerPoint	12/10/20	National Incident Management System (NIMS) Presentation	121020c-05
<b>5.2-5.5</b>	PowerPoint	12/10/20	Supportive Housing Services Presentation	121020c-06

Agenda Item No. 3.2

**Resolution No. 20-5141**, For the Purpose of Amending the FY 2020-21 Unified Planning Work Program (UPWP) to Include Three Additional Planning Projects Funded Since the UPWP was Adopted

*Consent Agenda*

Metro Council Meeting  
Thursday, December 17, 2020

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING THE FY ) RESOLUTION NO. 20-5141  
2020-21 UNIFIED PLANNING WORK )  
PROGRAM (UPWP) TO INCLUDE THREE ) Introduced by Chief Operating Officer  
ADDITIONAL PLANNING PROJECTS FUNDED ) Marissa Madrigal in concurrence with  
SINCE THE UPWP WAS ADOPTED ) Council President Lynn Peterson

WHEREAS, the Unified Planning Work Program (UPWP) describes all federally-funded transportation planning activities for the Portland-Vancouver metropolitan area to be conducted in FY 2020-21 ; and

WHEREAS, the FY 2020-21 UPWP indicates federal funding sources for transportation planning activities carried out by Metro, Southwest Washington Regional Transportation Council, TriMet, Oregon Department of Transportation (ODOT) and other local jurisdictions; and

WHEREAS, ODOT Urban Mobility Office has initiated a planning effort to analyze two potential locations for tolling, I-5 and I-205; and

WHEREAS, the Oregon Transportation Commission (OTC) has allocated an additional \$12.5 million since the 2020-21 UPWP was adopted in Spring 2020 for continuing I-5 and I-205 planning and implementation activities this fiscal year; and

WHEREAS, TriMet has received a \$700,000 grant from the Federal Transit Administration (FTA) to complete planning for transit oriented development along the proposed 7.8-mile, 10-station west extension of the existing MAX Red Line light rail project and the east portion of the same Red Line corridor and anticipates initiating the project and spending \$328,820 in FY 2020-21; and

WHEREAS, Metro has been awarded an \$850,000 HOPE grant from the FTA for planning work for Tualatin-Valley Highway and anticipates initiating the project and spending \$100,000 in FY 2020-21; and

WHEREAS, all federally-funded transportation planning projects for the Portland-Vancouver metropolitan area must be included in the FY 2020-21 UPWP; now therefore,

BE IT RESOLVED that the Metro Council hereby amends the FY 2020-21 UPWP to add funding for the ODOT – I-5 and I-205 Metropolitan Value Pricing project, the Red line Transit Oriented Development planning project, and the Tualatin-Valley Highway Transit and Development project as shown in the attached Exhibits A,B,C.

ADOPTED by the Metro Council this 17th day of December, 2020.

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Lynn Peterson, Council President

Approved as to Form:

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Carrie MacLaren, Metro Attorney

## ODOT: I-5 and I-205 Portland Metropolitan Value Pricing

**Staff Contact:** [Lucinda Broussard, Lucinda.BROUSSARD@odot.state.or.us](mailto:Lucinda.BROUSSARD@odot.state.or.us) ~~Mandy Putney,~~  
~~Mandy.Putney@odot.state.or.us~~

### Description

This project will advance the results of a feasibility analysis completed in December 2018. The Value Pricing Feasibility Analysis was conducted using state funding from House Bill 2017; no federal funds were spent (except for \$43 in June by administrative staff activating the account). The current phase is advancing two tolling locations – one each on I-5 and I-205 – for further refined analysis and review under federal environmental and tolling requirements.

During the period of July 2019 to June 2020 the work was focused on coordination with the FHWA and other partners, [environmental planning, public engagement](#), work planning for back office system and [roadside technology systems](#), and coordination with the planned bridge reconstruction, seismic improvements, and widening on I-205. [The phase commencing in the fall of 2020 will advance two tolling locations – one each on I-5 and I-205 – for further refined analysis and review under federal environmental and tolling requirements.](#) The planning/environmental analysis phase is expected to continue into 2023.

The Oregon Transportation Commission is the tolling authority for Oregon. The project is led by ODOT, which has developed a decision and advisory structure to engage regional partners for technical input as well as an advisory committee to assist in developing an equity framework and equitable process. Regional partners include local, county, and regional agencies, as well as transit service providers including TriMet, Smart, and others. Additionally, ODOT is coordinating with Metro and the City of Portland on concurrent efforts related to congestion pricing.

This project is consistent with the 2018 RTP Transportation System Management and Operations Policies. Specifically, TSMO Policy 1: Expand use of pricing strategies to manage travel demand on the transportation system.

### Key Project Deliverables / Milestones



### FY 2020-21 Cost and Funding Sources

<b>Requirements:</b>		<b>Resources:</b>	
Personnel Services	\$ 0	Federal grant	\$ <u>6,354,600</u> <u>18,027,064</u>



FY 2020-21 Unified Planning Work Program

Materials & Services	\$ <del>7,000,000</del> <u>19,547,890</u>	Local Match	\$ <del>645,400</del> <u>1,520,826</u>
<b>TOTAL \$ Total Amount</b>		<b>TOTAL \$ <del>7,000,000</del> <u>19,547,890</u></b>	

## TriMet Red Line MAX Extension TOD & Station Area Planning

**Staff Contact:** Bob Hastings, [hastingb@trimet.org](mailto:hastingb@trimet.org) or Jeff Owen, [owenj@trimet.org](mailto:owenj@trimet.org)

### Description

Through the award of a Federal Transit Administration (FTA) grant, this project will seek to activate under-developed station areas along the west extension of the MAX Red Line and the east portion of the Red Line corridor where increased reliability of MAX service resulting from the proposed Small Starts capital investments provides additional incentive for private and public investments. While the entire extended Red Line corridor includes the alignment between Portland International Airport and the Fair Complex/Hillsboro Airport Transit Center, TriMet is choosing to focus these project activities on two specific segments of the corridor.

The project area is defined as all areas within ¼ of a mile of the MAX alignment east of NE 47th Avenue in Multnomah County and west of SW Murray and east of NE 28th Avenue in Washington County. Focus areas will also be established at the following stations: Parkrose / Sumner Transit Center; Gateway / NE 99th Transit Center; NE 82nd; NE 60th; Millikan Way; Beaverton Creek; Elmonica/SW 170th; Willow Creek/ SW 185th Transit Center; Fair Complex/ Hillsboro Airport. Station areas within the project area that are not focus areas will be included in broader economic and market analysis. Stabilization and economic opportunity development strategies will also be applied to these station areas.

### Key Project Deliverables / Milestones

After project initiation in Q2/Q3 and during the remainder of FY 2020-21, this project plans to complete an economic analysis at focus station areas across the east and west corridor segments; a business stabilization and development taskforce; and begin a resident stabilization and housing growth taskforce. The project will then carry into the following fiscal year.



### FY 2020-21 Cost and Funding Sources

#### Requirements:

Personal Services      \$ 30,000  
 Materials & Services    \$ 298,820

**TOTAL**    \$ **328,820**

#### Resources:

Federal grant            \$ 219,213  
 Local Match             \$ 109,607

**TOTAL**    \$ **328,820**

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## **Tualatin Valley Highway Transit and Development Project**

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**Staff Contact:** [Elizabeth.Mros-OHara@oregonmetro.gov](mailto:Elizabeth.Mros-OHara@oregonmetro.gov)

### **Description**

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The Tualatin Valley (TV) Highway transit and development project creates a collaborative process with the surrounding communities and relevant jurisdictions to prioritize transportation projects, building on recent work undertaken by Washington County.

This is a new program commencing in the second half of fiscal year 2020-21. The project's first major task is to establish a steering committee that includes elected officials and community-based organizations (CBOs) that represent communities of color and other marginalized communities within the study area. This group is responsible for developing an equitable development strategy (EDS) and a locally preferred alternative (LPA) for a transit project. The committee's work is informed by input gathered through public engagement efforts that include targeted outreach to communities of concern.

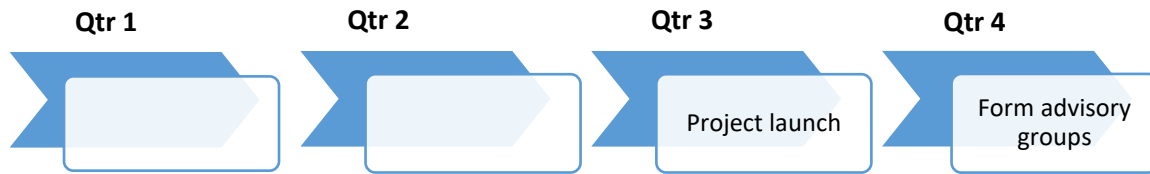
The EDS identifies actions for minimizing and mitigating displacement pressures within the corridor, particularly in high poverty census tracts where public investments may most affect property values. This effort includes identification of existing conditions, businesses owned by marginalized community members and opportunities for workforce development. The EDS strategy may identify additional housing needs, workforce development gaps and opportunities for residents, regulatory issues to be addressed particularly around land use and development, additional public investments, community-led development initiatives, and leadership training and education for residents.

For the transit LPA, the project will advance conceptual designs enough to apply for entry to federal project development, undertake a travel time and reliability analysis, and evaluate the feasibility of using articulated electric buses.

This project supports the 2018 RTP policy guidance on equity, safety, climate and congestion. Typical project activities include coordinating and facilitating the project steering committee, jurisdictional partner staff meetings, and the community engagement program; developing the equitable development strategy; and undertaking design work and analysis related to the locally preferred transit project. Contact Metro staff for to learn more details.

FY 2020-21 Unified Planning Work Program

**Key Project Deliverables / Milestones**



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**FY 2020-21 Cost and Funding Sources**

**Requirements:**

Personnel Services      \$ 50,000  
Materials & Services    \$ 50,000  
Interfund Transfer      \$ 11,445

**TOTAL**    \$ **111,445**

**Resources:**

FTA / FHWA / ODOT      \$ 100,000  
Metro Required Match    \$ 11,445

**TOTAL**    \$ **111,445**

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## STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 20-5141 FOR THE PURPOSE OF AMENDING THE FY 2020-21 UNIFIED PLANNING WORK PROGRAM (UPWP) TO INCLUDE THREE ADDITIONAL PLANNING PROJECTS FUNDED SINCE THE UPWP WAS ADOPTED

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Date: November 24, 2020  
Department: Planning  
Meeting Date: December 17, 2020

Prepared by: John Mermin, [john.mermin@oregonmetro.gov](mailto:john.mermin@oregonmetro.gov), Glen Bolen [glen.a.bolen@odot.state.or.us](mailto:glen.a.bolen@odot.state.or.us), Jeff Owen, [OwenJ@TriMet.org](mailto:OwenJ@TriMet.org), Chris Ford [chris.ford@oregonmetro.gov](mailto:chris.ford@oregonmetro.gov)

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### ISSUE STATEMENT

The UPWP is developed annually and documents metropolitan transportation planning activities performed with federal transportation funds. The UPWP is a living document, and may be amended periodically over the course of the year to reflect changes in project scope or budget.

### ACTION REQUESTED

Approval of the requested amendment to the 2020-2021 UPWP.

### IDENTIFIED POLICY OUTCOMES

The near-term investment strategy contained in the 2018 Regional Transportation Plan (RTP) focuses on key priorities for the purpose of identifying transportation needs, including projects and the planning activities contained in the UPWP. These investment priorities include a specific focus on four key outcomes:

- Equity
- Safety
- Managing Congestion
- Climate

The planning activities within the ODOT Urban Mobility Office are consistent with 2018 RTP policies and intend to help the region achieve these outcomes.

### STAFF RECOMMENDATIONS

Approve Resolution No. 20-5141 and amend the FY 2010-21 UPWP.

### STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

#### Known Opposition

None

## Legal Antecedents

Metro Council Resolution No. 20-5086 FOR THE PURPOSE OF ADOPTING THE FISCAL YEAR 2020-21 UNIFIED PLANNING WORK PROGRAM

## Anticipated Effects

Approval will result in funds added to the existing ODOT – Metropolitan Value Pricing project budget, which will allow ODOT to continue planning work on I-205 Tolling between now and June 30, 2021.

## **BACKGROUND**

### ODOT - I-5 / I-205 Metropolitan Value Pricing project

The adopted 2020-21 UPWP includes a work item for ODOT to complete a Metropolitan Value Pricing study for I-5 and I-205. This project will advance the results of a feasibility analysis completed in December 2018. The Value Pricing Feasibility Analysis was conducted using state funding from House Bill 2017; no federal funds were spent (except for \$43 in June by administrative staff activating the account).

The Oregon Transportation Commission has made multiple obligations since project outset, now totaling \$19.5 million. Most recently, In September 2020, the Oregon Transportation Commission allocated an additional \$4.4 million to continue planning for I-5 and implementation activities for I-205. This funding furthers the work of environmental planning and public engagement under the National Environmental Policy Act for tolling of the I-205 corridor and pre-NEPA planning for tolling of the I-5 corridor, traffic and revenue tolling studies, and planning for the tolling's back office and roadside technology systems.

During the period of July 2019 to September 2020 the work was focused on coordination with the FHWA and other partners, environmental planning, public engagement, work planning for back office and roadside technology systems, and coordination with the planned bridge reconstruction, seismic improvements, and widening on I-205.

The project began with a \$3 Million financial obligation in the 2019-20 UPWP. The final project budget is expected to be from \$35 to \$50 million. In August 2019, the Oregon Transportation Commission allocated, and JPACT approved \$2.1 million using redistribution funds for the purpose of continued planning in preparation for the National Environmental Policy Act (NEPA) process. Some specific efforts included analysis of traffic, diversion and community benefits and impacts, concept refinement and stakeholder engagement. In April \$10 million was obligated to continue the NEPA preliminary work for I-5 and the NEPA process for I-205, and the procurement of a General Tolling Consultant bringing the project total to \$15.1 million

The current phase is advancing two tolling locations – one each on I-5 and I-205 – for further refined analysis and review under federal environmental and tolling requirements and brings the total project budget to \$19.5 million.

The planning/environmental analysis phase is expected to continue into 2023.

The Oregon Transportation Commission is the tolling authority for Oregon. The project is led by ODOT, which has developed a decision and advisory structure to engage regional partners for technical input as well as an advisory committee to assist in developing an equity framework and equitable process.

Regional partners include local, county, and regional agencies, as well as transit service providers, including TriMet, Smart, and others. Additionally, ODOT is coordinating with Metro and the City of Portland on concurrent efforts related to congestion pricing. This project is consistent with the 2018 RTP Transportation System Management and Operations Policies. Specifically, TSMO Policy 1: Expand use of pricing strategies to manage travel demand on the transportation system.

#### TriMet - Red Line Transit Oriented Development planning project

In June 2020 TriMet was awarded a \$700,000 grant from the Federal Transit Administration (FTA) to complete planning for transit oriented development along the proposed 7.8-mile, 10-station west extension of the existing MAX Red Line light rail project and the east portion of the same Red Line corridor.

The MAX Red Line Extension and Reliability Improvements Project successfully entered FTA Project Development as a Small Starts project in July 2019. An Application for a rating within the 5309 Small Starts Capital Investment Grant Program was submitted to FTA on August 23, 2019. This project includes capital improvements that will increase the reliability of the entire MAX light rail system and allow the MAX Red Line to service 10 additional stations west of Beaverton Transit Center (TC).

Project elements include the 7.8 mile extension of Red Line service to the west; track, switch and signalization work at the Fair Complex / Hillsboro Airport station; track work and the construction of a new light rail platform to convert a single-track section to double-track at Gateway Transit Center; track work to convert a single-track section to double-track at the Portland International Airport station; and the purchase of six new light rail vehicles to enable the operation of the extension. This project will double the frequency of light rail service in a rapidly-growing part of the Portland metropolitan region.

This project will seek to activate under-developed station areas along the west extension of the MAX Red Line and the east portion of the Red Line corridor where increased reliability of MAX service resulting from the proposed Small Starts capital investments provides additional incentive for private and public investments. The MAX Red Line corridor forms the backbone of the regional light rail network. While this corridor represents an early investment in fixed guideway service, new investments in the corridor present an opportunity to respond to present-day regional growth and development patterns. The activation of these station areas is in response to changing growth patterns that extend the concentration of development activity away from the central city core, to middle-ring areas between five and fifteen miles from the Portland City Center. Engagement in focused TOD planning work is timely and allows new, state-of-the-practice approaches to station area and comprehensive planning to be applied to middle-ring stations.

While the entire extended Red Line corridor includes the alignment between Portland International Airport and the Fair Complex/Hillsboro Airport Transit Center, TriMet is choosing to focus these project activities on two specific segments of the corridor. The project area is defined as all areas within  $\frac{3}{4}$  of a mile of the MAX alignment east of NE 47th Avenue in Multnomah County and west of SW Murray and east of NE 28th Avenue in Washington County. Focus areas will also be established at the following stations: Parkrose / Sumner Transit Center; Gateway / NE 99th Transit Center; NE 82nd; NE 60th; Millikan Way; Beaverton Creek; Elmonica/SW 170th; Willow Creek/ SW 185th Transit Center; Fair Complex/ Hillsboro Airport. Station areas within the project area that are not focus areas will be included in broader economic and market analysis. Stabilization and economic opportunity development strategies will also be applied to these station areas.

The section of the corridor between Hollywood Transit Center and the Beaverton Central station has already established or transitioned to active development patterns and does not require the level of planning attention needed in the segments in the middle-ring areas where the market has not yet responded to investments in fixed guideway infrastructure.

The planning work undertaken as part of this project establishes a model for future TOD planning and implementation in middle-ring geographies. The approach and project activities proposed are intended to influence near term and long term economic, housing, public space and infrastructure planning, zoning and development activities in the project area to achieve the following results:

- Increased density of housing, businesses and services at middle-ring MAX Red Line Station Areas to leverage capital investments in increased reliability and grow transit ridership;
- Stabilization and access to business growth opportunities for current area businesses and new and emerging businesses;
- Stabilization and access to housing opportunity for current area residents and new residents;
- Ensure an appropriate mix of uses tailored to the unique needs of middle-ring station areas is achieved;
- Integration of multi-modal and transit efficient services into uses around station areas (ie, e-scooters, TNCs, delivery lockers);
- Improvement of bicycle and pedestrian facilities and better integration with existing high-quality multi-use path facilities to increase overall access to station areas; and
- Increased public and private development activity in the project area that concentrates growth near the most active and frequent alignment of MAX light rail in the region.

To achieve these outcomes, TriMet will engage with the broad community of businesses and residents in the project area, to create strategies for stabilization and increased economic opportunity, and will coordinate planning activities with multiple jurisdictional partners. Local and regional development professionals in both the private and public /



human services sector will also be engaged to understand the market and barriers to achieving transit supportive densities. Project deliverables will establish concrete strategies for Red Line station areas, and will also inform TriMet's Transit Oriented Development Guidelines, real estate acquisition and transfer activities, and development of public-private partnerships.

#### Metro - Tualatin-Valley Highway Transit and Development project

The Tualatin Valley (TV) Highway transit and development project creates a collaborative process with the surrounding communities and relevant jurisdictions to prioritize transportation projects, building on recent work undertaken by Washington County.

This is a new program commencing in the second half of fiscal year 2020-21. The project's first major task is to establish a steering committee that includes elected officials and community-based organizations (CBOs) that represent communities of color and other marginalized communities within the study area. This group is responsible for developing an equitable development strategy (EDS) and a locally preferred alternative (LPA) for a transit project. The committee's work is informed by input gathered through public engagement efforts that include targeted outreach to communities of concern.

The EDS identifies actions for minimizing and mitigating displacement pressures within the corridor, particularly in high poverty census tracts where public investments may most affect property values. This effort includes identification of existing conditions, businesses owned by marginalized community members and opportunities for workforce development. The EDS strategy may identify additional housing needs, workforce development gaps and opportunities for residents, regulatory issues to be addressed particularly around land use and development, additional public investments, community-led development initiatives, and leadership training and education for residents.

For the transit LPA, the project will advance conceptual designs enough to apply for entry to federal project development, undertake a travel time and reliability analysis, and evaluate the feasibility of using articulated electric buses.

This project supports the 2018 RTP policy guidance on equity, safety, climate and congestion. Typical project activities include coordinating and facilitating the project steering committee, jurisdictional partner staff meetings, and the community engagement program; developing the equitable development strategy; and undertaking design work and analysis related to the locally preferred transit project. Contact Metro staff for to learn more details.

Agenda Item No. 4.1

**Resolution No. 20-5138**, For the Purpose of Accepting the Findings in the Regional Framework for  
Highway Jurisdictional Transfer Study

*Resolution*

Metro Council Meeting  
Thursday, December 17, 2020

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ACCEPTING THE  
FINDINGS IN THE REGIONAL FRAMEWORK  
FOR HIGHWAY JURISDICTIONAL TRANSFER  
STUDY

RESOLUTION NO. 20-5138  
Introduced by Chief Operating Officer  
Marissa Madrigal in concurrence with  
Council President Lynn Peterson

WHEREAS, In greater Portland, ownership patterns of streets, roads, and highways reflect historical patterns; these patterns do not necessarily reflect current transportation, land use, and development needs; and

WHEREAS, many of these highway segments have significant needs and deficiencies, such as pedestrian and bicycle facility gaps, inadequate transit infrastructure, poor pavement conditions, or inadequate safety infrastructure, and many of these segments travel adjacent to areas with high concentrations of people of color, people with low incomes, or people who speak English as a second language; and

WHEREAS, The facility design and management approaches articulated in ODOT's Blueprint for Urban Design can address immediate community needs in advance of a jurisdictional transfer, while also reducing the cost of transfer and long-term maintenance of the facility; and

WHEREAS, Metro's 2018 Regional Transportation Plan (RTP) identified a jurisdictional transfer assessment as one approach to help the region meet its equity, safety and multimodal goals; and

WHEREAS, The Regional Framework for Highway Jurisdictional Transfer Study identifies which state-owned routes in greater Portland could be evaluated and considered for a jurisdictional transfer based on regional priorities, and summarizes key opportunities and barriers to transfer the routes; and

WHEREAS, The study was developed with input from several regional committees and elected bodies, such as the Transportation Policy Advisory Committee (TPAC), the Metropolitan Transportation Advisory Committee (MTAC), the County Coordinating Committees, and direction from the Joint Policy Advisory Committee on Transportation (JPACT), and the Metro Council; and

WHEREAS, The study was released for public comment and responses were received through an online survey, letters and virtual briefings; and

WHEREAS, The study identified technical and readiness methodologies for use by state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer or roadway ownership; and

WHEREAS, the study identified 11 state-owned highway segments in greater Portland considered to be most promising for a jurisdictional transfer based on an assessment of technical, readiness, and equity considerations at this point in time; and

WHEREAS, the study recognized all corridors in the study are of importance and that the technical and readiness factors will change over time and, as a result the most promising corridors for a jurisdictional transfer will change over time as well; and

WHEREAS, The Metro Council hereby recognizes that jurisdictional transfer depends on readiness and funding and that jurisdictional transfer is one but not the only approach to addressing the needs on statewide highways; and

WHEREAS, The Metro Council further recognizes the value in using the findings of this report to inform ongoing efforts to advance the use of facility design and management approaches and to develop funding strategies in advance of any jurisdictional transfers, now therefore,

**BE IT RESOLVED:**

1. That the Metro Council hereby accepts the findings in the Regional Framework for Highway Jurisdictional Transfer study to inform policy development in the 2023 Regional Transportation Plan update as shown in Exhibit A.
  
3. That the Metro Council accepts the public comments received in Exhibit B

ADOPTED by the Metro Council this 17th day of December, 2020.

Approved as to Form:

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Lynn Peterson, Council President

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Carrie MacLaren, Metro Attorney

# Regional Framework for Highway Jurisdictional Transfer Study

November 2020  
Final



Metro

## **Metro respects civil rights**

Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age, or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights) or call 503-797-1536.

Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid, or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) five business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at [www.trimet.org](http://www.trimet.org).

**Metro is the federally mandated metropolitan planning organization** designated by the governor to develop an overall transportation plan and to allocate federal funds for the region.

The Joint Policy Advisory Committee on Transportation (JPACT) is a 17-member committee that provides a forum for elected officials and representatives of agencies involved in transportation to evaluate transportation needs in the region and to make recommendations to the Metro Council. The established decision-making process assures a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including allocating transportation funds.

**Project web site:** <https://www.oregonmetro.gov/tools-partners/guides-and-tools/jurisdictional-transfer-assessment>

# Acknowledgments

## **Metro**

Margi Bradway  
Tom Kloster  
John Mermin

## **Oregon Department of Transportation**

Mandy Putney  
Glen Bolen

## **Project Steering Committee**

Margi Bradway, Metro  
Tom Kloster, Metro  
Mandy Putney, ODOT  
Art Pearce, Portland Bureau of Transportation  
Kristin Hull, Portland Bureau of Transportation  
Jessica Berry, Multnomah County  
Chris Fick, Multnomah County  
Chris Deffebach, Washington County  
Stephen Roberts, Washington County  
Mike Bezner, Clackamas County  
Bernie Bottomly, TriMet

## **Metro Council, JPACT, TPAC**

## **Consultants**

### **WSP**

Kirsten Pennington  
Liz Antin  
Geoff Gibson  
Mike Mason  
John Maloney  
Zoie Wesenberg  
Emily Wolff

### **JLA**

Brandy Steffen  
Jaye Cromwell

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# List of Abbreviations and Acronyms

ADA	American with Disabilities Act
FHWA	Federal Highway Administration
FTA	Federal Transit Administration
HB	House Bill
HDM	Highway Design Manual
HWY	Highway
I-	Interstate
IGA	Intergovernmental agreement
JPACT	Joint Policy Advisory Committee on Transportation
MPAs	Metropolitan Planning Areas
NHS	National Highway System
OAR	Oregon Administrative Rule
ODOT	Oregon Department of Transportation
OHP	Oregon Highway Plan
ROW	Right of way
RTP	Regional Transportation Plan
Study	Regional Framework for Highway Jurisdictional Transfer Study
TSP	Transportation System Plan
TV	Tualatin Valley

The Regional Framework for Highway Jurisdictional Transfer Study identifies which state-owned routes in greater Portland could be evaluated and considered for a jurisdictional transfer based on regional priorities, and summarizes key opportunities and barriers to transfer the routes. For the purposes of this study, jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing ownership of a highway right-of-way from the State to a local jurisdiction – a city or county.<sup>1</sup> The decision framework serves as a tool for the state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer of roadway ownership. The study was convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

Metro's 2018 Regional Transportation Plan (RTP) identified a jurisdictional transfer assessment as a necessary step to help the region meet its equity, safety and multimodal goals. In greater Portland, ownership patterns of streets, roads, and highways reflect historical patterns; these patterns do not necessarily reflect current transportation, land use, and development needs.

Several arterials in greater Portland were originally constructed to provide connections from farmland to the cities (referred to as "farm-to-market" roads). Over time, they grew to become highways. In 1956, the federal government began building the Interstate Highway System (known as the Dwight D. Eisenhower National System of Interstate and Defense Highways) and between 1960 and 1980, the highway system in the Portland area was built. It included limited access facilities such as Interstate 5 (I-5), I-205, and Highway 26, which provided more efficient long-distance travel options and replaced the function of the existing state system.

Since then, much of the land surrounding these highways has evolved to accommodate population growth, new development, and diversified land uses. As a result, many of the original roads now serve multiple travel needs, providing space for people walking and biking, taking transit, and making short- and medium-distance trips by motor vehicle. Roadway designs that catered to convenient auto access and were useful last century do not always work for our communities today. Managing these roads – ones that used to function as highways – to meet the needs of our communities, especially people of color, people with low-incomes, or limited-English speakers, has become increasingly complex due to historic lack of public and private investment in areas serving disadvantaged communities of color or communities with lower incomes.

While roadway functions have changed, for many, their roadway classification and physical design have not. Roadways that remain state highways retain the same classification identified in the 1999 Oregon Highway Plan (OHP), as amended. Transferring non-limited access state highways that function as urban arterials to local jurisdictions could provide the opportunity for them to be re-constructed and operated consistent with local design standards that may respond better to modern transportation uses and mobility options, desired land use and development patterns, and community needs.

The study provides a toolkit for state, regional, and local jurisdiction leaders to identify promising candidate roadways for transfer and to facilitate successful transfer of roadway ownership. It identified 11 state-owned highway segments in greater Portland that could be considered for a jurisdictional transfer and addressed some of the opportunities and barriers to transferring the routes. These 11 highway segments have significant needs and deficiencies, such as pedestrian and bicycle facility gaps, poor pavement conditions, or inadequate safety infrastructure. Many of these segments travel adjacent to areas with high concentrations of people of color, people with low incomes, or people who speak English as a second language. In general, these characteristics make them more promising candidates for jurisdictional transfer to local jurisdictions. In some cases, there is current interest from the local jurisdictions to pursue transfer in attempts to align existing and future land uses with community interest. As such, an investment in a jurisdictional transfer is not just a transportation investment, but also a community investment.

---

1. A jurisdictional transfer can also be the transfer of ownership from a local jurisdiction to ODOT.

In addition to briefings and workshops with members of Metro’s Transportation Policy Alternatives Committee (TPAC) and Metro Council, project-focused committees were established to inform the study.

The Project Executive Team included representatives from Metro and ODOT and the Project Steering Committee included representatives from Metro, ODOT, TriMet, Washington County, Clackamas County, Multnomah County and the City of Portland.

### **Inventory of non-interstate highways**

The study team prepared an atlas including all state-owned highways within the Portland metropolitan area that are not freeways. The atlas identifies jurisdictional boundaries, national, state, regional and local roadway classifications or designations and other roadway characteristics or elements such as surrounding land use, average annual daily traffic volume, presence of sidewalks, bike lanes, and bridges, and environmental factors. The atlas provided an inventory to help identify which roadways were studied further to develop findings regarding the most promising candidates for jurisdictional transfer. The atlas is included as Attachment A.

### **Policy framework**

The study team summarized the legal, regulatory, and policy framework for highway jurisdictional transfers in Oregon. The team also identified major constraints to the transfer process and provided best practices based on examples of completed roadway transfers in Oregon. The summary gives decision-makers the overarching policy framework, relevant case studies and best practices needed to identify, analyze and implement jurisdictional transfers in the region. (see Section 2 and Attachment B)

### **Corridor evaluations and findings**

The study team evaluated 78 corridor segments within the Portland metropolitan area to determine the most promising corridor segments for transfer. For the purposes of this evaluation, a corridor segment is defined as a portion of an arterial highway within a single jurisdiction in the Portland Metropolitan Planning Area (MPA).<sup>2,3</sup> The evaluation methodology consists of two parallel processes, each consisting of one screening round and one evaluation round.

- Round 1: Preliminary screening of all ODOT-owned arterial highway corridor segments in the Portland MPA to screen out segments that are not viable candidates for jurisdictional transfer because of their intended vehicle and freight throughput function
- Round 2a: Technical evaluation of the remaining segments from Round 1 to select promising segments for potential transfer
- Round 2b: Readiness evaluation of the remaining segments from Round 1 to select promising segments for potential transfer

The results from Round 1, preliminary screening, equally informed subsequent evaluation rounds. After Round 1, the study team evaluated the remaining corridor segments to identify the most promising segments as candidates for jurisdictional transfer from two perspectives: technical (Round 2a) and readiness of the local jurisdictional to accept and manage an arterial (Round 2b). The technical evaluation examined segments using technical considerations related to the existing and future function of the roadway. Starting with a technical perspective allows considerations about the function of a roadway to inform conversations about jurisdictional transfer. The readiness evaluation examines the same universe of segments using readiness considerations related to local support and interest, including characteristics such as jurisdictional capacity, leadership interest, or experience with jurisdictional transfers.

Historically, identifying a single, comprehensive funding source for jurisdictional transfers in the region has been a challenge. Jurisdictions are typically only interested in transfers when accompanied by funding to improve the roadway, and it is difficult to provide a meaningful funding amount by piecing different funding

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2. The MPA is a federally-mandated boundary designated by Metro and encompasses all cities in the metropolitan area.

3. Corridor segment definitions are for this evaluation only. Highway transfer recommendations may combine or split corridor segments based on what makes sense at the time of a transfer.

buckets together. The study team recognizes the need for a wholistic and comprehensive funding strategy to fully accomplish jurisdictional transfers. Refer to the Consultant Recommendation memorandum (November 2020) for a list of funding sources and a broader funding discussion.

The study team also conducted an equity consideration evaluation to identify highway corridors with higher-than-average levels of people of color, low-income households, people who are unemployed and people with limited English proficiency and/or disabilities. Those corridors with higher than regional averages of equity-focused populations were given additional consideration as most promising for jurisdictional transfer.

The team evaluated and compared results from Round 2a and Round 2b, informed by the equity considerations evaluation, to identify segments that appeared most promising for jurisdictional transfer discussion (see Sections 3 and 4 and Attachment C for evaluation criteria and scoring and Attachment D for the Equity Considerations).

While all of the corridors in this report are of importance, the team identified the 11 corridors with mile points (MP) listed below (as shown in Figure ES-1) for consideration for further jurisdictional transfer discussions. These corridors showed the strongest characteristics for potential jurisdictional transfer based on an assessment of technical, readiness and equity considerations. Many of these highway corridors are within areas that have higher than average concentrations of people of color and people who are low-income. In addition, many of these highway corridors demonstrated traffic safety needs. Of the factors used in the analysis, these factors were identified of critical concern in the 2018 RTP. Figure ES-2 illustrates the evaluation process.

1. Powell Boulevard (U.S. 26): MP 0.2 - 10.0
2. Barbur Boulevard (OR 99W): MP 1.2 - 7.6
3. SE/NE 82nd Avenue (OR 213): MP -0.1 - 7.2
4. Tualatin Valley Highway (OR 8): MP 2.9 - 5.9
5. Pacific Highway W (OR 99W): MP 7.6 -11.5
6. Tualatin Valley Highway (OR 8): MP 5.9 - 17.9
7. Pacific Highway W (OR 99W): MP 11.5 - 14.5
8. Farmington Road (OR 10): MP 5.9 - 7.3
9. SW Hall Boulevard (OR 141: MP 2.6 - 7.1 and MP 7.7 - 8.9
10. SE McLoughlin Boulevard (OR 99E): MP 5.7 - 6.7
11. Willamette Drive (OR 43): MP 8.0 - 11.5

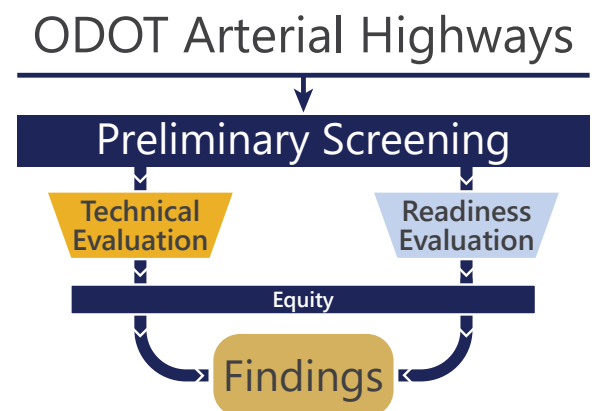


Figure ES-2: Screening, technical evaluation and readiness evaluation process

## Needs and deficiencies

The study team prepared a high-level assessment of the needs and deficiencies based on today's conditions and sentiments of the 11 potential jurisdictional transfer candidates identified above to help inform future conversations about investment and/or jurisdictional transfer. The needs and deficiencies assessment is designed and organized primarily as a tool for cities and counties most likely to receive these facilities and secondarily for regional and state agencies. See Section 5 and Attachment E.

## Cost estimating methodology

The study team developed a cost estimating methodology to provide partners with a consistent process for use in developing and understanding the costs associated with a highway jurisdictional transfer in greater Portland. The methodology is based on industry practices, asset management strategies, past jurisdictional transfers, and technical expertise in consultation with ODOT staff and technical experts. Roadways require maintenance, improvements, and oversight over the course of ownership. The methodology ensures partners have consistent, necessary tools to consider these variables as local jurisdictions, Metro and ODOT engage in conversations regarding highway jurisdictional transfer. See Section 6 and Attachment F.





# 1. Introduction

The Regional Framework for Highway Jurisdictional Transfer Study (study) identifies which state-owned routes in greater Portland could be evaluated and considered for a jurisdictional transfer based on regional priorities, and summarizes key opportunities and barriers to transfer the routes.

For the purposes of this study, jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing ownership of a highway right of way from the State to a local jurisdiction – a city or county.<sup>4</sup> The decision framework will serve as a tool for state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer of roadway ownership. The study is convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

Metro's 2018 Regional Transportation Plan (RTP) identified a jurisdictional transfer assessment as a necessary step to help the region meet its equity, safety and multimodal goals. In greater Portland, ownership patterns of streets, roads and highways reflect historical patterns, but do not necessarily reflect current transportation, land use and development needs.

Several arterials in greater Portland were originally constructed to provide connections from farmland to the cities (referred to as "farm-to-market" roads). Over time, they grew to become highways. In 1956, the federal government began building the Interstate Highway System (known as the Dwight D. Eisenhower National System of Interstate and Defense Highways) and between 1960 and 1980 the highway system in the Portland area was built. It included limited access facilities such as Interstate (I-)5, I-205 and Highway 26, which provided more efficient long-distance travel options and replaced the function of the existing state system. Since then, much of the land surrounding these highways has evolved to accommodate population growth, new development, and diversified land uses. As a result, many of the original roads now serve multiple travel needs, providing space for people walking and biking, transit, and short- and medium-distance travel for vehicles. Roadway designs that catered to convenient auto access and were useful last century do not always work for our communities today. Managing these roads that used to function

---

4. A jurisdictional transfer can also be the transfer of ownership from a local jurisdiction to ODOT.

# Introduction

as highways to meet the needs of our communities, especially people of color, people with low-incomes, or limited-English speakers has become increasingly complex due to historic lack of public and private investment in areas serving communities of color or communities with lower incomes.

While roadway functions have changed, for many, their roadway classification and physical design have not. Roadways that remain state highways retain the same classification identified in the 1999 Oregon Highway Plan (OHP), as amended. Transferring non-limited access state highways that function as urban arterials to local jurisdictions could provide the opportunity for them to be reconstructed and operated consistent with local design standards that may respond better to modern transportation uses and mobility options, desired land use and development patterns, and community needs. As such, an investment in a jurisdictional transfer is not just a transportation investment, but also a community investment.

In addition to briefings and workshops with members of Metro's Transportation Policy Alternatives Committee (TPAC) and Metro Council, project-focused committees were established to inform the study.

The Project Executive Team included representatives from Metro and ODOT and the Project Steering Committee included representatives from Metro, ODOT, TriMet, Washington County, Clackamas County, Multnomah County and the City of Portland.

This report includes the following sections and attachments:

1. Introduction
2. Policy framework – an overview of the legal, regulatory and policy framework for highway jurisdictional transfers in Oregon
3. Methodologies – summarizes the methodology used for three rounds of evaluation – Preliminary Screening (Round 1), Round 2a Technical, and Round 2b Readiness – and the equity considerations analysis
4. Findings – summarizes the findings from the 3 rounds of evaluation and equity considerations and provides a description of the potential jurisdictional transfer candidates
5. Needs and deficiencies – summarizes a high-level snapshot assessment of the needs and deficiencies of potential jurisdictional transfer candidates in the Greater Portland Area to help inform future conversations about investment and/or jurisdictional transfer
6. Cost estimating methodology – summarizes the considerations needed to develop costs to support a highway jurisdictional transfer. The baseline approach developed for this project provides information such as costs and necessary supporting information for decision-makers to engage in jurisdictional transfer negotiations
7. Conclusion – describes next steps in general and considerations at a state, regional, local level

## Attachments

- |  |  |
|--|--|
| <b>A.</b> Inventory of non-interstate highways           | <b>D.</b> Equity considerations memorandum |
| <b>B.</b> Policy framework                               | <b>E.</b> Needs & deficiencies assessment  |
| <b>C.</b> Methodologies and evaluation (round 1, 2a, 2b) | <b>F.</b> Cost estimating methodology      |
|  | <b>G.</b> Reclassification memo            |





## 2. Policy framework

Understanding Oregon’s legal, regulatory, and policy framework for highway jurisdictional transfers is critical to navigating a transfer process. The study identifies major constraints to the transfer process and provides best practices based on examples of completed roadway transfers in Oregon (see Attachment B: Policy framework).

To give decision-makers the tools they need to identify, analyze, and implement jurisdictional transfers in the region, the study focuses on providing policy framework background, relevant case studies, and best practices.

The study’s policy framework describes the federal, state, regional, and local government policies and plans that affect roadway classifications. It also defines key legal considerations for a jurisdictional transfer and describes the legal process for a transfer.

### 2.1 Roadway classifications

Roadway classifications are categorizations given to roadways by the federal, state, regional, or local governments to help delineate differences in roadway purpose and design.<sup>5</sup> A single roadway may have multiple classifications

(e.g., federal, state, regional, and local) and multiple policy overlays (e.g., expressways, land use, statewide freight routes, scenic byways, lifeline routes, etc.).

These classifications are intended to define the purpose of a road and its function within the larger transportation network. Classifications are based on how many people use a road, how often they use it, why they use it, and their experience while using it. A roadway’s design standards, planning, engineering, maintenance, and operations can all be influenced by its classification. In general, the classification designated by the owner of the roadway most significantly impacts roadway design. Roadway classifications are delineated in plans and policies. In some cases, classifications are based on a roadway’s past

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5. Policy Brief: Route Designations and Classifications. Oregon Department of Transportation. n.d.

# Policy framework

use and the roadway no longer functions consistent with its classification given current needs of local jurisdictions or changes in land use. In these cases, a roadway classification may need to be updated to better align its function and classification.

**Federal:** The Federal Highway Administration (FHWA) oversees the National Highway System designations and has established the following functional classifications for roadways:

Principal Arterial (all sub-categories are recognized in both urban and rural forms)

- Interstate
- Other Freeways & Expressways
- Other
- Minor Arterial
- Collector (all sub-categories are recognized in both urban and rural forms)
- Major
- Minor
- Local

The federal classification hierarchy identifies how roadways meet intended travel objectives. These objectives range from serving long-distance passenger and freight needs to neighborhood travel. The coordinated and systemic maintenance of an effective roadway functional classification system supports the strategic allocation of Federal Aid funds to the roadways with the greatest need and enables people and goods to move fluidly through the transportation system.

**State:** The 1999 OHP has three main elements: Vision, Policy, and System. The Policy Element contains goals, policies, and actions.

Goal 1 of the OHP is System Definition. This goal is “to maintain and improve the safe and efficient movement of people and goods and contribute to the health of Oregon’s local, regional and statewide economies and livability of its communities.” The System Definition policies define a



*Tualatin Valley Hwy (OR 8)*

roadway classification system for state highways to guide decisions. Policy 1A divides state highways into five roadway classification categories based on function:

- **Interstate Highways** provide connections to major cities, regions of the state, and other states. In urban areas, they provide connections for intraregional trips as a secondary function.
- **Statewide Highways** provide interurban and interregional mobility and provide connections to larger urban areas, ports, and major recreation areas. They also provide connections for intra-urban and intraregional trips.
- **Regional Highways** provide connections to regional centers, statewide or interstate highways, or economic and activity centers of regional significance.
- **District Highways** provide connections between small urbanized area, rural centers, and urban hubs. They serve local access and traffic.
- **Local Interest Roads** function as local streets or arterials and serve little or no purpose for through traffic mobility.<sup>6</sup>



Additionally, OHP Policy 2C (Interjurisdictional Transfers) requires the State of Oregon to consider, in cooperation with local jurisdictions, interjurisdictional transfers that:

- rationalize and simplify the management responsibilities along a roadway segment or corridor;
- reflect the appropriate functional classification of a roadway segment or corridor; and/or
- lead to increased efficiencies in the operation and maintenance of a roadway segment or corridor.<sup>7</sup>

**Regional:** Oregon Metro's 2018 Regional Transportation Plan (RTP) is the blueprint to guide investments for all forms of travel in the Metro area. The RTP prioritizes policies, planning, and projects identified and adopted by the Joint Policy Advisory Committee on Transportation (JPACT) and approved by FHWA and Federal Transit Administration (FTA) as the region-wide transportation plan. It identifies the region's most urgent transportation needs and priorities for investments over the next 25 years.

Chapter 3 of the 2018 RTP establishes regional classifications for roadways within the Portland metropolitan area. These classifications categorize roads for each identified regional modal network (pedestrian, bicycle, transit, freight, and motor vehicles). Like federal and state classification systems, the RTP's classifications are hierarchical and provide a vision for the modal networks. Each classification describes the volume and type of trips most suited for the group of roadways. The RTP classifications, by modal network, include:

6. Oregon Highway Plan. Oregon Department of Transportation. 1999.

7. Ibid.

# Policy framework

- **Pedestrian:** pedestrian parkway, regional pedestrian corridor, local pedestrian connectors
- **Bicycle:** bicycle parkway, regional bikeway, local bikeways
- **Transit:** existing light rail, commuter rail, enhanced transit corridor, street car, High Capacity Transit (HCT) in progress, future HCT, intercity high-speed rail, frequent bus, regional and local bus
- **Freight:** main roadway routes, regional intermodal connections, roadway connections
- **Motor Vehicle:** throughways, major arterial, minor arterial

Chapter 8 of the RTP establishes the Jurisdictional Transfer Assessment Program as part of the ongoing and future efforts to implement the RTP. Metro created this program as part of near-term planning efforts to apply the plan at the regional scale (section 8.2.3.4 of the RTP).

**Local:** At the local level, cities and counties use Transportation System Plans (TSPs) and local code to designate roadway classifications and their design standards. Pursuant to Oregon Administrative Rule (OAR) 660-012-0015, all TSPs require a road plan for a system of arterials and collectors and standards for the layout of local streets and other important non-collector street connections.

Roadway classifications in city and county TSPs are also required to be consistent with regional and state classifications.<sup>8</sup> Local classifications often use different systems and/or terminology but are fundamentally consistent in policy.

## 2.2 Legal considerations and legal process for transfer in Oregon

The jurisdictional transfer process includes completing and approving two documents that can address specific legal issues if they arise: the Jurisdictional Transfer Agreement and the intergovernmental agreement (IGA).

The jurisdictional transfer agreement should clearly spell out maintenance responsibilities to prevent confusion about which agency performs maintenance and to what standard. In particular, highways that have been constructed or improved using federal funds may still have federal requirements dictating maintenance levels for long periods of time, usually the useful life of the facility.

An IGA should clearly state the process and timing for transfer and identify the responsibilities of the

State and local jurisdiction to address three common legal issues:

- Tort liability
- Americans with Disabilities Act (ADA) claims
- Right-of-way designations

The IGA addresses tort claims by identifying who assumes liability (i.e., liability for a wrongful act, not including breach of contract or trust, that results in injury to another person's property or the like and for which the injured party is entitled to compensation). Because agencies have six months to respond to tort claims, the involved agencies would likely know of any outstanding claims related to the segment for jurisdictional transfer. The IGA should lay out a clear timeframe for transfer and identify agency roles to prevent liability issues.

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8. OAR 660-012-0020.



*SE McLoughlin Blvd (OR 99E)*

Second, the IGA should clearly identify timing and agency responsibilities to ensure federal or state ADA claims relevant to the highway being transferred are appropriately addressed. Unlike tort claims, ADA claims require immediate response from the responsible agency.

Third, the IGA should clearly identify the precise right of way being transferred. The ownership of roadways is complex; in some instances, ODOT maintains the road from curb to curb, while the city owns and maintains the roadway from the curb to the right of way line. The IGA should ensure the ownership of the right of way, and where they right of way is located, is clear to prevent confusion on ownership and liability.

Lastly, the IGA often identifies a cost (typically for state of good repair and/or upgrades) and source of funding for the transfer that is mutually agreed to by all parties.

Best practice indicates that transferring ownership of a state highway requires years of intentional planning and collaboration among the involved parties. Once a roadway is selected, the formal process that legally transfers property from ODOT to a local jurisdiction (or vice versa) can begin. The legal mechanism for this transfer is a contract between the parties. This is referred to as the jurisdictional transfer process. The following three steps summarize the legal process:

**Step 1:** Jurisdictional Transfer Agreement – once an agreement has been approved, ODOT and the local agency signs the agreement to implement the transfer process.

**Step 2:** Jurisdictional Transfer Conveyance Documents – a transfer contract includes agreement on right of way acquisition and mapping, roles and responsibilities after the transfer, and recording the legal documents with the County.

**Step 3:** Changes to the OHP and RTP: A jurisdictional transfer involves a change to the highway system that is noted on the OHP highway map and the OHP list of state-owned highways. The OHP must be amended accordingly, which requires OTC approval.<sup>9</sup> The RTP must be amended if the jurisdictional transfer results in any changes to RTP functional classifications (on the motor vehicle, transit, bicycle, pedestrian, or freight system maps) or any changes to the RTP project list.

9. Transferring Roads: A Handbook For Making Jurisdictional Transfers. Oregon Department of Transportation. 2003

## 2.3 Jurisdictional transfer process and considerations

The study's examination of case studies of completed highway jurisdictional transfers yielded three primary themes:

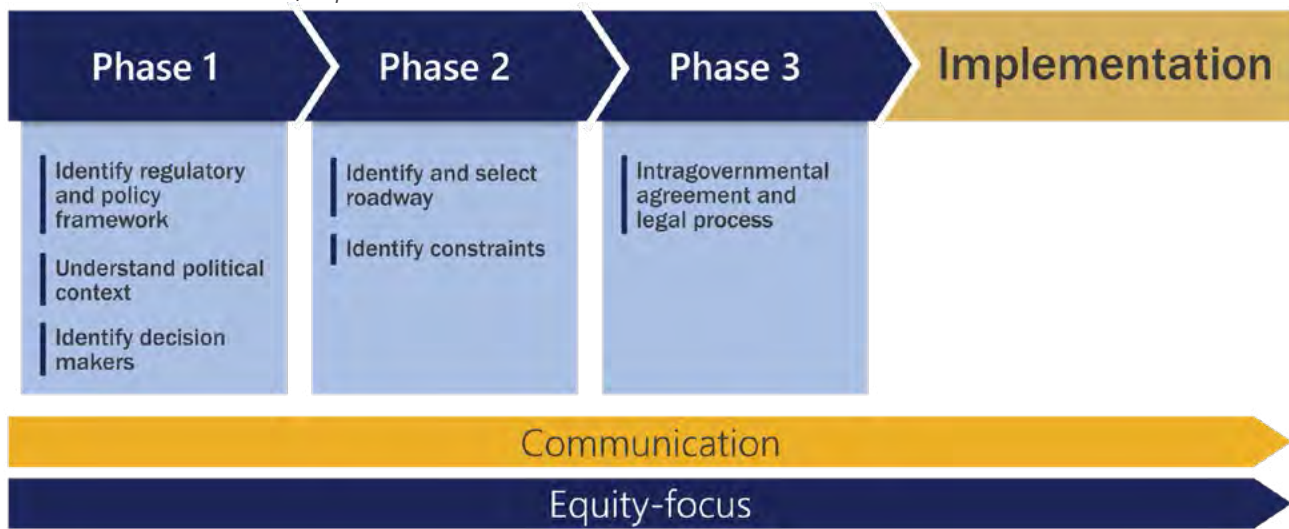
1. **Incentive and mutual benefits:** Jurisdictional transfer is initiated when the state and local jurisdiction have incentive to execute the transfer. Case studies indicate that local jurisdictions are motivated by the community's desire for an improved roadway and when a change in roadway function will prioritize non-automobile travel modes, to improve traffic safety or support desired land use outcomes. Transfer is easiest when funding is available (for example, through the State Legislature) to upgrade the road prior to transfer. Frequently, a transfer reduces maintenance costs and liability for the State, providing long-term financial incentive for the State to complete a transfer. Once incentives are established, the state and local jurisdiction are motivated to complete a transfer by the prospect of mutual benefits. Because the jurisdictional transfer process is grounded in negotiations, transparent and frequent communication ensures that both parties will receive some type of benefit – a financial benefit or outcome that supports the agency's mission.
2. **Roadway maintenance and design standards:** Jurisdictional transfers frequently occur to improve a roadway's maintenance or change its design standards. ODOT design standards are consistent with the Highway Design Manual, and many local jurisdictions use design standards with more flexibility for urban design. Design standards are influenced by a road's classification and may not be consistent with current or future uses of the roadway.
3. **Consistency with current land use:** While jurisdictional transfers often occur to update physical conditions of a roadway, they also occur when a roadway's function is not consistent with current and future land use. Transferring road ownership to a local jurisdiction can help support development or redevelopment by aligning transportation and adjacent land use. The transfer process itself can facilitate development when the negotiation process results in a design that supports adjacent land uses. Sandy Boulevard between Grand Avenue and 99th Avenue was transferred from ODOT to the City of Portland in 2003. Prior to the transfer, two segments of Sandy Boulevard operated differently from the remainder of the road, with greater mixing of modes as the roadway moved east. The transfer was intended to support redevelopment and growth within the Hollywood Town Center and Main Street improvements. Under City ownership, the Sandy Boulevard Resurfacing and Streetscape Project made multimodal improvements and changed the streetscape. In 2008, the City prepared a report that found the project to be widely successful. The transfer reduced ODOT's maintenance costs and regional through traffic is still served by I-84.

### Best practices

Best practices for highway jurisdictional transfer should be followed throughout the entire transfer process – from selection to implementation.

**Follow a process:** The jurisdictional transfer process typically begins years prior to the formal legal process, starting with regional and statewide planning, and continuing through highway selection to implementation of the Transfer Agreement. From initiation to completion, jurisdictional transfers should follow a clear process to enable the State and local jurisdiction(s) to effectively address issues before they become sticking points that prevent or delay the transfer.

Figure 2-1. Jurisdictional transfer process



Importantly, a fair, equitable process helps jurisdictional transfers meet community goals. Throughout the process, the involved agencies should prioritize community needs and values. In the Portland region, 56% of state-owned arterial highways are located in Historically Marginalized Communities (*areas with higher than average number of people of color, English language learners, and/or lower-income people*). It is imperative for the involved agencies to develop a process and identify equitable outcomes to ensure the results of jurisdictional transfer reduce barriers for people of color and marginalized communities and is consistent with Metro Council’s Regional Equity Strategy, which is being carried out across Metro’s planning department. Figure 2-1 provides an overview of the comprehensive jurisdictional transfer process.

*Phase 1:* The first phase is focused on preparing for the transfer. During this phase, the involved agencies should:

- **Identify a regulatory and policy framework** to allow the involved agency staff and stakeholders to understand the basis for jurisdictional transfer. The jurisdictional transfer process is rooted in state statute, but it includes intricacies at the federal, regional and local levels. A regulatory and policy framework helps navigate these complexities, such as, roadway ownership, classifications, relevant policies and legal requirements. It also helps involved staff and stakeholders to become familiar with relevant terminology and concepts. This step provides the same information to the involved agencies, ensuring they enter the transfer process with a shared understanding of the applicable regulations and policies.
- **Understand the political context** in the region and within and among the State and local jurisdiction(s) to help identify funding opportunities, develop a process for transfer and set expectations for the transfer process. Developing a knowledge of the political context, including agency and community priorities, helps determine if highway jurisdictional transfer is the right tool to accomplish the desired outcomes. Jurisdictional transfer can help achieve community goals and result in mutual benefits – but it is not always the most effective route to achieving desired outcomes for the roadway under consideration. Once a roadway is selected, taking inventory of each agency’s priorities, elected officials’ interests, and community goals will support a more successful process. Agency priorities will vary and are often influenced by elected officials. Understanding the overall political context will help set expectations for the formal transfer process, ensuring the process and desired outcomes are achievable. Agency priorities

# Policy framework

will impact candidate roadways for transfer, available funding sources and levels, and the interests each agency brings to the negotiating table. All these elements should be documented and understood before entering Phase 2 and 3.

- **Identify decision makers early** for jurisdictional transfer to set expectations, help identify realistic outcomes and help navigate the process to achieve desired outcomes. The decision-makers include those who will agree to enter into negotiations, and those who will sign the transfer documents to formalize the transfer. Identifying the approvers early will ensure the process is on track to complete the jurisdictional transfer and avoid backpedaling down the road. It will also set outcomes that are expected to be approved.

*Phase 2:* Once the foundation for transfer has been established, the agencies are set to select a roadway and identify the constraints to transferring it from one agency to another. Identifying a roadway may hinge on available funding, but best practice indicates that roadways should be selected based on community needs and values. The 2018 RTP recommends the following steps to select roadways for transfer:

- identify state owned routes that the community and stakeholders would like to evaluate and consider for jurisdictional transfer;
- identify gaps and deficiencies on these roadways;
- prioritize the roadways; and
- address some of the barriers and opportunities to transfer the prioritized routes from state ownership to local ownership.

After the roadway has been selected, constraints should be identified. Major constraints, as illustrated in the case studies, can delay or limit the ability to achieve the preferred outcome, even if both parties agree a transfer is the best option. However, identifying and addressing constraints early and effectively helps shape expectations for the involved parties. It encourages compromise and creativity to develop a mutually beneficial agreement. Constraints differ on a case-by-case basis, but can generally be categorized into two categories: fiscal constraints and physical constraints. Refer to Attachment B: Policy Framework for additional information.





*Phase 3:* After the roadway is selected, the agencies can enter into the formal transfer process that implements an intergovernmental agreement. This phase is described above in the Legal Considerations and Legal Process for Transfer in Oregon section.

**Communicate:** Best practices for jurisdictional transfer include communications that result in shared desired outcomes. Best practices (shown in figure 2-2) include:

- Identify clear roles within ODOT and within the involved local jurisdiction(s), such as a jurisdictional transfer specialist, asset manager, agreements specialist, traffic engineer and financial and support services staff. This will allow staff to develop expertise in the process and foster relationships among the involved staff.
- Set expectations for clear, open, and frequent communication among each agency's departments and between agencies.
- Encourage compromise and creativity between the state and local agencies to lead to a fair and acceptable agreement. Communication is particularly critical during negotiation.
- Conduct early outreach with the affected communities.
- Commit the partnering agencies to do their due diligence to understand the community's needs. Early engagement will lead to a smoother process by preventing tension and backpedaling during negotiation and agreement.

Figure 2-2. Best practices for communication during a jurisdictional transfer process



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# 3. Methodologies

This section describes the methodology to evaluate and select the most promising arterial highways in greater Portland as potential candidates for highway jurisdictional transfer. This overall methodology describes the methods for three different evaluations: the technical evaluation, the readiness evaluation, and equity considerations. The technical evaluation examines segments using technical considerations related to the existing and future function of the roadway. Starting with a technical perspective allows considerations about the function of a roadway to inform conversations about jurisdictional transfer. The readiness evaluation examines the same universe of segments using readiness considerations related to current (2020) local support and interest, including characteristics such as jurisdictional capacity, leadership interest, or experience with jurisdictional transfers. The results of the technical evaluation are more static, and the results of the readiness evaluation are more fluid; the readiness evaluation may change over time as local support and political interest change.

The methodology consists of two parallel processes, each consisting of one screening round and one evaluation round, to determine the most promising corridor segments for transfer from ODOT to a local jurisdiction. For the purposes of this evaluation, a corridor segment is defined as a portion of an arterial highway within a single jurisdiction in the Portland Metropolitan Planning Area (MPA).<sup>10,11</sup>

**Round 1:** Preliminary screening of all ODOT-owned arterial highway corridor segments in the Portland MPA to screen out segments that are not viable candidates for jurisdictional transfer because of their intended vehicle and freight throughput function.

**Round 2a:** Technical evaluation of the remaining segments from Round 1 to select promising segments for potential transfer.

**Round 2b:** Readiness evaluation of the remaining segments from Round 1 to select promising segments for potential transfer.

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10. The MPA is a federally-mandated boundary designated by Metro and encompasses all cities in the metropolitan area.

11. Corridor segment definitions are for this evaluation only. Highway transfer recommendations may combine or split corridor segments based on what makes sense at the time of a transfer.

# Methodologies

Figure 3-1. Metro RTP four pillars



The results from Round 1, preliminary screening, equally informed subsequent evaluation rounds. After Round 1, the study team evaluated the remaining corridor segments to identify the most promising segments as candidates for jurisdictional transfer from two perspectives: technical (Round 2a) and readiness of the local jurisdiction to accept and manage an arterial (Round 2b). The readiness evaluation lagged the technical evaluation to allow roadway function to inform transfer discussions. The team completed Round 1 and Round 2a in fall 2019, and completed Round 2b in spring 2020. The team then evaluated and compared results from Round 2a and Round 2b to develop findings for consideration. These findings were informed by the project team's Equity Considerations analysis, which evaluated highway corridors for numbers of people of color, low-income households, people who are unemployed and people with limited English proficiency and/or disabilities.

The project team selected segments with the highest scores from each of the evaluations as recommendations for the most promising candidates for jurisdictional transfer (see Section 4 Findings). Refer to Attachment C for more detailed technical and readiness evaluation methodologies and Attachment D for a more detailed equity considerations analysis methodology. Figure 3-1 illustrates this process.

## 3.1 Round 1: preliminary screening

Round 1 had one yes/no question that identified significant barriers to jurisdictional transfer. The study team applied the question to each corridor segment. Corridor segments that did not "pass" Round 1 did not move to Round 2a or 2b. Corridor segments with a "no" answer to the screening question moved on the technical and readiness evaluation rounds. The Round 1 preliminary screening question, including rationale, is listed below.

Question: Does the segment have an Expressway (OHP) and/or Throughway (RTP) designation?

If the answer to this question was "no," the segment moved to Round 2 of the evaluation and selection process. Expressway and Throughway designations indicate that a roadway or corridor segment has statewide or regional significance and describes the function of the roadway. The results from this preliminary screening round equally informed subsequent evaluation rounds.

## 3.2 Round 2a: technical evaluation

Round 2a's purpose was to evaluate the remaining corridor segments with a consistent set of technical criteria that reflect regional values (i.e., consistent with the RTP and its four pillars). Using professional expertise, the team intentionally developed measures and corresponding questions to avoid complicated technical analysis, allowing any jurisdiction to evaluate its own roadways.

The following criteria were used for the technical evaluation:

- Local plans
- Access to business and housing
- Historically marginalized communities
- Crash frequency
- Density of conflict points
- Freight connection
- Pedestrian and bicycle system priority
- Transit priority
- Redundant route

After the study team evaluated the corridor segments, they used the results to select segments that appeared most promising for jurisdictional transfer from a technical perspective. The evaluation was based on the overall results, so that the segments receiving more "high" and "medium" ratings were selected.

## 3.3 Round 2b: readiness evaluation

Round 2b's purpose was to evaluate the remaining segments (after Round 1) with a consistent set of readiness criteria. This was the same group of segments evaluated in Round 2a. The project team evaluated the corridor segments for readiness using a mix of available data and interviews with a staff representative from the local jurisdiction where the highway segment is physically located.

Professional judgment was used in cases where an interview response was not available. The study's interview guide is found in Appendix B of Attachment C.

The readiness analysis represents a snapshot-in-time evaluation of each corridor segment. Changes in political leadership or investments in paving, safety enhancements, or other improvements will change the overall readiness score for a corridor. The following criteria were used for the readiness evaluation:

- Jurisdiction interest
- Segmentation
- Funding capacity
- Maintenance capacity
- Existing conditions and state of maintenance
- Bridges/structures
- Environmental
- Land use



The results of the evaluation were used to identify segments that appeared most promising for jurisdictional transfer from a readiness perspective. The evaluation was based on overall results, so that the segments receiving more “high” and “medium” ratings were selected as most promising.

## 3.4 Equity considerations

State highway designs of the past, coupled with limited design options available as these facilities grew from market road to highway, means that roadways do not always work for the multimodal needs of communities along the corridors. This is particularly the case for people of color, people with low incomes, or limited-English speakers due to the prevalence of these communities living near these corridors and typically being more transit-dependent.

Highway management is increasingly complex because of the competition for limited funds, resulting in less investment in these areas than would be expected for similar roadways owned by local jurisdictions. Understanding the demographics of these corridors is critical to ensure highway transfer decisions address the needs of people of color, people with low-incomes, or limited-English speaking communities. Current and historic decision-making has resulted in communities along these corridors experiencing disparate impacts relating to safety, access to transit and sidewalks, and noise.

The equity considerations analysis supplements and informs the corridor segment selection’s technical and readiness evaluations for jurisdictional transfer (see Attachment D: Equity Considerations for Highway Jurisdictional Transfer). Understanding where equity-focused communities exist informs the identification of placemaking opportunities to help address the results of the

*SW Hall Blvd (OR 141)*

region’s racist history of zoning.<sup>12</sup> Equity considerations also can help identify corridors that would benefit from funding to make them better for people walking, needing better access to transit, and biking.

The study team identified the census tracts adjacent to each of the State-owned nonarterial highways in the study to collect existing demographic data. For each census tract, the study team used the U.S. Census Bureau American Community Survey (ACS) FactFinder to collect the following 2017 demographic data (density and percent):

- people of color (residents)
- people of color (unemployment)
- low-income residents
- low-income unemployment
- limited English proficiency

The data for each highway corridor was compared to the regional<sup>13</sup> density average determined by Metro, defined as twice the average density for the given population, and to the regional percentage average (see Table 3-1). Figure 3-2 shows the MPA, Metro’s equity focus areas, and the 17 highway segments.

Highways – or segments of highways – identified in the equity considerations analysis as having high ratios of people of color, low income, and unemployment compared to the Metro regional average added support to segments scoring high on technical and readiness evaluations for promising jurisdictional transfer corridors.

*Table 3-1. Metro’s regional averages for demographic data*

Demographic Category	%	Density
People of color (residents)	28.6	1.11
People of color (unemployed)	4.6	0.03
Hispanic & Latino (unemployed)	4.9	0.02
Low-income (residents)	28.5	1.09
Low-income (unemployment)	13.0	0.04
Limited English proficiency	7.9	0.29

Notes:

Percentage is the number of people that fit the category per the total census tract population.

Density is defined as the number of people per acre.

12. “Historical Context of Racist Planning: A History of How Planning Segregated Portland” (2019) <https://beta.portland.gov/sites/default/files/2019-12/portlandracistplanninghistoryreport.pdf>

13. The region is defined as the Portland MPA.

# Methodologies

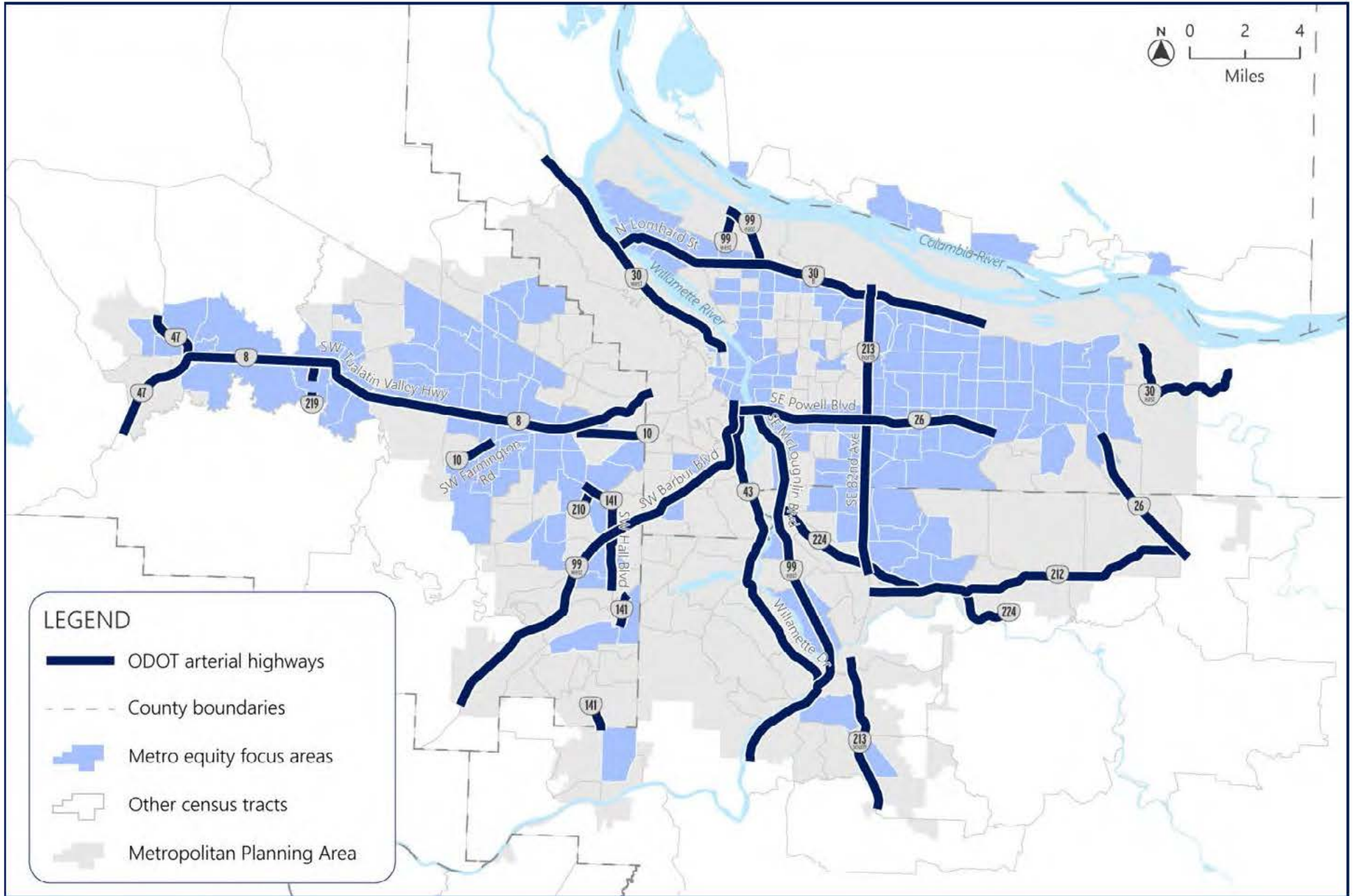


Figure 3-2: Metro's Equity Focus Areas with the 17 arterial highway segments





# 4. Findings

## 4.1 Most promising candidates for jurisdictional transfer

Considered together, the preliminary screening, technical and readiness evaluations, and the equity considerations analysis produced 11 state highway corridor segments that show the most promising characteristics for potential jurisdictional transfer. These segments are identified to help inform future conversations about investment and/or jurisdictional transfer. While all of the corridors in this report are of importance, the team identified these 11 corridors for consideration for further jurisdictional transfer discussions. These corridors showed the strongest characteristics for potential jurisdictional transfer based on an assessment of technical, readiness, and equity considerations.

Many of these highway corridors are in areas with high concentrations of people of color and people with low income compared to regional averages, and many of them have serious safety needs (refer to Section 5). In some cases, the local jurisdiction's interest in a transfer is low. However, considering the technical, readiness and equity evaluations, the findings suggest that despite a jurisdiction's low interest, those corridors may be the most promising for transfer when looking at transfers from a regional perspective. These corridors function more similar to a local roadway than a state highway. A transfer would give local jurisdictions more autonomy to make improvements. The corridors are listed below and shown in Figure 4-1.

1. Powell Boulevard (U.S. 26) (MP 0.2 – 10.0) – Powell Boulevard in the City of Portland scored high in the technical evaluation and the readiness evaluation. The portion of the corridor from I-205 to the Gresham city line has high ratio of people of color, with low incomes and unemployment compared to the regional average. The City of Portland's interest in jurisdictional transfer is medium.
2. Barbur Boulevard (OR 99W) (MP 1.2 – 7.6) – Barbur Boulevard in the City of Portland scored high in the technical evaluation and the readiness evaluation. The corridor scored low in the equity considerations evaluation. The City of Portland's interest in jurisdictional transfer is high.

# Findings

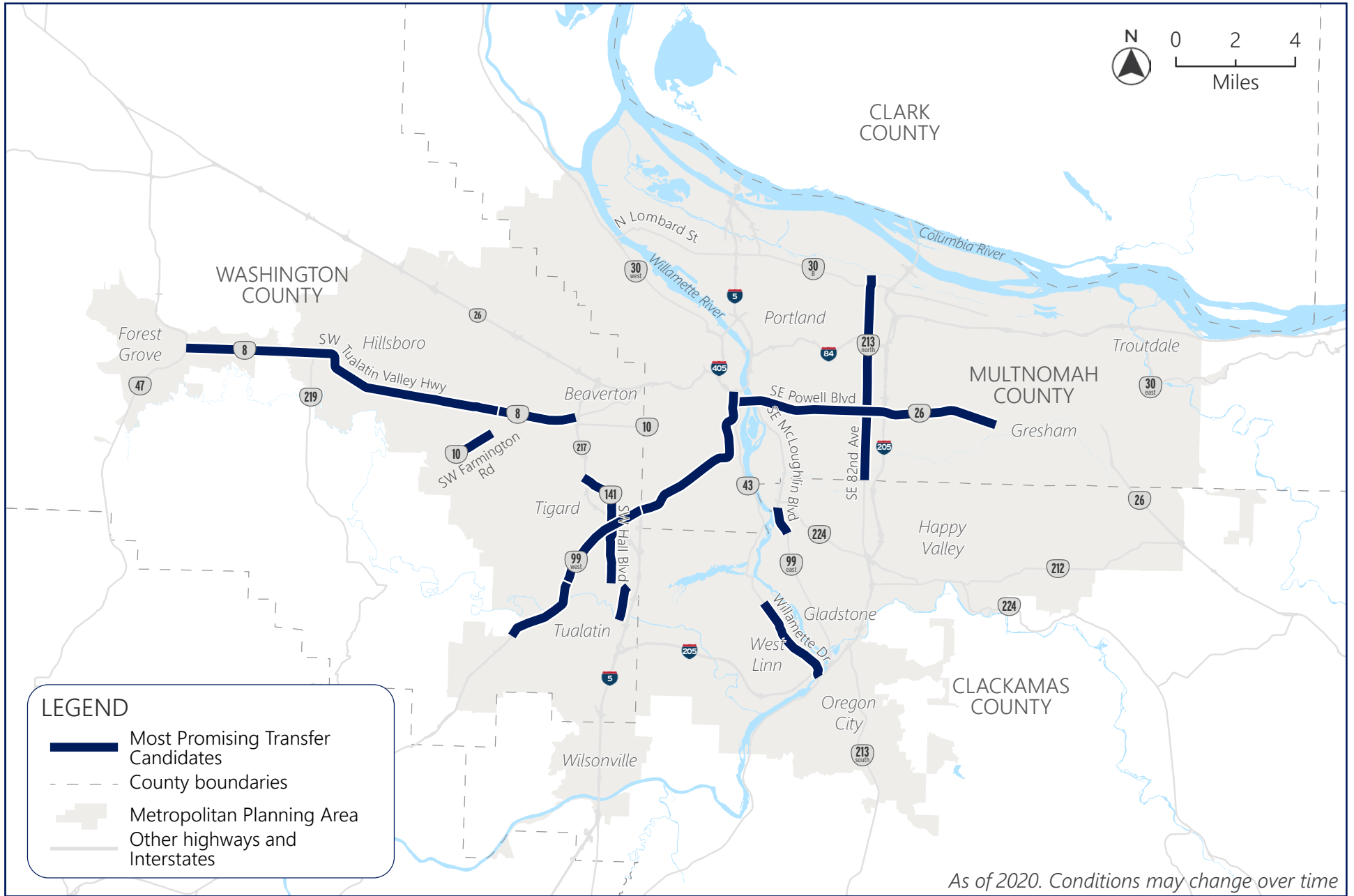


Figure 4-1: Corridors identified as promising candidates for jurisdictional transfer

- 3.** SE/NE 82nd Avenue (OR 213) (MP -0.1-7.2) – 82nd Avenue in the City of Portland scored high in the technical evaluation and the readiness evaluation. The corridor has high ratio of people of color, with low incomes and unemployment compared to the regional average. The City of Portland’s interest in jurisdictional transfer is high.
- 4.** Tualatin Valley Highway (OR 8) (MP 2.9-5.9) – Tualatin Valley Highway, west of OR 217 in the City of Beaverton, scored high in the technical evaluation and the readiness evaluation. The corridor scored medium in the equity considerations evaluation. The City of Beaverton’s interest in jurisdictional transfer is high.
- 5.** Pacific Highway West (OR 99W) (MP 7.6-11.5) – Pacific Highway West in the City of Tigard scored high in the technical evaluation and the readiness evaluation. The corridor has high ratio of people of color, with low incomes and unemployment compared to the regional average. The City of Tigard’s interest in jurisdictional transfer is low.
- 6.** Tualatin Valley Highway (OR 8) (MP 5.9-17.9) – The majority of Tualatin Valley Highway in Washington County scored high in the technical evaluation (MP 14.3 – 14.9 scored medium) and all of highway corridor scored medium in the readiness evaluation. The corridor has high ratios of people of color, with low incomes and unemployment compared to the regional average. Washington County’s interest in jurisdictional transfer for the whole corridor is high.
- 7.** Pacific Highway W (OR 99W) (MP 11.5-14.5) – Pacific Highway West from MP 11.5 to 12.2 in Washington County scored high in the technical evaluation and MP 12.2 to 14.5 scored medium in the technical evaluation. MP 11.5-13.3 scored medium in the readiness evaluation and MP 13.3-14.5 scored high in the readiness evaluation. The corridor scored low in the equity considerations evaluation. Washington County’s interest in jurisdictional transfer is low.
- 8.** Farmington Road (OR 10) (MP 5.9-7.3) – Farmington Road in Washington County scored medium in the technical evaluation and high in the readiness evaluation. The corridor has high ratios of people of color, with low incomes and unemployment compared to the regional average. Washington County’s interest in jurisdictional transfer is high.
- 9.** SW Hall Boulevard (OR 141) (MP 2.6-7.1 and 7.7-8.9) – SW Hall Boulevard from MP 2.6 to 7.1 in Washington County scored high in the technical evaluation and MP 7.7 to 8.9 scored medium in the technical evaluation. MP 3.3-7.1 and 7.7-8.9 scored high in the readiness evaluation and MP 2.6-3.3 and 8.9 scored medium in the readiness evaluation. The segments of the corridor in Beaverton (MP 2.6-3.3) and Tigard (MP 4.1-7.1 and 7.7-7.8) have high ratios of people of color, with low incomes and limited English proficiency compared to the regional average. Washington County’s interest in jurisdictional transfer is high.
- 10.** SE McLoughlin Boulevard (OR 99E) (MP 5.7-6.7) – SE McLoughlin Boulevard in the City of Milwaukie scored high in the technical evaluation and the readiness evaluation. The corridor has high ratios of people with low incomes and unemployment compared to the regional average. The City of Milwaukie’s interest in jurisdictional transfer is low.
- 11.** Willamette Drive (OR 43) (MP 8.0-11.5) – Willamette Drive in the City of West Linn scored high in the technical evaluation and the readiness evaluation. The corridor scored low in the equity considerations evaluation. The City of West Linn’s interest in jurisdictional transfer is high.

# Findings

The sections below describe the results from each of the individual evaluations described in Section 3.

## 4.2 Round 1: preliminary screening results

Round 1's purpose was to perform a preliminary screening of all ODOT-owned arterial highway corridor segments in the Portland metro region to screen out those not viable for jurisdictional transfer because of their intended vehicle throughput function. A total of 78 highway segments in the region were considered during the preliminary screening round (see Section 3 for more on the methodologies for each round of evaluation). Of these highway segments, 48 were classified as either an OHP Expressway or as an RTP Throughway.

These 48 segments did not move on to the technical and readiness evaluations, are shown in Figure 4-2, and are listed in Table 4-1.

Table 4-1. Round 1: Segments designated as OHP Expressway or RTP Throughway

Segment ID	Mile Point begin	Mile Point end	Jurisdiction	Throughways	Expressways
OR 47 - TV Highway					
A7	17.9	19.4	Forest Grove	Yes	No
A8	19.4	23.2	Washington	Yes	No
U.S. 26 - Mount Hood Highway					
C2	14.2	15.6	Gresham	Yes	Yes
C3	15.6	16.8	Multnomah	Yes	Yes
C4	16.8	19.6	Clackamas	Yes	Yes
OR 30W - Lower Columbia River Highway					
F1	2.8	9.7	Portland	Yes	No
F2	9.7	13.3	Multnomah	Yes	No
OR 47 - Nehalem Highway					
H1	88.5	90.2	Washington	Yes	No
H2	90.2	90.6	Forest Grove	Yes	No
OR 99E - Pacific Highway East					
I1	-5.7	-5.9	Portland	Yes	No
I3	1.5	4.6	Portland	Yes	No
I4	4.6	5.7	Milwaukie	Yes	No
I9	12.4	14.2	Oregon City	Yes	No
I10	14.2	16.4	Clackamas	Yes	No
OR 99W - Pacific Highway West					
J7	14.5	16.7	Sherwood	Yes	No
J8	16.7	17.9	Washington	Yes	No
OR 212 - Clackamas-Boring Highway					
M1	1.9	8.6	Clackamas	Yes	No
M2	1.8	1.9	Happy Valley	Yes	No
M3	1.0	1.8	Clackamas	Yes	No

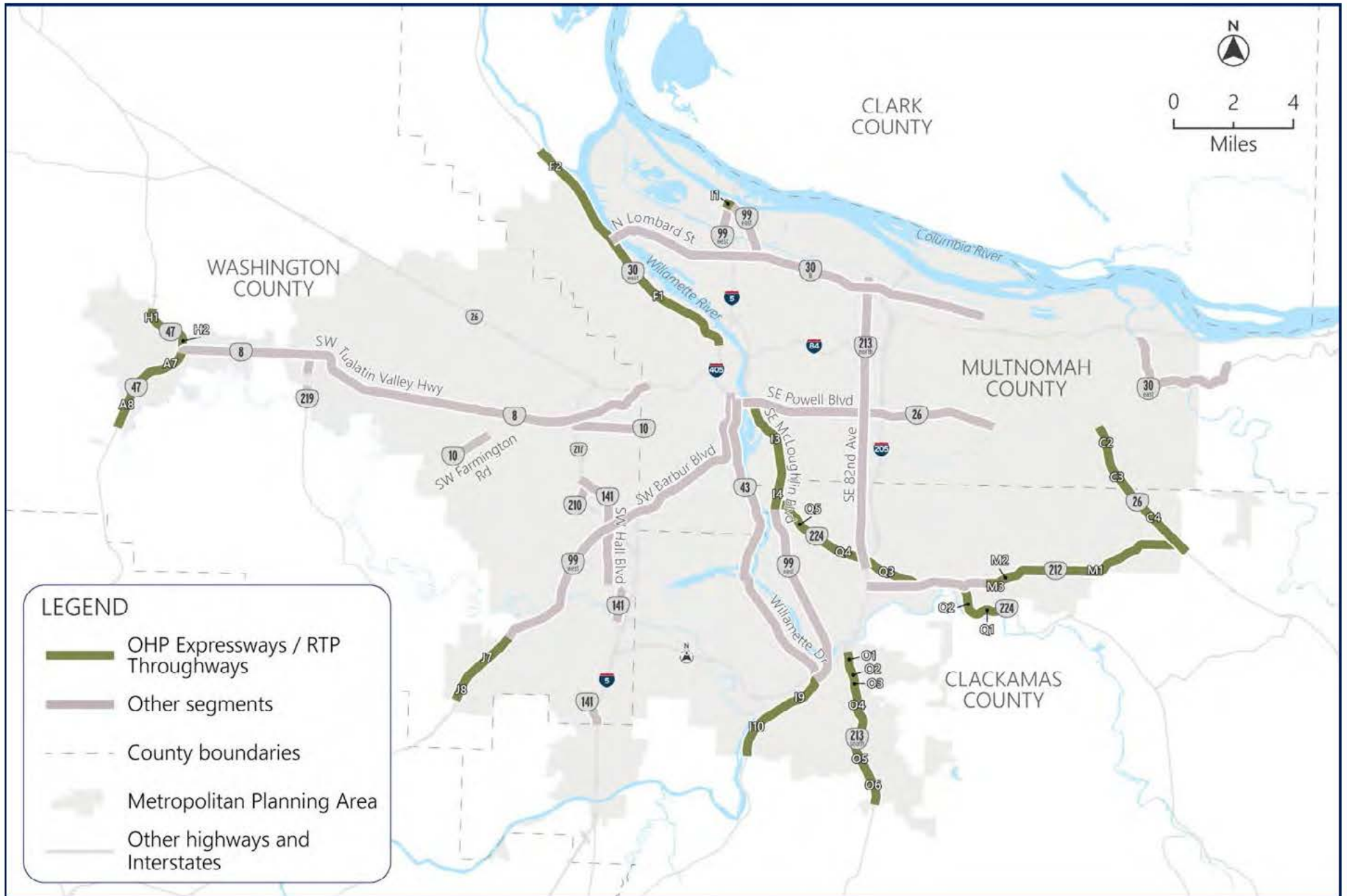


Figure 4-2. Round 1: preliminary screening results

# Findings

Table 4-1. Round 1: Segments designated as OHP Expressway or RTP Throughway (cont.)

Segment ID	Mile Point begin	Mile Point end	Jurisdiction	Throughways	Expressways
OR 213S - Cascade Highway South					
O1	0.0	0.6	Oregon City	Yes	Yes
O2	0.6	1.1	Clackamas	Yes	Yes
O3	1.1	1.3	Oregon City	Yes	Yes
O4	1.3	2.6	Clackamas	Yes	Yes
O5	2.6	4.2	Oregon City	Yes	Yes
O6	4.2	6.5	Clackamas	Yes	No
OR 224 - Clackamas Highway/Sunrise Expressway					
Q1	9.4	10.5	Clackamas	Yes	No
Q2	8.2	9.5	Happy Valley	Yes	No
Q3	4.6	6.3	Clackamas	Yes	No
Q4	2.7	3.8	Clackamas	Yes	Yes
Q5	0.0	2.7	Milwaukie	Yes	Yes

Notes:

ODOT convention allows some Mile Points to be negative numbers.

## 4.3 Round 2a: technical evaluation results

Round 2a's purpose was to evaluate the 48 corridor segments that emerged from Round 1 with a consistent set of technical criteria that reflect regional values (i.e., consistent with the RTP pillars). The study team evaluated each of the 48 non-throughway and non-expressway corridor segments with the technical criteria, measures, and ratings/definitions described in Section 3.

The top-scoring segments are the most promising candidates for jurisdictional transfer from a technical perspective in that they function more like a local roadway than a state roadway. There were 25 segments that scored highest. These are shown in Figure 4-3 and listed in Table 4-2.

Table 4-2. Round 2a: Segments that scored high in the technical assessment

Segment ID	Mile Point begin	Mile Point end	Jurisdiction	Technically Promising for Transfer?
OR 8 - TV Highway				
A1	0.1	5.9	Beaverton	Yes - High
A2	5.9	7.8	Washington	Yes - High
A3	7.8	14.3	Hillsboro	Yes - High
A5	14.9	17.2	Cornelius	Yes - High
A6	17.2	17.9	Forest Grove	Yes - High
OR 10 - Beaverton-Hillsdale/Farmington Highway				
B1	2.6	3.4	Washington	Yes - High
U.S. 26 - Mount Hood Highway				
C1	0.2	10.0	Portland	Yes - High
OR 30B - Northeast Portland Highway				
D1	0	14.7	Portland	Yes - High

Table 4-2. Round 2a: Segments that scored high in the technical assessment (cont.)

Segment ID	Mile Point begin	Mile Point end	Jurisdiction	Technically Promising for Transfer?
<b>OR 43 - Oswego Highway</b>				
G1	0	3.6	Portland	Yes - High
G4	5.8	8.0	Lake Oswego	Yes - High
G5	8.0	11.5	West Linn	Yes - High
<b>OR 99E - Pacific Highway East</b>				
I5	5.7	6.7	Milwaukie	Yes - High
I6	6.7	10.4	Clackamas	Yes - High
I7	10.4	11.2	Gladstone	Yes - High
I8	11.2	12.4	Oregon City	Yes - High
<b>OR 99W - Pacific Highway West</b>				
J1	-6.0	-4.8	Portland	Yes - High
J2	1.2	7.6	Portland	Yes - High
J3	7.6	11.5	Tigard	Yes - High
J4	11.5	12.2	Washington	Yes - High
<b>OR 141 - Beaverton-Tualatin Highway/SW Hall Blvd</b>				
K1	2.6	3.3	Beaverton	Yes - High
K2	3.3	4.1	Washington	Yes - High
K3	4.1	7.1	Tigard	Yes - High
<b>OR 210 - Scholls Highway/SW Scholls Ferry Rd</b>				
L1	9.6	9.1	Beaverton	Yes - High
<b>OR 213N - Cascade Highway North</b>				
N1	-0.1	7.2	Portland	Yes - High
N2	7.2	10.4	Clackamas	Yes - High

**Notes:**

ODOT convention allows some Mile Points to be negative numbers.

All segments with a "Yes - High" are arterial highway segments that scored 17-26 points in the Round 2a technical evaluations. These segments are identified as the most promising candidates for jurisdictional transfer from a technical perspective. Segments that have a Medium scored 8-16 points and segments that have a Low scored 0-7 in the Round 2a technical evaluations.

# Findings

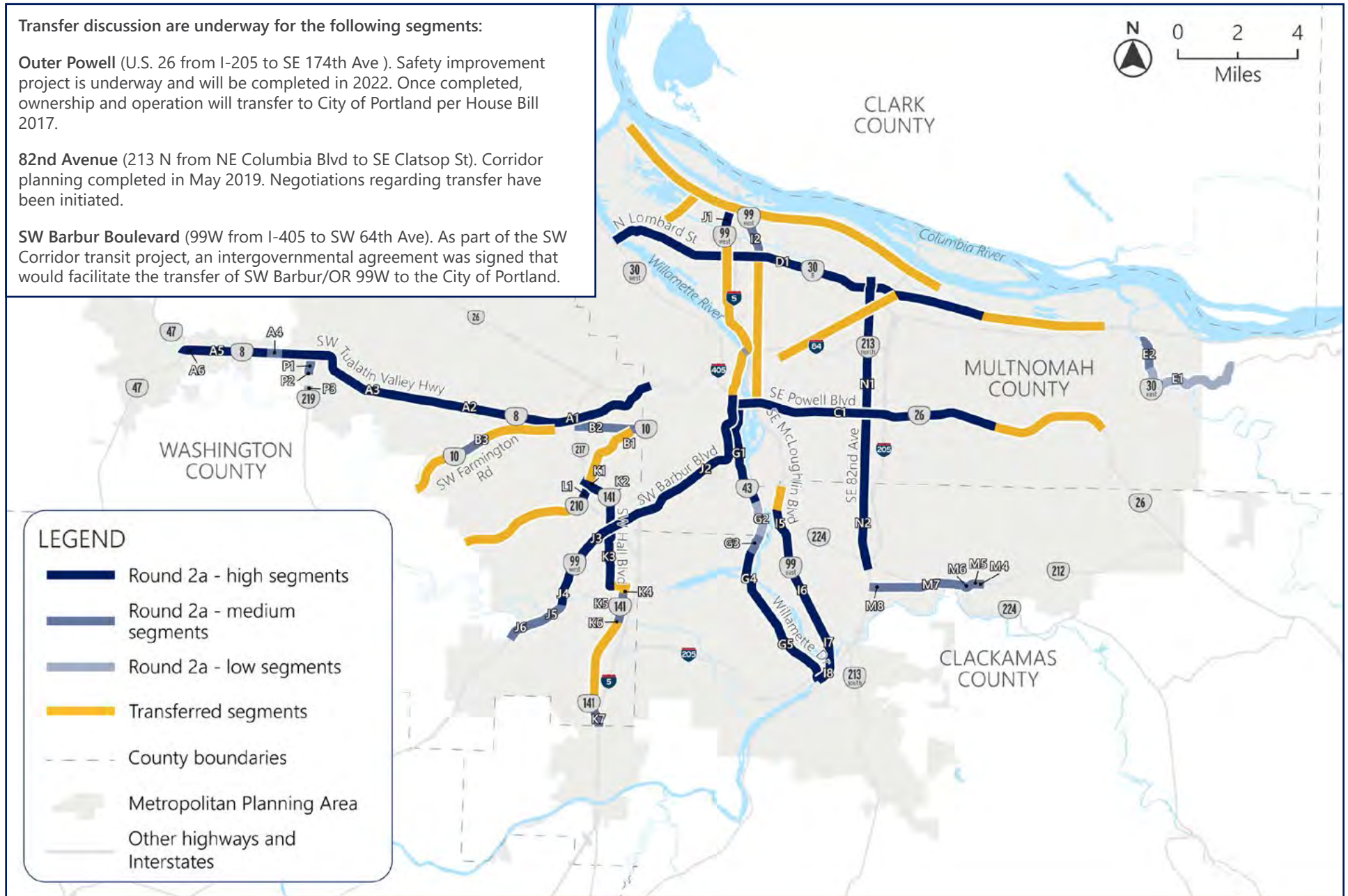


Figure 4-3. Round 2a: technical evaluation results



## 4.4 Round 2b: Readiness Evaluation Results

Round 2b's purpose was to evaluate the remaining corridor segments (those remaining after Round 2a with a consistent set of readiness criteria. This was the same group of segments evaluated in the Round 2a Technical Evaluation. The study team evaluated each of the 48 non-throughway and non-expressway corridor segments with the readiness criteria, measures, and ratings/definitions described in Section 3.

Readiness scores reflect a snapshot-in-time evaluation of each corridor. Changes in political leadership, new investments in corridor improvements, or other fungible factors will change a corridor segment's readiness score.

A total of 14 segments scored in the readiness evaluation's top third of points meaning that for these segments, local jurisdictions are more capable and willing to assume the responsibilities of the roadway, and the roadway itself is in adequate condition with minimal barriers to ownership from the perspective of the local jurisdiction. These 14 segments are shown in Figure 4-4 and listed in Table 4-3.

Table 4-3. Round 2b: Segments that scored high in the readiness assessment

Segment ID	Mile Point begin	Mile Point end	Jurisdiction	High rank for transfer readiness?
OR 8 - TV Highway				
A1	0.1	5.9	Beaverton	Yes - High
OR 10 - Beaverton-Hillsdale/Farmington Highway				
B3	5.9	7.4	Washington	Yes - High
U.S. 26 - Mount Hood Highway				
C1	0.2	10.0	Portland	Yes - High
OR 43 - Oswego Highway				
G5	8.0	11.5	West Linn	Yes - High
OR 99E - Pacific Highway East				
I5	5.7	6.7	Milwaukie	Yes - High
OR 99W - Pacific Highway West				
J2	1.2	7.6	Portland	Yes - High
J3	7.6	11.5	Tigard	Yes - High
J6	13.3	14.5	Washington	Yes - High
OR 141 - Beaverton-Tualatin Highway/SW Hall Blvd				
K2	3.3	4.1	Washington	Yes - High
K3	4.1	7.1	Tigard	Yes - High
K4	7.7	7.8	Tigard	Yes - High
K5	7.8	8.9	Durham	Yes - High
K7	12.5	13.1	Wilsonville	Yes - High
OR 213N - Cascade Highway North				
N1	-0.1	7.2	Portland	Yes - High

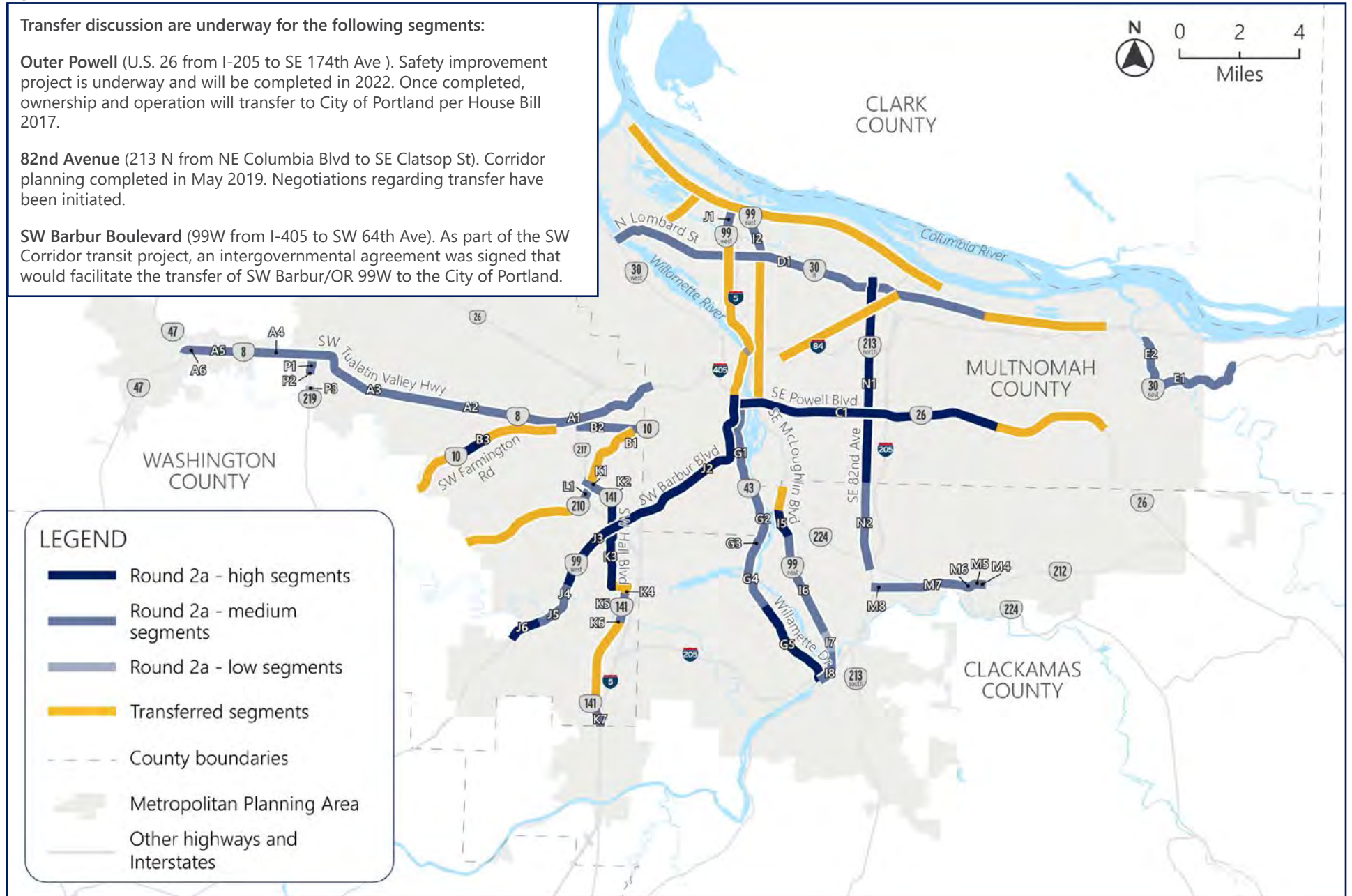
Notes:

ODOT convention allows some Mile Points to be negative numbers.

All segments with a "Yes - High" are arterial highway segments that scored 14-22 points in the Round 2a readiness evaluations. These segments are identified as the most promising candidates for jurisdictional transfer from a technical perspective. Segments that have a Medium scored 8-13 points and segments that have a Low scored 0-7 in the Round 2a technical evaluations.

# Findings

Figure 4-4. Round 2b: readiness evaluation results



## 4.5 Equity considerations analysis

The purpose of the equity considerations analysis was to supplement and inform the segment selection technical and readiness evaluations for jurisdictional transfer. The goal is to reduce disparities and barriers faced by communities of color and other historically marginalized communities. Equity considerations can help identify corridors that would benefit from funding to make them better for walking, access to transit, and biking. **In some cases, a jurisdictional transfer and/or a change in roadway design would benefit the communities identified in this equity considerations analysis that live along these corridors.**

Highways – or segments of highways – and their locations identified in the equity analysis as having high ratios of people of color, low income, and unemployment compared to the Metro regional average are described below.

**TV Highway (OR 8):** TV Highway segments in Washington County, Hillsboro and Cornelius have high ratios of people of color, low income, and unemployment compared to the Metro regional average.

**Beaverton-Hillsdale/Farmington Highway (OR 10):** Beaverton-Hillsdale/Farmington Highway segments in Beaverton and west Washington County have high ratios of people of color, low income, and unemployment compared to the regional average.

**Mount Hood Highway (U.S. 26):** The Mount Hood Highway segment in Portland from I-205 to the Gresham city line has high ratios of people of color, low income, and unemployment compared to the regional average.

**Northeast Portland Highway (U.S. 30B):** The NE Portland Highway corridor has high ratios of people of color, low income, and unemployment compared to the regional average.

**Nehalem Highway (OR 47):** The Nehalem Highway segment that divides Forest Grove and Washington County has high ratios of people of color, low income, and unemployment compared to the regional average.

**Pacific Highway East (OR 99E):** Pacific Highway East's most northern segment in Portland has high ratios of people of color, low-income, and limited English proficiency compared to the regional average. OR 99E segments farther to the south in Milwaukie have high ratios of low income and unemployment. This southern area does not have a high percentage of people of color.

**Pacific Highway West (OR 99W):** The Pacific Highway West segment in Tigard has high ratios of people of color, low income, and unemployment compared to the regional average.

**Beaverton-Tualatin Highway (OR 141):** The Beaverton-Tualatin Highway segments in Beaverton and Tigard have high ratios of people of color, low income, and limited English proficiency compared to the regional average.

**Scholls Highway (OR 210):** Scholls Highway has high ratios of people of color, low income, and unemployment compared to the regional average.

**Cascade Highway North (OR 213N):** The Cascade Highway North segment from North Portland to Clackamas County has high ratios of people of color, low income, and unemployment compared to the regional average.

**Hillsboro-Silverton Highway (OR 219):** Hillsboro-Silverton Highway has high ratios of people of color, low income, and unemployment compared to the regional average.

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# 5. Needs and deficiencies

This section provides a high-level assessment of the needs and deficiencies of the most promising jurisdictional transfer candidates (identified in Section 4) in the Metro area to help inform future conversations about investment and/or jurisdictional transfer.

The assessment is designed and organized primarily as a tool for local jurisdictions and secondarily for regional and state agencies. The corridors featured in the assessment show the strongest characteristics for potential jurisdictional transfer based on an assessment of technical, readiness, and equity considerations (see Attachment E: Needs and Deficiencies Assessment). The assessment presents a corridor's characteristics as a snapshot in time.

For example, future investments in paving, safety enhancements or other improvements will change a corridor's needs and deficiencies assessment.

Many of these highway corridors travel through areas with high concentrations of people of color and people who are low-income compared to regional averages. In addition, many of these highway corridors demonstrate safety needs. Key characteristics of each promising segment are assembled in the assessment, including information on:

- Pedestrian network
- Bicycle network
- Transit routes
- Safety data
- Corridor data (pavement condition, freight route designation, bridge ratings, speed limit, lane number, and length)
- Roadway classification
- Demographics

In addition, the mapping provided in the assessment shows environmentally sensitive areas, Metro equity focus areas, regional land use, and the location for each corridor. A list of projects funded in an adopted capital improvement program and typical photos from the corridor round out the information in the assessment.

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# 6. Cost estimating methodology

The study team developed a cost estimating methodology to identify high-level planning costs associated with transferring ownership of a highway from one jurisdiction to another, typically ODOT to a city or county (see Attachment F: Cost Estimating Methodology).

The study team developed this cost estimating methodology to provide partners with a consistent process for use in developing and understanding the costs associated with a highway jurisdictional transfer in the Portland Metro area. The methodology is based on industry practices, asset management strategies, past jurisdictional transfers, and technical expertise in consultation with ODOT staff and technical experts. Roadways require maintenance, improvements, and oversight over the course of ownership. This methodology ensures partners have consistent, necessary tools to consider these variables as local jurisdictions, Metro, and ODOT engage in conversations regarding highway jurisdictional transfer.

This methodology is a toolkit for assessing deficiency on a roadway, assuming the roadways are improved to meeting existing traffic safety needs. The methodology includes approaches to estimating direct costs (e.g., upgrading roadway elements to address crashes) and indirect costs (e.g., ongoing maintenance of roadway elements).

The overall cost estimating methodology includes physical and programmatic cost considerations. Physical costs are immediate state of good repair upgrades, identified capital needs, or future maintenance projects that require construction work. Programmatic cost considerations are costs incurred as part of the ownership (i.e., soft costs) and management of a corridor over time. The following four categories address both physical costs and programmatic cost considerations to provide a full understanding of financial implications of jurisdictional transfer:

- State of good repair
- Regionally or locally identified capital needs
- Maintenance and operations
- Soft ownership costs



Figure 6-1. Seven steps to bring a corridor segment to a SOGR

## 6.1 State of good repair

A state of good repair (SOGR) approach applies a fair cost estimate to determine which roadway elements (e.g., pavement, signal systems, striping, signing, lighting, sidewalks, etc.) need to be upgraded so they do not impart unknown costs onto the receiving jurisdiction. At its core, a SOGR approach ensures that all corridor elements function as intended. Corridor elements are components of a roadway facility that serve an important functional need such as pavement, drainage system or signal systems.

Follow these seven steps in Figure 6-1 to bring a corridor segment to a SOGR.

## 6.2 Capital needs

In addition to state of good repair, it is important to account for capital needs identified in regional and local plans, programs, needs assessments or safety audits, per mutual discussion between ODOT and local jurisdictions. These identified, but unfunded, improvements require consideration as the agencies estimate and negotiate the costs associated with transfer. For example, in the 2018 RTP, local jurisdictions identified approximately \$800 million in capital projects on ODOT highways in the region. Each local jurisdiction used an identified RTP “allocation” to prioritize a larger list of capital projects identified in the 2018 RTP. The following capital needs are common local priorities to consider when estimating the cost to transfer:

- Crossings and lighting near key community places (e.g., schools, libraries, community centers)
- Medians at high crash locations
- Enhanced transit stops or safety improvements around transit stops
- Missing connections or gaps in the bicycle and pedestrian networks
- Improvements identified for safe routes to school and the Safe Routes to School (SRTS) program
- Other modernization improvements

In addition to the list of common capital needs, ODOT and the local jurisdiction must consider the costs associated with Americans with Disabilities Act (ADA) compliance. ADA compliance can be assessed by reviewing ODOT ADA inventory data and conducting ADA compliance assessments.



## 6.3 Maintenance and operation costs

Long-term cost considerations include routine corridor inspections, basic maintenance of existing conditions, long-term improvement needs, staff training, and contingency costs associated with potential asset damage due to unforeseen events or conditions.

Maintenance and operation costs provide a forecast for future costs after a highway jurisdictional transfer is complete and should be considered during negotiations. Local jurisdictions may consider contracting maintenance and operation responsibilities to other agencies. Costs associated with these arrangements should be considered.

## 6.4 Ownership costs

Non-physical soft costs of owning a corridor segment also need to be considered in the financial implications of jurisdictional transfer. These costs are overarching indirect costs associated with the acquisition of any new roadway to effectively manage it consistent with the local jurisdiction's defined policies and goals. While these costs do not directly inflate the cost of transferring a highway from ODOT to a local jurisdiction, they need to be considered for the increase in staff time and skills required to own them.

Ownership costs are categorized by:

1. Increase in liability
2. Access management reviews
3. Programming and planning
4. Reporting obligations



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# 7. Conclusion

The Metro Highway Jurisdictional Transfer Framework study provides a toolkit for state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and to facilitate successful transfer of roadway ownership. It identified the top 11 state-owned highway segments in greater Portland that could be considered for a jurisdictional transfer and addressed some of the opportunities and barriers to transferring the routes (refer to Section 4.1). These 11 highway segments have significant needs and deficiencies, such as pedestrian and bicycle facility gaps, poor pavement, or lacking safety infrastructure. Many of these segments travel adjacent to areas with high concentrations of people of color, people with low-incomes, or people who speak English as a second language. In general, these characteristics make them more promising candidates for jurisdictional transfer to local jurisdictions. In some cases, there is current interest from the local jurisdictions to pursue transfer in attempts to align existing and future land uses with community interest. In some cases, the local jurisdiction's interest in a transfer is low. However, considering the technical, readiness and equity evaluations, the findings suggest that despite a jurisdiction's low interest, those corridors may be the most promising for transfer when looking at transfers from a regional perspective. These corridors function more similar to a local roadway than a state highway. A transfer would give local jurisdictions more autonomy to make improvements.

Historically, identifying a single, comprehensive funding source for jurisdictional transfers in the region has been a challenge. Jurisdictions are typically only interested in transfers when accompanied by funding to improve the roadway, and it is difficult to provide a meaningful funding amount by piecing different funding buckets together. The study team recognizes the need for a wholistic and comprehensive funding strategy to fully accomplish jurisdictional transfers. Refer to the Consultant Recommendation memorandum (November 2020) for a list of funding sources and a broader funding discussion.

Jurisdictional transfers are an important part of managing and adapting to changing travel and land use patterns within the region. They can be a "win-win" for the state, local governments and local communities. The overall objective of jurisdictional transfers is to ensure that Oregon roads are owned and operated at the right jurisdictional level (i.e., by the right agency). This will ensure that roadways align appropriately to provide the right level of service and better meet the needs of users in terms of maintenance, ride quality and traffic safety.

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# METRO HIGHWAY JURISDICTIONAL TRANSFER FRAMEWORK

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Attachments A - G

November 2020

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# Metro Highway Jurisdictional Transfer Framework Attachments A-G

## Table of Contents

Attachment A Inventory of Non-Interstate Highways

Attachment B Policy Framework

Attachment C Corridor Segment Selection Methodology and Evaluation Results

Attachment D Equity Considerations

Attachment E Needs and Deficiencies Assessment

Attachment F Cost Estimating Methodology

Attachment G Roadway Classification Change Recommendations

# ATTACHMENT A - Inventory of Non-Interstate Highways



HIGHWAY JURISDICTIONAL  
TRANSFER FRAMEWORK  
**INVENTORY OF  
NON-INTERSTATE  
HIGHWAYS**

FEBRUARY 2020



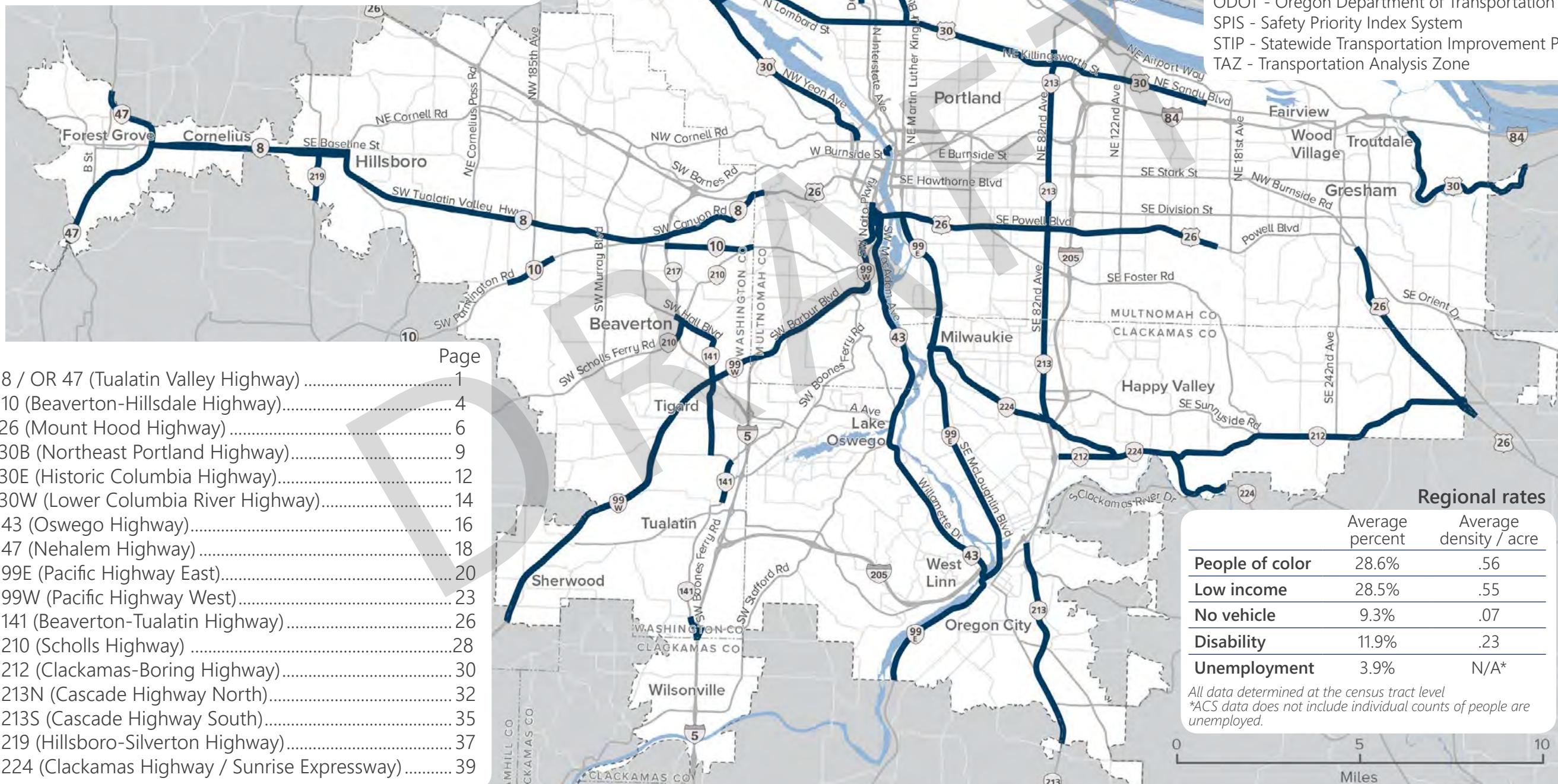


ATLAS INDEX

This atlas includes all state-owned highways within the Portland metropolitan area that are not freeways. It identifies jurisdictional boundaries, national, state, regional, and local roadway classifications or designations and other roadway characteristics or elements such as surrounding land use, average annual daily traffic volume, presence of sidewalks, bike lanes, and bridges, and environmental factors. The atlas provides an inventory to help identify which roadways will be studied further to develop recommendations to implement highway jurisdictional transfer in the Portland metropolitan area.

Acronyms

- ATNI - Active Transportation Needs Inventory
- CCC - Clackamas Community College
- CIP - Capital Improvement Project
- FS - Frequent Service
- MP - Milepoint
- MPH - Miles per hour
- NHS - National Highway System
- ODOT - Oregon Department of Transportation
- SPIS - Safety Priority Index System
- STIP - Statewide Transportation Improvement Program
- TAZ - Transportation Analysis Zone



	Page
OR 8 / OR 47 (Tualatin Valley Highway) .....	1
OR 10 (Beaverton-Hillsdale Highway).....	4
US 26 (Mount Hood Highway) .....	6
US 30B (Northeast Portland Highway).....	9
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OR 99E (Pacific Highway East).....	20
OR 99W (Pacific Highway West).....	23
OR 141 (Beaverton-Tualatin Highway) .....	26
OR 210 (Scholls Highway) .....	28
OR 212 (Clackamas-Boring Highway).....	30
OR 213N (Cascade Highway North).....	32
OR 213S (Cascade Highway South).....	35
OR 219 (Hillsboro-Silverton Highway).....	37
OR 224 (Clackamas Highway / Sunrise Expressway).....	39

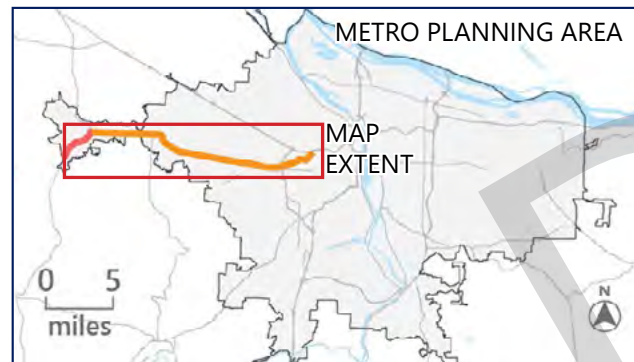
	Average percent	Average density / acre
<b>People of color</b>	28.6%	.56
<b>Low income</b>	28.5%	.55
<b>No vehicle</b>	9.3%	.07
<b>Disability</b>	11.9%	.23
<b>Unemployment</b>	3.9%	N/A*

All data determined at the census tract level  
\*ACS data does not include individual counts of people are unemployed.

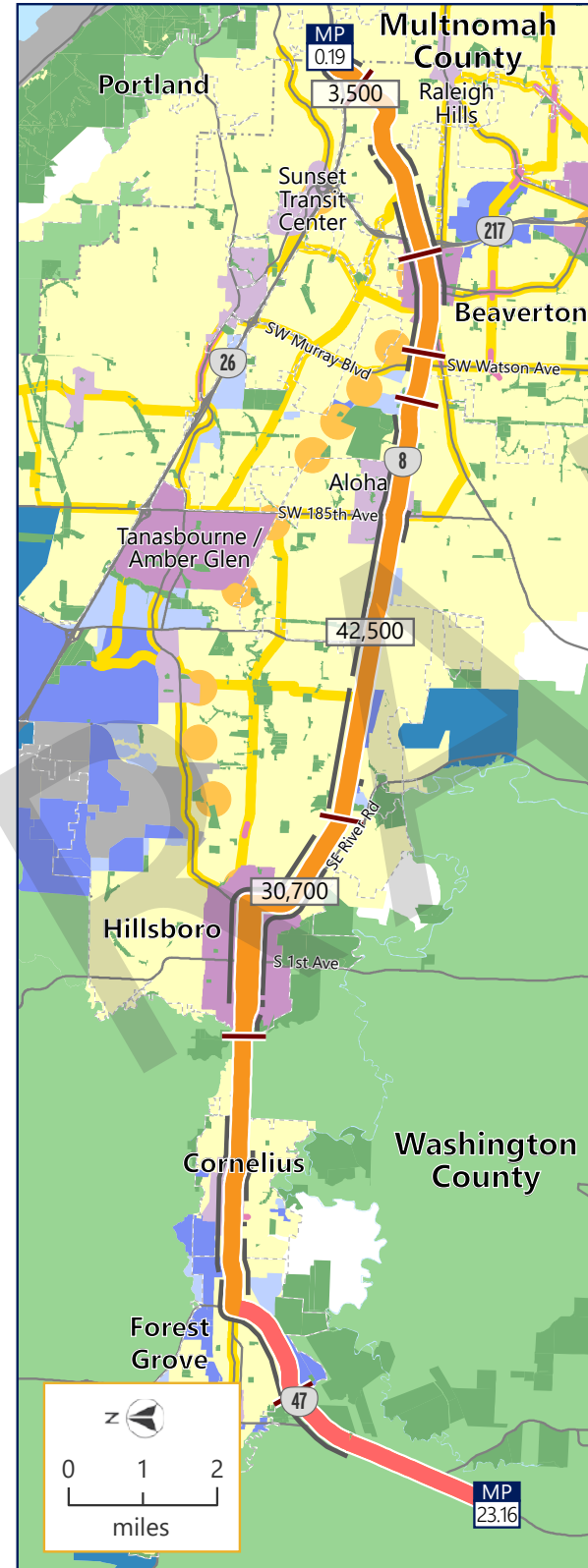
## TUALATIN VALLEY HIGHWAY (OR 8 / OR 47)

### CORRIDOR INFORMATION

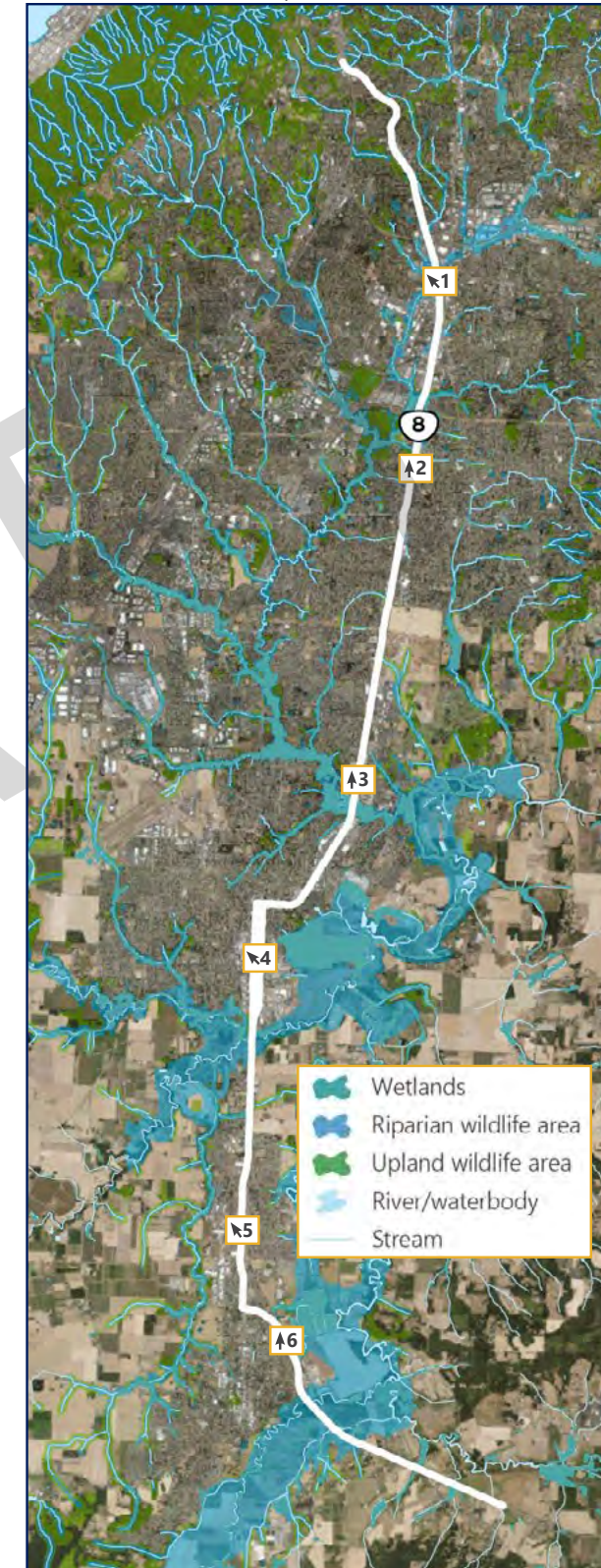
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: Statewide Highway, Regional Highway, District Highway Metro: Throughway, Major Arterial, 2040 Corridor Local: Arterial (Washington County, Multnomah County, Hillsboro, Forest Grove, Beaverton), Principal Arterial (Beaverton, Cornelius), Regional Trafficway (Portland)
<b>Highway length</b>	22.5 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 46, 47, 48, 57 (FS), 58, 61, 76 and 78
<b>Freight routes</b>	Elm St to OR 217 (Metro), Reduction Review Route
<b>Crash history (2013-2018)</b>	106 pedestrian-involved, 51 cyclist-involved, 4,186 vehicle
<b>Number of lanes</b>	4-6
<b>Speed limit</b>	30-45 mph
<b>Population</b>	69,302 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	44,069 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>



### REGIONAL LAND USE AND TRANSPORTATION



### ENVIRONMENT with photo locations



### PHOTOS



Source: Metro RLIS database and ODOT TransGIS.

TUALATIN VALLEY HIGHWAY (OR 8 / OR 47)

CORRIDOR INFORMATION

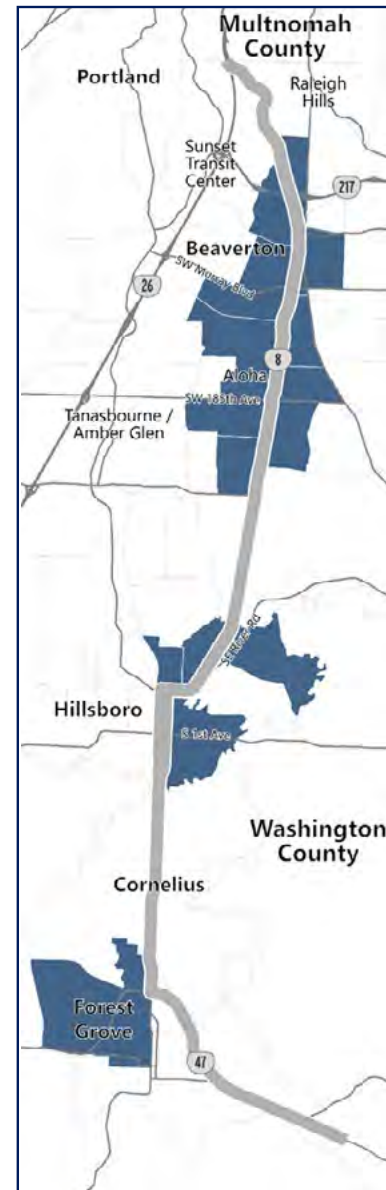
<b>Crash data</b>	Metro High Crash Corridor 510 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Good:</b>
	MP 0.23 - 2.9 MP 3.18 - 4.02 MP 4.02 - 5.6 MP 5.6 - 8.32 MP 8.32-11.28	MP 11.28 - 12.53 MP 15.22 - 15.36 MP 15.53 - 15.72 MP 15.9 - 17.46 MP 19.96 - 25.73
<b>Bridges and bridge ratings (0-100)</b>	<b>Fair:</b>	<b>Very Good:</b>
	MP 2.81 - 3.18 MP 14.28 - 17.88	MP 12.41 - 13.5 MP 17.88 - 19.96
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 15.7 miles</li> <li>Sidewalk substandard: 12.2 miles</li> <li>Sidewalk meets standard: 8 miles</li> <li>Bicycle gaps: 7.3 miles</li> <li>Bicycle substandard: 14.4 miles</li> <li>Bicycle meets standard: 8.3 mile</li> <li>Number of crossings: 48</li> </ul> </li> </ul>	
	<b>Transit frequency</b>	TriMet Line 57: 86% on time

Corridor information table continues on next page.

PEOPLE OF COLOR



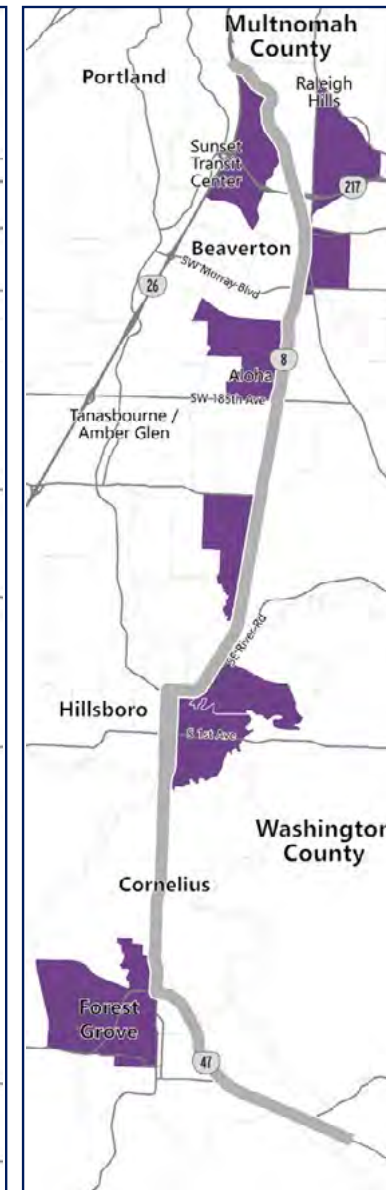
LOW INCOME



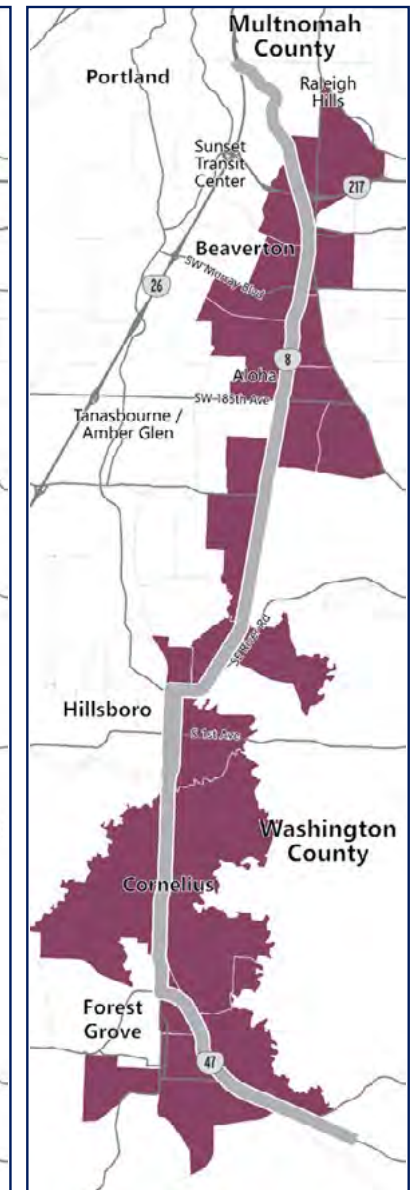
NO VEHICLE HOUSEHOLDS



PEOPLE WITH DISABILITIES



UNEMPLOYMENT



Above regional rates for people of color

At or below regional rates

Above regional rates for low income

At or below regional rates

Above regional rates for no vehicle households

At or below regional rates

Above regional rates for people with disabilities

At or below regional rates

Above regional rates for unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as being above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is above the regional rate as determined by the U.S. Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

### CORRIDOR INFORMATION

#### Capital projects

##### ODOT STIP 2018-2021

- OR8 at River Rd & OR222 at Lake Rd (20451)
- Region 1 bike ped crossings (20479)
- OR211/OR224/OR26/OR8 curb ramps (21488)
- OR8 SW Adams Ave - SE 10th Ave and SE baseline St - SE Maple St (18004)
- OR8 SW Hocken Ave - SW Short St (18758)
- OR8 at OR219 and SE 44th - SE 45th Ave, Hillsboro (18791)
- OR8 SW 192nd Ave, Aloha - SW 160th Ave, Beaverton (18839)
- OR8 corridor safety & access to transit II (20328)

##### ODOT STIP 2021-2024

- Region 1 bike ped crossings (20479)
- OR8 SW Hocken Ave - SW Short St (18758)
- OR8 SW Watson Ave - SW 110th Ave, Beaverton (18794)
- OR8 corridor safety & access to transit II (20328)
- OR8 at River Rd (20451)
- OR8 at 174th Ave, Armco Ave, Main St and A&B Row (21608)
- Washington County safety, bike and pedestrian improvements (21615)
- OR8 SE Brookwood Ave - OR217 (21617)

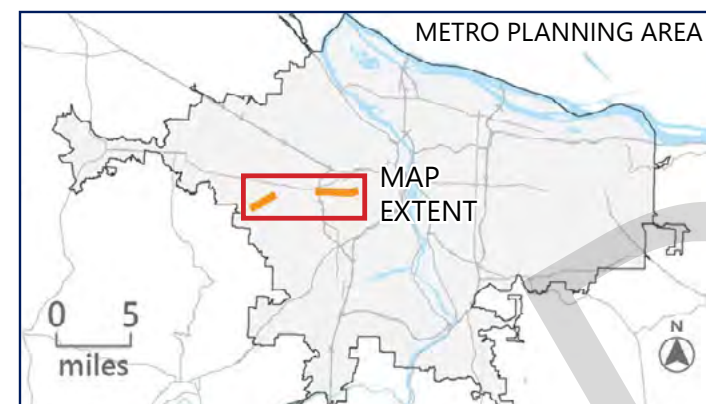
##### City CIPs

- Beaverton - 209th Avenue (Alexander to Kinnaman)
- Beaverton - 192nd Avenue (FY 2020-22 Pedestrian Improvement)
- Beaverton - Century Boulevard/TV Highway Intersection
- Beaverton - Hocken Ave (RR - TV Hwy) Widening (3408)
- Beaverton - Canyon Rd (Hocken Ave-Short St) Improvements, MTIP (3519A)
- Forest Grove - TV Hwy & Quince (ST.012)
- Hillsboro - Cornelius Pass Road

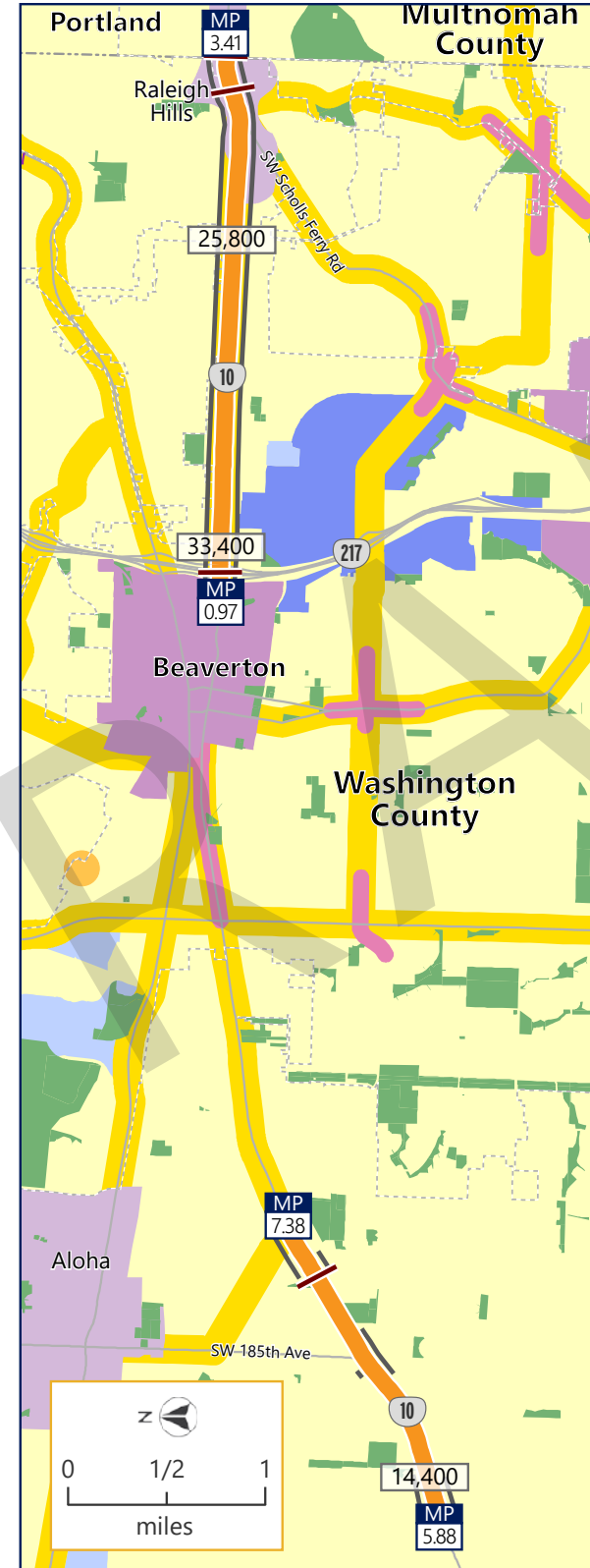
# BEAVERTON-HILLSDALE / FARMINGTON HIGHWAY (OR 10)

## CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: District Highway Metro: Major Arterial, 2040 Corridor Local: Arterial (Washington County, Beaverton)
<b>Highway length</b>	4.5 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 52, 54 (FS), 55, 56 (FS), 61, 88 and 92
<b>Freight routes</b>	SW 198th Ave to SW Division St (Metro)
<b>Crash history (2013-2018)</b>	1 pedestrian-involved, 19 cyclist-involved, 998 vehicle
<b>Number of lanes</b>	2-4
<b>Speed limit</b>	30-40 mph
<b>Population</b>	36,379 people
<small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>	
<b>Employment</b>	19,882 jobs
<small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>	



## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



- County boundary
- City boundary
- Arterials
- ### Annual average daily traffic volumes
- == Sidewalks
- Bridge
- MP ## Milepost termini
- Throughway
- Major Arterial
- Minor Arterial
- Arterial Outside Urban Growth Boundary
- 2040 corridor
- Central city
- Regional center
- Town center
- Employment areas
- Industrial areas
- Regionally significant industrial areas
- Neighborhoods
- Urban reserves
- Rural reserves
- Parks & open space
- River/waterbody

Source: Metro RLIS database and ODOT TransGIS.

## BEAVERTON-HILLSDALE / FARMINGTON HIGHWAY (OR 10)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 95 ODOT SPIS sites
<b>Pavement condition</b>	<b>Poor:</b> MP 0.97 - 3.41 <b>Fair:</b> MP 5.88 - 7.38 <b>Very Good:</b> MP 1.42 - 6.73
<b>Bridges and bridge rating (0-100)</b>	MP 3.28: 85 MP 3.31: 85 MP 7.14: 97.1
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:               <ul style="list-style-type: none"> <li>Sidewalk gaps: 1.3 miles</li> <li>Sidewalk substandard: 2.8 miles</li> <li>Sidewalk meets standard: 1.6 miles</li> <li>Bicycle gaps: 3.8 miles</li> <li>Bicycle substandard: 0.7 miles</li> <li>Bicycle meets standard: 0 miles</li> <li>Number of crossings: 2</li> </ul> </li> </ul>
<b>Transit frequency</b>	No current frequent service lines. Planned: TriMet Lines 52, 54, and 88
<b>Capital projects</b>	<b>City CIPs</b> <ul style="list-style-type: none"> <li>Beaverton - Rosa Road (FY 2018-2020 URMD Pedestrian Safety)</li> <li>Beaverton - 179th Avenue (FY 2018-2020 URMD Pedestrian Project)</li> <li>SW Portland - SW Capitol Highway - Huber to Kerr Parkway Complete Streets Project</li> <li>SW Portland - SW Capitol Highway: Multnomah to Texas</li> </ul>

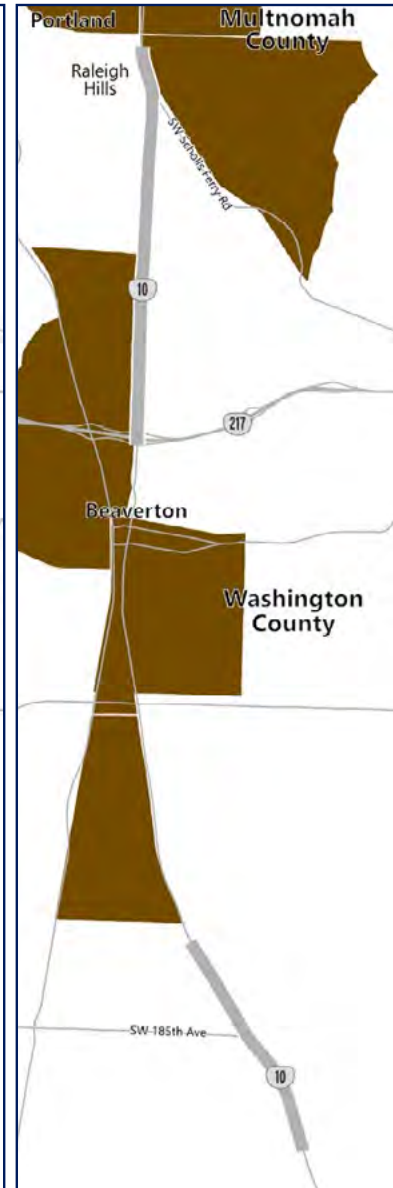
### PEOPLE OF COLOR



### LOW INCOME



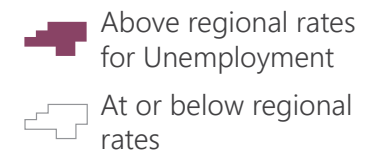
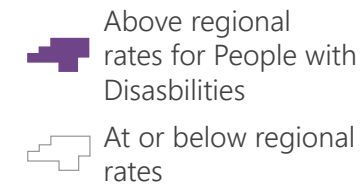
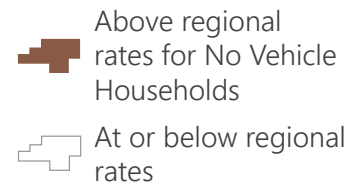
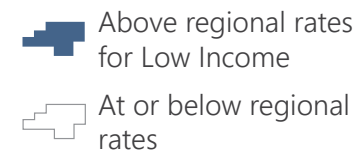
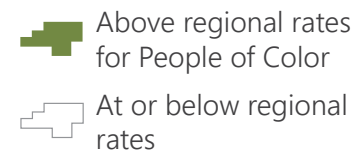
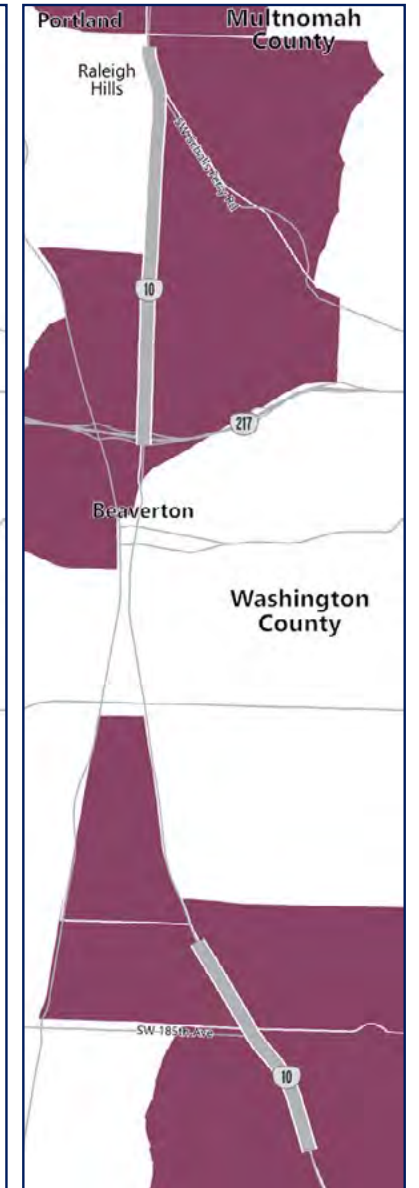
### NO VEHICLE HOUSEHOLDS



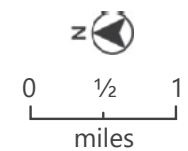
### PEOPLE WITH DISABILITIES



### UNEMPLOYMENT



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

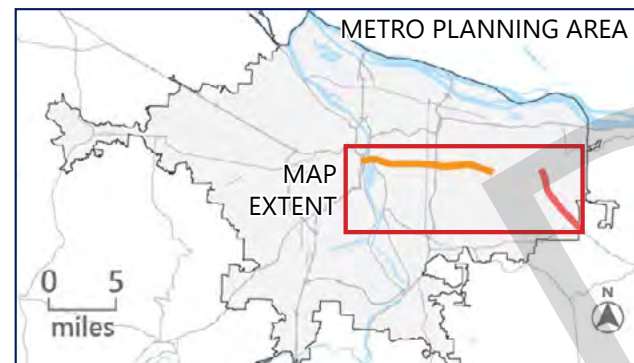


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

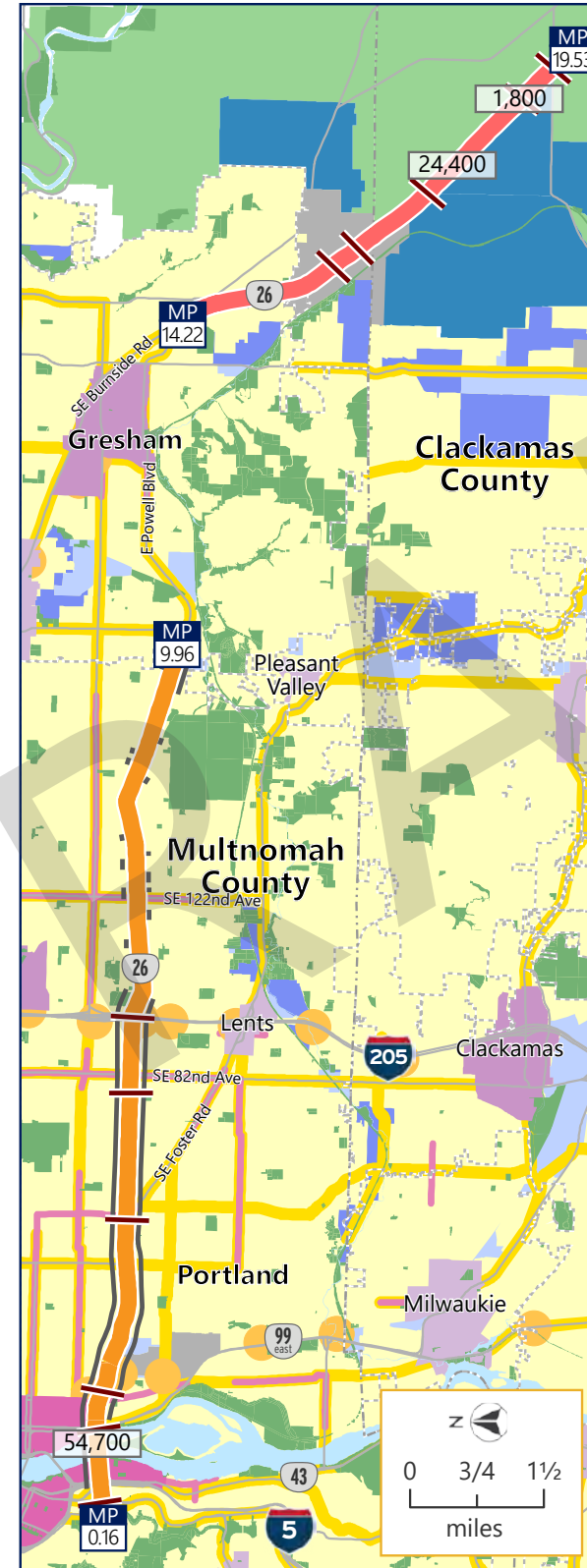
# MOUNT HOOD HIGHWAY (US 26)

## CORRIDOR INFORMATION

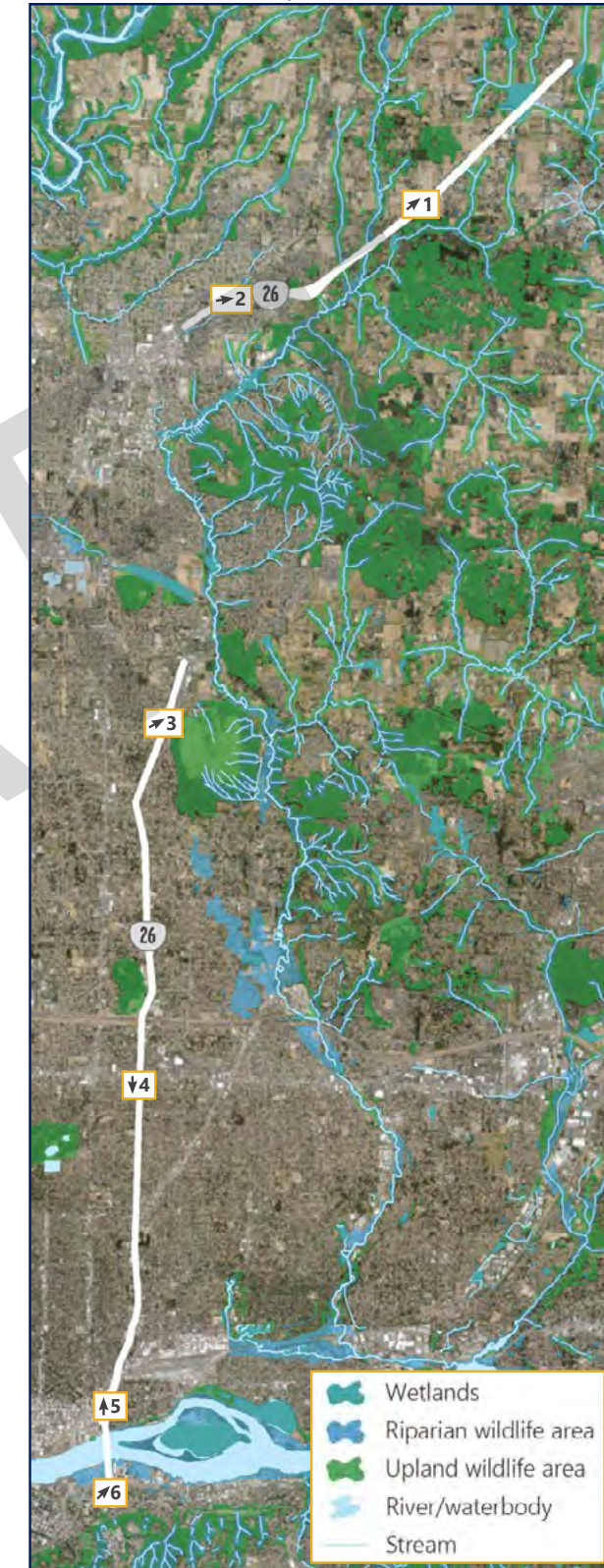
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: Statewide Highway, District Highway, Seismic Lifeline Route, Safety Corridor, Expressway Metro: Throughway, Major Arterial, 2040 Corridor Local: Interstate/Expressway (Multnomah County), Arterial (Multnomah County and Gresham), Principal Arterial (Clackamas County), Major City Traffic Street (Portland)
<b>Highway length</b>	21.4 miles
<b>Bike network</b>	Bike lanes; wide shoulders (partial)
<b>Transit</b>	TriMet routes 9 (FS), 19, 36, 66, 74 (FS) and 99
<b>Freight routes</b>	Entire corridor (Metro, ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	69 pedestrian-involved, 42 cyclist-involved, 3,394 vehicle
<b>Number of lanes</b>	2-4
<b>Speed limit</b>	35-45 mph
<b>Population</b>	74,559 people
<small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>	
<b>Employment</b>	157,490 jobs
<small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>	



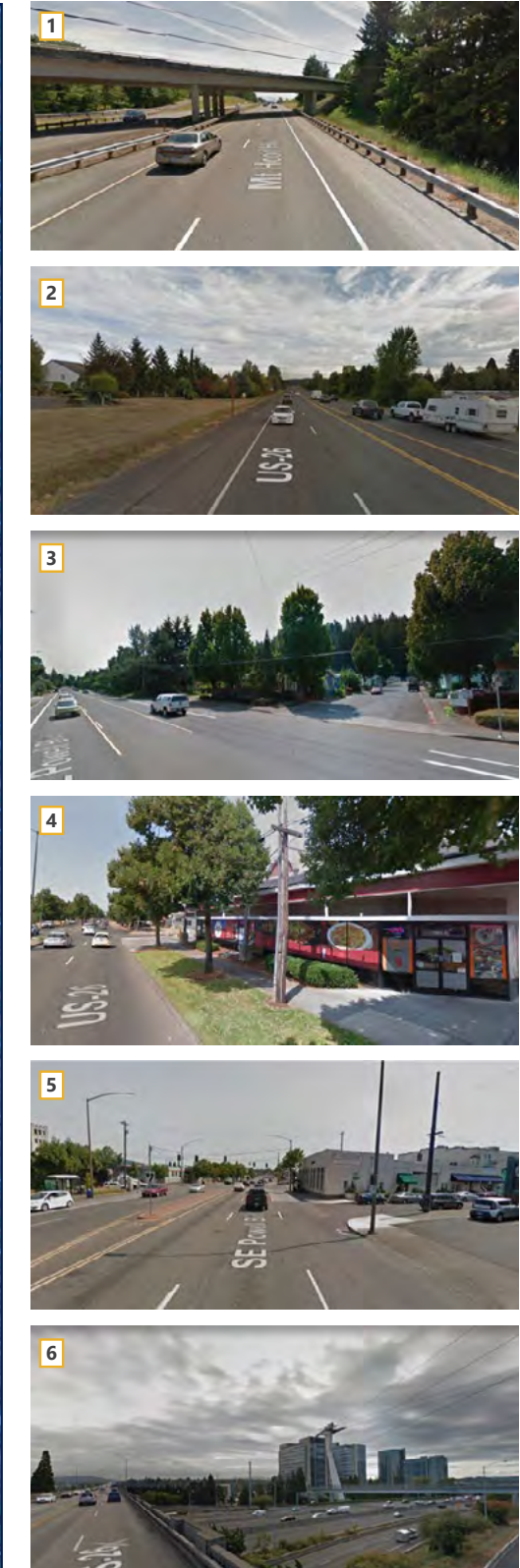
## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



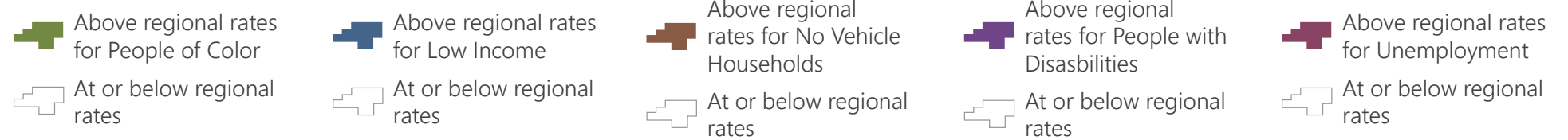
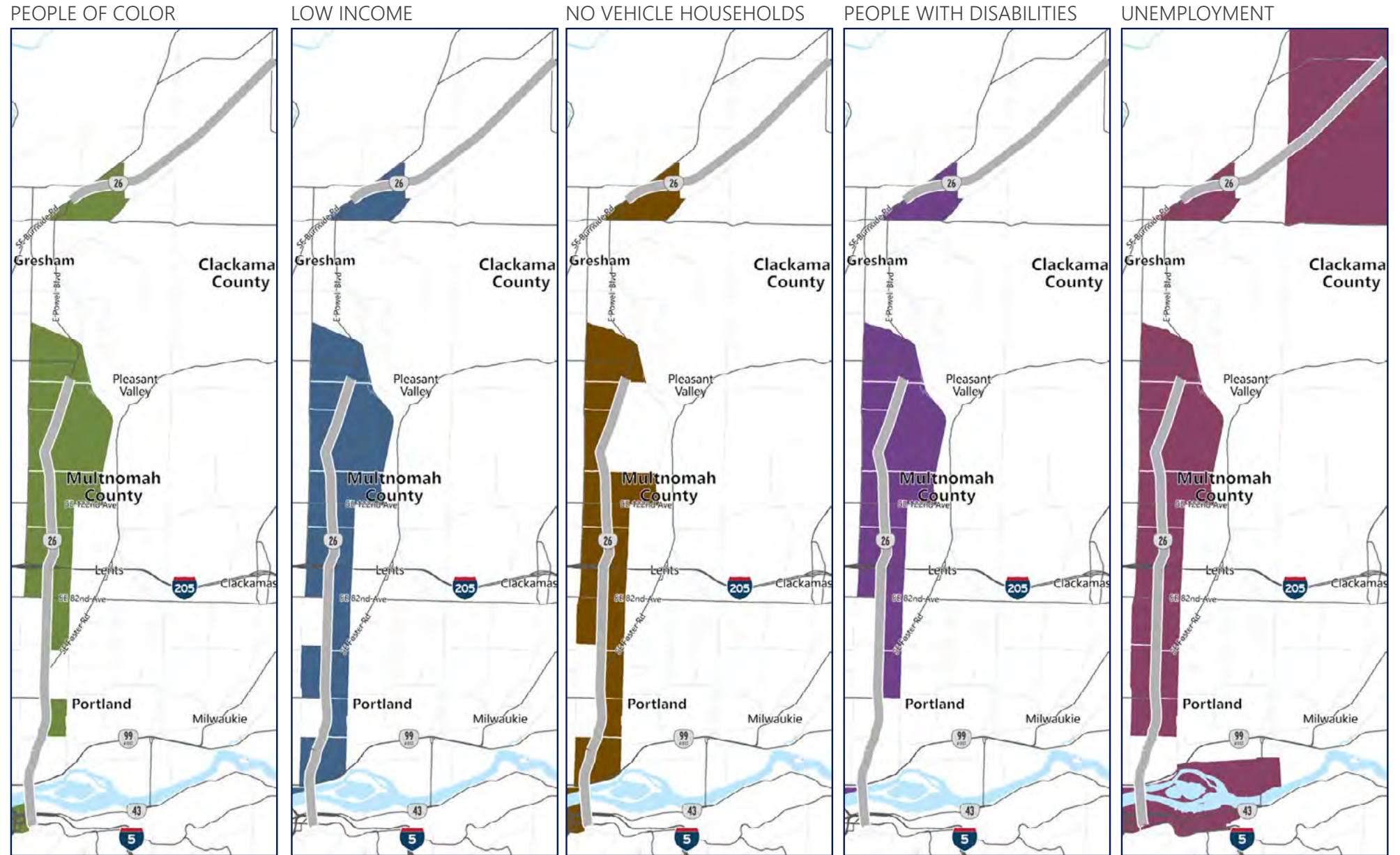
Source: Metro RLIS database and ODOT TransGIS.

## MOUNT HOOD HIGHWAY (US 26)

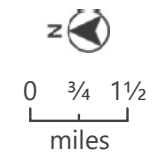
### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 496 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Good:</b>
	MP -0.1 - 0.3	MP 0 - 0.31
	MP 0 - 0.76	MP 0.3 - 1.02
	MP 1.24 - 1.67	MP 3.46 - 5.87
	<b>Fair:</b>	MP 5.97 - 9.96
	MP 1.24 - 1.67	MP 14.22 - 19.96
	MP 1.02 - 3.46	
<b>Bridges and bridge rating (0-100)</b>	MP 0.1: 26.9	MP 16.19: 82.9
	MP 0.13: 68.8	MP 16.53: 82.9
	MP 0.99: 76.4	MP 19.05: 77.5
	MP 1.01: 56.6	
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 10.4 miles</li> <li>Sidewalk substandard: 4.3 miles</li> <li>Sidewalk meets standard: 6.4 miles</li> <li>Bicycle gaps: 6.5 miles</li> <li>Bicycle substandard: 10.6 miles</li> <li>Bicycle meets standard: 0 miles</li> <li>Number of crossings: 57</li> </ul> </li> </ul>	
	<b>Transit frequency</b>	
	TriMet Line 9: 88% on time	

Corridor information table continues on next page.



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics



## MOUNT HOOD HIGHWAY (US 26)

8

## CORRIDOR INFORMATION

**Capital projects****ODOT STIP 2018 – 2021**

- US26: Ten Eyck Rd/Wolf Fr – Vista Loop, Sandy (18823)
- US26: Weber – E Cherryville (20210)
- US26 (Powel Blvd): SE 122nd Ave – SE 136th Ave (19690)
- US26 (Powell Blvd): SE 99th Ave – East City Limits (21178)
- US26/OR213 Curb Ramps (21255)
- US26: Little Humbug Creek Bridge (21224)
- US26: Meadow Lakes Dr – Combs Flat Rd, Prineville (20268)

**ODOT STIP 2021 – 2024**

- US26 (Powell Blvd): SE 99th Ave – East City Limits (21178)
- US26/OR213 Curb Ramps (21255)
- US26: SE 8th Ave – SE 87th Ave (21614)
- US26: Meadow Lakes Dr – Combs Flat Rd, Prineville (20268)

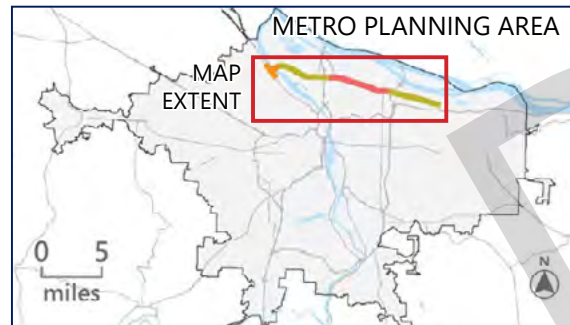
**City CIPs**

- Boring - SE 282nd Avenue: SE Orient Drive to County Line
- Gresham - SE 267th Avenue: City of Gresham Boundary to End of Road
- Gresham - SE Anderson State Road: SE 267th Avenue (S) to SE 267th Avenue (N)
- Gresham - Jenne Rd to 174th Ave Overlay: 190 ft. south of SE Naegeli Drive to SE Circle Avenue
- Gresham - Palmquist/Hwy 26 (527700)
- SE Portland - East Portland Active Transportation to Transit Project

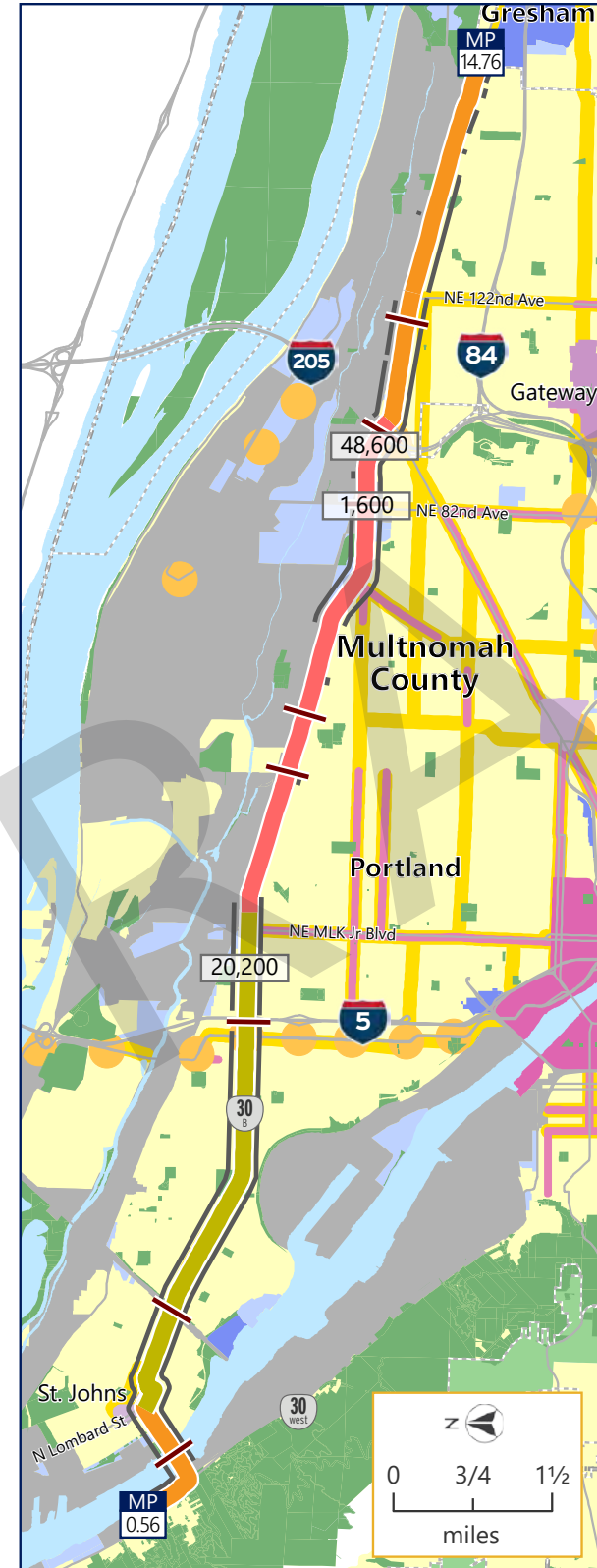
## NORTHEAST PORTLAND HIGHWAY (US 30B)

### CORRIDOR INFORMATION

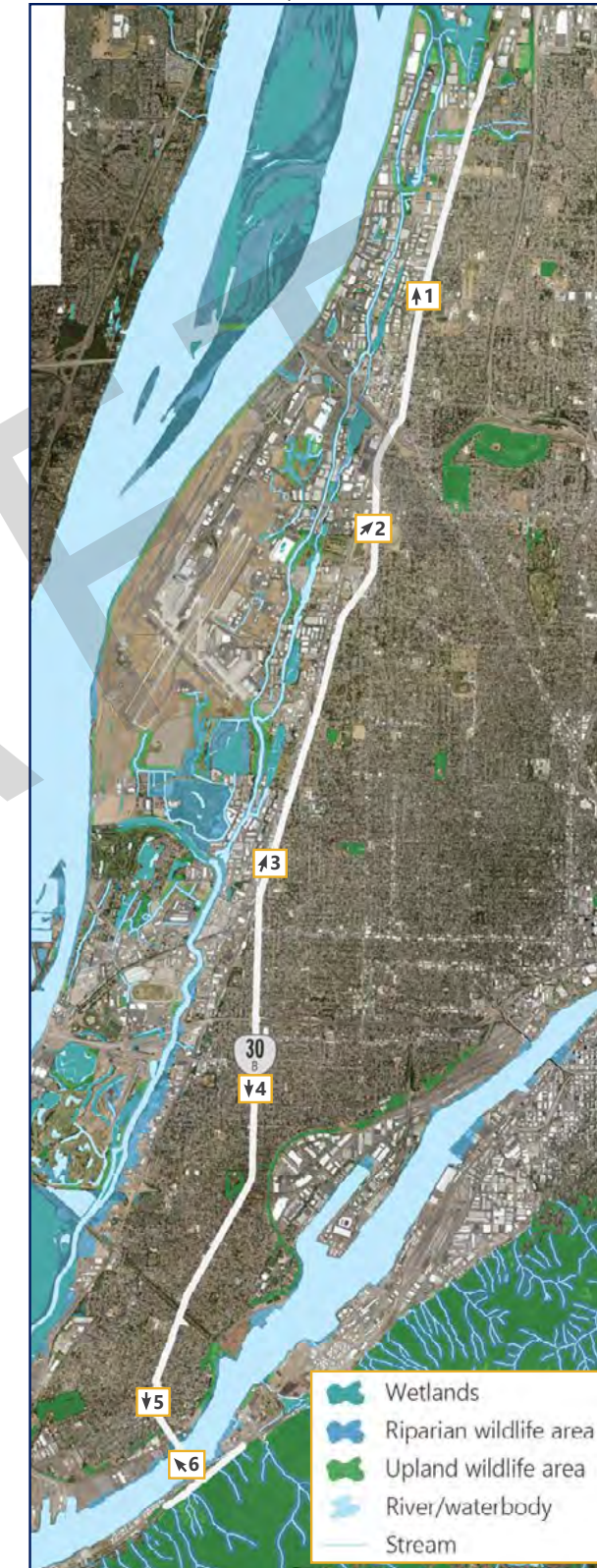
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial, Urban Minor Arterial (NHS) State: Statewide Highway, District Highway Metro: Throughway, Major Arterial, Minor Arterial, 2040 Corridor Local: Arterial (Gresham), District Collector Street (Portland), Major City Traffic Street (Portland), Regional Trafficway (Portland)
<b>Highway length</b>	16.3 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 4 (FS), 16, 21, 72 (FS), 75 (FS)
<b>Freight routes</b>	NW St Helens Rd to N Ivanhoe St and NE MLK Jr Blvd to NE 165th Ave (Metro); NW St Helens Rd to I-5 (ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	54 pedestrian-involved, 46 cyclist-involved, 2,185 vehicle
<b>Number of lanes</b>	2-6
<b>Speed limit</b>	25-40 mph
<b>Population</b>	51,295 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	31,380 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>



### REGIONAL LAND USE AND TRANSPORTATION



### ENVIRONMENT with photo locations



### PHOTOS



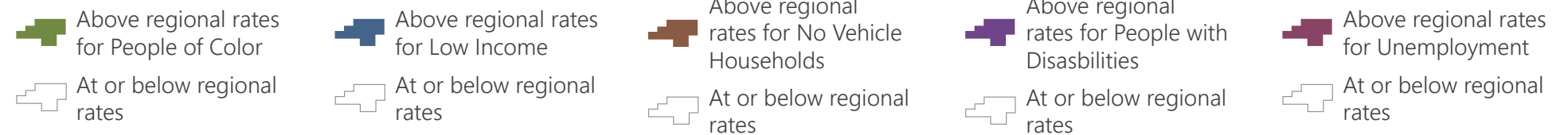
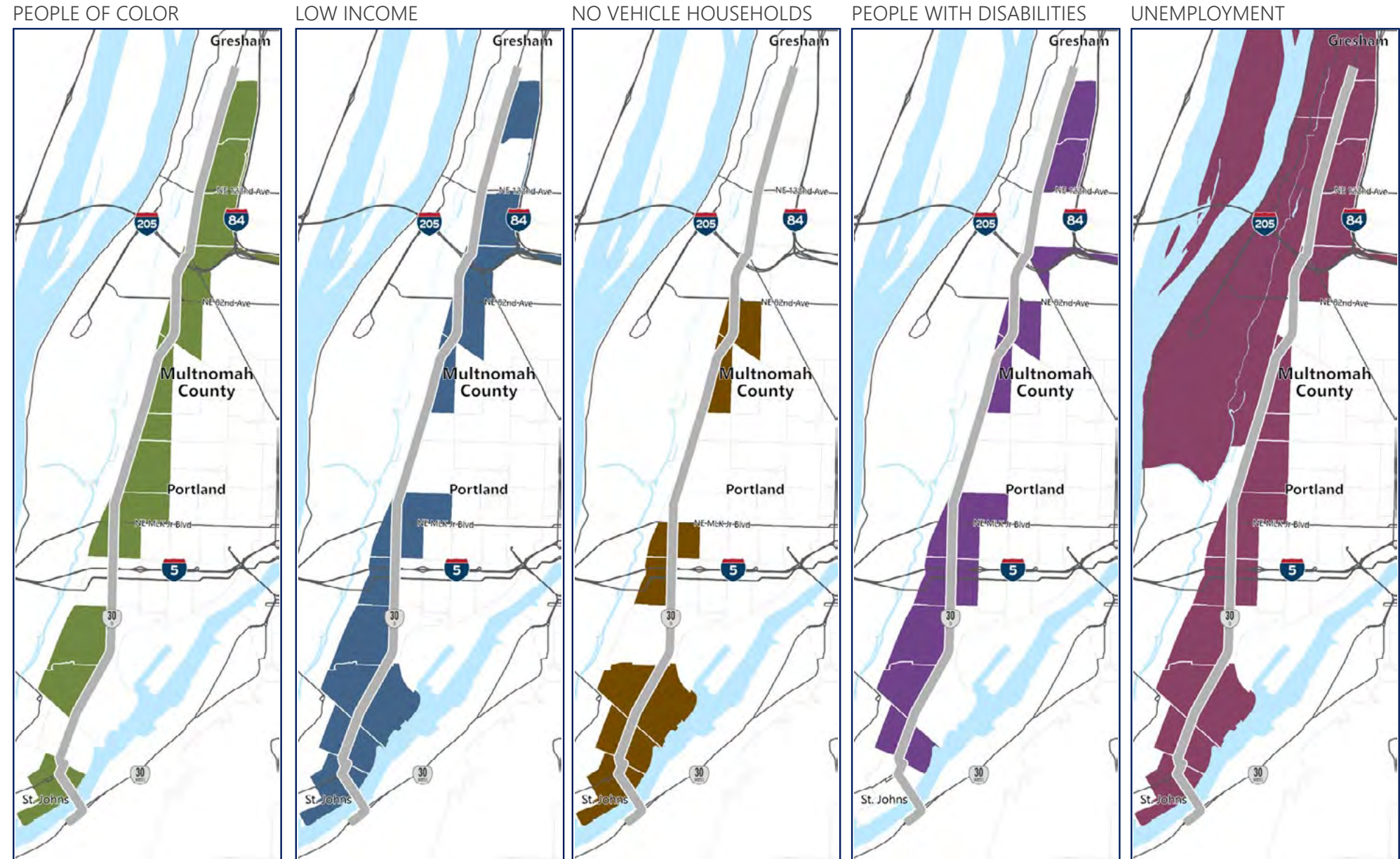
Source: Metro RLIS database and ODOT TransGIS.

NORTHEAST PORTLAND HIGHWAY (US 30B)

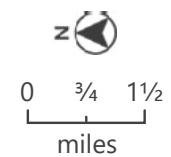
CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 226 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Good:</b>
	MP 0 - 0.42	MP 0.57 - 1.25
	MP 0 - 0.57	MP 5.38 - 6.15
	MP 1.25 - 1.31	MP 9.2 - 10.88
	MP 1.31 - 1.73	MP 10.88 - 11.25
<b>Fair:</b>	MP 1.73 - 3.66	<b>Very Good:</b>
	MP 3.66 - 5.38	MP 12.43 - 13.54
	MP 6.15 - 9.2	
<b>Bridges and Bridge Rating (0-100)</b>	MP 11.25 - 12.43	MP 10.41: 80.9
	MP 13.54 - 14.76	MP 0.91: 65
		MP 11.12: 87.8
		MP 2.4: 48.4
<b>Pedestrian and bicycle network completion</b>	MP 12.43: 78.5	MP 5.33: 71.2
	<ul style="list-style-type: none"> <li>Listed as a Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 5.5 miles</li> <li>Sidewalk substandard: 3.3 miles</li> <li>Sidewalk meets standard: 1.6 miles</li> <li>Bicycle gaps: 7.4 miles</li> <li>Bicycle substandard: 4.5 miles</li> <li>Bicycle meets standard: 6.7 miles</li> <li>Number of crossings: 9</li> </ul> </li> </ul>	
	<b>Transit frequency</b>	
	TriMet Lines:	
	<ul style="list-style-type: none"> <li>4: 89% on time</li> <li>57: 86% on time</li> <li>72: 87% on time</li> </ul>	

Corridor information table continues on next page.



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

### CORRIDOR INFORMATION

#### Capital projects

##### ODOT STIP 2018 - 2021

- Portland Metropolitan: Bridge screening and rail retrofit (19918)
- I-405 Fremont bridge to US26 WB connection bridge, Portland (19533)
- US30BY (Lombard) N Fiske Ave - N Boston Ave (20413)
- US30BY (Lombard) at Fenwick (20415)
- US30 Troutdale (Sandy River) Bridge (20703)
- US30 at Bridge Ave ramps (20522)

##### ODOT STIP 2021 - 2024

- US30 Sandy River - OR35 (21613)
- US30 NW Saltzman Rd - NW Bridge Ave (20208)
- US30 at Bridge Ave ramps (20522)
- OR99W: OR217 - SW Sunset Blvd & US30B: Kerby - 162nd Ave (21616)
- US30 Bridge over private driveway, Portland (21704)
- US30 Bridal Veil Falls Bridge (21706)
- US30B St Johns (Willamette River) Bridge (21707)
- US30 Troutdale (Sandy River) Bridge (21710)
- US30 Watson Rd - NW Hoge Ave (21779)

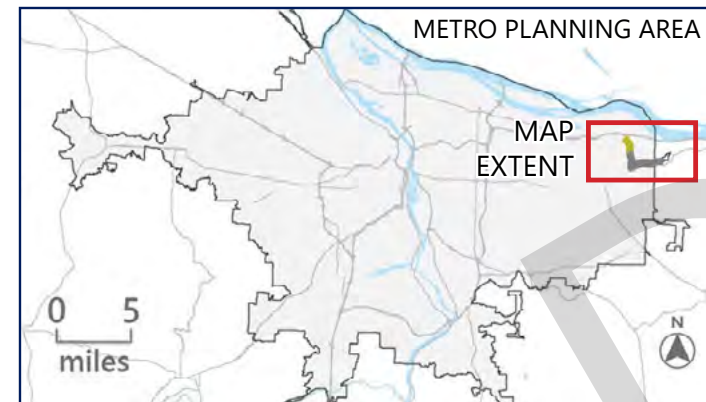
##### City CIPs

- N Portland - N Denver: Lombard to Watts
- N Portland - St. Johns Truck Strategy - Phase II

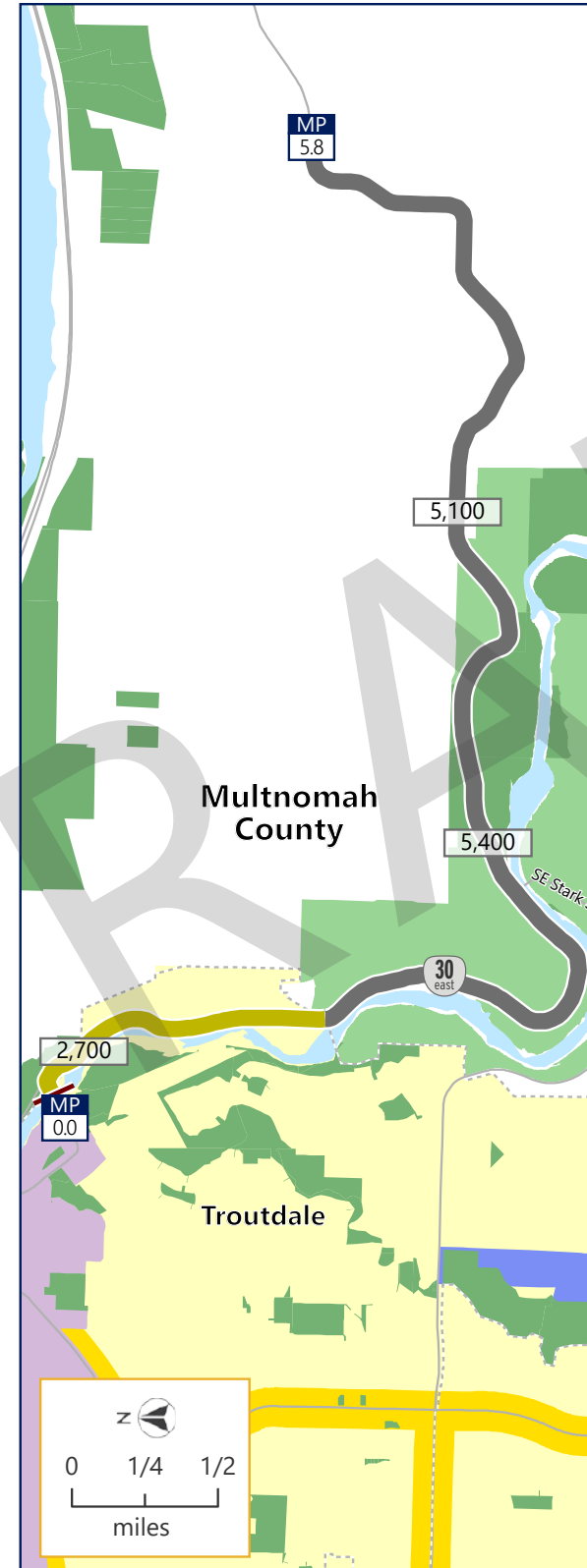
# HISTORIC COLUMBIA HIGHWAY (US 30E)

## CORRIDOR INFORMATION

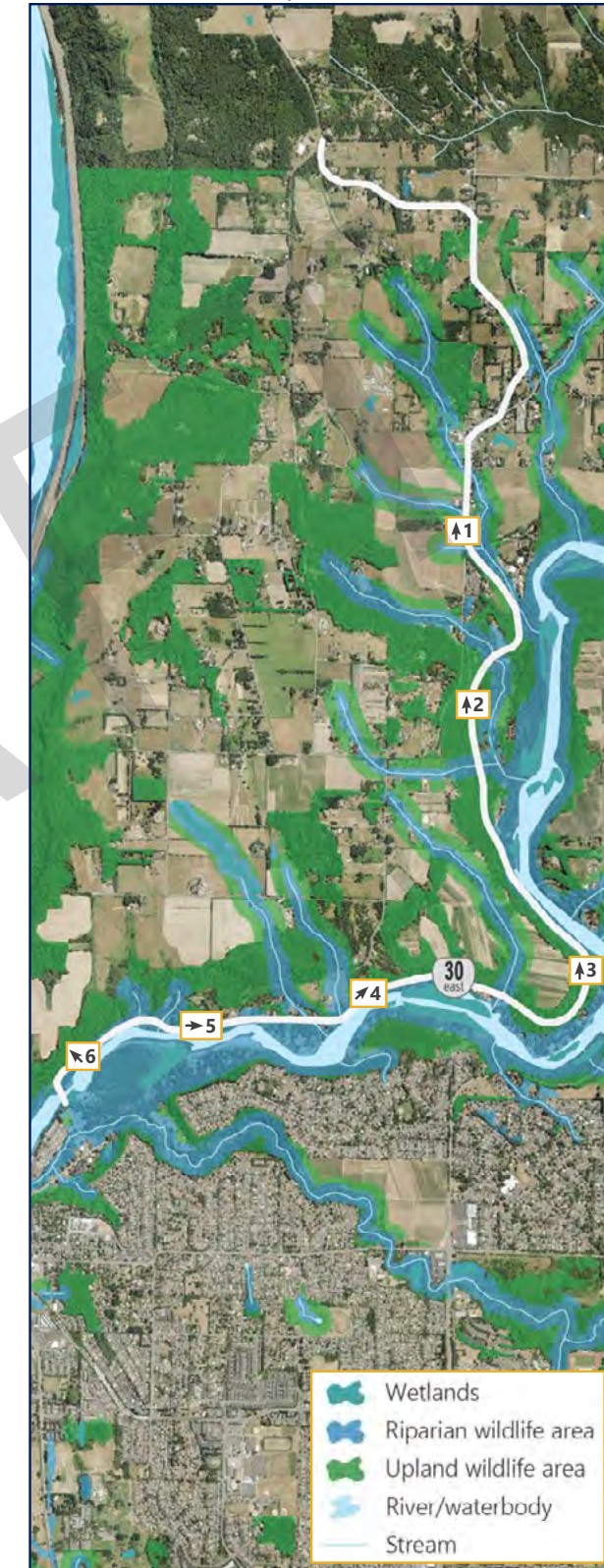
<b>Roadway classification</b>	Federal: Urban Collector State: District Highway Metro: Minor Arterial, Arterial Outside of UGB Local: Arterial (Troutdale, Multnomah County), Collector (Troutdale, Multnomah County)
<b>Highway length</b>	4.2 miles
<b>Bike network</b>	None
<b>Transit</b>	None
<b>Freight routes</b>	None
<b>Crash history (2013-2018)</b>	0 pedestrian-involved, 1 cyclist-involved, 52 vehicle
<b>Number of lanes</b>	2
<b>Speed limit</b>	35 mph
<b>Population</b>	6,588 people
<small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>	
<b>Employment</b>	1,660 jobs
<small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>	



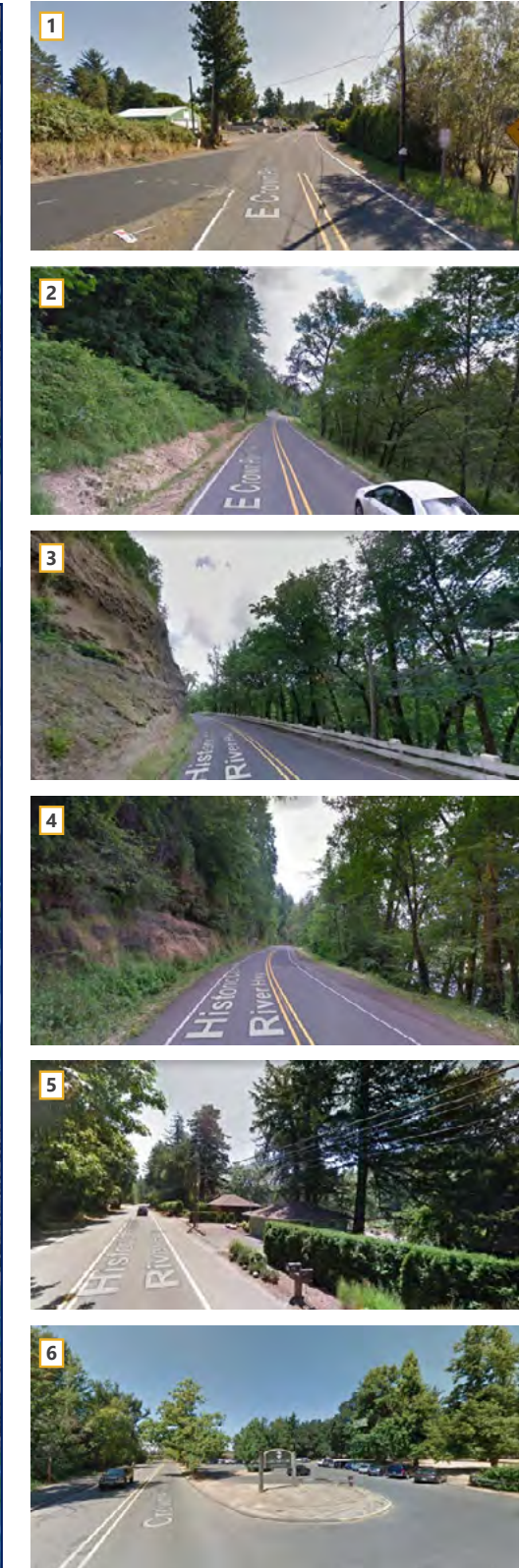
## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



County boundary	Throughway	Employment areas
City boundary	Major Arterial	Industrial areas
Arterials	Minor Arterial	Regionally significant industrial areas
Annual average daily traffic volumes	Arterial Outside Urban Growth Boundary	Neighborhoods
Sidewalks	2040 corridor	Urban reserves
Bridge	Central city	Rural reserves
Milepost termini	Regional center	Parks & open space
Not designated	Town center	River/waterbody

Source: Metro RLIS database and ODOT TransGIS.

## HISTORIC COLUMBIA HIGHWAY (US 30E)

### CORRIDOR INFORMATION

<b>Crash data</b>	9 ODOT SPIS sites						
<b>Pavement condition</b>	<table border="0"> <tr> <td><b>Fair:</b></td> <td><b>Good:</b></td> </tr> <tr> <td>MP 0.07 - 3.95</td> <td>MP 0 - 0.07</td> </tr> <tr> <td>MP 3.95 - 8.76</td> <td></td> </tr> </table>	<b>Fair:</b>	<b>Good:</b>	MP 0.07 - 3.95	MP 0 - 0.07	MP 3.95 - 8.76	
<b>Fair:</b>	<b>Good:</b>						
MP 0.07 - 3.95	MP 0 - 0.07						
MP 3.95 - 8.76							
<b>Bridges and bridge rating (0-100)</b>	MP 0.03: 48						
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor for part of the corridor (&gt;50%)</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 5.6 miles</li> <li>Sidewalk substandard: 0 miles</li> <li>Sidewalk meets standard: 0 miles</li> <li>Bicycle gaps: 5.6 miles</li> <li>Bicycle substandard: 2.3 miles</li> <li>Bicycle meets standard: 0 miles</li> <li>Number of crossings: 0</li> </ul> </li> </ul>						
<b>Transit frequency</b>	No existing frequent service lines.						
<b>Capital projects</b>	<p><b>ODOT STIP 2018 - 2021</b></p> <ul style="list-style-type: none"> <li>US30 Kittridge - St. Johns (20208)</li> <li>US30 Troutdale (Sandy River) Bridge (20703)</li> </ul> <p><b>ODOT STIP 2021 - 2024</b></p> <ul style="list-style-type: none"> <li>US30 Sandy River - OR35 (21613)</li> <li>US30 NW Saltzman Rd - NW Bridge Ave (20208)</li> <li>US30 Troutdale (Sandy River) Bridge (21710)</li> <li>US30 Watson Rd - NW Hoge Ave (21779)</li> </ul> <p><b>City CIP</b></p> <ul style="list-style-type: none"> <li>Portland - Sandy Blvd: 13th-47th, NE</li> <li>Troutdale - Stark Street Bridge</li> <li>Troutdale - SE Stark Street: SE 35th Street to Stark Street Bridge/E Historic Columbia River Highway</li> </ul>						

### PEOPLE OF COLOR



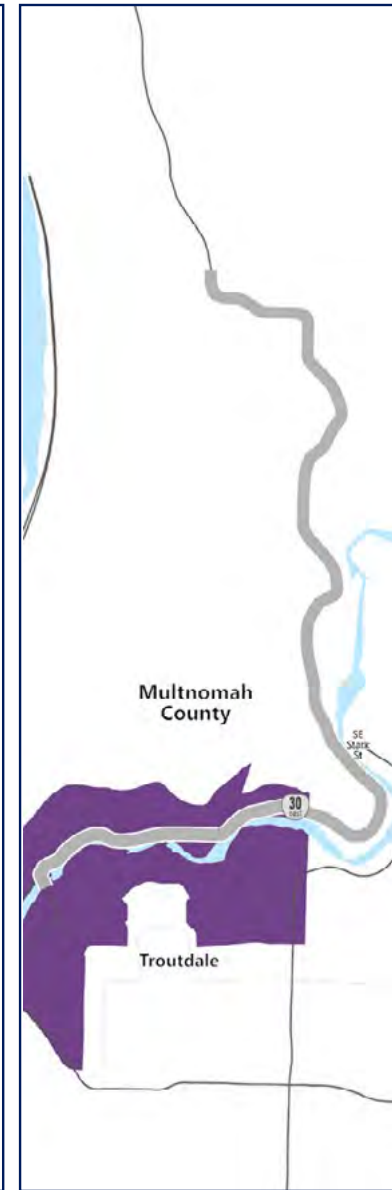
### LOW INCOME



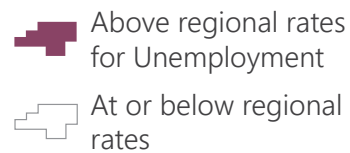
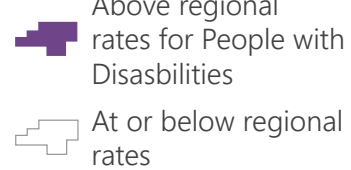
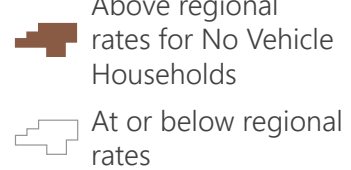
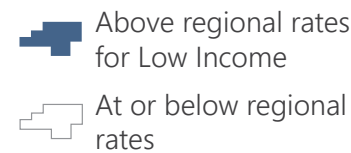
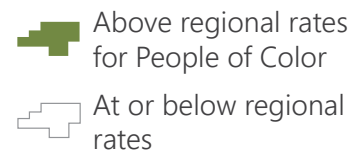
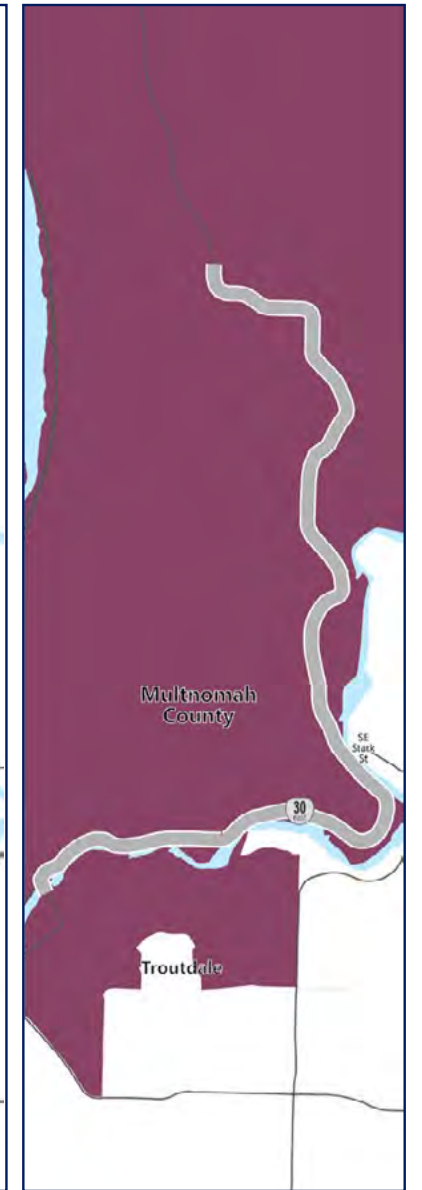
### NO VEHICLE HOUSEHOLDS



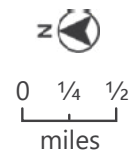
### PEOPLE WITH DISABILITIES



### UNEMPLOYMENT



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

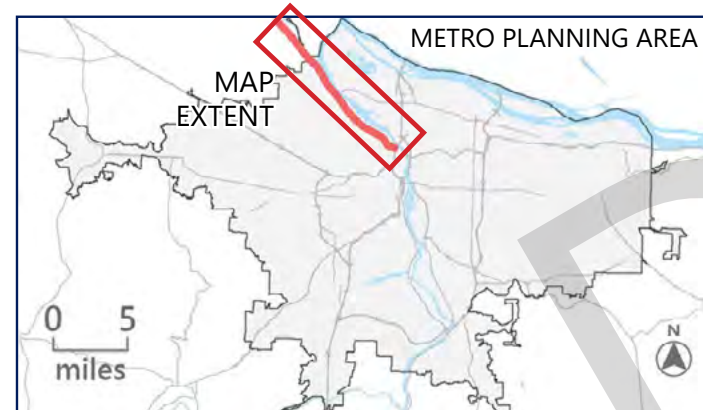


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

# LOWER COLUMBIA RIVER HIGHWAY (US 30W)

## CORRIDOR INFORMATION

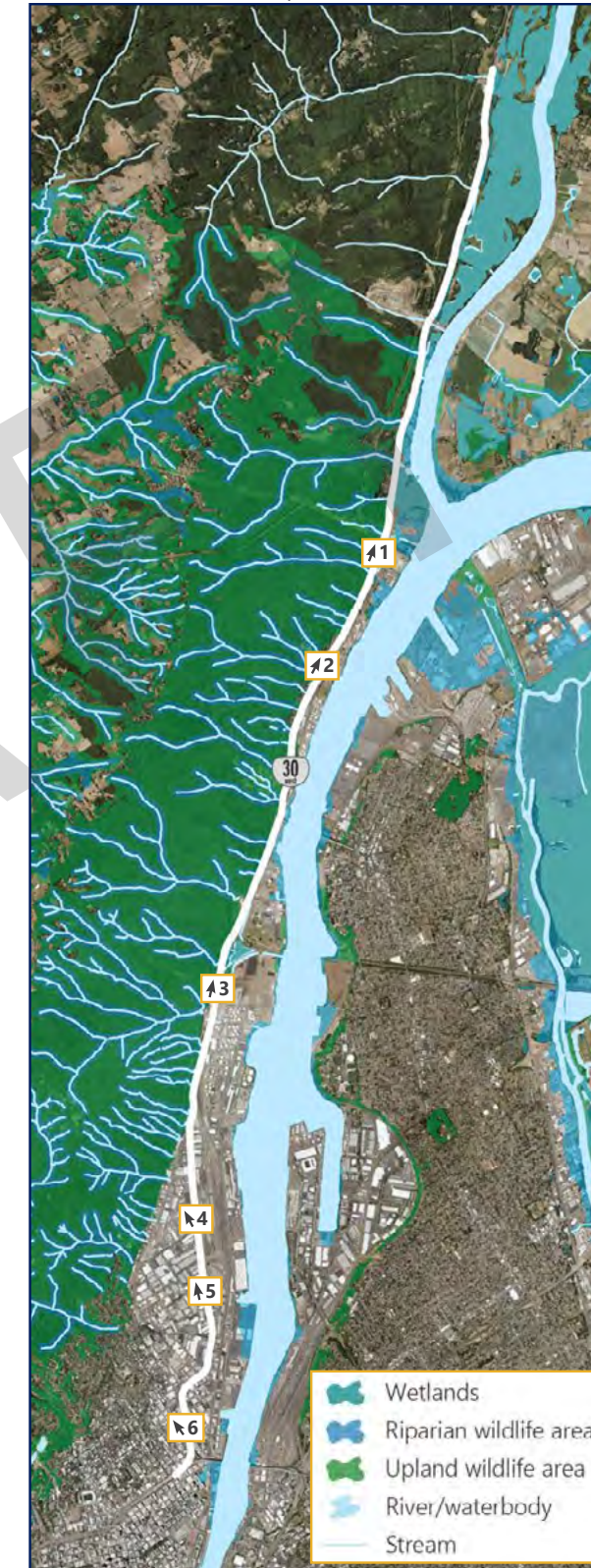
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: Statewide Highway, Seismic Lifeline Route Metro: Throughway Local: Arterial (Multnomah County), Interstate/Expressway (Multnomah County), Major City Traffic Street/Regional Trafficway (Portland)
<b>Highway length</b>	11.9 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 15 and 16
<b>Freight routes</b>	Entire corridor (Metro, ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	5 pedestrian-involved, 8 cyclist-involved, 402 vehicle
<b>Number of lanes</b>	4-6
<b>Speed limit</b>	35-55 mph
<b>Population</b>	35,077 people
<small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>	
<b>Employment</b>	158,828 jobs
<small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>	



## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



Source: Metro RLIS database and ODOT TransGIS.

## LOWER COLUMBIA RIVER HIGHWAY (US 30W)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor for part of the corridor (<50%) 35 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Very Good:</b>
	MP 4.52 - 6.5	MP 6.5 - 9.65
	<b>Good:</b>	MP 9.65 - 13.12
	MP 0.87 - 1.45	MP 13.12 - 17.9
<b>Bridges and bridge rating (0-100)</b>	MP 1.24: 95.4	MP 3.24: 87.9
	MP 1.26: 92.4	MP 5.21: 70.8
	MP 1.69: 77.4	
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 6.2 miles</li> <li>Sidewalk substandard: 6.1 miles</li> <li>Sidewalk meets standard: 7.5 miles</li> <li>Bicycle gaps: 3.5 miles</li> <li>Bicycle substandard: 2.4 miles</li> <li>Bicycle meets standard: 6.6 miles</li> <li>Number of crossings: 14</li> </ul> </li> </ul>	
	<b>Transit frequency</b>	
	No existing frequent service lines. Planned: TriMet Line 16	
	<b>Capital projects</b>	
	<b>ODOT STIP 2018 - 2021</b>	
	<ul style="list-style-type: none"> <li>US30 Kittridge - St. Johns (20208)</li> </ul>	
	<b>ODOT STIP 2021 - 2024</b>	
<ul style="list-style-type: none"> <li>US30 Sandy River - OR35 (21613)</li> <li>Multnomah Falls Viaducts Repair Project (17479)</li> <li>US30 NW Saltzman Rd - NW Bridge Ave (20208)</li> <li>US30 Bridal Veil Falls Bridge (21706)</li> <li>US30 Watson Rd - NW Hoge Ave (21779)</li> </ul>		
<b>City CIPs</b>		
<ul style="list-style-type: none"> <li>NW Portland - NW Cornelius Pass Road: Highway 30 - Skyline Boulevard</li> <li>NW Portland - NW Cornelius Pass Road: Skyline Boulevard to County Line</li> </ul>		

### PEOPLE OF COLOR



### LOW INCOME



### NO VEHICLE HOUSEHOLDS







### PEOPLE WITH DISABILITIES







### UNEMPLOYMENT





 Above regional rates for People of Color  
 At or below regional rates

 Above regional rates for Low Income  
 At or below regional rates

 Above regional rates for No Vehicle Households  
 At or below regional rates

 Above regional rates for People with Disabilities  
 At or below regional rates

 Above regional rates for Unemployment  
 At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



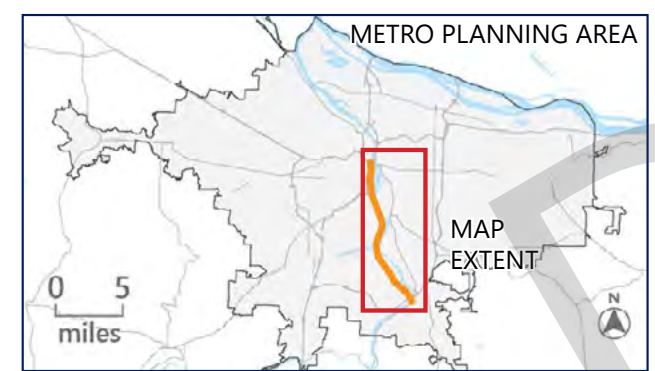
Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics



# OSWEGO HIGHWAY (OR 43)

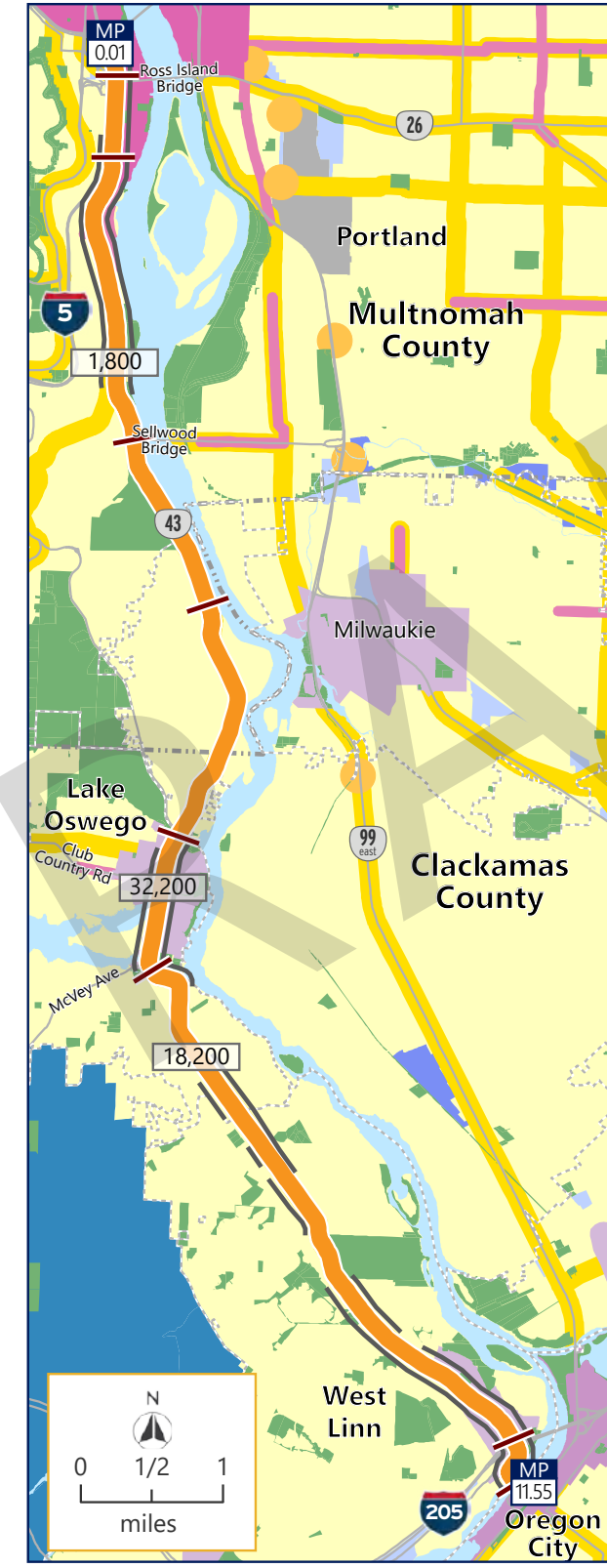
## CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS), Urban Minor Arterial State: Statewide Highway, District Highway, Seismic Lifeline Route Metro: Major Arterial, 2040 Corridor Local: Major City Traffic Street (Portland); Principal Arterial (Clackamas County), Major Arterial (Clackamas County, West Linn, Oregon City, Lake Oswego)
<b>Highway length</b>	14.9 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 35, 36, 99
<b>Freight routes</b>	None
<b>Crash history (2013-2018)</b>	17 pedestrian-involved, 9 cyclist-involved, 1,000 vehicle
<b>Number of lanes</b>	2-5
<b>Speed limit</b>	25-45 mph
<b>Population</b>	60,086 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	158,151 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>



- County boundary
- Throughway
- Employment areas
- City boundary
- Major Arterial
- Industrial areas
- Arterials
- Minor Arterial
- Regionally significant industrial areas
- Annual average daily traffic volumes
- Arterial Outside Urban Growth Boundary
- Neighborhoods
- Sidewalks
- 2040 corridor
- Urban reserves
- Bridge
- Central city
- Rural reserves
- Milepost termini
- Regional center
- Parks & open space
- Town center
- River/waterbody

## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



Source: Metro RLIS database and ODOT TransGIS.

## OSWEGO HIGHWAY (OR 43)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor for part of the corridor (<50%) 42 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b> MP 0 - 0.76 MP 0 - 0.24 MP 0.24 - 0.64 MP 0.64 - 2.53 MP 7.6 - 11.29	<b>Fair:</b> MP 5.79 - 6.13 MP 6.13 - 7.6 MP 11.29 - 11.39 <b>Good:</b> MP 2.53 - 5.79 MP 11.39 - 11.55
<b>Bridges and bridge rating (0-100)</b>	MP 0.09: 58.2 MP 0.16: 89.6 MP 2.69: 84.5 MP 2.69: 81.7 MP 4: 73.7	MP 5.79: 0 MP 6.76: 56.4 MP 6.82: 80 MP 11.43: 45.2
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                         <ul style="list-style-type: none"> <li>Sidewalk gaps: 7 miles</li> <li>Sidewalk substandard: 5.9 miles</li> <li>Sidewalk meets standard: 2.1 miles</li> <li>Bicycle gaps: 6.9 miles</li> <li>Bicycle substandard: 6.5 miles</li> <li>Bicycle meets standard: 1.5 miles</li> <li>Number of crossings: 19</li> </ul> </li> </ul>	
<b>Transit frequency</b>	No existing frequent service lines. Planned: TriMet Line 35	
<b>Capital projects</b>	<b>ODOT STIP 2018 - 2021</b> <ul style="list-style-type: none"> <li>Portland Metropolitan: Bridge screening and rail retrofit (19918)</li> <li>OR43 Arbor Dr - hidden springs Rd (20329)</li> </ul> <b>ODOT STIP 2021 - 2024</b> <ul style="list-style-type: none"> <li>OR43 Arbor Dr - Hidden Springs (20329)</li> </ul> <b>City CIPs</b> <ul style="list-style-type: none"> <li>Portland - Dunthorpe Urban Pockets Active Transportation Projects</li> </ul>	

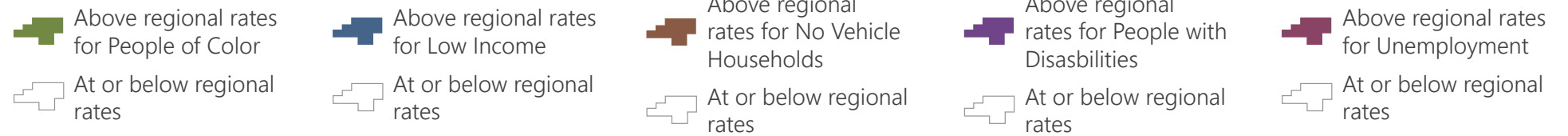
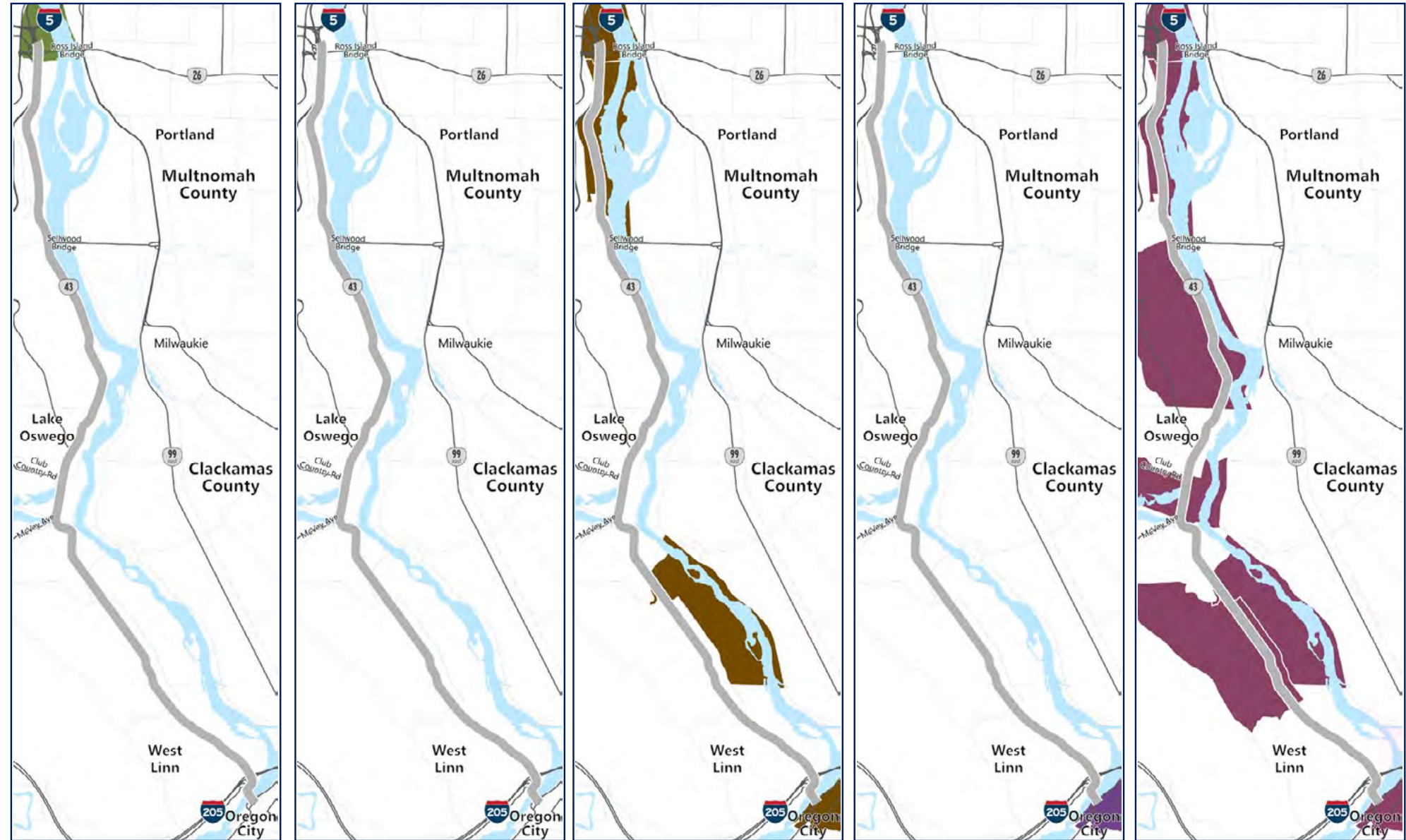
### PEOPLE OF COLOR

### LOW INCOME

### NO VEHICLE HOUSEHOLDS

### PEOPLE WITH DISABILITIES

### UNEMPLOYMENT



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

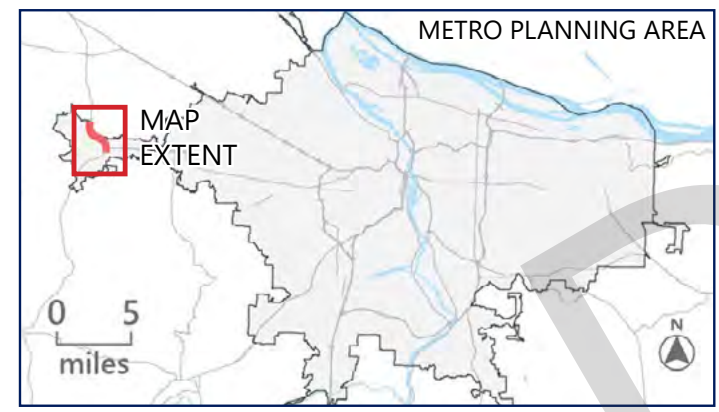


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

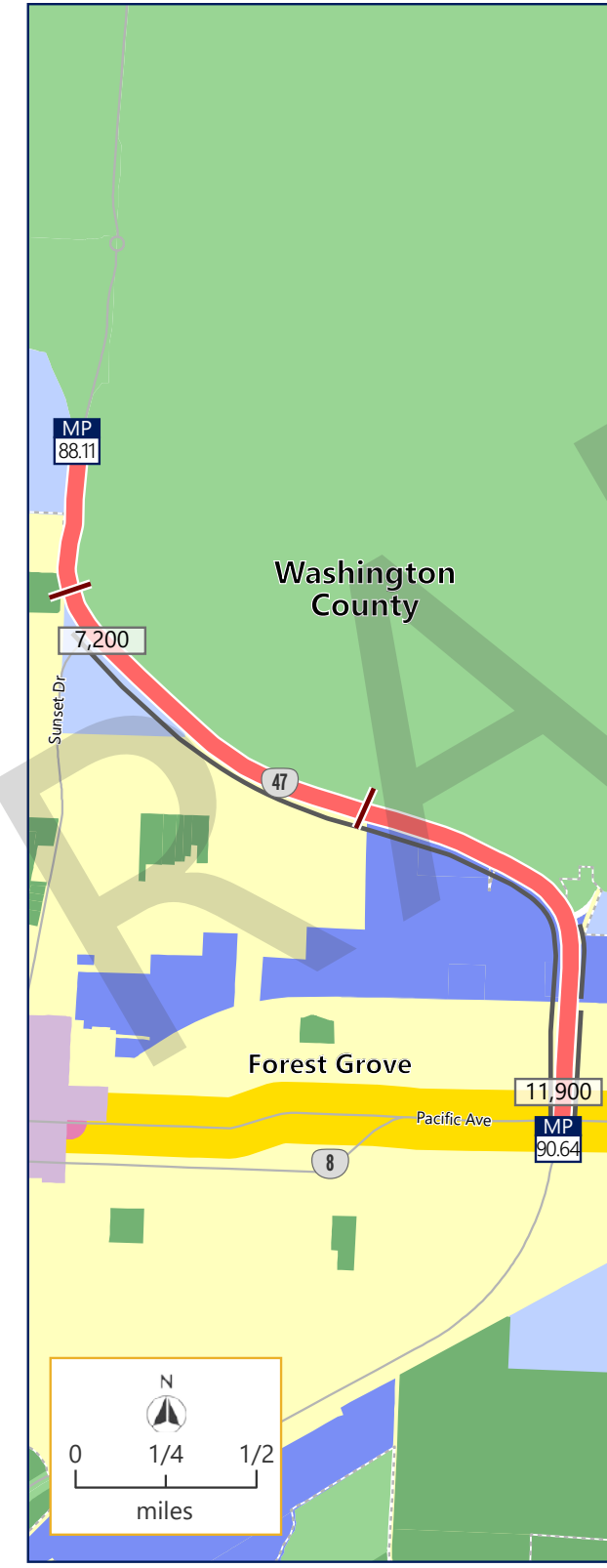
# NEHALEM HIGHWAY (OR 47)

## CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: Statewide Highway, District Highway Metro: Throughway Local: Principal Arterial (Forest Grove, Washington County)
<b>Highway length</b>	2.2 miles
<b>Bike network</b>	Bike lanes
<b>Transit</b>	None
<b>Freight routes</b>	Entire corridor (Metro), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	1 pedestrian-involved, 0 cyclist-involved, 106 vehicle
<b>Number of lanes</b>	2
<b>Speed limit</b>	25-50 mph
<b>Population</b>	11,951 people
<small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>	
<b>Employment</b>	5,570 jobs
<small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>	



## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



- County boundary
- City boundary
- Arterials
- Annual average daily traffic volumes
- Sidewalks
- Bridge
- Milepost termini
- Throughway
- Major Arterial
- Minor Arterial
- Arterial Outside Urban Growth Boundary
- 2040 corridor
- Central city
- Regional center
- Town center
- Employment areas
- Industrial areas
- Regionally significant industrial areas
- Neighborhoods
- Urban reserves
- Rural reserves
- Parks & open space
- River/waterbody

Source: Metro RLIS database and ODOT TransGIS.

## NEHALEM HIGHWAY (OR 47)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 0 ODOT SPIS sites
<b>Pavement condition</b>	<b>Poor:</b> MP 88.8 - 90.4 <b>Fair:</b> MP 90.4 - 90.64 <b>Very Good:</b> MP 87.85 - 88.8
<b>Bridges</b>	MP 88.51 - 90.1/100 MP 88.84 - 70/100 MP 89.69 - 99.6/100
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI: <ul style="list-style-type: none"> <li>Sidewalk gaps: 1.6 miles</li> <li>Sidewalk substandard: 1 mile</li> <li>Sidewalk meets standard: 0.7 miles</li> <li>Bicycle gaps: 0 miles</li> <li>Bicycle substandard: 6.5 miles</li> <li>Bicycle meets standard: 0.3 miles</li> <li>Number of crossings: 2</li> </ul> </li> </ul>
<b>Transit frequency</b>	No existing or planned frequent service lines.
<b>Capital projects</b>	<b>City CIP</b> <ul style="list-style-type: none"> <li>Forest Grove - TV Hwy &amp; Quince (ST.012)</li> </ul>

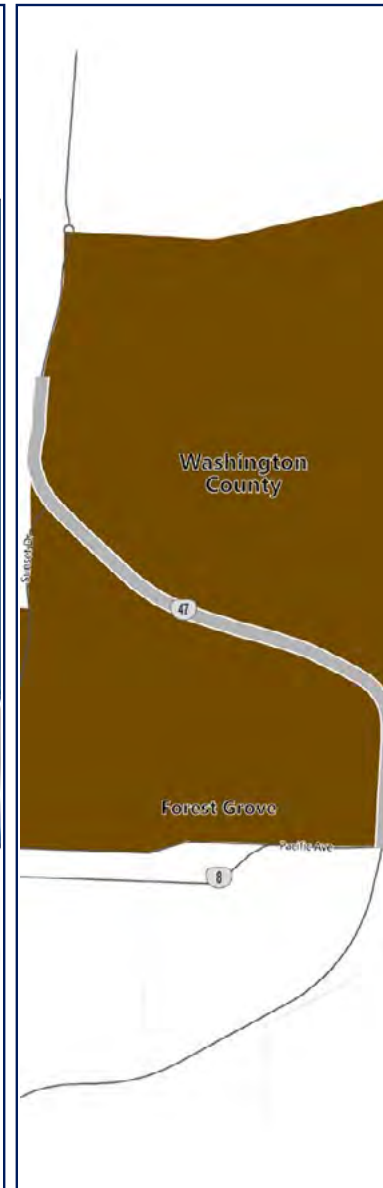
### PEOPLE OF COLOR



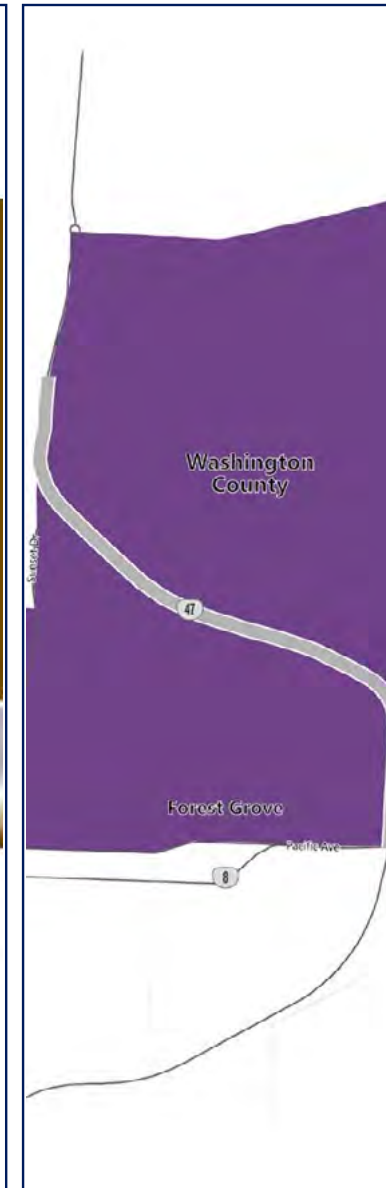
### LOW INCOME



### NO VEHICLE HOUSEHOLDS





### PEOPLE WITH DISABILITIES





### UNEMPLOYMENT





 Above regional rates for People of Color


 At or below regional rates


 Above regional rates for Low Income


 At or below regional rates


 Above regional rates for No Vehicle Households

 At or below regional rates

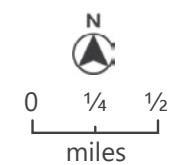
 Above regional rates for People with Disabilities

 At or below regional rates

 Above regional rates for Unemployment

 At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

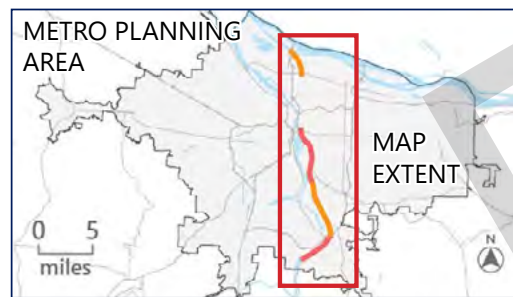


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

PACIFIC HIGHWAY EAST (OR 99E)

CORRIDOR INFORMATION

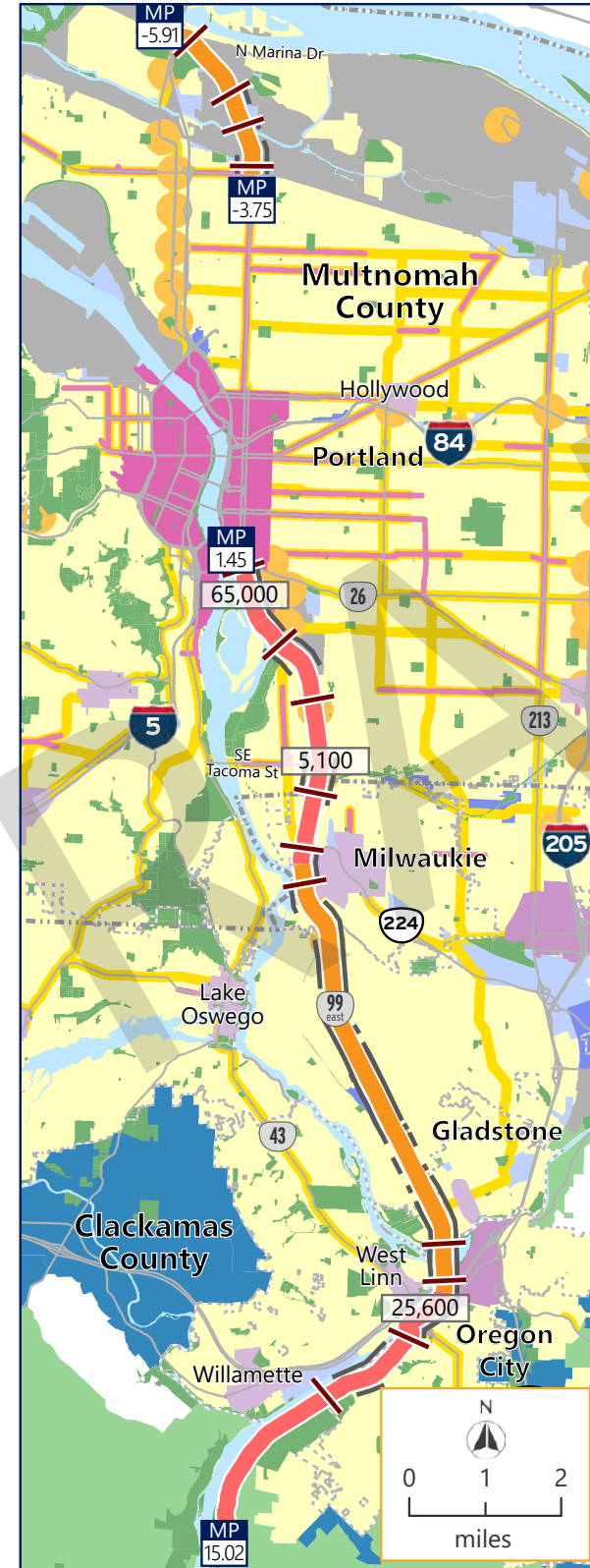
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS), Urban Minor Arterial State: Statewide Highway, Regional Highway, District Highway, Seismic Lifeline Route Metro: Throughway, Major Arterial, 2040 Corridor Local: Major City Traffic Street/Regional Trafficway (Portland), Principal Arterial (Clackamas County), District Hwy (Gladstone), Regional Route (Milwaukie), Arterial (Milwaukie, Multnomah County), Major Arterial (Clackamas County, Oregon City)
<b>Highway length</b>	26.7 miles
<b>Bike network</b>	Bike lanes; buffered bike lanes (partial)
<b>Transit</b>	TriMet routes 6 (FS), 11, 29, 30, 31, 32, 33 (FS), 34, 35, 79, 99, 154 and 291 Orange Night Bus
<b>Freight routes</b>	Entire corridor (Metro); SE Powell Blvd to OR 224 (ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	61 pedestrian-involved, 39 cyclist-involved, 2,354 vehicle
<b>Number of lanes</b>	2-6
<b>Speed limit</b>	40-55 mph
<b>Population</b>	88,386 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	177,516 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>



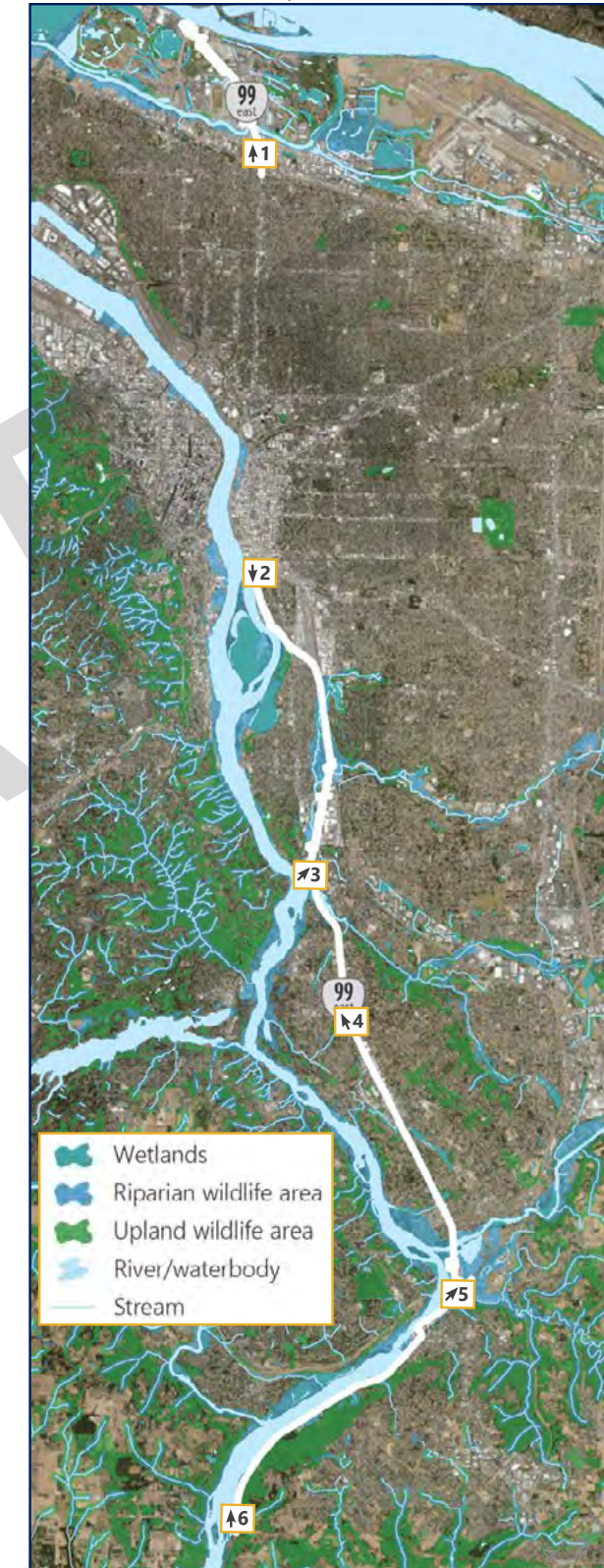
- |                                      |                        |   |
|--------------------------------------|------------------------|---|
| County boundary                      | Throughway             | Employment areas                        |
| City boundary                        | Major Arterial         | Industrial areas                        |
| Arterials                            | Minor Arterial         | Regionally significant industrial areas |
| Annual average daily traffic volumes | Arterial Outside Urban | Neighborhoods                           |
| Sidewalks                            | 2040 corridor          | Urban reserves                          |
| Bridge                               | Central city           | Rural reserves                          |
| Milepost termini                     | Regional center        | Parks & open space                      |
| Not designated                       | Town center            | River/waterbody                         |

Source: Metro RLIS database and ODOT TransGIS.

REGIONAL LAND USE AND TRANSPORTATION



ENVIRONMENT with photo locations



PHOTOS



## PACIFIC HIGHWAY EAST (OR 99E)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 227 ODOT SPIS sites		
<b>Pavement condition</b>	<b>Poor:</b>	<b>Good:</b>	
	MP -5.65 - -4.01	MP -6.09 - -5.65	
	MP -4.01 - -3.75	MP 1.45 - 3.17	
	<b>Fair:</b>	MP 5.46 - 5.72	
	MP -0.01 - 0.09	MP 9.22 - 11.73	
	MP 0.11 - 0.5	MP 13 - 15.01	
	MP 5.72 - 9.22	MP 15.01 - 18.25	
	MP 11.73 - 13	<b>Very Good:</b>	
		MP 3.17 - 4.24	
<b>Bridges and bridge rating (0-100)</b>	MP:5.95: 97.5	MP 4.5: 97.5	
	MP:5.75: 79.4	MP 5.97: 82.8	
	MP:4.86: 91.1	MP 11.2: 38.4	
	MP:4.46: 91.2	MP 11.38: 85.7	
	MP:4.41: 47.5	MP 12.22: 37.4	
	MP:3.86: 57.6	MP 12.29: 49.4	
	MP 3.51: 32.1	MP 13.86: 66	
	MP 4.43: 80.8		
	<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 10.7 miles</li> <li>Sidewalk substandard: 4.3 miles</li> <li>Sidewalk meets standard: 8.5 miles</li> <li>Bicycle gaps: 9.3 miles</li> <li>Bicycle substandard: 11.1 miles</li> <li>Bicycle meets standard: 5.6 miles</li> <li>Number of crossings: 25</li> </ul> </li> </ul>	
		<b>Transit frequency</b>	
TriMet Line 33: 90% on time			

Corridor information table continues on next page.

### PEOPLE OF COLOR



### LOW INCOME



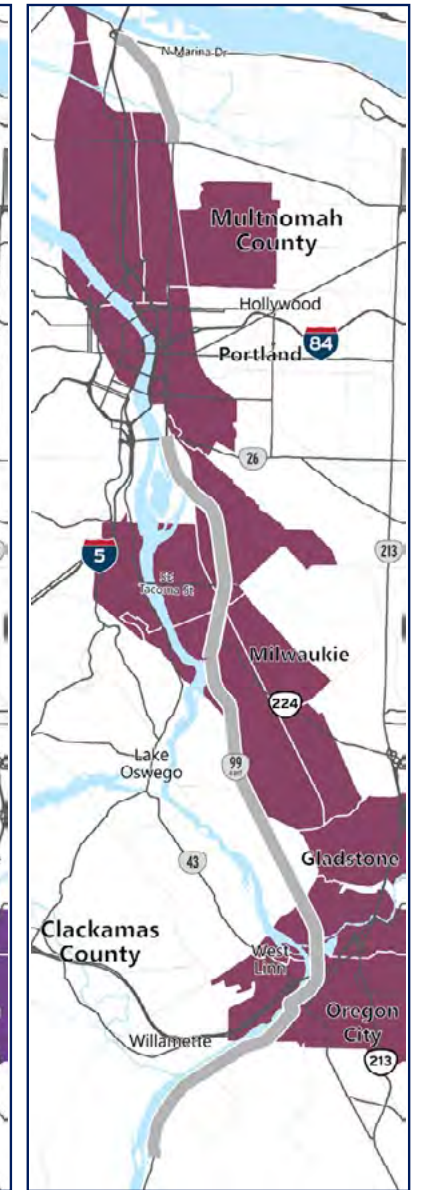
### NO VEHICLE HOUSEHOLDS



### PEOPLE WITH DISABILITIES



### UNEMPLOYMENT



Above regional rates for People of Color

At or below regional rates

Above regional rates for Low Income

At or below regional rates

Above regional rates for No Vehicle Households

At or below regional rates

Above regional rates for People with Disabilities

At or below regional rates

Above regional rates for Unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

## CORRIDOR INFORMATION

**Capital projects****ODOT STIP 2018 – 2021**

- OR99E Railroad tunnel illuminations and ITS (18759)
- East systemic signals and illumination (20339)
- Region 1 bike ped crossings (20479)
- NE Columbia blvd at MLK Jr. blvd (13502)
- OR99E over UPRR at Baldwin Street Bridge (20487)
- Area 4 and 5 signal improvements (20221)
- OR99 Urban upgrade in Cottage Grove (20242)
- OR99 @ Woodson in Cottage Grove (20408)

**ODOT STIP 2021 – 2024**

- East Systemic Signals and Illumination (20339)
- OR99E Clackamas River (Mcloughlin) Bridge (20472)
- Region 1 bike ped crossings (20479)
- OR99E over UPRR at Baldwin Street Bridge (20487)

**City CIPs**

- Gladstone - Jennings Ave - Sidewalk and Bike lanes
- Milwaukie - Main St Crossing Improvements
- Milwaukie - Hwy 224 & Hwy 99E Improvements

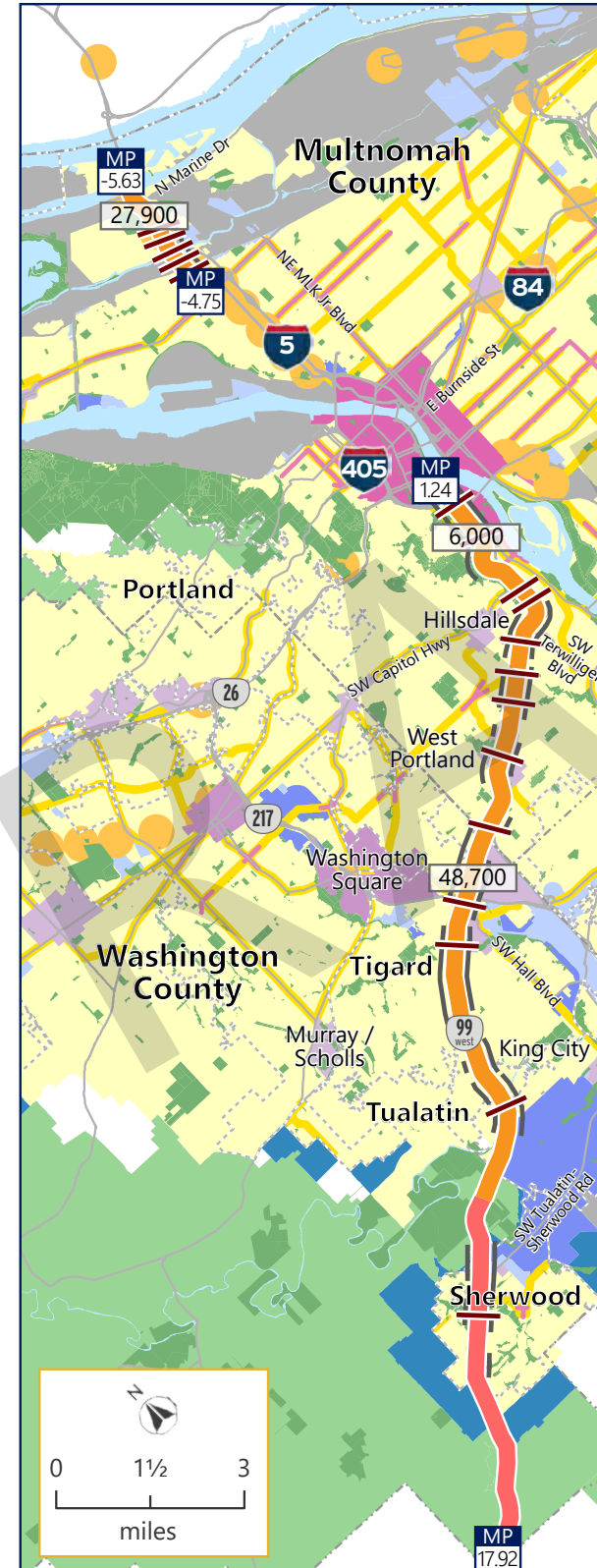
## PACIFIC HIGHWAY WEST (OR 99W)

### CORRIDOR INFORMATION

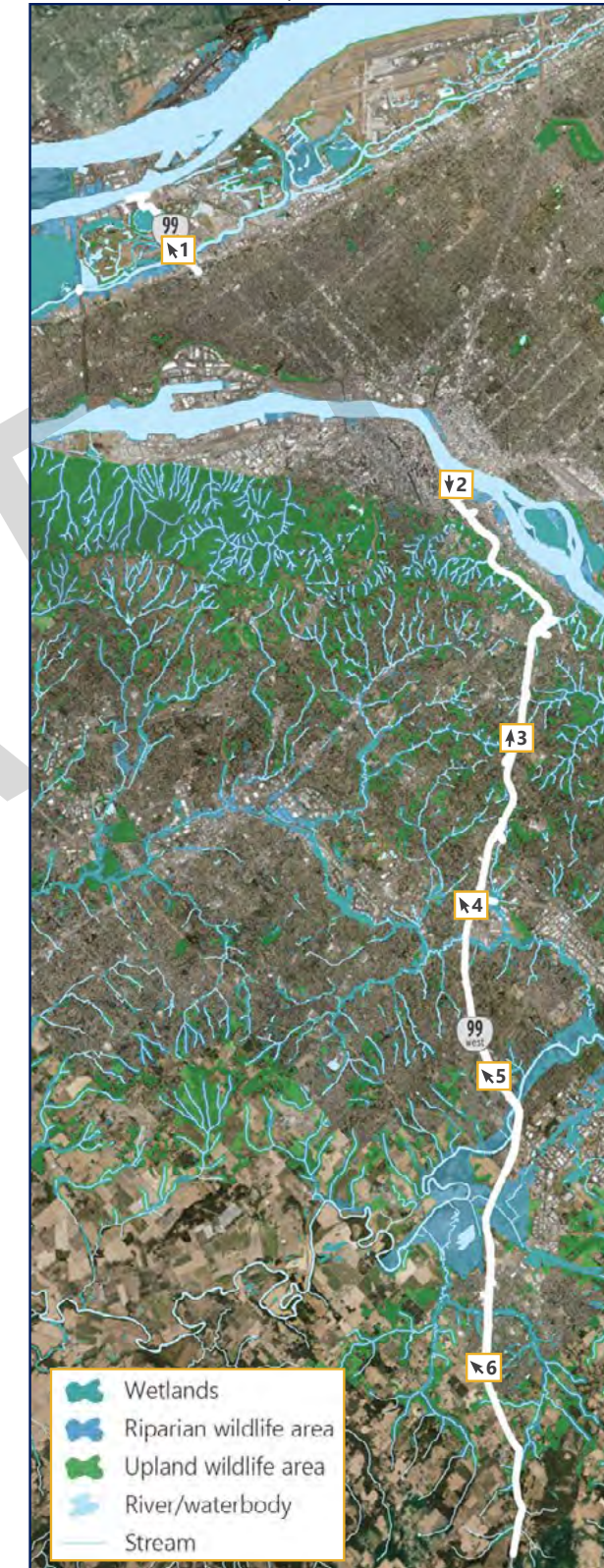
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial, Urban Minor Arterial (NHS) State: Statewide and District Highway, Seismic Lifeline Route Metro: Throughway, Major Arterial, 2040 Corridor Local: Major City Traffic Street (Portland), Regional Trafficway (Portland), Principal Arterial (Sherwood, Tigard, Washington County), Arterial (Washington County), Major Arterial (Tualatin)
<b>Highway length</b>	30.2 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 1, 4 (FS), 8 (FS), 12 (FS), 38, 39, 43, 44, 45, 54 (FS), 55, 56 (FS), 64, 65, 77, 92, 93, 94, MAX Red Line, Blue Line, Yellow Line and Green Line
<b>Freight routes</b>	Entire corridor (Metro); SW 64th Ave to SW Sunset Blvd (ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	52 pedestrian-involved, 49 cyclist-involved, 2,644 vehicle
<b>Number of lanes</b>	4-6
<b>Speed limit</b>	35-55 mph
<b>Population</b>	100,940 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	191,558 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>



### REGIONAL LAND USE AND TRANSPORTATION



### ENVIRONMENT with photo locations



### PHOTOS



Source: Metro RLIS database and ODOT TransGIS.



PACIFIC HIGHWAY WEST (OR 99W)

CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 159 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Good:</b>
	MP 1.24 - 1.67 MP 1.67 - 2.33 MP 3.85 - 4.35 MP 7.42 - 8.67 MP 8.67 - 10.3 MP 10.3 - 12.1	MP 12.1 - 14.67 MP 14.67 - 15.67 MP 16.67 - 19.44 <b>Very Good:</b> MP 15.67 - 16.67
<b>Bridges and bridge rating (0-100)</b>	<b>Fair:</b>	
	MP 2.33 - 3.85 MP 4.35 - 7.42	
<b>Pedestrian and bicycle network completion</b>	MP -5.5: 72.3	MP 4.86: 62.3
	MP -4.84: 47.1	MP 5.26: 76.4
	MP -3.18: 51.4	MP 6.21: 76.7
	MP -0.44: 96.1	MP 6.22: 52.6
	MP 0.00: 0	MP 7.4: 61.8
	MP 1.29: 52.8	MP 7.82: 88.1
	MP 1.41: 53.6	MP 8.65: 56.6
	MP 1.61: 91.5	MP 9.21: 46.6
	MP 1.67: 60.1	MP 9.37: 58
	MP 1.93: 49.4	MP 12.18: 60.4
<b>Transit frequency</b>	TriMet lines:	
	12: 87% on time	
	54: 82% on time	
	56: 86% on time	

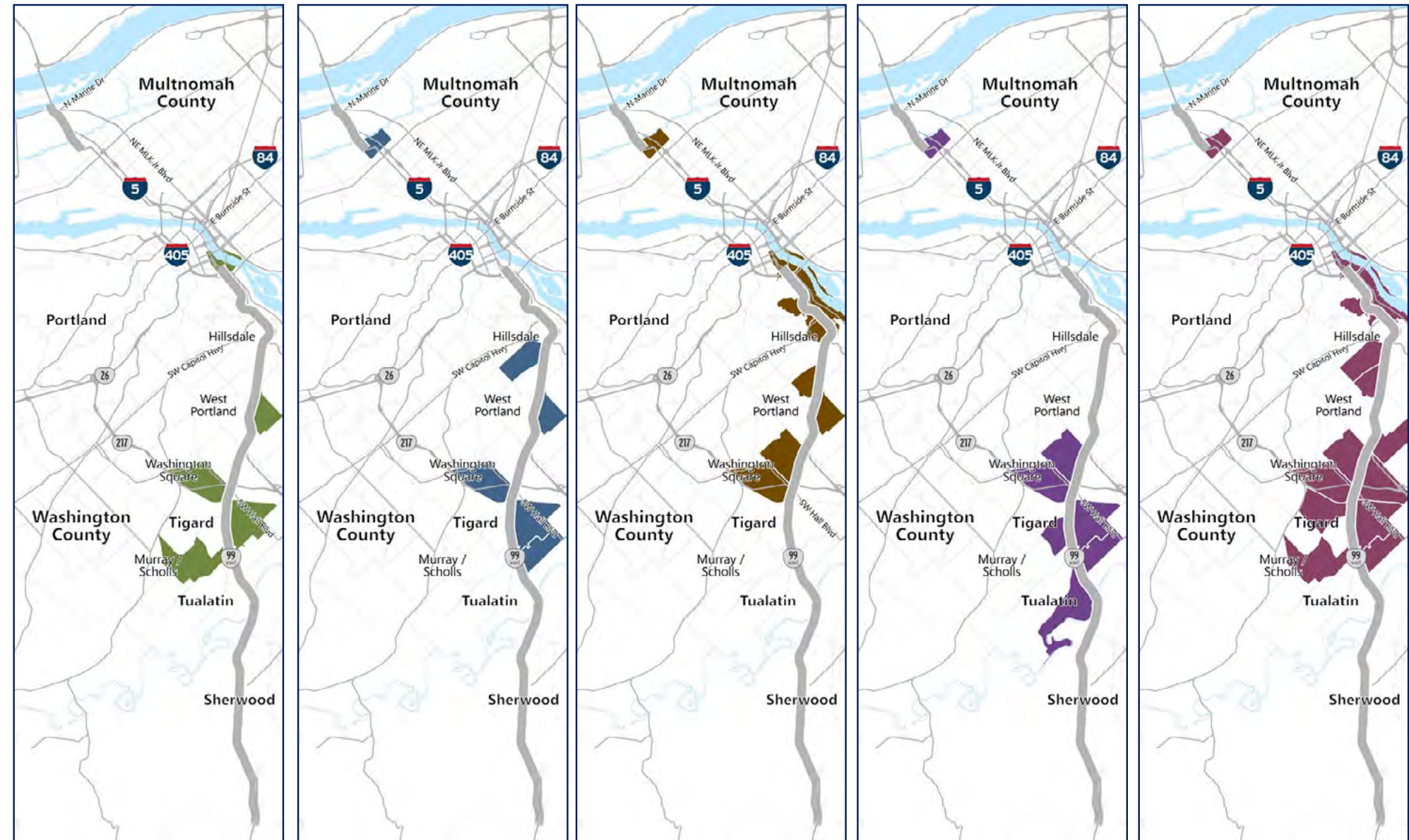
PEOPLE OF COLOR

LOW INCOME

NO VEHICLE HOUSEHOLDS

PEOPLE WITH DISABILITIES

UNEMPLOYMENT



Above regional rates for People of Color

Above regional rates for Low Income

Above regional rates for No Vehicle Households

Above regional rates for People with Disabilities

Above regional rates for Unemployment

At or below regional rates

At or below regional rates

At or below regional rates

At or below regional rates

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Corridor information table continues on next page.

Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

### CORRIDOR INFORMATION

#### Capital projects

##### ODOT STIP 2018 – 2021

- SW Barbur Blvd: SW Caruthers St – SW capitol Hwy (18316)
- OR99W SW lane St, Portland – SW Naeve St, Tigard (18838)
- OR99W SB Ramp to I-5 SB (Capital Highway Interchange) (20702)
- OR99W Tualatin River northbound bridge (20471)
- OR99W I-5 – McDonald St (20435)
- OR99W (Barbur Blvd) MP 8.01 to MP 11.50 (20436)
- OR99W Barbur Blvd. northbound connection bridge over I-5 (20465)
- OR99 Urban upgrade in Cottage Grove (20242)
- OR99 @ Woodson in Cottage Grove (20408)

##### ODOT SPIS 2021 – 2024

- SW Barbur Blvd: SW Caruthers St – SW capitol Hwy (18316)
- OR99W: OR217 – SW Sunset Blvd & US30B: Kerby – 162nd Ave (21616)
- OR99W I-5 – McDonald St (20435)
- OR99W (Barbur Blvd) MP 8.01 to MP 11.50 (20439)
- OR99W Tualatin River northbound bridge (20471)
- OR99W Rock Creek Bridge (21712)

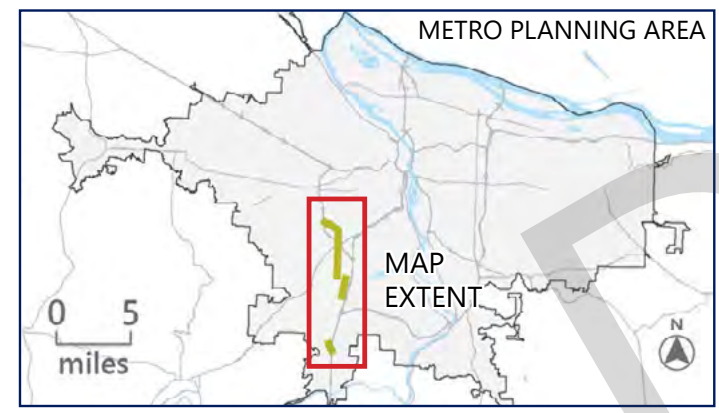
##### City CIPs

- Sherwood – Tualatin-Sherwood Road (Highway 99W Crossing)
- Sherwood – Elwert Road/Kruger Road Intersection

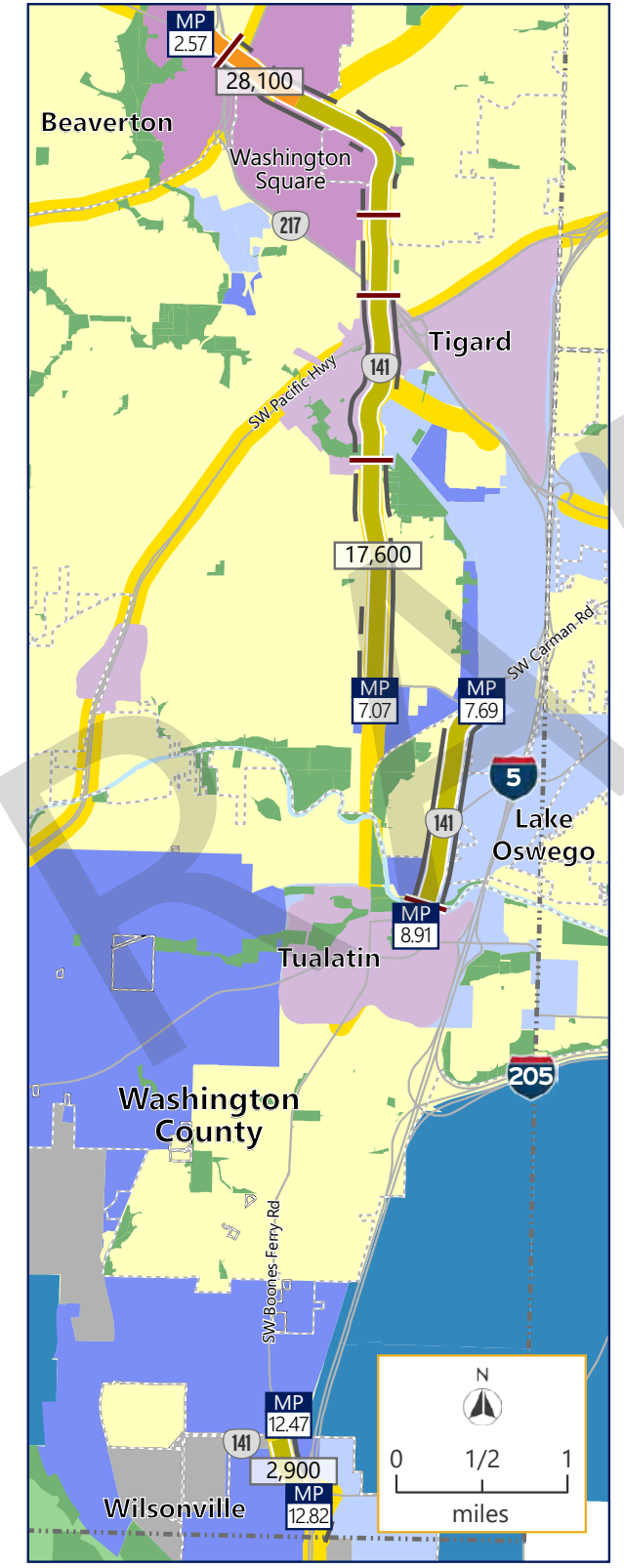
BEAVERTON-TUALATIN HIGHWAY/SW HALL BLVD (OR 141)

CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Minor Arterial State: District Highway Metro: Major Arterial, Minor Arterial, 2040 Corridor Local: Major Arterial (Tualatin, Wilsonville), Arterial (Tigard, Washington County, Beaverton)
<b>Highway length</b>	8.1 miles
<b>Bike network</b>	Bike lanes
<b>Transit</b>	TriMet routes 42, 43, 45, 56, 76, 78 and 96
<b>Freight routes</b>	SW Pacific Hwy to SW Hunziker Rd, SW Bridgeport Rd to SW Barngrover Way, and SW Day Rd to SW Argyle Ave (Metro)
<b>Crash history (2013-2018)</b>	13 pedestrian-involved, 17 cyclist-involved, 819 vehicle
<b>Number of lanes</b>	2-4
<b>Speed limit</b>	30-40 mph
<b>Population</b>	26,171 people
<i>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</i>	
<b>Employment</b>	50,649 jobs
<i>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</i>	



REGIONAL LAND USE AND TRANSPORTATION



ENVIRONMENT with photo locations



PHOTOS



Source: Metro RLIS database and ODOT TransGIS.

## BEAVERTON-TUALATIN HIGHWAY/SW HALL BLVD (OR 141)

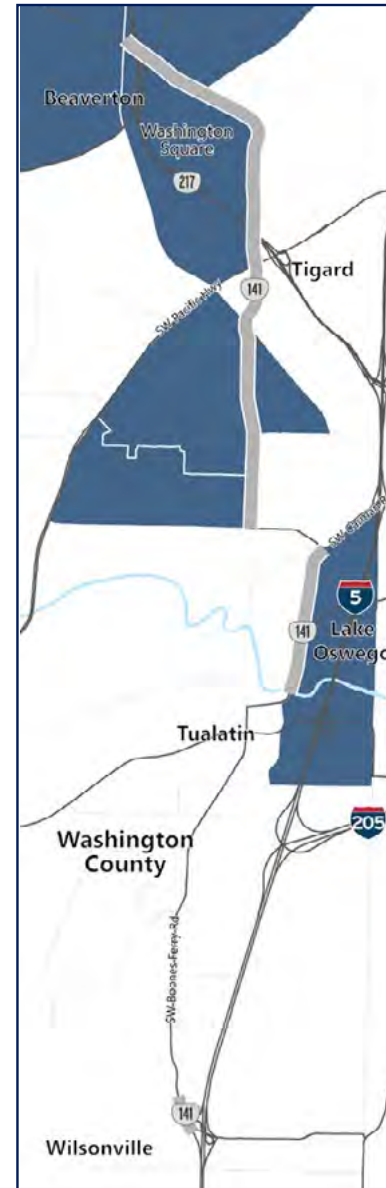
### CORRIDOR INFORMATION

<b>Crash data</b>	45 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Good:</b>
	MP 4.97 - 7.07	MP 7.69 - 8.91
	MP 3.31 - 4.97	<b>Very Good:</b>
	MP 2.57 - 3.31	MP 12.74 - 12.95
<b>Fair:</b>	MP 12.47 - 12.74	MP 12.96 - 13.24
	MP 12.69 - 12.96	
<b>Bridges and bridge rating (0-100)</b>	MP 2.71: 58.1	MP 5.73: 83.6
	MP 4.24: 96.2	MP 8.88: 93.7
	MP 4.71: 93.5	MP 12.84: 85.9
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor.</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 2.5 miles</li> <li>Sidewalk substandard: 4.1 miles</li> <li>Sidewalk meets standard: 0 miles</li> <li>Bicycle gaps: 1.8 miles</li> <li>Bicycle substandard: 3.4 miles</li> <li>Bicycle meets standard: 5.7 miles</li> <li>Number of crossings: 22</li> </ul> </li> </ul>	
	<b>Transit frequency</b>	
	No existing frequent service lines. Planned: TriMet Line 76	
	<b>Capital projects</b>	
	<b>ODOT STIP 2018 – 2021</b>	
	<ul style="list-style-type: none"> <li>OR217 OR10 – OR99W (18841)</li> <li>OR210 SW Scholls Ferry Rd – SW Hall Blvd ITS (21121)</li> </ul>	
	<b>ODOT STIP 2021 – 2024</b>	
<ul style="list-style-type: none"> <li>OR217 OR10 – OR99W (18841)</li> <li>OR210 SW Scholls Ferry Rd – SW Hall Blvd ITS (21121)</li> </ul>		

### PEOPLE OF COLOR



### LOW INCOME



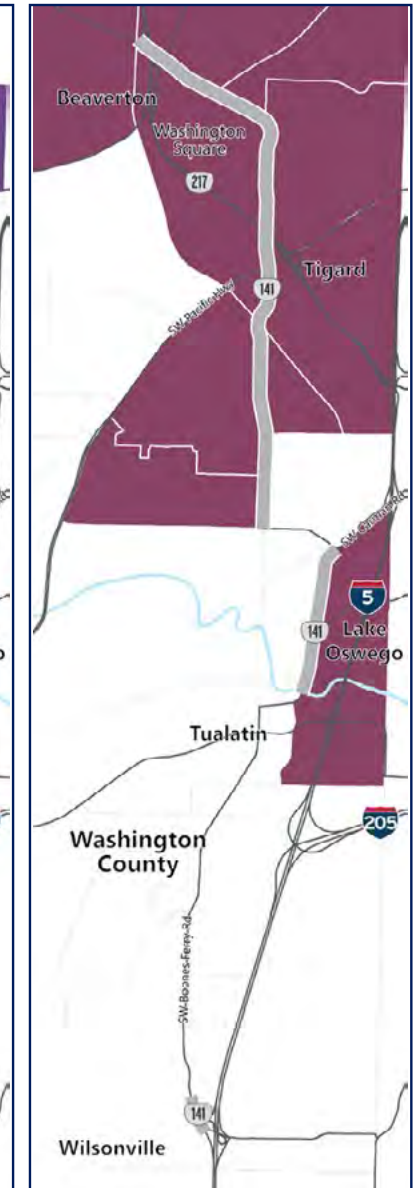
### NO VEHICLE HOUSEHOLDS



### PEOPLE WITH DISABILITIES



### UNEMPLOYMENT



Above regional rates for People of Color

At or below regional rates

Above regional rates for Low Income

At or below regional rates

Above regional rates for No Vehicle Households

At or below regional rates

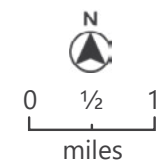
Above regional rates for People with Disabilities

At or below regional rates

Above regional rates for Unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

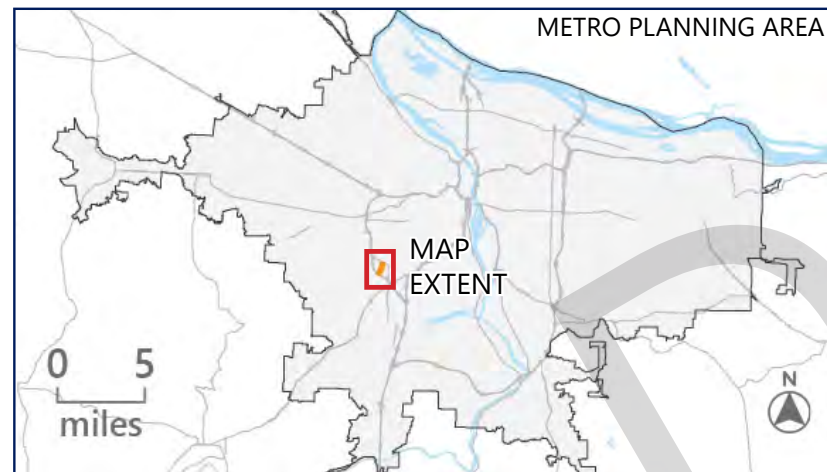


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

SCHOLLS HIGHWAY/SW SCHOLLS FERRY RD (OR 210)

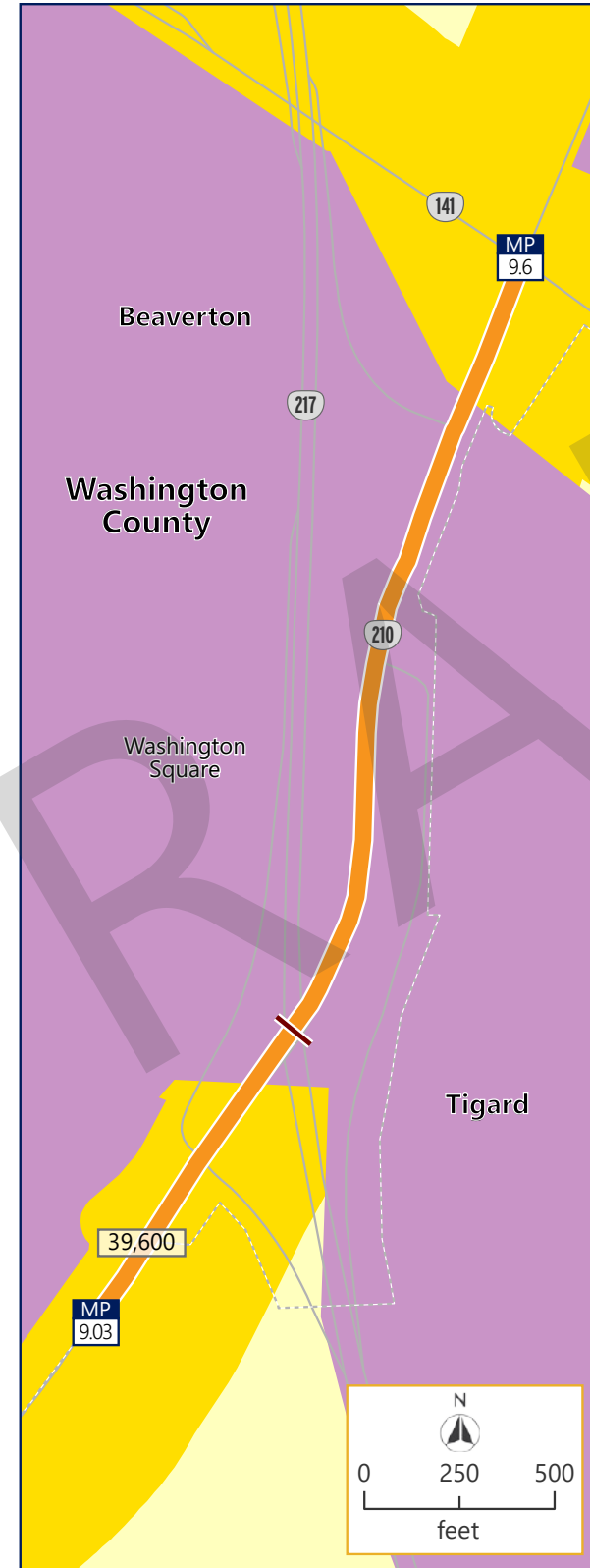
CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Minor Arterial State: District Highway Metro: Major Arterial, 2040 Corridor Local: Arterial (Washington County, Beaverton)
<b>Highway length</b>	0.6 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 45, 62 and 92
<b>Freight routes</b>	None
<b>Crash history (2013-2018)</b>	0 pedestrian-involved, 0 cyclist-involved, 48 vehicle
<b>Number of lanes</b>	4-5
<b>Speed limit</b>	35 mph
<b>Population</b>	154 people
<small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>	
<b>Employment</b>	9,289 jobs
<small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>	



County boundary	Throughway	Employment areas
City boundary	Major Arterial	Industrial areas
Arterials	Minor Arterial	Regionally significant industrial areas
Annual average daily traffic volumes	Arterial Outside Urban Growth Boundary	Neighborhoods
Sidewalks	2040 corridor	Urban reserves
Bridge	Central city	Rural reserves
Milepost termini	Regional center	Parks & open space
Not designated	Town center	River/waterbody

REGIONAL LAND USE AND TRANSPORTATION



ENVIRONMENT with photo locations



PHOTOS



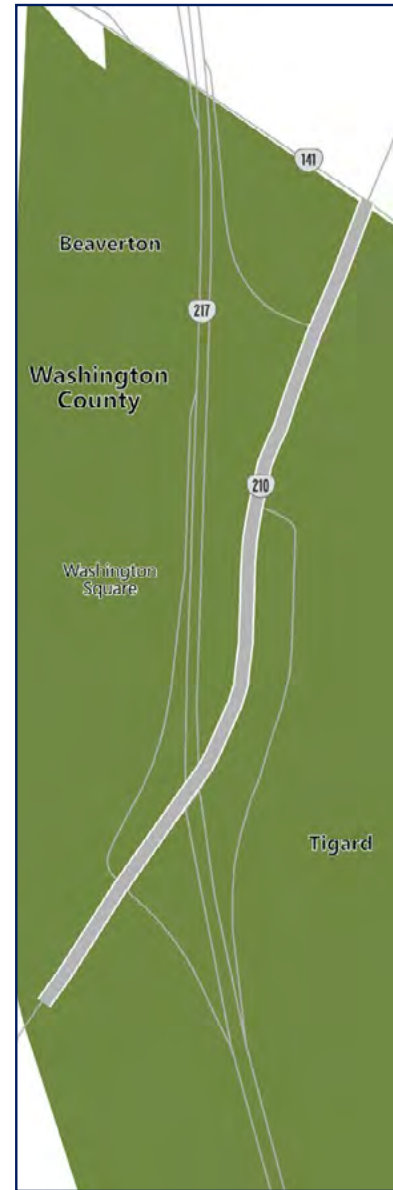
Source: Metro RLIS database and ODOT TransGIS.

## SCHOLLS HIGHWAY/SW SCHOLLS FERRY RD (OR 210)

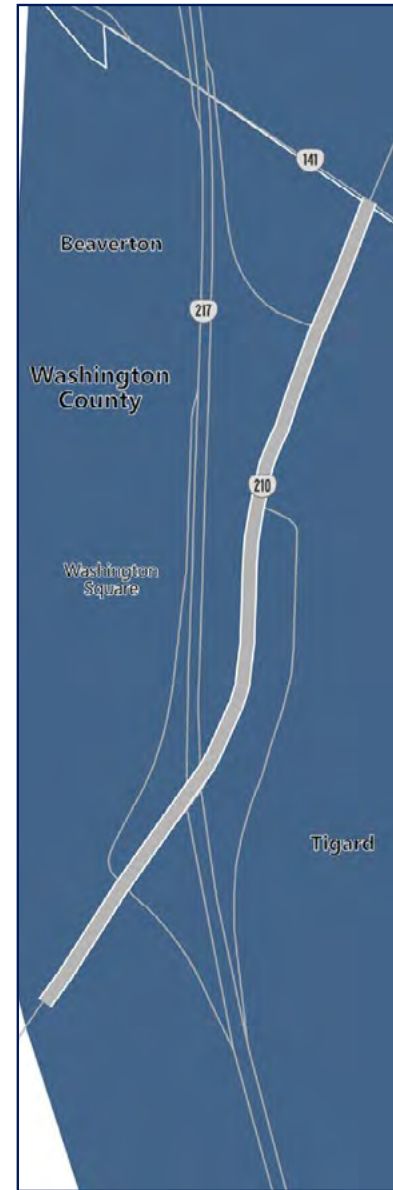
### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 23 ODOT SPIS sites
<b>Pavement condition</b>	<b>Poor:</b> MP 9.13 - 9.6 <b>Very Good:</b> MP 9.03 - 9.13
<b>Bridges and bridge rating (0-100)</b>	MP 4.27: 80.4
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI: <ul style="list-style-type: none"> <li>Sidewalk gaps: 0.6 miles</li> <li>Sidewalk substandard: 0.2 miles</li> <li>Sidewalk meets standard: 0.3 miles</li> <li>Bicycle gaps: 0.4 miles</li> <li>Bicycle substandard: 0.4 miles</li> <li>Bicycle meets standard: 0.6 miles</li> <li>Number of crossings: 5</li> </ul> </li> </ul>
<b>Transit frequency</b>	No existing frequent service lines. Planned: TriMet Line 62
<b>Capital projects</b>	<p><b>ODOT STIP 2018 – 2021</b></p> <ul style="list-style-type: none"> <li>OR217 OR10 – OR99W (18841)</li> <li>OR210 SW Scholls Ferry Rd – SW Hall Blvd ITS (21121)</li> </ul> <p><b>ODOT STIP 2021 – 2024</b></p> <ul style="list-style-type: none"> <li>OR217 OR10 – OR99W (18841)</li> <li>OR210 SW Scholls Ferry Rd – SW Hall Blvd ITS (21121)</li> </ul> <p><b>City CIPs</b></p> <ul style="list-style-type: none"> <li>Beaverton – Hall Blvd (Ridgecrest Dr – Hwy 217) Overlay (3416)</li> <li>Tigard – Scholls Ferry and Scholls-Sherwood Roads Intersection</li> </ul>

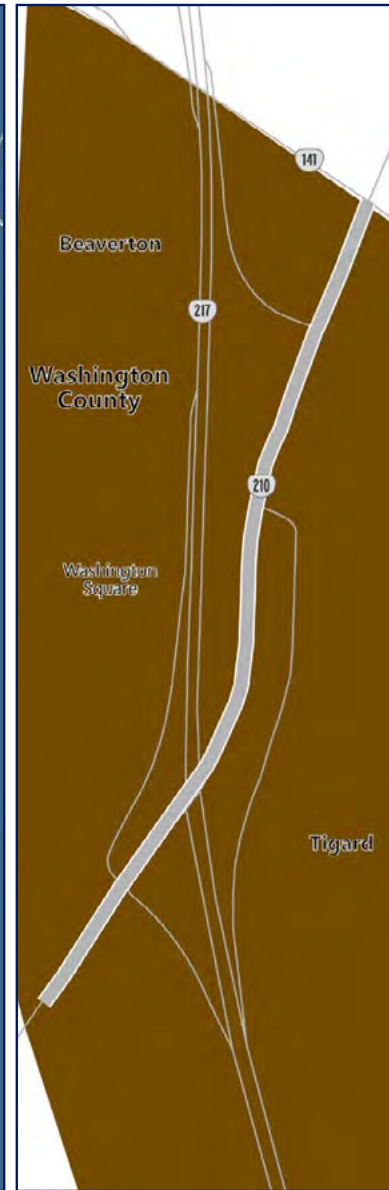
### PEOPLE OF COLOR



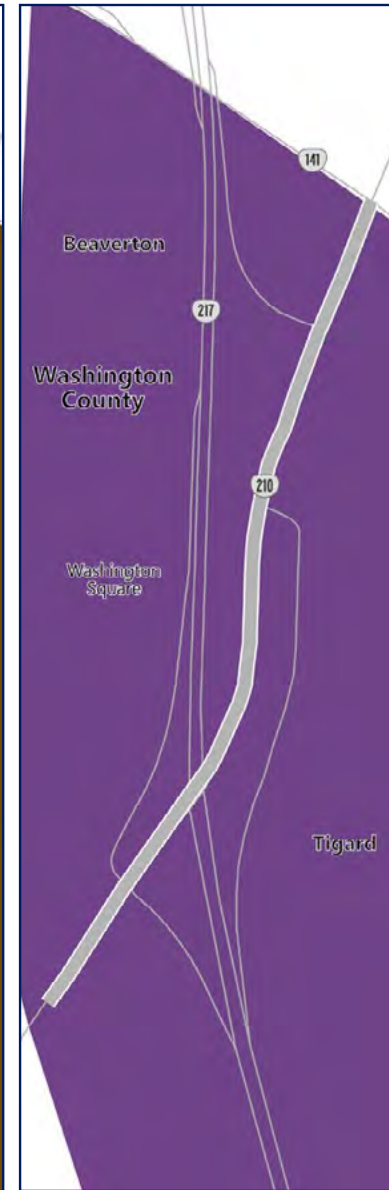
### LOW INCOME



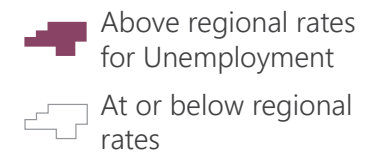
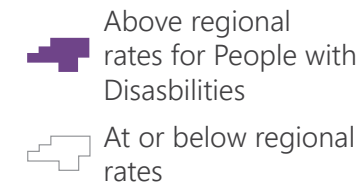
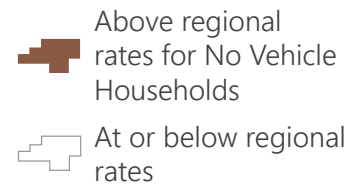
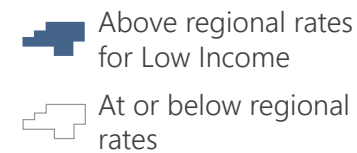
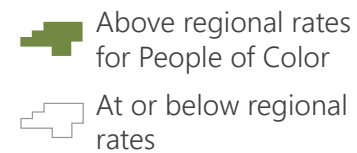
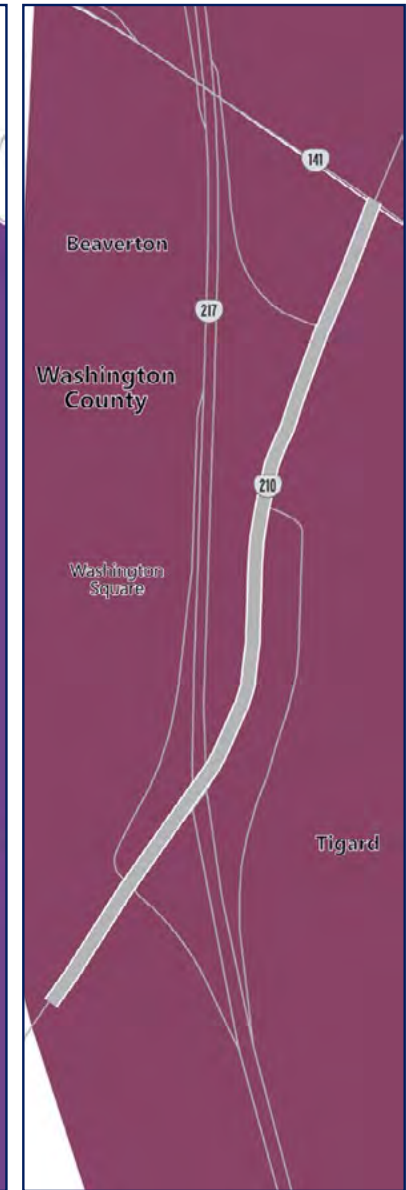
### NO VEHICLE HOUSEHOLDS



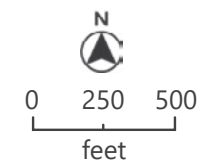
### PEOPLE WITH DISABILITIES



### UNEMPLOYMENT



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

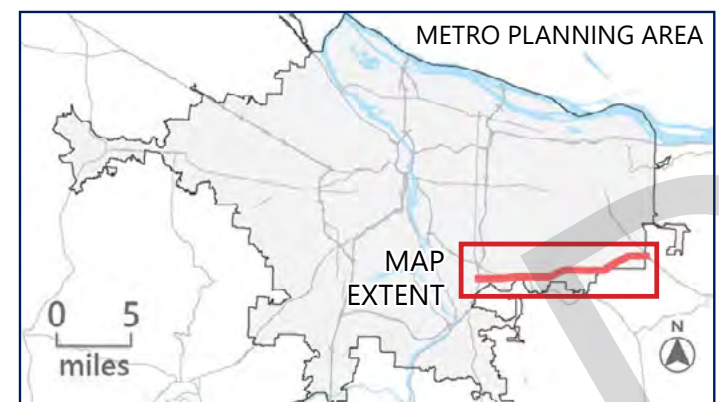


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

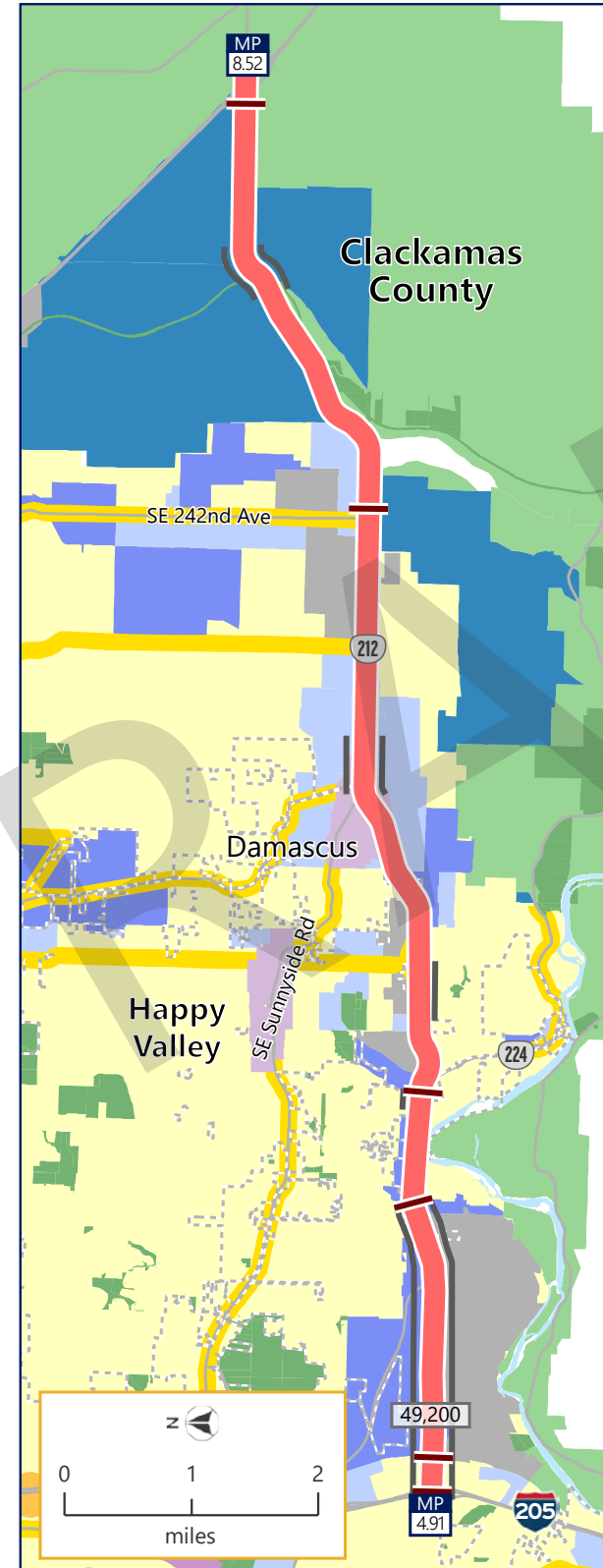
# CLACKAMAS-BORING HIGHWAY (OR 212)

## CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: Statewide Highway, Seismic Lifeline Route Metro: Throughway, 2040 Corridor Local: Principal Arterial (Clackamas County), Major Arterial (Happy Valley)
<b>Highway length</b>	16.4 miles
<b>Bike network</b>	Bike lanes; wide shoulders (partial)
<b>Transit</b>	TriMet routes 29, 30, 31, 152 and 156
<b>Freight routes</b>	Entire corridor (Metro, ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	21 pedestrian-involved, 18 cyclist-involved, 1,642 vehicle
<b>Number of lanes</b>	2-5
<b>Speed limit</b>	25-45 mph
<b>Population</b>	15,914 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	13,887 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>

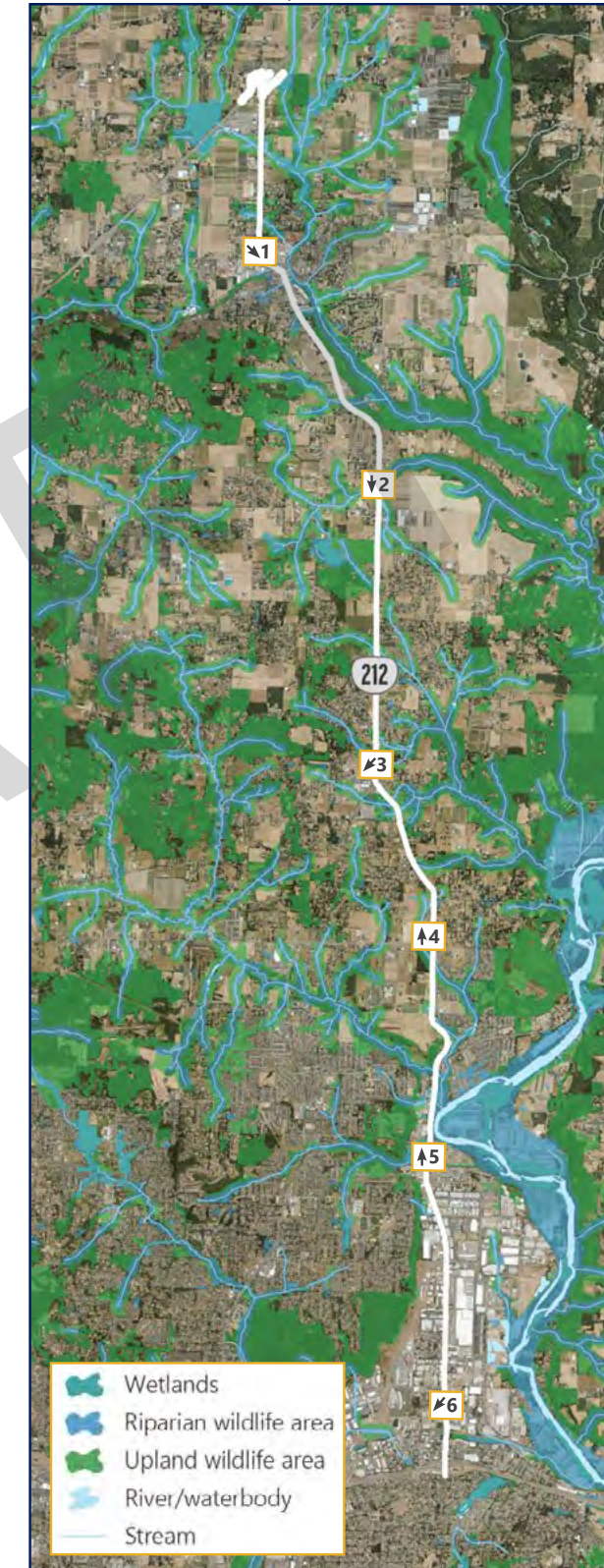


## REGIONAL LAND USE AND TRANSPORTATION



- |                                      |  |   |
|--------------------------------------|--|---|
| County boundary                      | Throughway                             | Employment areas                        |
| City boundary                        | Major Arterial                         | Industrial areas                        |
| Arterials                            | Minor Arterial                         | Regionally significant industrial areas |
| Annual average daily traffic volumes | Arterial Outside Urban Growth Boundary | Neighborhoods                           |
| Sidewalks                            | 2040 corridor                          | Urban reserves                          |
| Bridge                               | Central city                           | Rural reserves                          |
| Milepost termini                     | Regional center                        | Parks & open space                      |
| Not designated                       | Town center                            | River/waterbody                         |

## ENVIRONMENT with photo locations



## PHOTOS

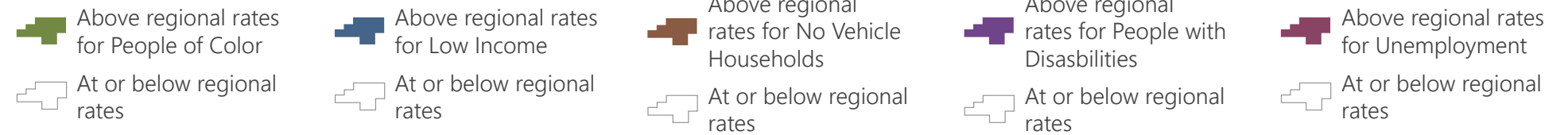
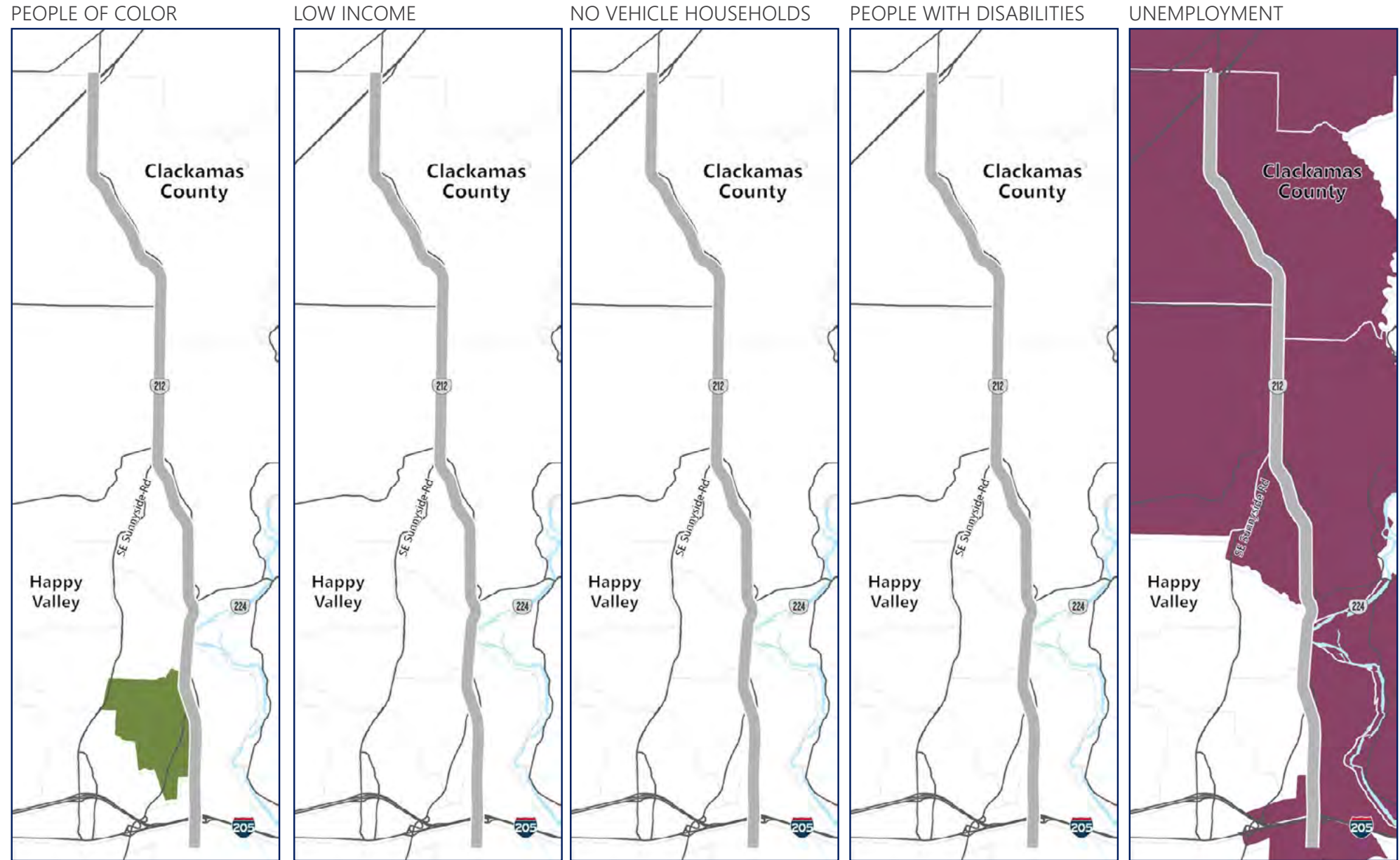


Source: Metro RLIS database and ODOT TransGIS.

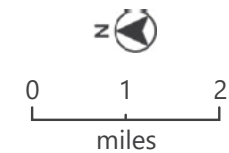
## CLACKAMAS-BORING HIGHWAY (OR 212)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor for part of the corridor (<50%) 88 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Poor:</b>	<b>Fair:</b>
	MP 5.18 - 6.56	MP 4.89 - 5.18
	MP 6.56 - 8.16	<b>Good:</b>
	MP 0.03 - 2.5	MP 8.15 - 8.22
	MP 2.5 - 4.62	MP 6.84 - 8.37
	MP 4.62 - 6.84	MP 8.37 - 8.87
<b>Bridges and bridge rating</b>	MP 8.37 - 8.53	MP 8.53 - 8.78
	MP 0.11: 96.2	MP 3.89: 70
	MP 0.33: 96	MP 4.44: 77.9
	MP 0.38: 84.1	MP 4.91: 60
	MP 2.64: 61.3	MP 8.47: 89.4
<b>Pedestrian and bicycle network completion</b>	MP 2.68: 100	
	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 5.8 miles</li> <li>Sidewalk substandard: 1.8 miles</li> <li>Sidewalk meets standard: 4.8 miles</li> <li>Bicycle gaps: 3.2 miles</li> <li>Bicycle substandard: 2.7 miles</li> <li>Bicycle meets standard: 3.3 miles</li> <li>Number of crossings: 16</li> </ul> </li> </ul>	
<b>Transit frequency</b>	No existing frequent service lines. Planned: TriMet Line 31	
<b>Capital projects</b>	<b>ODOT STIP 2018 – 2021</b>	
	<ul style="list-style-type: none"> <li>OR212 UPRR – US26 (18772)</li> <li>Portland Metropolitan: Bridge screening and rail retrofit (19918)</li> <li>OR212/224 Arterial Management (21495)</li> </ul>	
	<b>ODOT STIP 2021 – 2024</b>	
	<ul style="list-style-type: none"> <li>OR212/224 Arterial Management (21495)</li> </ul>	
	<b>City CIP</b>	
<ul style="list-style-type: none"> <li>Clackamas - Clackamas County Regional Freight ITS Project Phase 1 – Planning and Design and Phase 2 A/B- Construction</li> </ul>		



Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



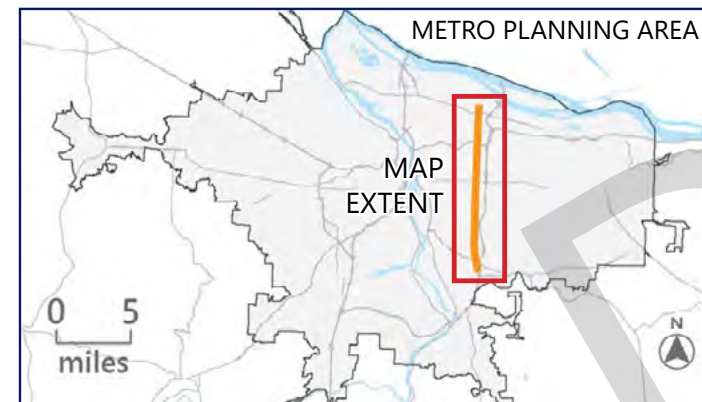
Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics



# CASCADE HIGHWAY NORTH (OR 213N)

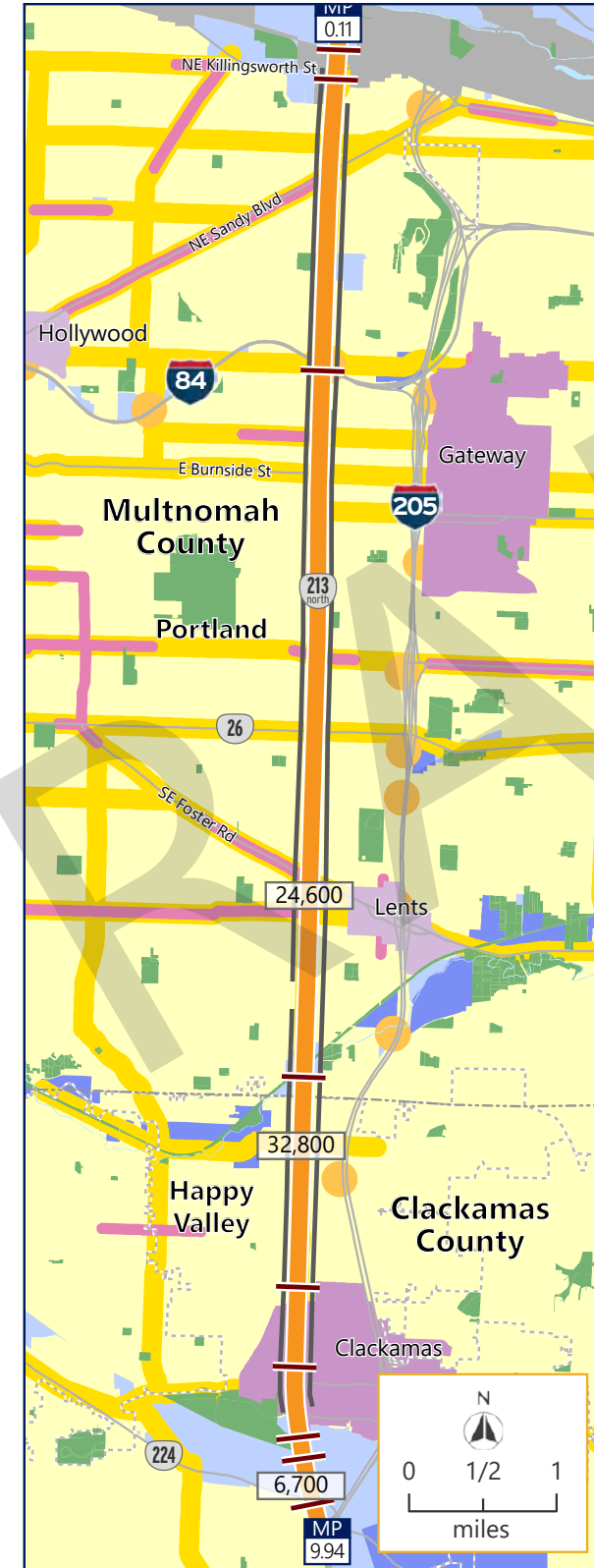
## CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: District Highway Metro: Major Arterial, 2040 Corridor Local: Principal Arterial (Clackamas County), Major City Traffic Street (Portland)
<b>Highway length</b>	12.9 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet routes 19, 29, 30, 31, 33, 71, 72 (FS), 79, 152, 272 and PDX Night Bus
<b>Freight routes</b>	NE Holman St to NE Weebster St and at I-205 and OR 224 interchange (Metro)
<b>Crash history (2013-2018)</b>	117 pedestrian-involved, 48 cyclist-involved, 3,270 vehicle
<b>Number of lanes</b>	4
<b>Speed limit</b>	35-50 mph
<b>Population</b>	39,455 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	35,331 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>

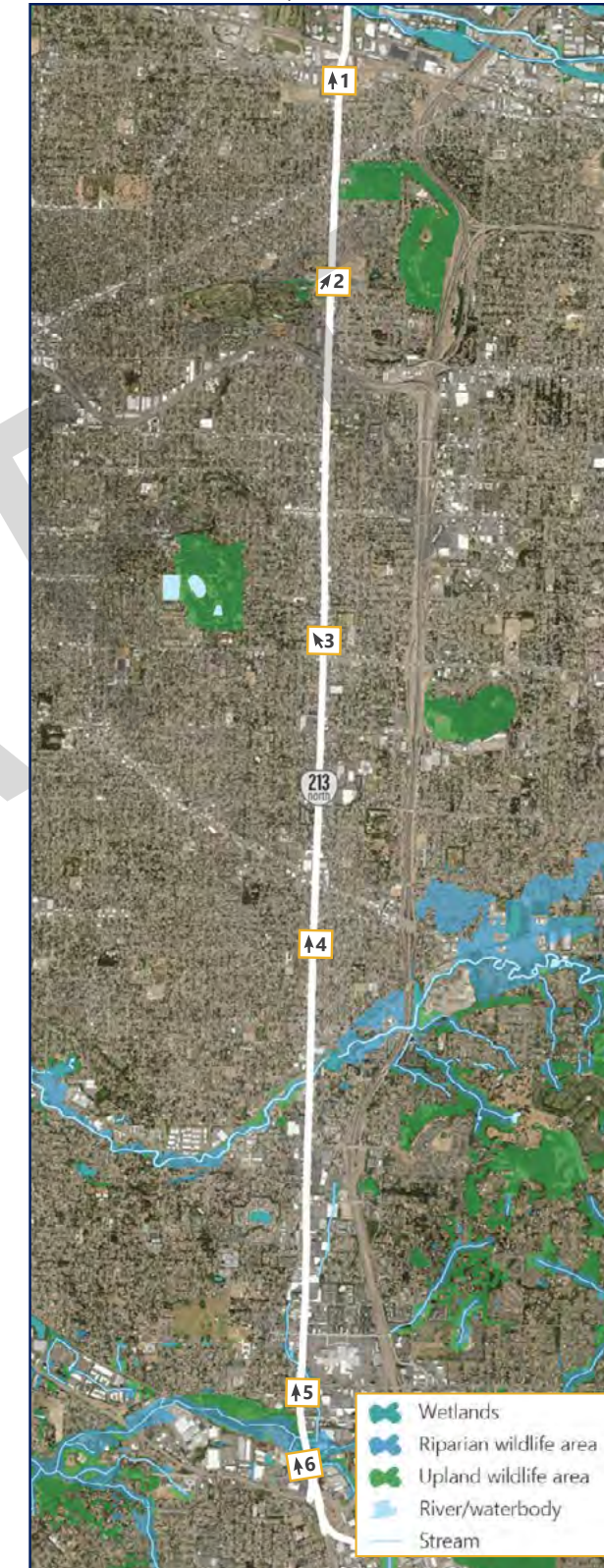


- County boundary
- City boundary
- Arterials
- Annual average daily traffic volumes
- Sidewalks
- Bridge
- Milepost termini
- Throughway
- Major Arterial
- Minor Arterial
- Arterial Outside Urban Growth Boundary
- 2040 corridor
- Central city
- Regional center
- Town center
- Employment areas
- Industrial areas
- Regionally significant industrial areas
- Neighborhoods
- Urban reserves
- Rural reserves
- Parks & open space
- River/waterbody

## REGIONAL LAND USE AND TRANSPORTATION



## ENVIRONMENT with photo locations



## PHOTOS



Source: Metro RLIS database and ODOT TransGIS.

## CASCADE HIGHWAY NORTH (OR 213N)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 301 ODOT SPIS sites	
<b>Pavement condition</b>	<b>Very Poor:</b>	<b>Good:</b>
	MP 5.76 - 6.73	MP 7.4 - 8.3
	MP 4.24 - 5.76	<b>Very Good:</b>
	<b>Poor:</b>	MP 9.67 - 10.18
	MP 0.44 - 4.24	MP 8.3 - 9.76
<b>Bridges and bridge rating (0-100)</b>	MP 0.44 - -0.14	
	MP 6.73 - 7.4	
	MP 2.24: 91.8	MP 9.07: 82
	MP 2.25: 82.4	MP 9.55: 70
	MP 7.1: 81.6	MP 9.67: 61
<b>Pedestrian and bicycle network completion</b>	MP 8.53: 82.2	MP 9.72: 73.6
	<ul style="list-style-type: none"> <li>▪ Metro bicycle corridor and pedestrian corridor</li> <li>▪ Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>• Sidewalk gaps: 2.1 miles</li> <li>• Sidewalk substandard: 3.4 miles</li> <li>• Sidewalk meets standard: 7.3 miles</li> <li>• Bicycle gaps: 8.5 miles</li> <li>• Bicycle substandard: 2.1 miles</li> <li>• Bicycle meets standard: 0.8 miles</li> <li>• Number of crossings: 55</li> </ul> </li> </ul>	
	<b>Transit frequency</b> TriMet Line 72: 87% on time	

Corridor information table continues on next page.

### PEOPLE OF COLOR

### LOW INCOME

### NO VEHICLE HOUSEHOLDS

### PEOPLE WITH DISABILITIES

### UNEMPLOYMENT



Above regional rates for People of Color

At or below regional rates

Above regional rates for Low Income

At or below regional rates

Above regional rates for No Vehicle Households

At or below regional rates

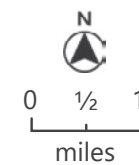
Above regional rates for People with Disabilities

At or below regional rates

Above regional rates for Unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

## CASCADE HIGHWAY NORTH (OR 213N)

34

## CORRIDOR INFORMATION

**Capital projects****ODOT STIP 2018 – 2021**

- Region 1 bike ped crossings (20479)
- OR213 (82nd Ave) SE foster Rd – SE Thompson Rd (21177)
- Meyers Rd OR213 – high school Ave in Oregon City (21423)
- OR213 (82nd Ave) at Madison High School (20507)
- US26/OR213 curb ramps (21255)

**ODOT STIP 2021 – 2024**

- East Systemic Signals and Illumination (20339)
- Region 1 bike ped crossings (20479)
- OR213 (82nd Ave) SE foster Rd – SE Thompson Rd (21177)
- OR213 I-205 – OR211 (21638)
- US26/OR213 curb ramps (21255)
- OR213 at NE Glisan St & NE Davis St (21607)

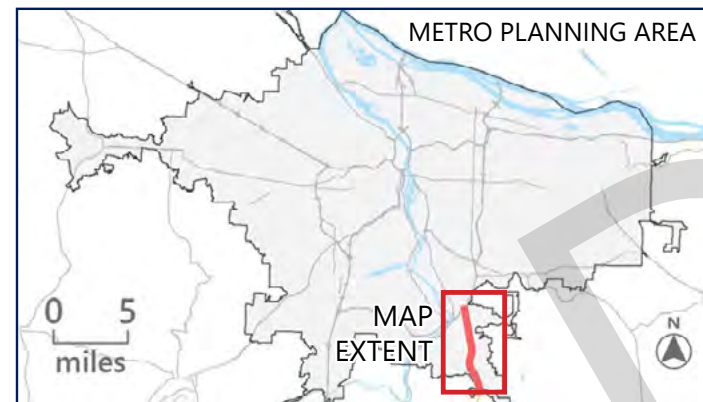
**City CIPs**

- Clackamas - Johnson Creek Crossing on Linwood Ave
- E Portland – 82nd Ave Safety Improvements, SE/NE

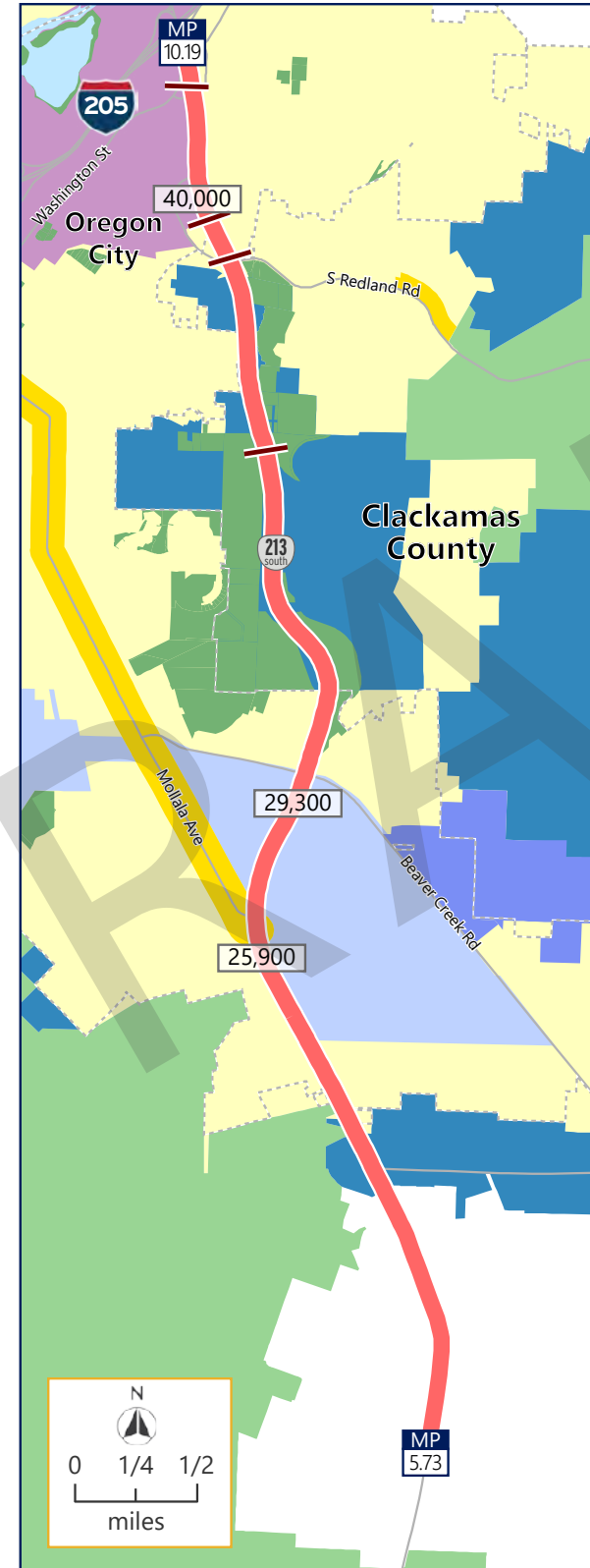
## CASCADE HIGHWAY SOUTH (OR 213S)

### CORRIDOR INFORMATION

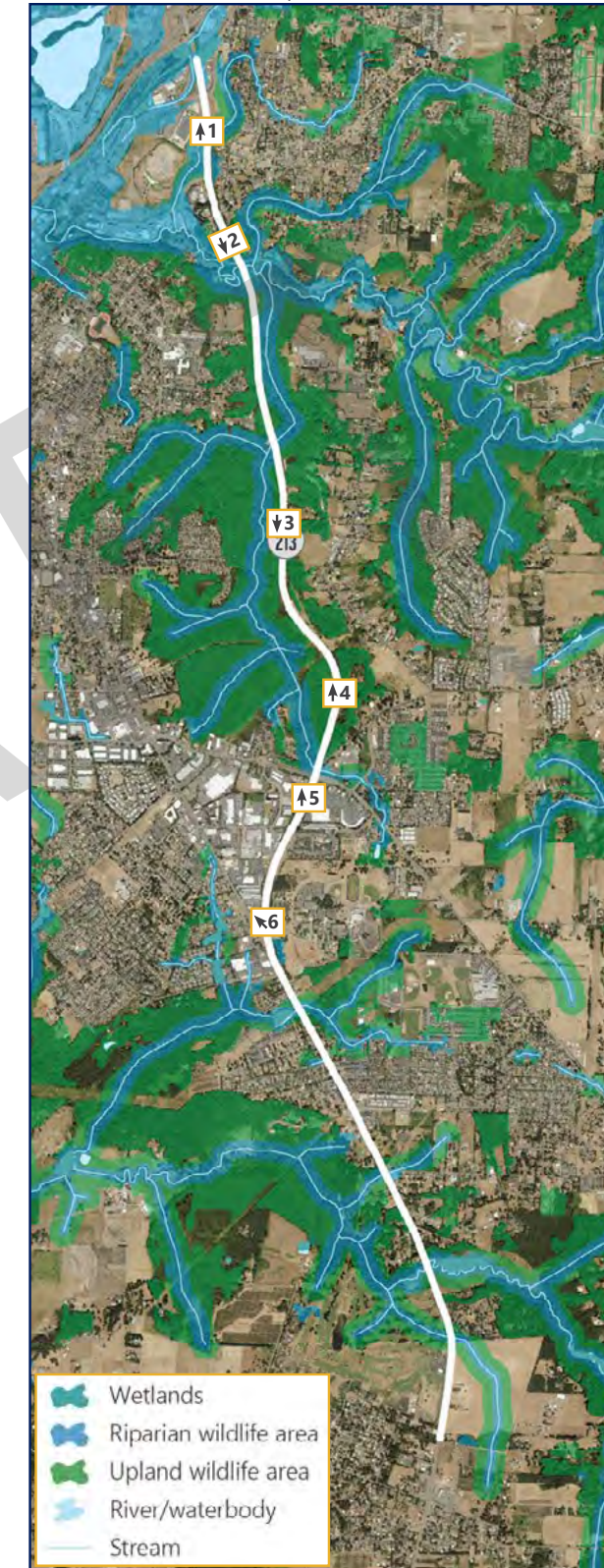
<b>Roadway classification</b>	Federal: Urban Other Principal Arterial (NHS) State: District Highway, Expressway Metro: Throughway Local: Principal Expressway (Clackamas County, Oregon City), Principal Arterial (Clackamas County), Major Arterial (Oregon City)
<b>Highway length</b>	5.8 miles
<b>Bike network</b>	Bike lanes; wide shoulders
<b>Transit</b>	Served by CCC Xpress shuttle
<b>Freight routes</b>	Entire corridor (Metro)
<b>Crash history (2013-2018)</b>	1 pedestrian-involved, 0 cyclist-involved, 186 vehicle
<b>Number of lanes</b>	2-5
<b>Speed limit</b>	45-55 mph
<b>Population</b>	10,707 people <small>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</small>
<b>Employment</b>	7,874 jobs <small>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</small>



### REGIONAL LAND USE AND TRANSPORTATION



### ENVIRONMENT with photo locations



### PHOTOS



Source: Metro RLIS database and ODOT TransGIS.

CASCADE HIGHWAY SOUTH (OR 213S)

CORRIDOR INFORMATION

<b>Crash data</b>	58 ODOT SPIS sites						
<b>Pavement condition</b>	<table border="0"> <tr> <td><b>Fair:</b></td> <td><b>Good:</b></td> </tr> <tr> <td>MP 3.69 - 4</td> <td>MP 0.33 - 4</td> </tr> <tr> <td></td> <td>MP 4 - 5.73</td> </tr> </table>	<b>Fair:</b>	<b>Good:</b>	MP 3.69 - 4	MP 0.33 - 4		MP 4 - 5.73
<b>Fair:</b>	<b>Good:</b>						
MP 3.69 - 4	MP 0.33 - 4						
	MP 4 - 5.73						
<b>Bridges and bridge rating (0-100)</b>	<table border="0"> <tr> <td>MP 0.85: 41.7</td> </tr> <tr> <td>MP 1.57: 26</td> </tr> <tr> <td>MP 4.77: 72.6</td> </tr> </table>	MP 0.85: 41.7	MP 1.57: 26	MP 4.77: 72.6			
MP 0.85: 41.7							
MP 1.57: 26							
MP 4.77: 72.6							
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>▪ Metro bicycle corridor and pedestrian corridor</li> <li>▪ Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>• Sidewalk gaps: 10 miles</li> <li>• Sidewalk substandard: .8 miles</li> <li>• Sidewalk meets standard: 0 miles</li> <li>• Bicycle gaps: 3.2 miles</li> <li>• Bicycle substandard: 5.2 miles</li> <li>• Bicycle meets standard: 4.1 miles</li> <li>• Number of crossings: 8</li> </ul> </li> </ul>						
<b>Transit frequency</b>	No existing or planned frequent service lines.						
<b>Capital projects</b>	<p><b>ODOT STIP 2018 – 2021</b></p> <ul style="list-style-type: none"> <li>▪ East systemic signals and illumination (20339)</li> <li>▪ Region 1 bike ped crossings (20479)</li> <li>▪ Meyers Rd OR213 – high school Ave in Oregon City (21423)</li> <li>▪ US26/OR213 curb ramps (21255)</li> </ul> <p><b>ODOT STIP 2021 – 2024</b></p> <ul style="list-style-type: none"> <li>▪ Region 1 bike ped crossings (20479)</li> <li>▪ US26/OR213 curb ramps (21255)</li> <li>▪ OR213 at NE Glisan St &amp; NE Davis St (21607)</li> </ul>						

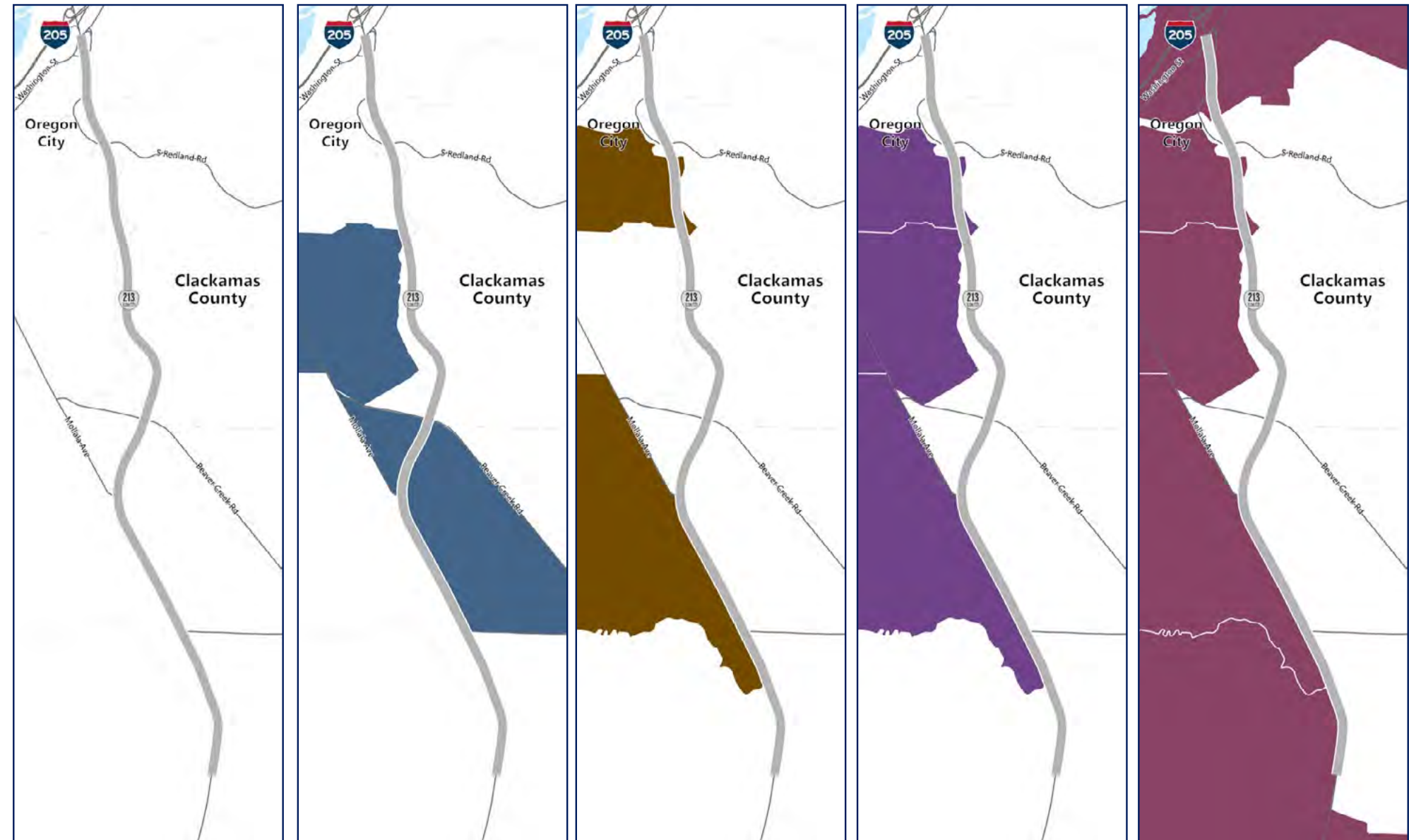
PEOPLE OF COLOR

LOW INCOME

NO VEHICLE HOUSEHOLDS

PEOPLE WITH DISABILITIES

UNEMPLOYMENT



Above regional rates for People of Color

At or below regional rates

Above regional rates for Low Income

At or below regional rates

Above regional rates for No Vehicle Households

At or below regional rates

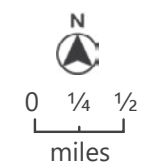
Above regional rates for People with Disabilities

At or below regional rates

Above regional rates for Unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.

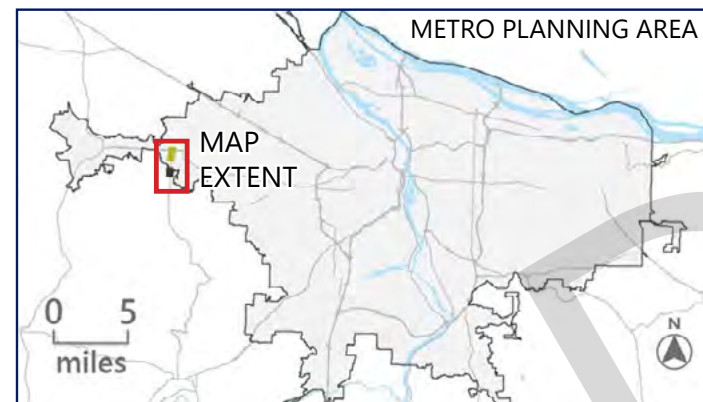


Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

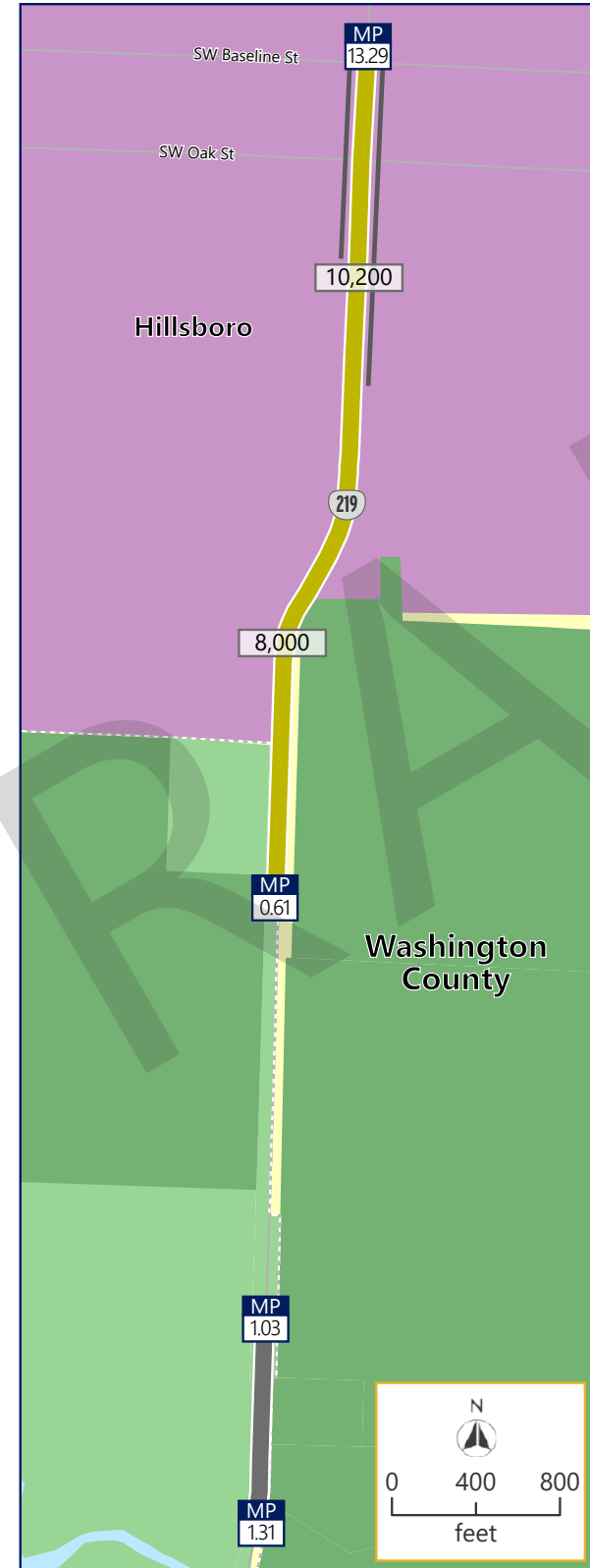
## HILLSBORO-SILVERTON HIGHWAY (OR 219)

### CORRIDOR INFORMATION

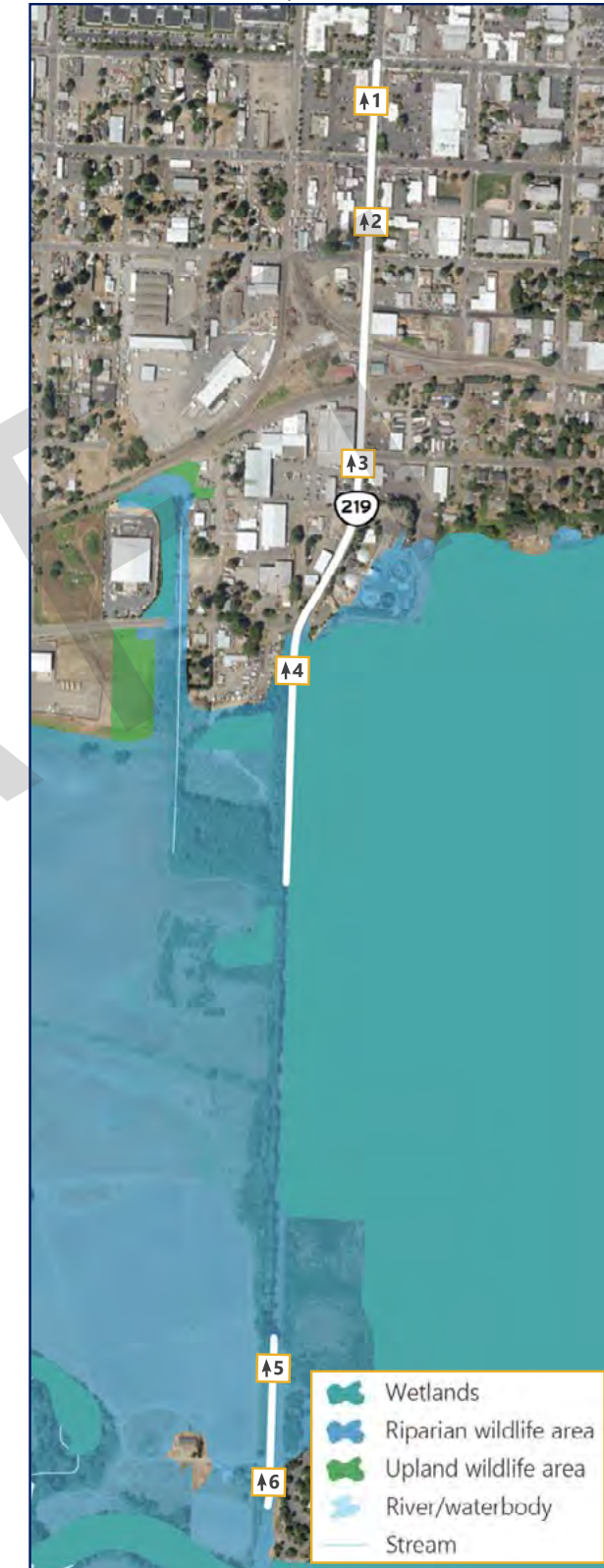
<b>Roadway classification</b>	Federal: Urban Minor Arterial State: District Highway, Seismic Lifeline Route Metro: Minor Arterial, 2040 Corridor, Arterial Outside of UGB Local: Arterial (Washington County, Hillsboro)
<b>Highway length</b>	0.9 miles
<b>Bike network</b>	None
<b>Transit</b>	None
<b>Freight routes</b>	SW Wood St to SW Baseline St (Metro)
<b>Crash history (2013-2018)</b>	5 pedestrian-involved, 1 cyclist-involved, 132 vehicle
<b>Number of lanes</b>	2
<b>Speed limit</b>	25-40 mph
<b>Population</b>	20,368 people
<i>2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.</i>	
<b>Employment</b>	12,212 jobs
<i>2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.</i>	



### REGIONAL LAND USE AND TRANSPORTATION



### ENVIRONMENT with photo locations



### PHOTOS



- County boundary
- Throughway
- Employment areas
- City boundary
- Major Arterial
- Industrial areas
- Arterials
- Minor Arterial
- Regionally significant industrial areas
- Annual average daily traffic volumes
- Arterial Outside Urban Growth Boundary
- Neighborhoods
- Sidewalks
- 2040 corridor
- Urban reserves
- Bridge
- Central city
- Rural reserves
- Milepost termini
- Regional center
- Parks & open space
- Town center
- River/waterbody

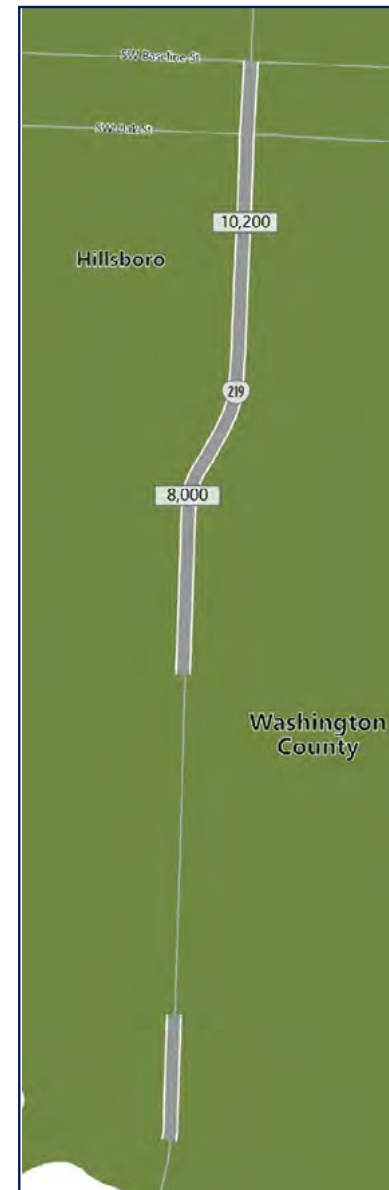
Source: Metro RLIS database and ODOT TransGIS.

HILLSBORO-SILVERTON HIGHWAY (OR 219)

CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor 0 ODOT SPIS sites
<b>Pavement condition</b>	Very Good: MP 0 - 0.37 MP 0.37 - 5.8
<b>Bridges and bridge rating (0-100)</b>	No bridges
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 0.4 miles</li> <li>Sidewalk substandard: 0 miles</li> <li>Sidewalk meets standard: 0.3 miles</li> <li>Bicycle gaps: 0.5 miles</li> <li>Bicycle substandard: 0 miles</li> <li>Bicycle meets standard: 0.4 miles</li> <li>Number of crossings: 2</li> </ul> </li> </ul>
<b>Transit frequency</b>	No existing or planned frequent service lines.
<b>Capital projects</b>	No capital projects are planned at this time.

PEOPLE OF COLOR



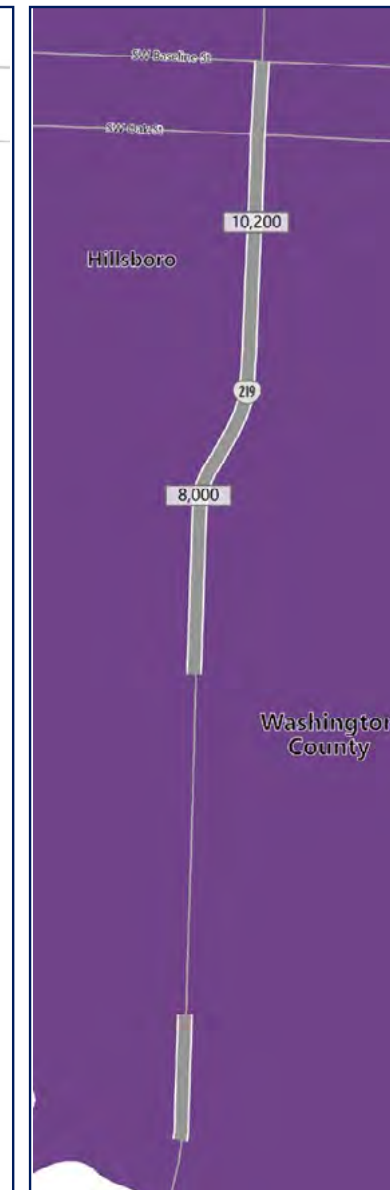
LOW INCOME



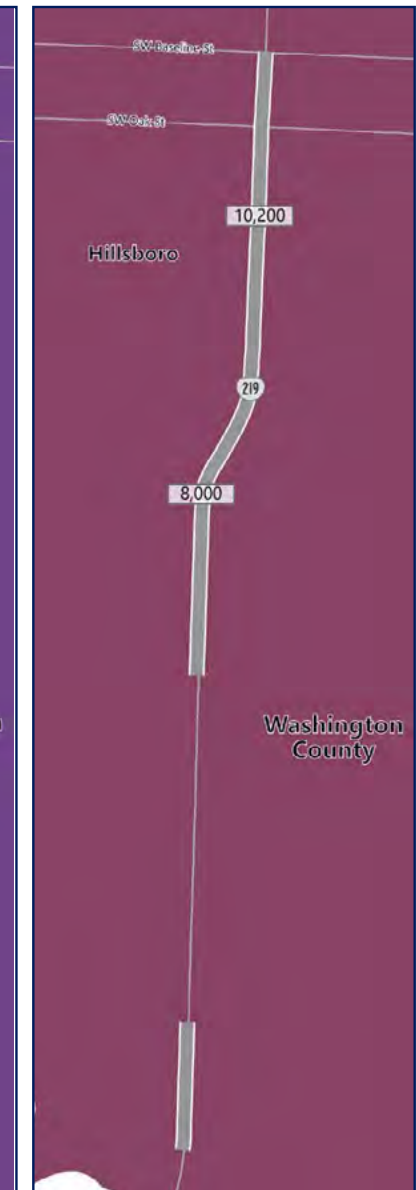
NO VEHICLE HOUSEHOLDS



PEOPLE WITH DISABILITIES



UNEMPLOYMENT



Above regional rates for People of Color

At or below regional rates

Above regional rates for Low Income

At or below regional rates

Above regional rates for No Vehicle Households

At or below regional rates

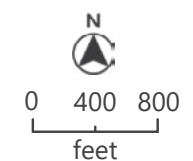
Above regional rates for People with Disabilities

At or below regional rates

Above regional rates for Unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

## CLACKAMAS HIGHWAY / SUNRISE EXPRESSWAY (OR 224)

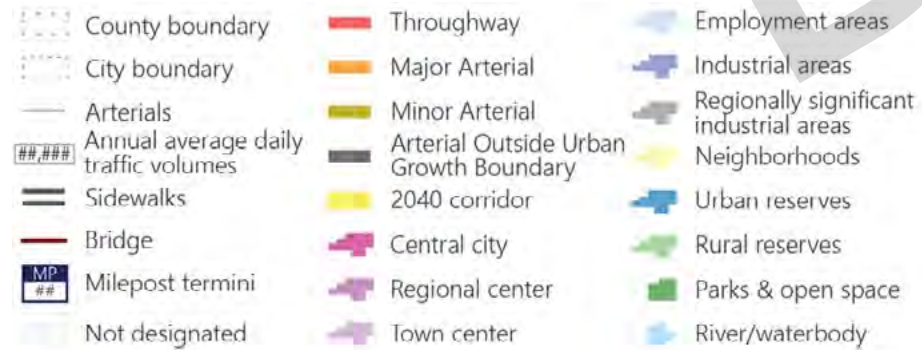
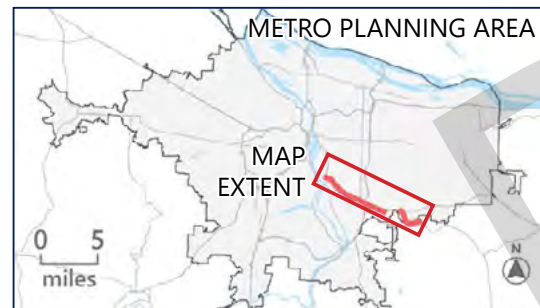
### CORRIDOR INFORMATION

<b>Roadway classification</b>	Federal: Urban Other Freeways and Expressways, Urban Minor Arterial State: Statewide Highway, District Highway, Expressway Metro: Throughway Local: Regional Route (Milwaukie), Principal Arterial (Clackamas County), New Principal Expressway (Clackamas County), Major Arterial (Happy Valley, Clackamas County)
<b>Highway length</b>	8.6 miles
<b>Bike network</b>	Bike lanes (partial)
<b>Transit</b>	TriMet Route 30
<b>Freight routes</b>	OR 212 to OR 99E (ODOT), Reduction Review Route (ODOT)
<b>Crash history (2013-2018)</b>	0 pedestrian-involved, 0 cyclist-involved, 163 vehicle
<b>Number of lanes</b>	2
<b>Speed limit</b>	35-55 mph
<b>Population</b>	29,708 people
<b>Employment</b>	39,437 jobs

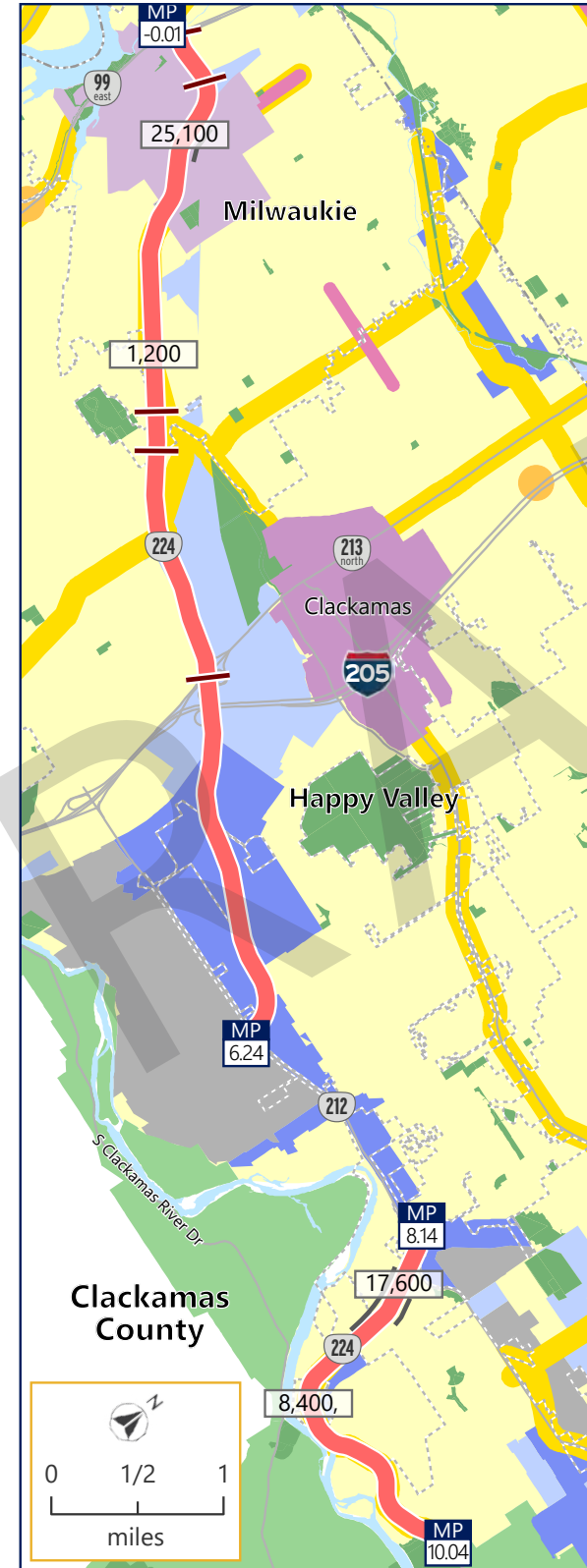
2010 U.S. Census data from all intersecting Transportation Analysis Zones (TAZs) and 2040 Centers.

2015 Longitudinal Employer-Household Dynamics (LEHD) from all intersecting TAZs and 2040 Centers.

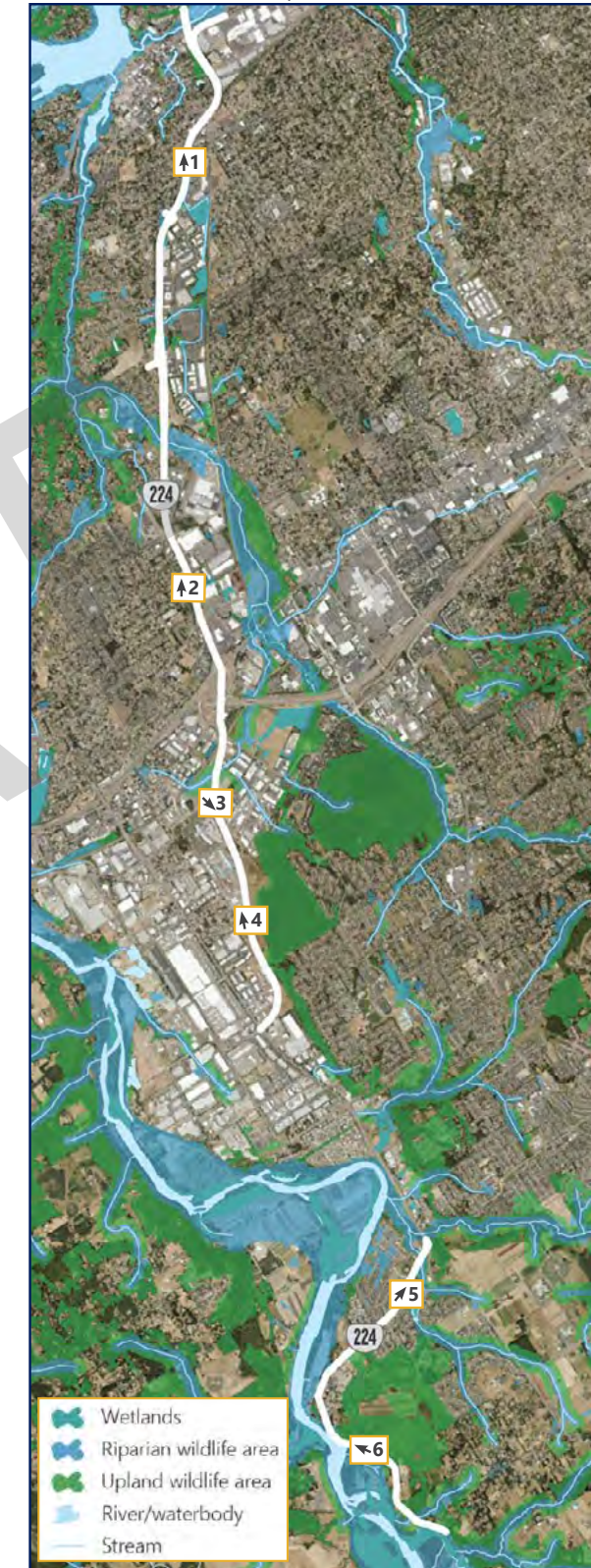
*Note: Happy Valley's Transportation System Plan has not been updated to include roadway classification for OR 224 (milepost 8.14 to 10.04).*



### REGIONAL LAND USE AND TRANSPORTATION



### ENVIRONMENT with photo locations



### PHOTOS



Source: Metro RLIS database and ODOT TransGIS.



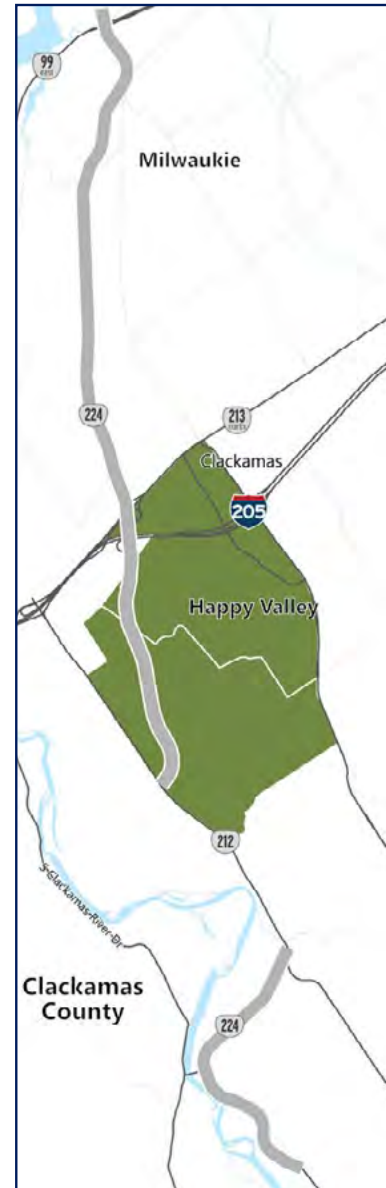
## CLACKAMAS HIGHWAY / SUNRISE EXPRESSWAY (OR 224)

### CORRIDOR INFORMATION

<b>Crash data</b>	Metro High Crash Corridor for part of the corridor (<50%) 10 ODOT SPIS sites
<b>Pavement condition</b>	Fair: MP -0.01 - 0.11 MP 0.09 - 20.09 MP 20.9 - 3.96 Very Good: MP 4.11 - 6.26 Good: MP 8.15 - 8.22 MP 8.16 - 8.8 MP 8.8 - 13.9
<b>Bridges and bridge rating (0-100)</b>	MP 0.38: 84.4 MP 2.64: 61.5
<b>Pedestrian and bicycle network completion</b>	<ul style="list-style-type: none"> <li>Metro bicycle corridor and pedestrian corridor</li> <li>Region 1 ODOT ATNI:                             <ul style="list-style-type: none"> <li>Sidewalk gaps: 7.6 miles</li> <li>Sidewalk substandard: 0.1 miles</li> <li>Sidewalk meets standard: 0 miles</li> <li>Bicycle gaps: 5 miles</li> <li>Bicycle substandard: 3.6 miles</li> <li>Bicycle meets standard: 0 miles</li> <li>Number of crossings: 12</li> </ul> </li> </ul>
<b>Transit frequency</b>	No existing or planned frequent service lines.

Corridor information table continues on next page.

### PEOPLE OF COLOR



### LOW INCOME



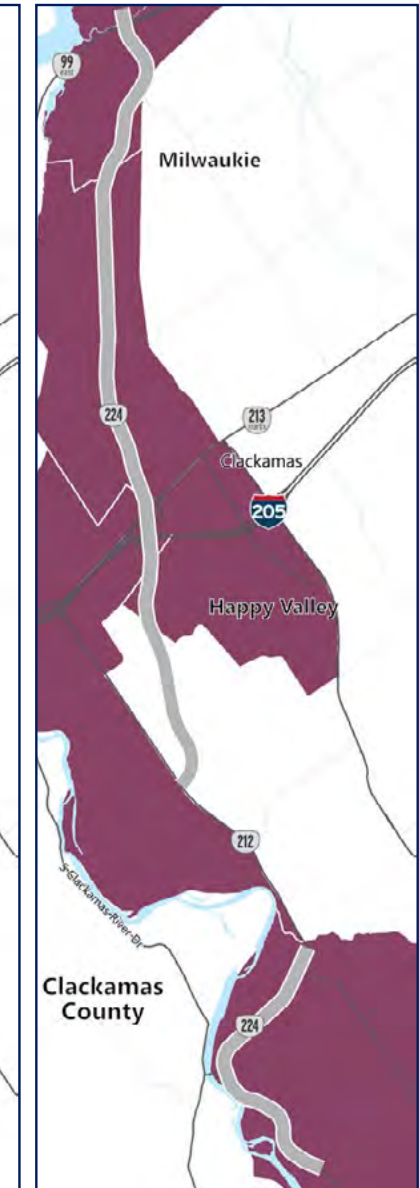
### NO VEHICLE HOUSEHOLDS



### PEOPLE WITH DISABILITIES



### UNEMPLOYMENT



Above regional rates for People of Color

At or below regional rates

Above regional rates for Low Income

At or below regional rates

Above regional rates for No Vehicle Households

At or below regional rates

Above regional rates for People with Disabilities

At or below regional rates

Above regional rates for Unemployment

At or below regional rates

Regional rates for people of color, low income, no vehicle households, and people with disabilities are defined as above the regional average percent of the population and twice the density as determined by the Metro 2018 Equity Evaluation. Unemployment is determined as above the regional rate as determined by the Bureau of Labor Statistics. See Atlas Index for regional rates.



Source: Metro RLIS database, ACS 2017, U.S. Bureau of Labor Statistics

## CLACKAMAS HIGHWAY/SUNRISE EXPRESSWAY (OR224)

41

## CORRIDOR INFORMATION

**Capital projects****ODOT STIP 2018 – 2021**

- East systemic signals and illumination (20339)
- OR8 at River Rd & OR222 at Lake Rd (20451)
- OR212/OR224 Arterial management (21495)
- Portland Metropolitan Bridge Screening and rail retrofit (19918)

**ODOT STIP 2021 – 2024**

- East Systemic Signals and Illumination (20339)
- OR212/224 Arterial Management (21495)
- OR224 SE 17th Ave – OR213 (21598)
- OR224 at SE Monroe St (21606)
- OR224 SE 17th Ave – Rainbow Campground (21612)

**City CIPs**

- Milwaukie - Clackamas County Regional Freight ITS Project Phase 1 – Planning and Design and Phase 2 A/B- Construction
- Milwaukie - Hwy 224 & Hwy 99E Improvements

# ATTACHMENT B - Policy Framework

## REGIONAL FRAMEWORK FOR HIGHWAY JURISDICTIONAL TRANSFER

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### Policy Framework

Date: September 19, 2019

Subject: Policy Framework Memo

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#### 1. Introduction

##### 1.1 Purpose of the Regional Framework for Highway Jurisdictional Transfer

The purpose of the Regional Framework for Highway Jurisdictional Transfer Study (Study) is to identify which state-owned routes in the Portland metropolitan region should be evaluated and considered for jurisdictional transfer, identify gaps and deficiencies on those routes, to regionally prioritize the routes, and address some of the barriers and opportunities to transfer the prioritized routes from state ownership to local ownership. Jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing the ownership of a roadway. The decision framework will serve as a tool for state, region, and local jurisdiction leaders to identify good candidate roadways for transfer and facilitate successful transfer of roadway ownership. The Study is convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

ODOT owns and maintains some roadways in greater Portland that were originally constructed to provide connections from farmland to the city (referred to as “farm-to-market” roads) and grew to become highways. In 1956, the federal government began building the Interstate Highway System (known as the Dwight D. Eisenhower National System of Interstate and Defense Highways), and between 1960 and 1980, the highway system in Portland was built. It included limited access facilities such as Interstate (I-)5, I-205 and Highway (HWY) 26 which provided more efficient long-distance travel options and replaced the function of the existing state system. As a result, many of these roads now serve a different purpose, providing short-distance travel for vehicles, transit and people walking and biking. The roadways have not only diversified in terms of types of travel, but also in the types of travelers. Today, in the Portland region, a concentration of people of color, low-income or limited-English speakers live and travel along some of these arterials that used to function as highways, such as 82<sup>nd</sup> Avenue and Tualatin Valley (TV) Highway.

While their function has changed, for many, their roadway classification and their physical design has not; those that remain state highways retain the same classification identified in the 1999 Oregon Highway Plan, as amended (OHP). Transferring non-limited access state highways that function as urban arterials to local jurisdictions would allow them to be operated and maintained consistent with local design standards that may respond better to modern transportation uses and mobility options, land use and development patterns. For this reason, local jurisdictions experience an opportunity cost of the status quo, given underperforming economic development that is often correlated with the condition of these roads.

## 1.2 Purpose of the Memorandum

This memorandum summarizes the legal, regulatory and policy framework for highway jurisdictional transfers in Oregon. The memorandum also identifies major constraints to the transfer process and provides best practices based on examples of completed roadway transfers in Oregon.

In this memorandum, highway jurisdictional transfer refers to the process of transferring ownership of a highway right of way from ODOT to a local jurisdiction – a City or County. A jurisdictional transfer can also be the transfer of ownership from a local jurisdiction to ODOT.

This memorandum is organized to give decision-makers the overarching policy framework, relevant case studies and best practices needed to identify, analyze and implement jurisdictional transfers in the region:

- Section 1: Introduction
- Section 2: Policy Framework
- Section 3: Case Studies
- Section 4: Best Practices

## 2. Policy Framework

### 2.1 Relevant Policies and Roadway Classifications

Roadway classifications are categorizations given to a roadway by the federal, state, regional or local government to help delineate differences in roadway purpose and design.<sup>1</sup> A single roadway may have multiple classifications (e.g., federal, state, regional and local) and multiple policy overlays (e.g., expressways, land use, statewide freight routes, scenic byways, lifeline routes, etc.). Roadway classifications define the purpose of a road and its function within the larger transportation network. Classifications are based on how many people use a road, how often they use it, why they use it, and their experience while using it. A roadway's design standards, planning, engineering, maintenance and operations are all influenced by its classification. In general, the classification designated by the owner of the roadway most significantly impacts roadway design. Roadway classifications are delineated in plans and policies. The following sections describe relevant federal, state, regional and local policies, including roadway classifications.

#### 2.1.1 Federal

As part of the National Highway System Designation Act of 1995, Congress adopted highway routes in the National Highway System (NHS). The Federal Highway Administration (FHWA) oversees the NHS and has established the following functional classifications:

- Principal Arterial (all sub-categories are recognized in both urban and rural forms)
  - Interstate
  - Other Freeways & Expressways
  - Other
- Minor Arterial
- Collector (all sub-categories are recognized in both urban and rural forms)
  - Major
  - Minor

<sup>1</sup> Policy Brief: Route Designations and Classifications. Oregon Department of Transportation. n.d.

- Local

The federal classification hierarchy identifies how roadways meet intended travel objectives. These objectives range from serving long-distance passenger and freight needs to neighborhood travel. The coordinated and systemic maintenance of an effective roadway functional classification system supports the strategic allocation of Federal Aid funds to the roadways with the greatest need and enables people and goods to move fluidly through the transportation system.

Functional classification has come to assume additional significance beyond identifying the role of roadways in moving vehicles through a network of highways. Functional classification directly impacts roadway design, funding opportunities, the evaluation of system performance and investment decisions. Expectations about roadway design, access control, operations, capacity and a roadway's relationship to existing land use and future development and redevelopment is associated with functional classification. Federal legislation continues to use functional classification to determine funding eligibility under the Federal-Aid program. Transportation agencies describe roadway system performance, benchmarks and targets by functional classification. As agencies continue to move towards a more performance-based management approach, functional classification is an increasingly important consideration in setting expectations and measuring outcomes for preservation, mobility and safety.<sup>2</sup>

The following federal functional classifications exist on roadways in the Portland metropolitan area:

- Urban Interstates** are designed and constructed for vehicular mobility and long-distance travel. Roadways in this category are officially designated by the U.S. Secretary of Transportation and all routes that comprise the National System of Interstate and Defense highways belong to this classification.
- Urban Other Principal Arterials** serve major centers of metropolitan areas and provide a high degree of mobility. They directly serve adjacent land uses.
- Urban Minor Arterials** serve relatively smaller geographic areas and provide connectivity to the higher Arterial system. They serve trips of moderate length to augment the higher Arterial system and provide intra-community continuity.
- Urban Collectors** serve a critical role in the roadway network by gathering traffic from Local Roads and funneling them to the Arterial network.
- Urban Local Roads** are not intended for use in long distance travel, except at the beginning or end of trips. They are designed to discourage through traffic. Local Roads are classified by default; once all Arterial and Collectors are identified, all remaining roadways are classified as Local Roads.

While functional classifications of some roadways can and do change over time, the vast majority of roadways maintain their federally designated classifications. Because of this, the FHWA advises States to focus their efforts on identifying roadways where the functionality has changed. A functional change can occur to the roadway itself, such as an extension or widening, or to surrounding land, such as new development or residential growth.

The Moving Ahead for Progress in the 21st Century Act (MAP-21), enacted in 2012, included provisions to make the Federal surface transportation more streamlined, performance-based, and multimodal and to address challenges facing the U.S. transportation system, including improving safety, maintaining infrastructure condition, reducing traffic congestion, improving efficiency of the system and freight movement, protecting the environment and reducing delays in project delivery. The Fixing America's

<sup>2</sup> Highway Functional Classification Concepts, Criteria and Procedures. U.S. Department of Transportation, Federal Highway Administration. 2013 ed.

Surface Transportation Act (FAST Act) builds on the changes made by MAP-21 by improving mobility on America's highways, creating jobs and supporting economic growth, and accelerating project delivery and promoting innovation. The FAST Act provides long-term funding for surface transportation infrastructure planning and investment.<sup>3</sup>

The FAST Act directed FHWA to establish a National Highway Freight Network (NHFN) to strategically direct Federal resources and policies toward improved performance of the U.S. freight transportation system. The NHFN includes four subsystems of roadways:

- **Primary Highway Freight System (PHFS)** is a network of highways identified as the most critical highway portions of the U.S. freight transportation system determined by measurable and objective national data. In Oregon, I-5 and I-84 are part of the PHFS.
- **Other Interstate portions not on the PHFS** consist of the remaining portion of Interstate roads not included in the PHFS. These routes provide important continuity and access to freight transportation facilities.
- **Critical Rural Freight Corridors (CRFCs)** are public roads not in an urbanized area which provide access and connection to the PHFS and the Interstate with other important ports, public transportation facilities, or other intermodal freight facilities.
- **Critical Urban Freight Corridors (CUFCs)** are public roads in urbanized areas which provide access and connection to the PHFS and the Interstate with other ports, public transportation facilities, or other intermodal transportation facilities.

States and in certain cases, Metropolitan Planning Organizations (MPOs), are responsible for designating public roads for the CRFCs and CUFCs in accordance with section 1116 of the FAST Act.<sup>4</sup>

The U.S. Department of Transportation also designates NHS freight connectors. These are the public roads that connect major intermodal terminals to the highway network. Several criteria are considered when designating an NHS connector including the level of activity of an intermodal terminal and its importance to a state's economy. In the greater Portland area, NHS freight connectors link to intermodal facilities such as the Portland International Airport, Portland Union Station, Portland Greyhound Bus Terminal, Port of Portland, Albina Yards, Brooklyn Yard, NW Industrial Area, and Swan Island Ship Repair Yard.<sup>5</sup>

When a roadway transfer occurs and results in a change in state classification, federal classifications remain, unless the agencies follow the federal process for classification change. Additional research may be required on a case-by-case basis to understand if and how federal designations affect potential transfers.<sup>6</sup>

## 2.1.2 State of Oregon

The 1999 Oregon Highway Plan (OHP) applies general directives to the state highway system. The plan emphasizes:

- efficient management of the system to increase safety, preserve the system and extend its capacity;
- increased partnerships, particularly with regional and local governments;

<sup>3</sup> Fixing America's Surface Transportation Act of "FAST Act": A Summary of Highway Provisions. Federal Highway Administration. 2016.

<sup>4</sup> National Highway Freight Network. Freight Management and Operations. Federal Highway Administration. 2018.

<sup>5</sup> Intermodal Connectors, Oregon. Federal Highway Administration. 2018.

<sup>6</sup> Highway Functional Classification Concepts, Criteria and Procedures. Federal Highway Administration. 2013.

- links between land use and transportation;
- access management;
- links with other transportation modes and travel demand management; and
- environmental and scenic resources.

The OHP has three main elements: the Vision, the Policy Element, and the System Element. The Policy Element contains goals, policies and actions.

Goal 1 of the OHP is System Definition. This goal is to maintain and improve the safe and efficient movement of people and goods and contribute to the health of Oregon's local, regional and statewide economies and livability of its communities. The System Definition policies define a classification system for state highways to guide management and investment decisions. Policy 1A divides state highways into five categories based on function:

- Interstate
- Statewide
- Regional
- District
- Local

Four special-purpose classifications supplement this foundational hierarchy: land use, statewide freight routes, scenic byways and lifeline routes. They address the special expectations and demands placed on portions of the highway system by land use, the movement of trucks, the Scenic Byway designation and significance as a lifeline or emergency response route. Information contained in these special designations is used to guide management, needs analysis and investment decisions on the highway system.

The following four classifications exist within the Portland metropolitan area:

- **Interstate Highways** provide connections to major cities, regions of the state, and other states. In urban areas, they provide connections for intraregional trips as a secondary function.
- **Statewide Highways** provide inter-urban and inter-regional mobility and provide connections to larger urban areas, ports and major recreation areas. They also provide connections for intra-urban and intra-regional trips.
- **Regional Highways** provide connections to regional centers, statewide or interstate highways or economic and activity centers of regional significance.
- **District Highways** provide connections between small urbanized area, rural centers and urban hubs. They serve local access and traffic.<sup>7</sup>

<sup>7</sup> Oregon Highway Plan. Oregon Department of Transportation. 1999. Pg. 37.

The 2015, 2018, and 2019 Oregon Legislative Sessions included bills that focused on jurisdictional transfer. While the Oregon Legislature did not pass the following bills, they provide insight on the intentions of the Legislature moving forward.

#### 2015

- Senate Bill (SB) 117 would have created a 12-member Task Force on Jurisdictional Transfers to evaluate and recommend potential transfer of state highways to cities or counties or transfer of county roads or city streets to the state highway program.
- SB 326 would have modified the state modernization program to make projects that facilitated jurisdiction transfers eligible for funding.
- House Bill (HB) 3302 would have allocated about \$27 million per year for 10 years to fund jurisdiction transfer projects.

#### 2018

- HB 4060 modified and added laws related to transportation, including transferring jurisdiction of specified highways.

#### 2019

- HB 2846 would have required regions to conduct jurisdictional transfer evaluation and present a report on the evaluations to the Joint Committee on Transportation.



Expressways are a subset of the Statewide, Regional and District Highways classifications. They are complete routes or segments of existing limited-access two-lane, multi-lane, and planned multi-lane highways that provide for safe and efficient high-speed and high-volume traffic movements. Their primary function is to provide interurban travel and connections to ports and major recreation areas with minimal interruptions. A secondary function is to provide long-distance and intra-urban travel in metropolitan areas.

System Management, Goal 2 of the OHP, encourages coordination between the State, local jurisdictions and federal agencies to create an increasingly seamless transportation system with respect to the development, operation, and maintenance of the highway and road system that:

- safeguards the state highway system by maintaining functionality and integrity;
- ensures that local mobility and accessibility needs are met; and
- enhances system efficiency and safety.

Additionally, Policy 2C (Interjurisdictional Transfers) requires the State of Oregon to consider, in cooperation with local jurisdictions, interjurisdictional transfers that:

- rationalize and simplify the management responsibilities along a roadway segment or corridor;
- reflect the appropriate functional classification of a roadway segment or corridor; and/or
- lead to increased efficiencies in the operation and maintenance of a roadway segment or corridor.<sup>8</sup>

The State classification system recognizes that some roads, which are currently state highways, often function as local roads. Policy 2C of the OHP states that ODOT will develop a process to identify roads that may be transferred to local jurisdictions in accordance with Policy 2C.

Goal 4 of the OHP, Travel Alternatives, addresses travel modes such as walking, biking, and transit, and transportation demand management strategies that support reductions in single-occupancy vehicle demand on the highway system. ODOT's Highway Design Manual (HDM) provides technical guidance and standards to guide the design of walking, biking, and transit facilities on ODOT owned and managed facilities. In addition, the HDM provides information regarding design exceptions that some jurisdictions pursue to include desired facility designs on ODOT highways in urban areas. A city may pursue a jurisdictional transfer of a state highway to support implementation of pedestrian or bicycle facility designs that would not otherwise be feasible via the HDM.

ODOT's Blueprint for Urban Design provides direction on designing ODOT facilities in various urban and suburban state highway contexts in Oregon. It seeks to align planning and design work for urban transportation projects by developing comprehensive design targets to address the unique needs of urban environments. The effort considers all modes of transportation including motor vehicle, freight, public transit, pedestrian, bicycle and rail.

### 2.1.3 Regional

Oregon Metro's 2018 Regional Transportation Plan (RTP) is the blueprint to guide investments for all forms of travel in greater Portland. The RTP prioritizes policies, planning and projects identified and adopted by the Joint Policy Advisory Committee on Transportation (JPACT), and approved by FHWA and Federal Transit Administration (FTA) as the region-wide transportation plan. It identifies the region's most urgent transportation needs and priorities for investments over the next 25 years. In 2018, JPACT and Metro Council identified four priority areas: traffic safety, equity, congestion relief and reducing

<sup>8</sup> Oregon Highway Plan. Oregon Department of Transportation. 1999.

impacts to Climate Change. During the development of the RTP 2018, stakeholders and jurisdictions called for a jurisdictional transfer study. As planning for jurisdictional transfers moves forward, the 2018 RTP lays the foundation for successful implementation.

**Chapter 3** of the 2018 RTP establishes regional classifications for roadways within the Portland metropolitan area. These classifications categorize roads for each identified regional modal network (pedestrian, bicycle, transit, freight and motor vehicles). Like federal and state classification systems, the RTP's classifications are hierarchical and provide a vision for the modal networks. Each classification describes the volume and type of trips most suited for the group of roadways. The RTP classifications, by modal network, include:

- **Pedestrian:** pedestrian parkway, regional pedestrian corridor, local pedestrian connectors
- **Bicycle:** bicycle parkway, regional bikeway, local bikeways
- **Transit:** existing light rail, commuter rail, enhanced transit corridor, street car, High Capacity Transit (HCT) in progress, future HCT, intercity high-speed rail, frequent bus, regional and local bus
- **Freight:** main roadway routes, regional intermodal connections, roadway connections
- **Motor Vehicle:** throughways, major arterial, minor arterial

**Chapter 8** of the RTP establishes the Jurisdictional Transfer Assessment Program as part of the ongoing and future efforts to implement the RTP. Metro created this program as part of near-term planning efforts to apply the plan at the regional scale (section 8.2.3.4 of the RTP).

**Chapter 6** identifies ten near-term capital program investment priorities to address greater Portland's most pressing transportation challenges. Of these priorities, Metro Council identified four to act as the pillars of the RTP. These four priorities provide critical guidance and direction for the Study. They will be integrated at each step of the jurisdictional transfer process, from identifying candidates to implementing a transfer. The priorities are:

- Equity – reduce disparities and barriers faced by communities of color and other historically marginalized communities
- Safety – reduce fatal and severe injury crashes, particularly focusing on the High Crash Corridor network
- Climate change – expand transit and active transportation networks, and leverage emerging technology to meet Climate Smart Strategy goals
- Congestion relief – manage congestion and travel demand through low-cost, high value solutions.

## 2.1.4 Local

At the local level, cities and counties use Transportation System Plans (TSPs) and local code to designate roadway classifications and their design standards. Pursuant to Oregon Administrative Rule (OAR) 660-012-0015, all TSPs require a road plan for a system of arterials and collectors and standards for the layout of local streets and other important non-collector street connections. Roadway classifications in city and county TSPs are also required to be consistent with regional and state classifications.<sup>9</sup> Local classifications often use different systems and/or terminology but are fundamentally consistent in policy.

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<sup>9</sup> OAR 660-012-0020.

## 2.2 Legal Considerations

The jurisdictional transfer process includes completing and approving two documents that can address specific legal issues if they arise: the Jurisdictional Transfer Agreement and the intergovernmental agreement.

The **jurisdictional transfer agreement** should clearly spell out maintenance responsibilities to prevent confusion about which agency performs maintenance and to what standard. In particular, highways that have been constructed or improved using federal funds may still have federal requirements dictating maintenance levels for long periods of time, usually the useful life of the facility. If the highway is not properly maintained, FHWA will hold ODOT responsible for rectifying the situation, regardless of whether the state or a local government has jurisdiction over the roadway. From the local government perspective, local governments are often taking on a large financial liability, especially as it relates to potential future tort claims, so it is important for the local jurisdictions to have clarity on whether they have autonomy in determining the level of maintenance needed and other engineering improvements. Therefore, it is in the best interest of all parties to clearly define maintenance responsibilities for roadways that used federal funds.<sup>10</sup>

The **intergovernmental agreement (IGA)** should clearly state the process and timing for transfer and identify the responsibilities of the State and local jurisdiction to address three common legal issues:

- Tort liability;
- Americans with Disabilities Act (ADA) claims; and
- Right-of-way designations.

The IGA addresses tort claims by identifying who assumes liability (i.e., liability for a wrongful act, not including breach of contract or trust, that results in injury to another person's property or the like and for which the injured party is entitled to compensation). Because agencies have six months to respond to tort claims, the involved agencies would likely know of any outstanding claims related to the segment for jurisdictional transfer. The IGA should lay out a clear timeframe for transfer and identify agency roles to prevent liability issues.

Second, the IGA should clearly identify timing and agency responsibilities to ensure federal or state ADA claims relevant to the highway being transferred are appropriately addressed. Unlike tort claims, ADA claims require immediate response from the responsible agency.

Third, the IGA should clearly identify the precise right of way being transferred. The ownership of roadways is complex; in some instances, ODOT maintains the road from curb to curb, while the city owns and maintains the roadway from the curb to the right of way line. The IGA should ensure the ownership of the right of way, and where they right of way is located, is clear to prevent confusion on ownership and liability.

Lastly, the IGA often identifies a cost and source of funding for the transfer that is mutually agreed to by all parties.

## 2.3 The Legal Process for Transfer in Oregon

Best practice indicates that transferring ownership of a state highway requires years of intentional planning and collaboration among the involved parties. Once a roadway is selected, the formal process that legally transfers property from ODOT to a local jurisdiction can begin. The legal mechanism for this

<sup>10</sup> Transferring Roads: A Handbook For Making Jurisdictional Transfers. Oregon Department of Transportation. 2003.

transfer is a contract between the parties. This is referred to as the jurisdictional transfer process. The following three steps summarize the legal process. There is a more comprehensive overview of the legal process in ODOT's Transferring Roads Handbook (2003).<sup>11</sup>

### 2.3.1 Step 1: Jurisdictional Transfer Agreement

If the jurisdictional transfer involves one or more local governments, ODOT and the partnering local government(s) begin preliminary negotiations regarding the highway segments to be transferred and/or retained. Based on these negotiations, the appropriate ODOT Region and local agency work together to prepare a draft agreement, along with a preliminary map of the highway segments involved. The agreement describes the necessary terms and conditions, including State and local jurisdiction obligations and general provisions. After the Jurisdictional Transfer Agreement has been approved, ODOT and the local agency sign the agreement to implement the transfer process.

### 2.3.2 Step 2: Jurisdictional Transfer Conveyance Documents

Negotiating a contract for jurisdictional transfer takes into account several things.

First, the parties must agree to the asset being transferred. The ODOT Right of Way Section, Acquisition Unit, prepares right of way documents, based on the terms of the agreement, and attaches the final exhibit map that clearly defines highway segments to be retained and/or transferred. The local government's Right of Way section will review and coordinate with ODOT's Right of Way section. When right-of-way is not clear or needs specificity, clauses relating to on-going maintenance of assets that are related or connected to the roadway, such as utilities and lighting, may be included in the contract.

The document will clarify roles and responsibilities after the transfer, especially as it relates to ongoing liability and indemnification. Once the agreement is in place and the terms and conditions have been mutually agreed upon by all parties, the formal resolutions and transfer documents finalizing the process are prepared for signature.

Once signed, the document transferring the right of way, with a reversionary clause, is recorded with the county, with the exhibit map attached. These two documents are a Resolution Eliminating a Section of Highway from the State Highway System and Minor Amendment to the Oregon Highway Plan, and a recorded Jurisdictional Transfer Document. The Resolution is the Oregon Transportation Commission's (OTC) formal decision documenting the transfer and amendment to the OHP. The Jurisdictional Transfer Document is a formal legal document finalizing the transfer. This step can also include agreements related to roles and responsibilities for future operations and maintenance of the roadway, liability, claims, and right of way.

### 2.3.3 Step 3: Changes to the Oregon Highway Plan

The 1999 OHP is the highway element of the state transportation system plan required by the Transportation Equity Act for the 21<sup>st</sup> Century and the state Transportation Planning Rule. It is a statement of state policy developed and adopted by the OTC and has legal status. A jurisdictional transfer involves a change to the highway system that is noted on the OHP highway map and the OHP list of state-owned highways. The OHP must be amended accordingly, which requires OTC approval.<sup>12</sup>

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<sup>11</sup> Transferring Roads: A Handbook For Making Jurisdictional Transfers. Oregon Department of Transportation. 2003.

<sup>12</sup> Ibid.

### 2.3.4 Changes to the Regional Transportation Plan

The Regional Transportation Plan must be amended if the jurisdictional transfer results in any changes to RTP functional classifications (on the motor vehicle, transit, bicycle, pedestrian or freight system maps) or any changes to the RTP project list.

### 2.3.5 Relevant Oregon Statutory Authority

Jurisdictional transfers are based on language in state statute and require OTC approval to complete the transfer. Oregon Revised Statute (ORS) gives OTC the authority to “select, establish, adopt, lay out, locate, alter, relocate, change and realign primary and secondary state highways.”<sup>13</sup> Oregon statute (ORS 366.290) also allows ODOT to add or remove roads from the state highway system and its considerations are listed below.

*(1) In the selection of highways or roads to be included in the state highway system the department shall give consideration to and shall select such county roads or public roads as will contribute to and best promote the completion of an adequate system of state highways. Thereafter the construction, improvement, maintenance and repair of such roads shall be under the jurisdiction of the department.*

*(2) In the selection of highways or roads to be included in the state highway system the department shall give consideration to and shall select such county roads or public roads as will contribute to and best promote the completion of an adequate system of state highways.*

*(3) (a) With the written agreement of the county in which a particular highway or part thereof is located, the department may, when in its opinion the interests of highway users will be best served, eliminate from the state highway system any road, highway, road segment or highway segment. The road, highway or segment becomes a county road or highway, and the construction, repair, maintenance or improvement, and jurisdiction over the road or highway will be exclusively under the county in which the road or highway is located.<sup>14</sup>*

Oregon statutes related to jurisdictional transfers include the following:

- ORS 366.340 establishes the highway purposes that ODOT may have for acquiring real property.
- Pursuant to ORS 366.395, the state may relinquish title to any of its property not needed for highway purposes to any other governmental body or political subdivision within the State of Oregon, subject to such restrictions, if any, imposed by deed or other legal instrument or otherwise imposed by the state.
- Pursuant to ORS 373.010, when the route of a state highway passes through a city, the state may locate, relocate, reroute, abandon, alter, or change such routing when in its opinion the interests of the motoring public will be better served.
- Pursuant to ORS 373.020, jurisdiction of streets taken over by the Department of Transportation extends from curb to curb or over the portion of the right of way utilized by the department for highway purposes.

<sup>13</sup> ORS 366.215, Creation of state highways.

<sup>14</sup> ORS 366.290, Adding to or removing roads from state highway system.

## 3. Case Studies

Since 1993, ODOT has transferred 12 facilities in Region 1 to local jurisdictions. Mandated by Keep Oregon Moving (House Bill 2017), ODOT is currently studying the cost to upgrade and transfer Inner Powell to the City of Portland, and is upgrading Outer Powell to transfer to the City of Portland. ODOT and the City of Portland are also discussing transfer of 82<sup>nd</sup> Avenue and 99W (Barbur Boulevard). Each jurisdictional transfer is a unique negotiation between ODOT and the receiving jurisdiction. Transfer conditions and agreements are influenced by community input, the local government funding capacity, the state of repair of the roadway and the roadway's relationship to the larger transportation network.<sup>15</sup>

### 3.1 Case Studies: Themes

Case studies of completed highway jurisdictional transfers illustrate a range of conditions and outcomes from past projects, providing useful information for future planning and pursuits. Three themes emerge from the review of several case studies:

**Theme 1:** Incentive and mutual benefits

**Theme 2:** Roadway maintenance and design standards

**Theme 3:** Consistency with current land use

The following sections describe the themes and present case studies that support each theme.

#### 3.1.1 Theme 1: Incentives and Mutual Benefit

Jurisdictional transfers are initiated when the State and local jurisdiction have incentive to execute the transfer. Case studies indicate that local jurisdictions are motivated by the community's desire for an improved roadway and when a change in roadway function will prioritize non-automobile travel modes, to improve traffic safety or support desired land use outcomes. Transfer is easiest when funding is available (for example, through the State Legislature) to upgrade the road prior to transfer. Frequently, transfers reduce maintenance costs and liability for the State, providing long-term financial incentive for the State to complete a transfer.

Once incentives are established, the State and local jurisdiction are motivated to complete a transfer by the prospect of mutual benefits. Because the jurisdictional transfer process is grounded in negotiations, transparent and frequent communication ensures that both parties will receive some type of benefit – a financial benefit or outcome that supports the agency's mission.

Table 1 presents examples where financial incentives and the prospect of mutual benefits motivated the State and local jurisdictions to complete highway jurisdictional transfers.

Additional jurisdictional transfers between ODOT and a local jurisdiction authorized by Keep Oregon Moving include:

- Pacific Highway West (Highway 91) from Beltline Highway to Washington Street, and Walnut Street to Interstate 5 from ODOT to the City of Eugene\*
- Springfield Highway (Highway 228) from ODOT to the City of Springfield
- The section of Territorial Highway (Highway 200) that is located within Lane County from ODOT to the County\*
- Springfield-Creswell Highway (Highway 222) from Jasper-Lowell Road to Emerald Parkway from ODOT to Lane County\*
- Delta Highway from Interstate 105 to Randy Pape Beltline from Lane County to ODOT
- Cornelius Pass Road from Highway 30 to Highway 26 from Multnomah and Washington County to ODOT

\*ODOT will retain jurisdiction of identified bridges

<sup>15</sup> 82<sup>nd</sup> Avenue of Roses Implementation Plan: Jurisdictional Transfer Explanation and Case Studies. CH2M. 2016.

**Table 1. Case studies - incentive and mutual benefit**

Roadway	Transfer to	Transfer from	Year	Reason for transfer	Outcome
Martin Luther King, Jr. Boulevard from Lombard Street to SE Division Street	City of Portland	ODOT Region 1	2002	The roadway served local commercial districts and residential neighborhoods. The community wanted to transform the highway into a boulevard-style roadway that was not consistent with ODOT Highway Design Manual standards. ODOT wanted to transfer the liability and associated maintenance costs to another jurisdiction.	The Portland Bureau of Transportation (PBOT) took full jurisdiction and maintenance of the highway. PBOT added on-street parking, pedestrian islands, crosswalks, and curbside street trees. As part of the agreement, ODOT turned over easements and lease rights on the East Bank Property and Holman Building. ODOT also rebuilt the viaduct.
Scholls Ferry Road (milepost 0.0 – 5.5)	Washington County	ODOT Region 1	2003	The road served mainly local functions and served as a major county arterial. It needed major improvements to address congestion issues that were not ODOT funding priorities.	The County and ODOT agreed that if the state provided 50 percent funding, the county would take over jurisdiction. County design standards were used to reduce costs, although the cities were able to incorporate some of their unique standards.

### 3.1.2 Theme 2: Roadway maintenance and design standards

Jurisdictional transfers frequently occur to improve a roadway’s maintenance or change its design standards. ODOT design standards are consistent with the Highway Design Manual, and many local jurisdictions use design standards with more flexibility for urban design. Design standards are dictated by a road’s classification and may not be consistent with current or future uses of the roadway.

Classifications also can relate to the level of funding a roadway receives from the State; often in the context of limited funding, ODOT invests in maintenance of Interstates or Statewide Highways first.

Table 2 presents examples where jurisdictional transfers were motivated by a need to improve roadway maintenance and change design standards.

**Table 2. Case studies - roadway maintenance and design standards**

Roadway	Transfer to	Transfer from	Year	Reason for transfer	Outcome
Lafayette Avenue	City of McMinnville	ODOT Region 2	2003	The roadway was a two-lane arterial with no sidewalks and drainage. Pavement conditions varied from fair to poor. The City tried to improve the road through the STIP process. Under ODOT’s ownership, the desired project could not be designed to state standards because of the narrow right of way. The project was ineligible for federal funding because it did not follow federal design guidelines.	The City agreed to put general fund money towards the project in addition to bond and systems development charge money to transfer the road. Without having to adhere to ODOT design standards, the City implemented the desired project.
Oregon 47	City of Forest Grove and Washington County	ODOT Region 1	2003	The local community wanted the road brought up to urban design standards and was willing to fund part of the project with property taxes.	ODOT constructed a new state highway bypass, designed to ODOT standards. Part of OR 47 was transferred to the County and part to the City of Forest Grove; Washington County completed the design work and acquired the right of way.
Martin Luther King, Jr. Boulevard Viaduct	City of Portland	ODOT Region 1	2003	A design for upgrading the 1936 viaduct was not compatible with PBOT and community vision for the Central Eastside, specifically around accommodation for pedestrians and bicyclists.	The Design Review Advisory Committee selected a design that did not meet ODOT or FHWA standards, prompting the negotiation for jurisdictional transfer. ODOT agreed to build the selected design if ownership was transferred. The City acquired maintenance and operations in 2011.

### 3.1.3 Theme 3: Consistency with current and future land use

While jurisdictional transfers often occur to update physical conditions of a roadway, they also occur when a roadway’s function is not consistent with current and future land use. Transferring road ownership to a local jurisdiction can help support development or redevelopment by aligning transportation and adjacent land use. The transfer process itself can facilitate development when the negotiation process results in a design that supports adjacent land uses. Negotiation also leads to



creativity and compromise, resulting in an outcome for the roadway that may have otherwise been undiscovered.

Table 3 presents examples where jurisdictional transfer helped align roadway functions with current and future land use.

**Table 3. Case studies - consistency with land use**

Roadway	Transfer to	Transfer from	Year	Description	Outcome
Sandy Boulevard from Grand Avenue to 99 <sup>th</sup> Avenue	City of Portland	ODOT Region 1	2003	Two segments of Sandy Blvd operated differently from the remainder of the road, with greater mixing of modes as the roadway moved east. The transfer was intended to support redevelopment and growth within the Hollywood Town Center and Main Street improvements.	Under City ownership, the Sandy Boulevard Resurfacing and Streetscape Project made multimodal improvements and changed the streetscape. In 2008, the City prepared a report that found the project to be widely successful. The transfer reduced ODOT's maintenance costs, regional through traffic is served by I-84.
Siskiyou Boulevard	City of Ashland	ODOT Region 3	2003	Located between the library and Southern Oregon University, the state highway functioned as a downtown city street. There was heavy pedestrian and bicycle traffic and safety concerns. The City requested a widening project, but there was disagreement on design issues.	ODOT made the modernization project in the STIP contingent upon the City building the project and taking over jurisdiction along a segment of the boulevard. The biggest issue in the transfer was establishing valuation for maintenance and finding adequate funding.
Interstate Avenue	City of Portland	ODOT Region 1	1993	The City wanted to transfer the road to help construct the new light rail transit line. The Light Rail could not be constructed under ODOT's jurisdiction.	Interstate Avenue was transferred to the City without the exchange of funds. The light rail line was constructed after transfer.

## 3.2 Major Constraints

Major constraints, as illustrated in the case studies, can delay or limit the ability to achieve the preferred outcome, even if both parties agree a transfer is the best option. However, identifying and addressing constraints early and effectively helps shape expectations for the involved parties. It encourages compromise and creativity to develop a mutually beneficial agreement. Constraints differ on a case-by-

case basis, but can generally be categorized into two categories: fiscal constraints and physical constraints.

### 3.2.1 Fiscal Constraints

The case studies indicate funding is a major constraint to transferring highway jurisdiction. Transfers hinge on the capacity of the local jurisdiction to incur the costs of roadway maintenance and sometimes the costs to upgrade the facility and/or take on future liabilities. The State and most local jurisdictions in Oregon do not have a dedicated funding source for transfers and, as the case studies illustrate, use a range of creative funding mechanisms, such as bonds.

The state gas tax is the primary source of transportation funding for state and local governments. Oregon's State Highway Fund collects resources from three main sources: taxes on motor fuels, taxes on heavy trucks and driver and vehicle fees. Under the Oregon Constitution, these fees and taxes must be spent on roads, including bikeways and walkways within the highway right of way. State funds can be used for both construction projects and maintenance and operation of state roads. The OTC allocates "fix it" funding for the operation and maintenance of the entire state-owned highway system, including roadways and bridges. Funding is limited.

OTC and ODOT have prioritized maintenance of the Interstate Highway system, which is very expensive.<sup>16</sup> Allocating funds to facilitate and process a highway transfer of an arterial street is challenging. Before the formal process begins, funding availability will likely influence the selection of highways for jurisdictional transfer.

Similarly, local government's ability to raise funds or receive federal or state gas tax funds is not keeping up with the rate of decline of the local roadway system, inflation and the cost of construction. Many local jurisdictions cannot afford to maintain their current transportation assets, in addition to their other aging assets such as utilities and water systems. Often, local governments cannot afford to finance the transfer of the roadway.

### 3.2.2 Physical Constraints

As part of the process, both parties work towards an agreement on the roadway design and the standards that apply to that design standards, and consider the physical elements of the roadway. In some cases, the parties agree to improvements before the transfer, and other cases, the focus of the negotiations is focused on post-transfer.

If the highway is on the NHS system, whether it is under state or local jurisdiction, the federally-approved design standards apply (in Oregon, ODOT design standards must be used). When the roadway is not on the NHS system, the design standards are determined by the owning agency. To achieve the desired vision, the Transfer Agreement should have clear provisions for the timing and circumstances for turning over the jurisdiction of the roadway.

The transfer process and desired outcomes can be constrained by the physical conditions and elements of the roadway. The following list should be considered when setting expectations for transfer and producing achievable goals.

- **Local zoning and local access.** The local government often oversees the local zoning along the corridor, owns the local streets, and in some cases, issues local building permits to businesses

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<sup>16</sup> More information about ODOT's paving projects can be found here: <https://www.oregon.gov/ODOT/Pages/ConstructionMap.aspx>

and residences along the street. The transfer should take into local comprehensive plans, local zoning, local corridor plans and existing land uses.

- **Outdoor advertising.** The state is required by state law to maintain control of outdoor advertising signs visible to state highways if the section of highway is on the NHS or was part of the Federal aid primary system in existence on June 1, 1991. If the section of highway was not a Federal-aid primary system highway on June 1, 1991, then responsibility for outdoor signage is transferred to the local jurisdiction.
- **Rail crossings.** The jurisdiction whose roadway crosses a rail line is responsible for the crossing markings and the pavement up to the rail line. The owner of the intersecting roadway is responsible for adhering to all the rail stipulations assigned to the former road authority.
- **Highway condition and maintenance.** Parties must mutually agree to the condition of the asset and its state of repair. This includes pavement, bridges, and other features as well as maintenance responsibilities. Highways that have been constructed or improved using federal funds may still have federal requirements or conditions that require maintenance to a standard and for a particular period of time, usually the useful life of the facility. Therefore, any transfer agreement should clearly spell out existing maintenance conditions and on-going maintenance responsibilities.
- **Route designations and signs.** When a highway route number moves from one state-owned road to another, the contract should include a clause regarding ODOT's removal of the signs and replacement by the local jurisdiction.
- **Traffic signals and illumination.** ODOT and the partnering agency may need to renegotiate any existing intergovernmental agreements regarding power, operations and maintenance of signals and illumination. The agreement should define who has power, maintenance and signal timing responsibilities, who has cost responsibility, and how and when any changes take place.

## 4. Best Practices

The following section presents best practices for highway jurisdictional transfer. These best practices should be followed throughout the entire transfer process –from selection to implementation.

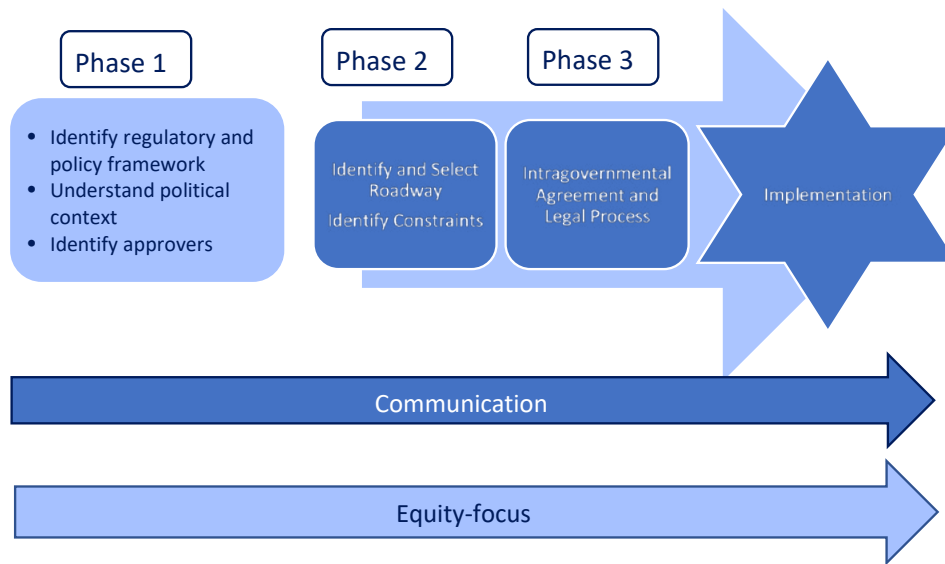
### 4.1 Follow a Process

The jurisdictional transfer process typically begins years prior to the formal legal process, starting with regional and statewide planning, and continuing through highway selection to implementation of the Transfer Agreement. From initiation to completion, jurisdictional transfers should follow a clear process to enable the State and local jurisdiction(s) to effectively address issues before they become sticking points that prevent or delay the transfer.

Importantly, a fair, equitable process helps jurisdictional transfers meet community goals. Throughout the process, the involved agencies should prioritize community needs and values. In the Portland region, 56% of state-owned arterial highways are located in Historically Marginalized Communities (*areas with higher than average number of people of color, English language learners, and/or lower-income people*). It is imperative for the involved agencies to develop a process and identify equitable outcomes to ensure the results of jurisdictional transfer reduce barriers for people of color and marginalized communities and is consistent with Metro Council's Regional Equity Strategy, which is being carried out across Metro's planning department.

Figure 1 provides an overview of the comprehensive jurisdictional transfer process.

**Figure 1. Jurisdictional Transfer Process**



## 4.1.1 Phase 1: Preparing for the transfer

The first phase is preparing for the transfer. During this phase, the involved agencies should:

- identify a regulatory and policy framework;
- understand the political context; and
- identify approvers early.

Identifying a regulatory and policy framework allows the involved agency staff and stakeholders to understand the basis for jurisdictional transfer. The jurisdictional transfer process is rooted in state statute, but it includes intricacies at the federal, regional and local levels. A regulatory and policy framework helps navigate these complexities, such as, roadway ownership, classifications, relevant policies and legal requirements. It also helps involved staff and stakeholders to become familiar with relevant terminology and concepts. This step provides the same information to the involved agencies, ensuring they enter the transfer process with a shared understanding of the applicable regulations and policies.

Understanding the political context in the region and within and among the State and local jurisdiction(s) will help identify funding opportunities, develop a process for transfer and set expectations for the transfer process. Developing a knowledge of the political context, including agency and community priorities, helps determine if highway jurisdictional transfer is the right tool to accomplish the desired outcomes. Jurisdictional transfer can help achieve community goals and result in mutual benefits – but it is not always the most effective route to achieving desired outcomes for the roadway under consideration.

Once a roadway is selected, taking inventory of each agency’s priorities, elected officials’ interests, and community goals will support a more successful process. Agency priorities will vary and are often influenced by elected officials. Understanding the overall political context will help set expectations for the formal transfer process, ensuring the process and desired outcomes are achievable. Agency

priorities will impact candidate roadways for transfer, available funding sources and levels, and the interests each agency brings to the negotiating table. All these elements should be documented and understood before entering Phase 2 and 3.

Last, identifying the final decision-makers for jurisdictional transfer sets expectation, helps identify realistic outcomes and helps navigate the process to achieve desired outcomes. The decision-makers include those who will agree to enter into negotiations, and those who will sign the transfer documents to formalize the transfer. Section 2.2 describes the necessary steps and documentation. Identifying the approvers early will ensure the process is on track to complete the jurisdictional transfer and avoid backpedaling down the road. It will also set outcomes that are expected to be approved.

#### 4.1.2 Phase 2: Identify and select roadway and identify constraints

Once the foundation for transfer has been established, the agencies are set to identify and select a roadway and identify the constraints to transferring it from one agency to another. Identifying a roadway may hinge on available funding, but best practice indicates that roadways should be selected based on community needs and values. The 2018 RTP recommends the following steps to select roadways for transfer:

- identify state owned routes that the community and stakeholders would like to evaluate and consider for jurisdictional transfer;
- identify gaps and deficiencies on these roadways,
- tier the roadways; and
- address some of the barriers and opportunities to transfer the prioritized routes from state ownership to local ownership.

After the roadway has been selected, constraints should be identified, including both fiscal and physical. Section 3.2 describes common constraints.

#### 4.1.3 Phase 3: Establish intragovernmental agreement and follow the legal process

After the roadway is selected, the agencies can enter into the formal process which implements an intergovernmental agreement. Phase 3 is explained in Section 2 of this memorandum.

## 4.2 Communicate

Communication is central to carry out a jurisdictional transfer process that results in shared desired outcomes. Best practices include:

- Identify clear roles within ODOT and within the involved local jurisdiction(s), such as a jurisdictional transfer specialist, asset manager, agreements specialist, traffic engineer and financial and support services staff. This will allow staff to develop expertise in the process and foster relationships among the involved staff.
- Set expectations for clear, open and frequent communication among each agency's departments and between agencies.
  - Compromise and creativity between the State and local agencies leads to a fair and acceptable agreement. Communication is particularly pertinent during negotiation.
- Conduct early outreach with the impacted communities.
  - The partnering agencies should do their due diligence to understand the community's needs. Early engagement will lead to a smoother process by preventing tension and backpedaling during negotiation and agreement.

## 5. Next Steps

As part of this Study, the Study team is developing a Jurisdictional Transfer Atlas to inventory state-owned highways that might be candidates for jurisdictional transfer. Using the Atlas and OHP roadway classification definitions as references, the Study team will prepare recommendations to the OTC to consider potential updates to OHP roadway classifications based on changes in how the roadway now functions. The team will also develop a toolkit that will include methodologies for how to select individual corridor segments for further study and how to estimate costs for jurisdictional transfer. The toolkit will establish a regional approach for how to assess needs and deficiencies for facilities under consideration for transfer and prepare assessments for each corridor segment. The team will rank corridor segments and address the capacity and readiness of a local agency to receive a facility ODOT for those corridors that are most ready. The team will then prepare a final report that describes points of regional consensus as well as the priorities held by individual partners.

## Appendix A. List of Acronyms

ADA	American with Disabilities Act
CRFCs	Critical Rural Freight Corridors
CUFCs	Critical Urban Freight Corridors
FAST Act	Fixing America's Surface Transportation Act
FHWA	Federal Highway Administration
FTA	Federal Transit Administration
HB	House Bill
HCT	High Capacity Transit
HDM	Highway Design Manual
HWY	Highway
I-	Interstate
IGA	Intergovernmental agreement
JPACT	Joint Policy Advisory Committee on Transportation
MAP-21	Moving Ahead for Progress in the 21 <sup>st</sup> Century Act
MPOs	Metropolitan Planning Organizations
NHFN	National Highway Freight Network
NHS	National Highway System
OAR	Oregon Administrative Rule
ODOT	Oregon Department of Transportation
OHP	Oregon Highway Plan
ORS	Oregon Revised Statute
PBOT	Portland Bureau of Transportation
PHFS	Primary Highway Freight System
ROW	Right of way
RTP	Regional Transportation Plan
SB	Senate Bill
Study	Regional Framework for Highway Jurisdictional Transfer Study
TSP	Transportation System Plan
TV	Tualatin Valley

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# ATTACHMENT C - Corridor Segment Selection Methodology and Evaluation Results

## METRO HIGHWAY JURISDICTIONAL TRANSFER FRAMEWORK

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### Corridor Segment Selection Methodology and Evaluation Results

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Date: June 2020

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#### 1 Introduction

##### 1.1 Purpose of the Regional Framework for Highway Jurisdictional Transfer

The purpose of the regional framework for highway jurisdictional transfer study (study) is to identify which state-owned routes in greater Portland should be evaluated and considered for a jurisdictional transfer, sort them based on regional priorities, and address some of the opportunities and barriers to transfer the routes. For the purposes of this study, jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing ownership of a highway right of way from the State to a local jurisdiction – a city or county. The decision framework will serve as a tool for state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer of roadway ownership. The study is convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

Metro’s 2018 Regional Transportation Plan (RTP) identified a jurisdictional transfer assessment as a necessary step to help the region meet its equity, safety and multimodal goals. In greater Portland, ownership patterns of streets, roads and highways reflect historical patterns, but do not necessarily reflect current transportation, land use and development needs.

Several arterials in greater Portland were originally constructed to provide connections from farmland to the city (referred to as “farm-to-market” roads). Over time, they grew to become highways. In 1956, the federal government began building the Interstate Highway System (known as the Dwight D. Eisenhower National System of Interstate and Defense Highways) and between 1960 and 1980 the highway system in the Portland area was built. It included limited access facilities such as Interstate (I-)5, I-205 and Highway 26, which provided more efficient long-distance travel options and replaced the function of the existing state system. Since then, much of the land surrounding these highways has evolved to accommodate population growth, new development and diversified land use. As a result, many of the original roads now serve multiple travel needs, providing space for people walking and biking, transit and short-distance travel for vehicles. Roadway designs that were useful last century do not always work for our communities today. Managing these roads that used to function as highways to meet the needs of our communities, especially people of color, people with low-incomes, or limited-English speakers has become increasingly complex due to historic lack of investment in areas serving communities of color or communities with lower incomes.

While their function has changed, for many, their roadway classification and physical design has not; those that remain state highways retain the same classification identified in the 1999 Oregon Highway Plan (OHP), as amended. Transferring non-limited access state highways that function as urban arterials

to local jurisdictions could provide the opportunity for them to be re-constructed and operated consistent with local design standards that may respond better to modern transportation uses and mobility options, land use and development patterns, and community needs.

## 1.2 Purpose of the Memorandum

First, this memorandum describes the methodology to evaluate and select the most promising arterial highways in greater Portland as potential candidates for highway jurisdictional transfer. This overall methodology describes the methods for two different evaluations: the technical evaluation and the readiness evaluation. The technical evaluation examines segments using technical considerations related to the existing and future function of the roadway. Starting with a technical perspective allows considerations about the function of a roadway to inform conversations about jurisdictional transfer. The readiness evaluation examines the same universe of segments using readiness considerations related to local support and interest, including characteristics such as jurisdictional capacity, leadership interest, or experience with jurisdictional transfers.

Second, this memorandum describes the results of both the technical evaluation and the readiness evaluation.

Third, this memorandum discusses next steps.

## 2 Corridor Segment Selection Methodology

The corridor segment selection methodology is framed and informed by the four pillars of Metro's 2018 RTP. The RTP identifies ten near-term capital program investment priorities to address greater Portland's most pressing transportation challenges; of these priorities, Metro identified four to act as the RTP pillars. The four pillars, listed below, reflect regional values and provide a basis for the methodology.

- Climate change – expand transit and active transportation networks, and leverage emerging technology to meet Climate Smart Strategy goals
- Equity – reduce disparities and barriers faced by communities of color and other historically marginalized communities
- Safety – reduce fatal and severe injury crashes, particularly focusing on the High Crash Corridor network
- Congestion relief – manage congestion and travel demand through low-cost, high value solutions

The methodology consists of two parallel processes, each consisting of one screening round and one evaluation round, to determine the most promising corridor segments for transfer from ODOT to a local jurisdiction. For the purposes of this evaluation, a corridor segment is defined as a portion of an arterial highway within a single jurisdiction in the Portland Metropolitan Planning Area (MPA).<sup>1, 2</sup>

- Round 1: Preliminary screening of all ODOT-owned arterial highway corridor segments in the Portland MPA to screen out segments that are not viable candidates for jurisdictional transfer because of their intended vehicle throughput function

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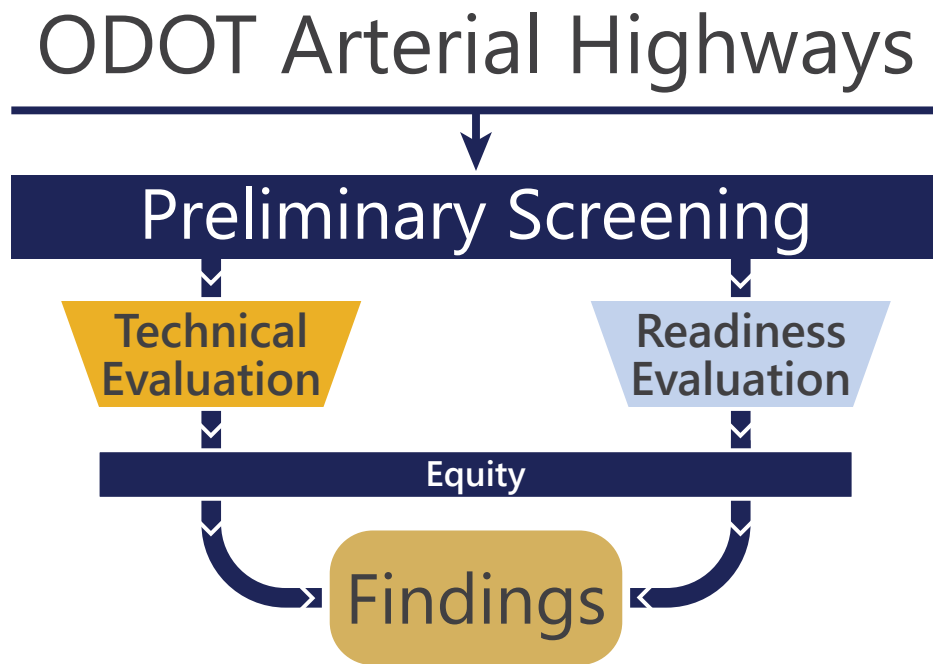
<sup>1</sup> The MPA is a federally-mandated boundary designated by Metro and encompasses all cities in the metropolitan area.

<sup>2</sup> Corridor segment definitions are for this evaluation only. Highway transfer recommendations may combine or split corridor segments based on what makes sense at the time of a transfer.

- Round 2a: Technical evaluation of the remaining segments from Round 1 to select promising segments for potential transfer
- Round 2b: Readiness evaluation of the remaining segments from Round 1 to select promising segments for potential transfer

The results from Round 1, preliminary screening, equally informed subsequent evaluation rounds. After Round 1, the study team evaluated the remaining corridor segments to identify the most promising segments as candidates for jurisdictional transfer from two perspectives: technical (Round 2a) and readiness of the local jurisdictional to accept an arterial (Round 2b). The readiness evaluation lagged the technical evaluation to allow roadway function to inform transfer discussions. The team completed Round 1 and Round 2a in fall 2019, and completed Round 2b in spring 2020. The team will next evaluate and compare results from Round 2a and Round 2b to develop recommendations for consideration. These recommendations will be developed in summer 2020. Figure 1 illustrates this process.

*Figure 1: Technical Evaluation and Readiness Evaluation Process*



## 2.1 Round 1: Preliminary Screening Methods

The purpose of Round 1 was to perform a preliminary screening of all ODOT-owned arterial highway corridor segments in the Portland MPA to screen out segments that are not viable for jurisdictional transfer because of their intended vehicle throughput function.

Round 1 had one yes/no question that identified significant barriers to jurisdictional transfer. The study team applied the question to each corridor segment. Corridor segments that did not “pass” Round 1 did not move to Round 2a or 2b. Corridor segments with a “no” answer to the screening question moved on to Round 2a and 2b. The study team documented the results of the Round 1 evaluation in a matrix. The Round 1 screening question, including rationale, is listed below.

**Question 1:** Does the segment have an Expressway (OHP) and/or Throughway (RTP) designation?

- If no, the segment moved to Round 2 of the evaluation and selection process.

Expressway and Throughway designations indicate that a roadway or corridor segment has statewide or regional significance and describes the function of the roadway.

**Expressways**, as designated by the OHP, are excluded as candidates for transfer because they have statewide significance as their primary purpose is to provide travel between cities and connections to ports and major recreation areas. They also serve long distance, intra-urban travel within metropolitan areas. Expressways are meant to provide safe travel for high speed and high-volume traffic with minimal interruption. Clackamas Highway/Sunrise Expressway (OR 224) is an example of an expressway.

**Throughways**, as designated by the RTP, are excluded as candidates for transfer because they have statewide and regional significance and serve as mobility routes with little or no property access and as connections between major destinations across the region and state. They generally span several jurisdictions and link greater Portland with neighboring cities, other parts of the state, other states and Canada. They also connect major activity centers within the region, including the Central City, regional centers, industrial areas and intermodal facilities. Lower Columbia River Highway (US 30W) is an example of a throughway.

## 2.2 Round 2a: Technical Evaluation and Selection Methods

The purpose of Round 2a was to evaluate the remaining corridor segments with a consistent set of technical criteria that reflect regional values (i.e., consistent with the RTP and its four pillars).

The study team evaluated and selected corridor segments using the matrix shown in Table 1. The matrix includes four categories: criteria, measure, rating/definition, and RTP pillar. The RTP pillar columns indicate which of the four RTP pillars each criterion addresses. The team measured the corridor segment's performance for each criterion by answering the measure questions according to the rating/definition provided in the matrix. Using professional expertise, the team intentionally developed measures and corresponding questions to avoid complicated technical analysis, allowing any jurisdiction to evaluate its own roadways.

Each measure was rated as high, medium, or low. A "high" rating means that the evaluated segment is more promising for jurisdictional transfer; a "medium" rating is somewhat promising for jurisdictional transfer; and a "low" rating is less promising for jurisdictional transfer under the technical evaluation criterion. The rating/definition is color coded so that high = dark blue, medium = blue, and low = light blue. The results allow the study team and partners to visually identify patterns and outliers. It is important to note that the criteria are listed in *no particular order* and are *not weighted*, providing a more flexible process and accounting for differences among local jurisdiction context and preferences.

After the study team evaluated the corridor segments, they used the results to select segments that appeared most promising for jurisdictional transfer, from a technical perspective. The evaluation was based on the overall results, so that the segments receiving more "high" and "medium" ratings were selected. The study team presented the selected corridor segments at Workshop #2 on December 18, 2019 to receive feedback from partners. Technical evaluation and selection results are included in Section 3.1 of this memorandum.

# Attachment C

**Table 1. Round 2a Technical Evaluation Methods Matrix**

Criteria	Measure	Rating/Definition	RTP Pillar			
			Climate Change/ 2040 Growth Concept	Equity	Safety	Congestion Relief
Local plans	Does the segment have a plan or vision?	<b>High:</b> Yes <b>Low:</b> No	✓			
Access to business and housing	Is the segment located within a 2040 designated Central City, Regional Center, Town Center, Station Community or Main Street?	<b>High:</b> Yes, one or more <b>Low:</b> No	✓	✓		
Historically marginalized communities <sup>1</sup>	Is the segment located within a historically marginalized community (communities that exceed the regional rate for low income, people of color, or limited English proficiency)?	<b>High:</b> Yes, 50% or more of the segment <b>Medium:</b> Yes, less than 50% of the segment <b>Low:</b> No		✓		
Crash frequency	Is the segment identified on Metro’s High Injury Corridors and Intersections in Greater Portland map and what is the density of Safety Priority Index System (SPIS) sites per mile?	<b>High:</b> The segment is identified on High Injury Corridors/ Intersection Map OR has 20 or more SPIS sites per mile <b>Medium:</b> The segment is not identified on High Injury Corridors/ Intersection Map and has 10 – 19 SPIS sites per mile <b>Low:</b> The segment is not identified on High Injury Corridors/ Intersection Map and has fewer than 10 SPIS sites per mile			✓	

Criteria	Measure	Rating/Definition	RTP Pillar			
			Climate Change/ 2040 Growth Concept	Equity	Safety	Congestion Relief
Density of conflict points	What is the segment's driveway density per mile?	<b>High:</b> 25 or more per mile <b>Medium:</b> 10 to 24 per mile <b>Low:</b> Less than 10 per mile			✓	✓
Freight connection <sup>2</sup>	Is the segment not listed as a designated National Highway System (NHS) freight connector or RTP freight route?	<b>High:</b> Yes <b>Low:</b> No				✓
Pedestrian system priority	Is the segment part of the regional pedestrian network?	<b>High:</b> Yes, 50% or more of the segment is classified as pedestrian parkway or regional pedestrian corridor <b>Medium:</b> Yes, less than 50% of the segment is classified as pedestrian parkway or regional pedestrian corridor <b>Low:</b> No	✓	✓	✓	✓
	Does the segment intersect with one or more regional pedestrian district(s)?	<b>High:</b> Yes <b>Low:</b> No	✓	✓	✓	✓
Bicycle system priority	Is the segment part of the regional bicycle network?	<b>High:</b> Yes, 50% or more of the segment is classified as bicycle parkways or regional bikeways <b>Medium:</b> Yes, less than 50% of the segment is classified as bicycle parkways or regional bikeways <b>Low:</b> No	✓	✓	✓	✓

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Criteria	Measure	Rating/Definition	RTP Pillar			
			Climate Change/ 2040 Growth Concept	Equity	Safety	Congestion Relief
	Does the segment intersect with one or more regional bicycle district(s)?	<b>High:</b> Yes <b>Low:</b> No	✓	✓	✓	✓
Transit Priority	Is there existing frequent <sup>3</sup> transit service or major transit investments planned along the segment?	<b>High:</b> Yes, one or more existing frequent service lines or major transit investments planned <b>Medium:</b> No, one or more standard or peak-hour service lines <b>Low:</b> No transit lines	✓	✓	✓	✓
	If yes, do the transit stops exist within ¼ mile of a Central City, Regional Center, Town Center, Station Community or Main Street?	<b>High:</b> Yes, multiple stops that serve different lines or at least one stop that serves multiple lines <b>Medium:</b> Yes, one or more stops that serve one line <b>Low:</b> No	✓	✓	✓	✓
Redundant route	Is the segment redundant to an RTP Throughway?	<b>High:</b> Yes <b>Low:</b> No				✓
<p>Notes:</p> <p><sup>1</sup> Community engagement would be necessary to validate that any proposed roadway improvements are consistent with the community’s vision and needs.</p> <p><sup>2</sup> Note that some segments may be designated Oregon Revised Statute (ORS) 366.215 routes. These routes must permanently retain existing vertical and horizontal clearance dimensions (“hole in the air”) to accommodate oversized freight vehicles, unless ODOT grants an exception.</p> <p><sup>3</sup> TriMet defines frequent service as transit that runs every 15 minutes or better most of the day, every day.</p>						

## 2.3 Round 2b: Readiness Evaluation and Selection Methods

The purpose of Round 2b was to evaluate the remaining segments (after Round 1) with a consistent set of readiness criteria. This was the same group of segments evaluated in Round 2a. The project team evaluated the corridor segments using the matrix shown in Table 2. Measures with an asterisk in Table 2 were evaluated where possible via an interview with a staff representative from the local jurisdiction



where the highway segment is physically located. Professional judgment was used in cases where an interview response was not available. The interview guide is included as Appendix B.

The matrix includes three categories: criteria, measure, and rating/definition. The team measured the corridor segment’s performance for each criterion by answering the measure questions according to the rating/definition provided in the matrix. Using professional expertise, the team intentionally developed measures and corresponding questions to avoid complicated analysis, allowing any jurisdiction to evaluate its own roadways. Each readiness measure is rated as high, medium, or low. A “high” rating means that the evaluated segment is more promising for jurisdictional transfer; a “medium” rating is promising for jurisdictional transfer; and a “low” rating is less promising for jurisdictional transfer. The rating/definition is color coded so that high = dark blue, medium = blue, and low = light blue. The results allowed the study team and partners to visually identify patterns and outliers. It is important to note that the criteria are listed in *no particular order* and are *not weighted*, providing a more flexible process and accounting for differences among local jurisdiction context and preferences.

After the study team evaluated the corridor segments, they used the results to select segments that appeared most promising for jurisdictional transfer, from a readiness perspective. The evaluation was based on overall results, so that the segments receiving more “high” and “medium” ratings were selected. Readiness evaluation and selection results are included in Section 3.2 of this memorandum.

**Table 2. Round 2b Readiness Evaluation Methods Matrix**

Criteria	Measure <sup>1</sup>	Rating/Definition
Jurisdiction Interest	Is there known local support for a jurisdictional transfer (political interest, risk tolerance, etc.)? *	<b>High:</b> Lots of support <b>Medium:</b> Some support <b>Low:</b> Opposition to transfer
Segmentation	Does the segmentation make sense?*	<b>High:</b> Yes <b>Medium:</b> Somewhat <b>Low:</b> No
Funding capacity	What dollar amount (in 2018-2021 or 2021-2024 STIP, MTIP or local CIP) of capital investment is committed to the segment that could be used as leverage for jurisdictional transfer? <sup>2</sup>	<b>High:</b> More than \$10M/mile funding <b>Medium:</b> Funding greater than \$0/mile but less than \$10M/mile <b>Low:</b> \$0/mile funding
	How familiar is the jurisdiction with delivery of a larger-scale project?*	<b>High:</b> Very familiar <b>Medium:</b> Some experience/familiarity <b>Low:</b> Not familiar/no experience
Maintenance capacity	Are there currently or could there be resources, staff capacity or agreements to maintain the segment?*	<b>High:</b> Yes <b>Medium:</b> Maybe <b>Low:</b> No

Criteria	Measure <sup>1</sup>	Rating/Definition
Existing conditions and state of maintenance	What is the current condition of the existing roadway assets?*	<b>High:</b> Very good to good <b>Medium:</b> Fair <b>Low:</b> Poor to very poor
	What is the pavement condition of the segment?	<b>High:</b> Very good to good <b>Medium:</b> Fair <b>Low:</b> Poor to very poor
	How many lane miles of pavement are there in the segment? <sup>2</sup>	<b>High:</b> Up to 15 lane miles <b>Medium:</b> 15-30 lane miles <b>Low:</b> Over 30 lane miles
Bridges/structures	Do bridges or structures exist on the segment? <sup>2</sup>	<b>High:</b> Less than four <b>Medium:</b> four to eight <b>Low:</b> More than 8
Environmental	Does the segment pass through an environmentally sensitive areas (defined as wetlands, riparian or upland habitats, such that any ground disturbance would trigger a need for environmental permits?)	<b>High:</b> Less than 25% (linear feet of segment) <b>Medium:</b> 25% to 75% (linear feet of segment) <b>Low:</b> More than 75% (linear feet of segment)
Land use	Are there active land use change discussions in the area (e.g., plan, development code, pedestrian-friendly design, etc.)?*	<b>High:</b> Yes <b>Low:</b> No
<p>Notes:</p> <p><sup>1</sup>Measures with an asterisk (*) were evaluated where possible via an interview with a staff representative from the local jurisdiction where the highway segment is located. Professional judgment was used in cases where interview responses were not available.</p> <p><sup>2</sup>The high, medium and low splits for the funding measure, lane miles and bridges were all defined by the natural break in the data.</p>		

## 2.4 Segment Selection Recommendation Methods

After the project team completes the evaluations described in Sections 2.1, 2.2, and 2.3, the team will compare the results of the technical evaluation (Round 2a) and the readiness evaluation (Round 2b). This comparison will be informed by the project team’s Equity Considerations analysis, which evaluated highway corridors for levels of people of color, low-income households, people who are unemployed and people with limited English proficiency and/or disabilities. The project team will select a minimum of the six segments with the highest scores from each of the evaluations (for a minimum total of 12 segments) as recommendations for the most promising candidates for jurisdictional transfer. The team will also consider other segments for reasons such as roadway designation continuity, equity, relatively higher scores in each evaluation, etc. for a full recommendation.

### 3 Evaluation and Results

#### 3.1 Round 1: Evaluation and Results

As described in Section 2.1, the purpose of Round 1 was to perform a preliminary screening of all ODOT-owned arterial highway corridor segments in the Portland MPA to screen out segments not viable for jurisdictional transfer because of their intended vehicle throughput function.

Table 3 lists each of the 77 highway segments and identifies if the segment is classified as either an OHP Expressway or as an RTP Throughway. Thirty segments are classified as RTP Throughways, OHP Expressways, or both. These segments are shaded in gray and did not move on to the Round 2a or 2b evaluation. Figure 2 also shows these segments.

**Table 3. Round 1: Preliminary Screening Results: RTP Throughways and OHP Expressways on ODOT Arterial Highways in the Portland MPA**

Segment ID <sup>1</sup>	Mile Point begin <sup>2</sup>	Mile Point end <sup>2</sup>	Jurisdiction	Throughway	Expressway
<b>OR 8 - TV Highway</b>					
A1	0.1	5.9	Beaverton	No	No
A2	5.9	7.8	Washington	No	No
A3	7.8	14.3	Hillsboro	No	No
A4	14.3	14.9	Washington	No	No
A5	14.9	17.2	Cornelius	No	No
A6	17.2	17.9	Forest Grove	No	No
<b>OR 47 - TV Highway</b>					
A7	17.9	19.4	Forest Grove	Yes	No
A8	19.4	23.2	Washington	Yes	No
<b>OR 10 - Beaverton-Hillsdale/Farmington Highway</b>					
B1	2.6	3.4	Washington	No	No
B2	1.0	2.6	Beaverton	No	No
B3	5.9	7.4	Washington	No	No
<b>U.S.26 - Mount Hood Highway</b>					
C1	0.2	10.0	Portland	No	No
C2	14.2	15.6	Gresham	Yes	Yes
C3	15.6	16.8	Multnomah	Yes	Yes
C4	16.8	19.6	Clackamas	Yes	Yes
<b>OR 30B - Northeast Portland Highway</b>					
D1	0	14.7	Portland	No	No
<b>OR 30E - Historic Columbia Highway</b>					
E1	1.2	5.8	Multnomah	No	No
E2	0	1.2	Troutdale	No	No
<b>OR 30W - Lower Columbia River Highway</b>					
F1	2.8	9.7	Portland	Yes	No

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Segment ID <sup>1</sup>	Mile Point begin <sup>2</sup>	Mile Point end <sup>2</sup>	Jurisdiction	Throughway	Expressway
F2	9.7	13.3	Multnomah	Yes	No
<b>OR 43 - Oswego Highway</b>					
G1	0	3.6	Portland	No	No
G2	3.6	5.1	Multnomah	No	No
G3	5.1	5.8	Clackamas	No	No
G4	5.8	8.0	Lake Oswego	No	No
G5	8.0	11.5	West Linn	No	No
G6	11.5	11.6	Oregon City	No	No
<b>OR 47 - Nehalem Highway</b>					
H1	88.5	90.2	Washington	Yes	No
H2	90.2	90.6	Forest Grove	Yes	No
<b>OR 99E - Pacific Highway East</b>					
I1	-5.7	-5.9	Portland	Yes	No
I2	-5.9	-3.8	Portland	No	No
I3	1.5	4.6	Portland	Yes	No
I4	4.6	5.7	Milwaukie	Yes	No
I5	5.7	6.7	Milwaukie	No	No
I6	6.7	10.4	Clackamas	No	No
I7	10.4	11.2	Gladstone	No	No
I8	11.2	12.4	Oregon City	No	No
I9	12.4	14.2	Oregon City	Yes	No
I10	14.2	16.4	Clackamas	Yes	No
<b>OR 99W - Pacific Highway West</b>					
J1	-6.0	-4.8	Portland	No	No
J2	1.2	7.6	Portland	No	No
J3	7.6	11.5	Tigard	No	No
J4	11.5	12.2	Washington	No	No
J5	12.2	13.3	Tualatin	No	No
J6	13.3	14.5	Washington	No	No
J7	14.5	16.7	Sherwood	Yes	No
J8	16.7	17.9	Washington	Yes	No
<b>OR 141 - Beaverton-Tualatin Highway/SW Hall Blvd</b>					
K1	2.6	3.3	Beaverton	No	No
K2	3.3	4.1	Washington	No	No
K3	4.1	7.1	Tigard	No	No
K4	7.7	7.8	Tigard	No	No
K5	7.8	8.9	Durham	No	No
K6	8.9	8.9	Tualatin	No	No

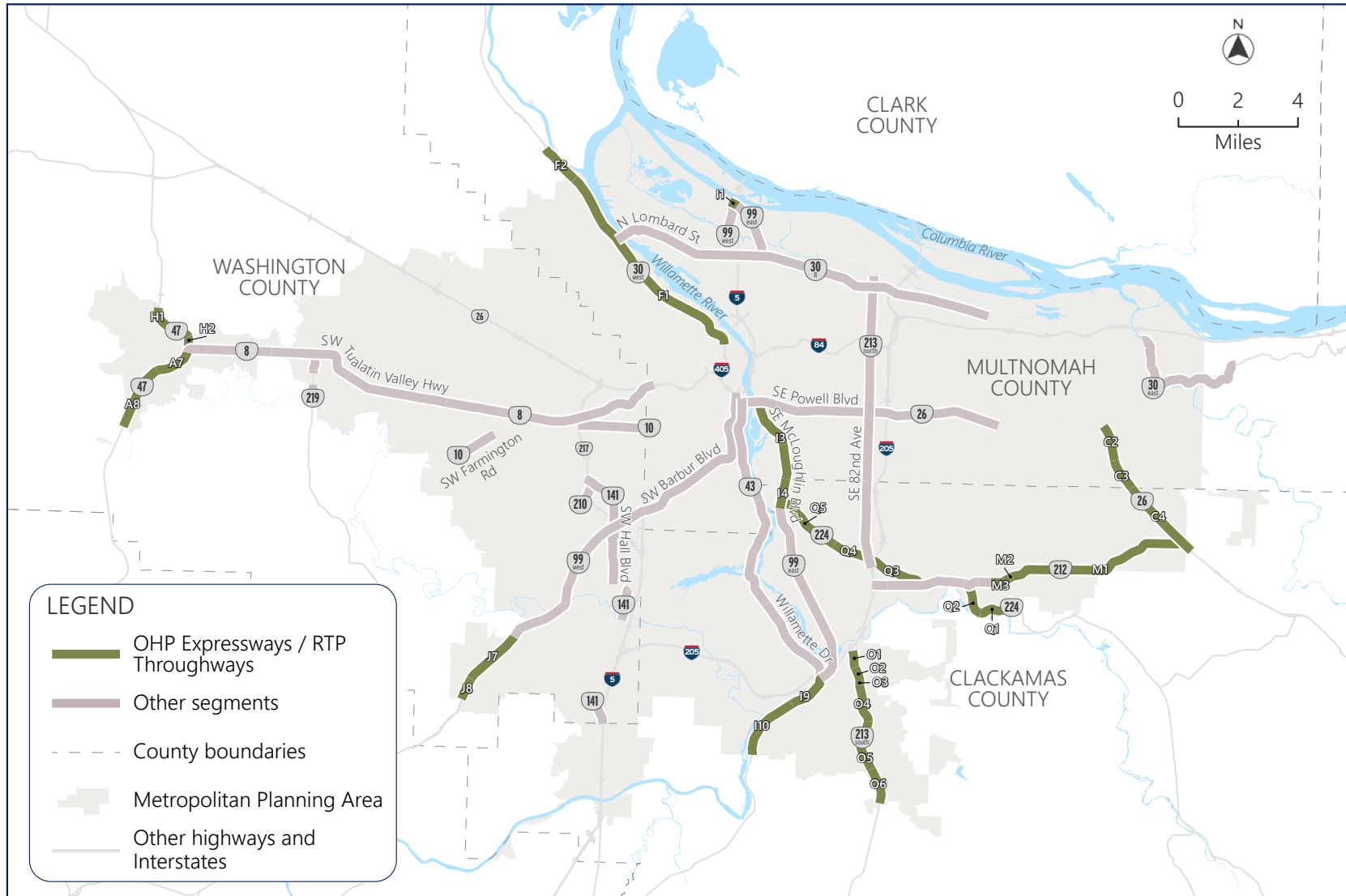
Segment ID <sup>1</sup>	Mile Point begin <sup>2</sup>	Mile Point end <sup>2</sup>	Jurisdiction	Throughway	Expressway
K7	12.5	13.1	Wilsonville	No	No
OR 210 - Scholls Highway/SW Scholls Ferry Rd					
L1	9.6	9.1	Beaverton	No	No
OR 212 - Clackamas-Boring Highway					
M1	1.9	8.6	Clackamas	Yes	No
M2	1.8	1.9	Happy Valley	Yes	No
M3	1.0	1.8	Clackamas	Yes	No
M4	0.6	1.0	Clackamas	No	No
M5	0.5	0.6	Happy Valley	No	No
M6	0.0	0.5	Clackamas	No	No
M7	5.5	0.0	Happy Valley	No	No
M8	4.9	5.5	Clackamas	No	No
OR 213N - Cascade Highway North					
N1	-0.1	7.2	Portland	No	No
N2	7.2	10.4	Clackamas	No	No
OR 213S - Cascade Highway South					
O1	0.0	0.6	Oregon City	Yes	Yes
O2	0.6	1.1	Clackamas	Yes	Yes
O3	1.1	1.3	Oregon City	Yes	Yes
O4	1.3	2.6	Clackamas	Yes	Yes
O5	2.6	4.2	Oregon City	Yes	Yes
O6	4.2	6.5	Clackamas	Yes	No
OR 219 - Hillsboro-Silverton Highway					
P1	0.0	0.6	Hillsboro	No	No
P2	0.6	1.39	Washington	No	No
OR 224 - Clackamas Highway/Sunrise Expressway					
Q1	9.4	10.5	Clackamas	Yes	No
Q2	8.2	9.5	Happy Valley	Yes	No
Q3	4.6	6.3	Clackamas	Yes	No
Q4	2.7	3.8	Clackamas	Yes	Yes
Q5	0.0	2.7	Milwaukie	Yes	Yes

Notes:

<sup>1</sup>Rows that are highlighted in gray and have a **Yes** are arterial highway segments that are OHP Expressways and/or RTP Throughways. These segments not viable for jurisdictional transfer because of their intended vehicle throughput function and will not advance to the Round 2a or 2b evaluations.

<sup>2</sup> ODOT convention allows some Mile Points to be negative numbers.

# Attachment C



**Figure 2.** Designated OHP Expressways and/or RTP Throughways on arterial highways in the Portland Metropolitan Planning Area

### 3.2 Round 2a: Technical Evaluation and Results

As described in Section 2.2, the purpose of Round 2a was to evaluate the remaining corridor segments with a consistent set of technical criteria that reflect regional values (i.e., consistent with the RTP pillars). The study team evaluated each of the 48 non-throughway and non-expressway corridor segments with the criteria, measures, and ratings/definitions found in Table 1. The study team weighted the “high” scoring criteria with 2 points, the “medium” scoring criteria with 1 point, and the “low” scoring criteria with zero points. The study team aggregated the total scores for each of the segments. The highest scoring segments had 26 points. The team divided the range of scores into thirds. The segments scoring in the top third (17-26 points) are the most promising candidates for jurisdictional transfer from a technical perspective in that they function more like a local roadway than a state roadway.

Of the 47 evaluated segments, the study team identified 25 segments that scored 17-26 points and are the most promising candidates for jurisdictional transfer from a technical perspective. These segments are listed and highlighted in gray in Table 4 and shown in dark blue on Figure 3. Table 4 and Figure 3 also identify which segments scored 8-16 points (medium blue) and which segments scored 0-7 points (light blue). A complete table of analysis is shown in Appendix C.

**Table 4. Round 2a: Technical Evaluation Results**

Segment ID	Mile Point begin <sup>1</sup>	Mile Point end <sup>1</sup>	Jurisdiction	Technically Promising for Transfer? <sup>2</sup>
<b>OR 8 - TV Highway</b>				
A1	0.1	5.9	Beaverton	<b>Yes - High</b>
A2	5.9	7.8	Washington	<b>Yes - High</b>
A3	7.8	14.3	Hillsboro	<b>Yes - High</b>
A4	14.3	14.9	Washington	Medium
A5	14.9	17.2	Cornelius	<b>Yes - High</b>
A6	17.2	17.9	Forest Grove	<b>Yes - High</b>
<b>OR 10 - Beaverton-Hillsdale/Farmington Highway</b>				
B1	2.6	3.4	Washington	<b>Yes - High</b>
B2	1.0	2.6	Beaverton	Medium
B3	5.9	7.4	Washington	Medium
<b>U.S.26 - Mount Hood Highway</b>				
C1	0.2	10.0	Portland	<b>Yes - High</b>
<b>OR 30B - Northeast Portland Highway</b>				
D1	0	14.7	Portland	<b>Yes - High</b>
<b>OR 30E - Historic Columbia Highway</b>				
E1	1.2	5.8	Multnomah	Low
E2	0	1.2	Troutdale	Medium

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Segment ID	Mile Point begin <sup>1</sup>	Mile Point end <sup>1</sup>	Jurisdiction	Technically Promising for Transfer? <sup>2</sup>
<b>OR 43 - Oswego Highway</b>				
G1	0	3.6	Portland	<b>Yes - High</b>
G2	3.6	5.1	Multnomah	Low
G3	5.1	5.8	Clackamas	Medium
G4	5.8	8.0	Lake Oswego	<b>Yes - High</b>
G5	8.0	11.5	West Linn	<b>Yes - High</b>
G6	11.5	11.6	Oregon City	Medium
<b>OR 99E - Pacific Highway East</b>				
I2	-5.9	-3.8	Portland	Medium
I5	5.7	6.7	Milwaukie	<b>Yes - High</b>
I6	6.7	10.4	Clackamas	<b>Yes - High</b>
I7	10.4	11.2	Gladstone	<b>Yes - High</b>
I8	11.2	12.4	Oregon City	<b>Yes - High</b>
<b>OR 99W - Pacific Highway West</b>				
J1	-6.0	-4.8	Portland	<b>Yes - High</b>
J2	1.2	7.6	Portland	<b>Yes - High</b>
J3	7.6	11.5	Tigard	<b>Yes - High</b>
J4	11.5	12.2	Washington	<b>Yes - High</b>
J5	12.2	13.3	Tualatin	Medium
J6	13.3	14.5	Washington	Medium
<b>OR 141 - Beaverton-Tualatin Highway/SW Hall Blvd</b>				
K1	2.6	3.3	Beaverton	<b>Yes - High</b>
K2	3.3	4.1	Washington	<b>Yes - High</b>
K3	4.1	7.1	Tigard	<b>Yes - High</b>
K4	7.7	7.8	Tigard	Medium
K5	7.8	8.9	Durham	Medium
K6	8.9	8.9	Tualatin	Medium
K7	12.5	13.1	Wilsonville	Medium
<b>OR 210 - Scholls Highway/SW Scholls Ferry Rd</b>				
L1	9.6	9.1	Beaverton	<b>Yes - High</b>
<b>OR 212 - Clackamas-Boring Highway</b>				
M4	0.6	1.0	Clackamas	Medium
M5	0.5	0.6	Happy Valley	Medium
M6	0.0	0.5	Clackamas	Medium
M7	5.5	0.0	Happy Valley	Medium
M8	4.9	5.5	Clackamas	Medium



Segment ID	Mile Point begin <sup>1</sup>	Mile Point end <sup>1</sup>	Jurisdiction	Technically Promising for Transfer? <sup>2</sup>
<b>OR 213N - Cascade Highway North</b>				
N1	-0.1	7.2	Portland	<b>Yes - High</b>
N2	7.2	10.4	Clackamas	<b>Yes - High</b>
<b>OR 219 - Hillsboro-Silverton Highway</b>				
P1	0.0	0.6	Hillsboro	Medium
P2	0.6	1.39	Washington	Medium

Notes:

<sup>1</sup> ODOT convention allows some Mile Points to be negative numbers.

<sup>2</sup> Rows that are highlighted in gray and have a **Yes - High** are arterial highway segments that scored 17-26 points in the Round 2a technical evaluations. These segments are identified as the most promising candidates for jurisdictional transfer from a technical perspective. Segments that have a Medium scored 8-16 points and segments that have a Low scored 0-7 in the Round 2a technical evaluations.

### 3.3 Round 2b: Readiness Evaluation and Results

As described in Section 2.3, the purpose of Round 2b was to evaluate the remaining corridor segments (those remaining after Round 1) with a consistent set of readiness criteria. This is the same group of segments evaluated in the Round 2a Technical Evaluation. The study team evaluated each of the 48 non-throughway and non-expressway corridor segments with the criteria, measures, and ratings/definitions found in Table 2.

The study team weighted the “high” scoring criteria with 2 points, the “medium” scoring criteria with 1 point, and the “low” scoring criteria with zero points. The study team then aggregated the total scores for each of the segments. The team divided the range of scores into thirds. The segments scoring in the top third are the most promising candidates for jurisdictional transfer from a readiness perspective. That means local jurisdictions are more capable and willing to assume the responsibilities of the roadway, and the roadway itself is in adequate condition with minimal barriers to ownership from the perspective of the local jurisdiction.

Of the 47 evaluated segments, the study team identified 14 segments that scored in the top third of points (14-22) and are the most promising candidates for jurisdictional transfer from a readiness perspective. These segments are listed and highlighted in gray in Table 5 and shown in dark blue on Figure 4. Table 5 and Figure 4 also identify which segments scored in the middle third with 8-13 points (medium blue) and which segments scored in the lowest third with 0-7 points (light blue). A complete table of analysis is shown in Appendix D.

**Table 5. Round 2b: Readiness Evaluation Results**

Segment ID	Mile Point begin <sup>1</sup>	Mile Point end <sup>1</sup>	Jurisdiction	High Rank for Transfer Readiness? <sup>2</sup>
<b>OR 8 - TV Highway</b>				
A1	0.1	5.9	Beaverton	<b>Yes - High</b>
A2	5.9	7.8	Washington	Medium
A3	7.8	14.3	Hillsboro	Medium
A4	14.3	14.9	Washington	Medium

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Segment ID	Mile Point begin <sup>1</sup>	Mile Point end <sup>1</sup>	Jurisdiction	High Rank for Transfer Readiness? <sup>2</sup>
A5	14.9	17.2	Cornelius	Medium
A6	17.2	17.9	Forest Grove	Medium
<b>OR 10 - Beaverton-Hillsdale/Farmington Highway</b>				
B1	2.6	3.4	Washington	Medium
B2	1.0	2.6	Beaverton	Medium
B3	5.9	7.4	Washington	<b>Yes - High</b>
<b>U.S.26 - Mount Hood Highway</b>				
C1	0.2	10.0	Portland	<b>Yes - High</b>
<b>OR 30B - Northeast Portland Highway</b>				
D1	0	14.7	Portland	Medium
<b>OR 30E - Historic Columbia Highway</b>				
E1	1.2	5.8	Multnomah	Medium
E2	0	1.2	Troutdale	Medium
<b>OR 43 - Oswego Highway</b>				
G1	0	3.6	Portland	Medium
G2	3.6	5.1	Multnomah	Medium
G3	5.1	5.8	Clackamas	Medium
G4	5.8	8.0	Lake Oswego	Medium
G5	8.0	11.5	West Linn	<b>Yes - High</b>
G6	11.5	11.6	Oregon City	Medium
<b>OR 99E - Pacific Highway East</b>				
I2	-5.9	-3.8	Portland	Medium
I5	5.7	6.7	Milwaukie	<b>Yes - High</b>
I6	6.7	10.4	Clackamas	Medium
I7	10.4	11.2	Gladstone	Low
I8	11.2	12.4	Oregon City	Medium
<b>OR 99W - Pacific Highway West</b>				
J1	-6.0	-4.8	Portland	Medium
J2	1.2	7.6	Portland	<b>Yes - High</b>
J3	7.6	11.5	Tigard	<b>Yes - High</b>
J4	11.5	12.2	Washington	Medium
J5	12.2	13.3	Tualatin	Medium
J6	13.3	14.5	Washington	<b>Yes - High</b>
<b>OR 141 - Beaverton-Tualatin Highway/SW Hall Blvd</b>				
K1	2.6	3.3	Beaverton	Medium
K2	3.3	4.1	Washington	<b>Yes - High</b>
K3	4.1	7.1	Tigard	<b>Yes - High</b>
K4	7.7	7.8	Tigard	<b>Yes - High</b>

Segment ID	Mile Point begin <sup>1</sup>	Mile Point end <sup>1</sup>	Jurisdiction	High Rank for Transfer Readiness? <sup>2</sup>
K5	7.8	8.9	Durham	<b>Yes - High</b>
K6	8.9	8.9	Tualatin	Medium
K7	12.5	13.1	Wilsonville	<b>Yes - High</b>
<b>OR 210 - Scholls Highway/SW Scholls Ferry Rd</b>				
L1	9.6	9.1	Beaverton	Medium
<b>OR 212 - Clackamas-Boring Highway</b>				
M4	0.6	1.0	Clackamas	Medium
M5	0.5	0.6	Happy Valley	Medium
M6	0.0	0.5	Clackamas	Medium
M7	5.5	0.0	Happy Valley	Medium
M8	4.9	5.5	Clackamas	Medium
<b>OR 213N - Cascade Highway North</b>				
N1	-0.1	7.2	Portland	<b>Yes - High</b>
N2	7.2	10.4	Clackamas	Medium
<b>OR 219 - Hillsboro-Silverton Highway</b>				
P1	0.0	0.6	Hillsboro	Medium
P2	0.6	1.39	Washington	Medium

Notes:

<sup>1</sup> ODOT convention allows some Mile Points to be negative numbers.

<sup>2</sup> Rows that are highlighted in gray and have a Yes - High are arterial highway segments that scored 14-22 points in the Round 2b readiness evaluations. These segments are identified as the most promising candidates for jurisdictional transfer from a readiness perspective. Segments that have a Medium scored 8-13 points and segments that have a Low scored 0-7 in the Round 2b readiness evaluations.

## 4 Next Steps

The study team completed Round 1 and Round 2a in fall 2019. Project partners reviewed the results of the evaluation and selection process at Workshop #2 on December 18, 2019. The study team completed Round 2b – readiness evaluation – in May 2020. The readiness evaluation lagged the technical evaluation to allow roadway function to inform transfer discussions. The next step for the study is to evaluate and compare results from Round 2a and Round 2b to develop recommendations for consideration. This evaluation will be informed by the Equity Considerations analysis completed in April 2020. For the equity analysis, the project team examined corridor segments for levels of people of color, low-income households, the unemployed and people with limited English proficiency and/or disabilities. An equity lens provides further information for jurisdictional transfer recommendations. The comparison and recommendation step will take place during spring/summer 2020.

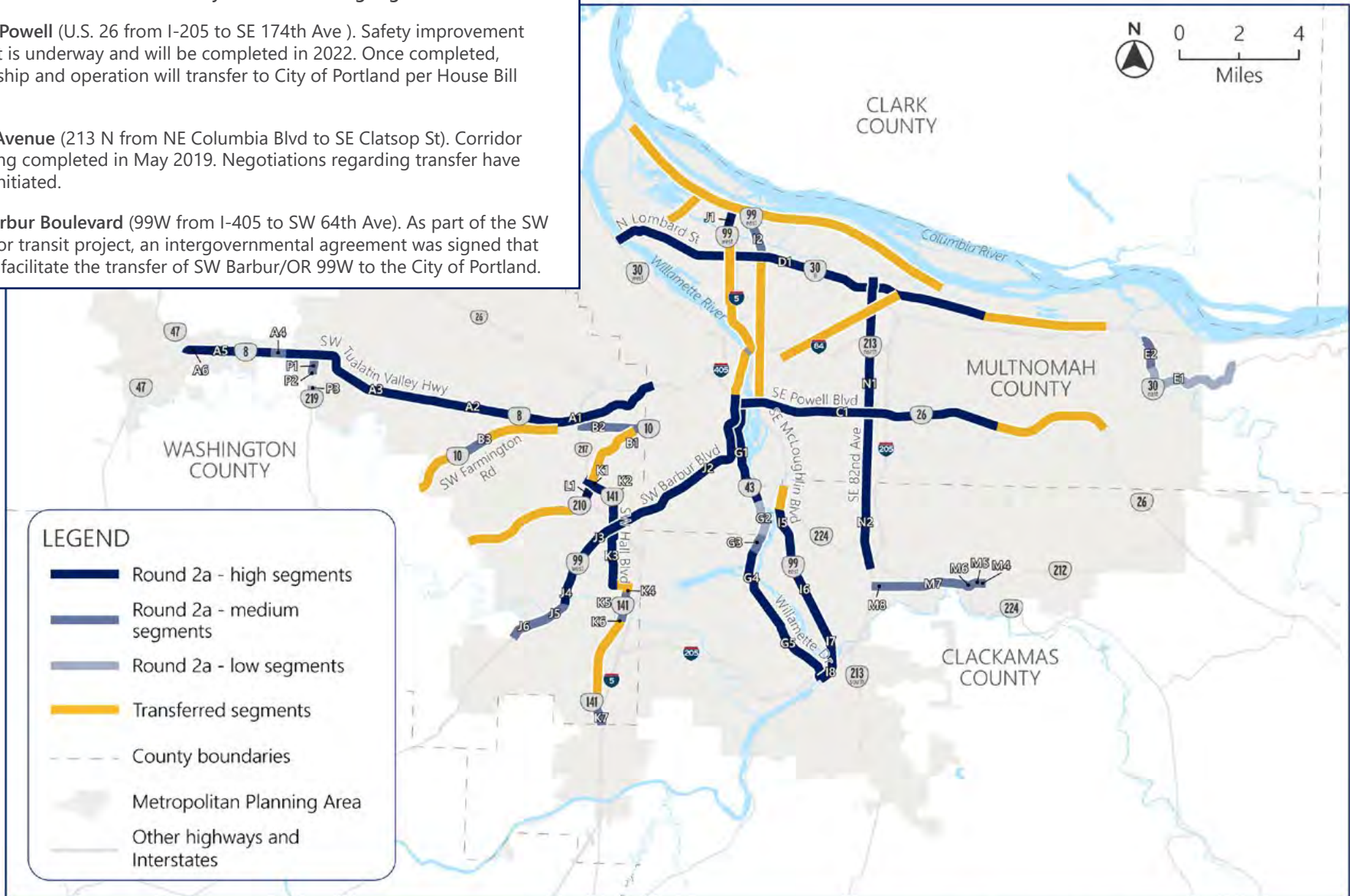
The study will conclude with a final report and recommendation for regional next steps regarding highway jurisdictional transfer. The study is intended to help the jurisdictional transfer process be more streamlined and transparent. Upon completion, Metro will share the study outcomes with regional partners.

Transfer discussions are underway for the following segments:

**Outer Powell** (U.S. 26 from I-205 to SE 174th Ave). Safety improvement project is underway and will be completed in 2022. Once completed, ownership and operation will transfer to City of Portland per House Bill 2017.

**82nd Avenue** (213 N from NE Columbia Blvd to SE Clatsop St). Corridor planning completed in May 2019. Negotiations regarding transfer have been initiated.

**SW Barbur Boulevard** (99W from I-405 to SW 64th Ave). As part of the SW Corridor transit project, an intergovernmental agreement was signed that would facilitate the transfer of SW Barbur/OR 99W to the City of Portland.



**Figure 3.** Round 2a Technical Evaluation: segments in the Portland Metropolitan Planning Area

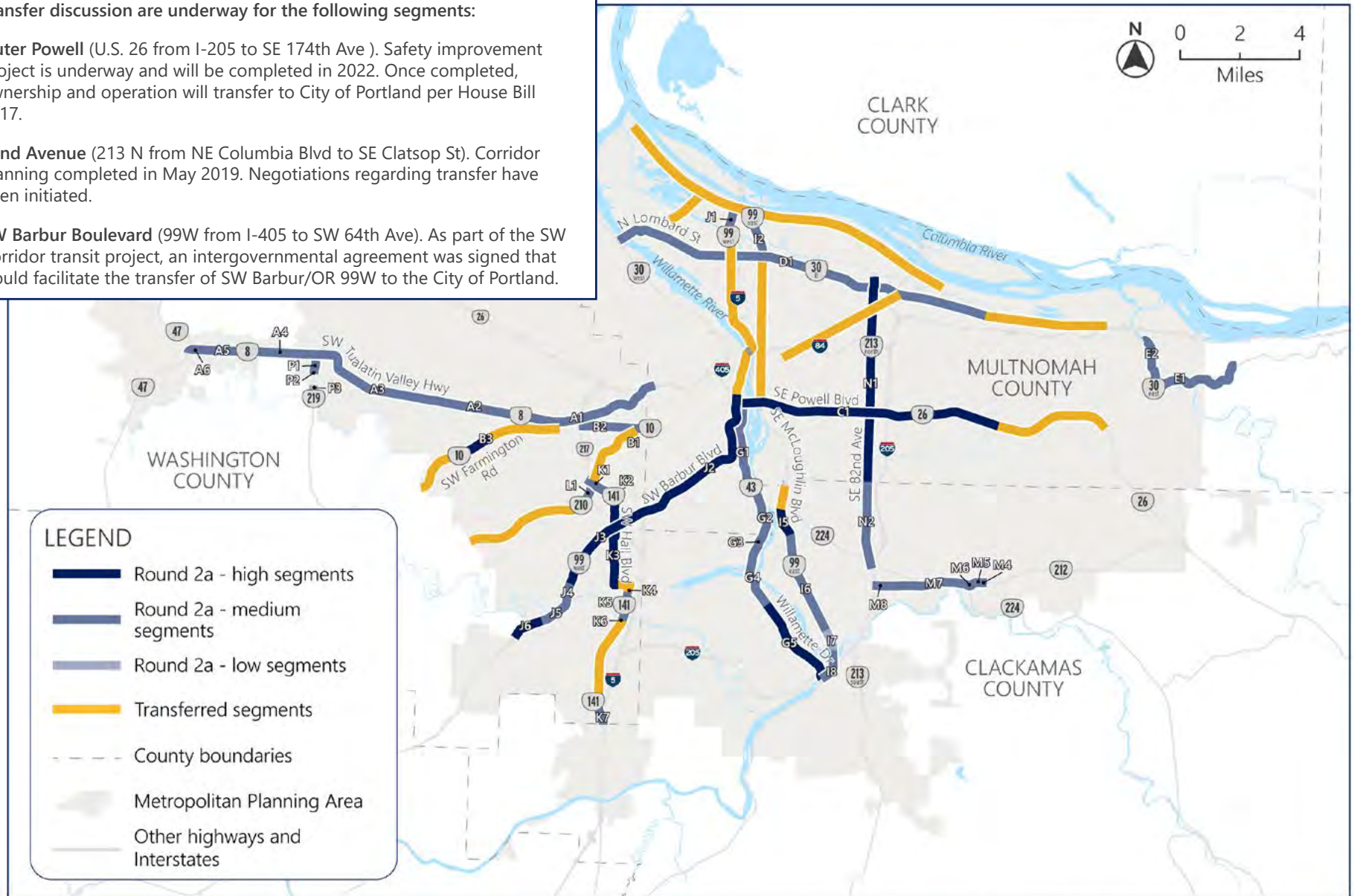
# Attachment C

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**SW Barbur Boulevard** (99W from I-405 to SW 64th Ave). As part of the SW Corridor transit project, an intergovernmental agreement was signed that would facilitate the transfer of SW Barbur/OR 99W to the City of Portland.



**Figure 4.** Round 2b Readiness Evaluation: segments in the Portland Metropolitan Planning Area

## Appendix A. List of Acronyms

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CIP	Capital Improvement Program
MP	Mile Point
MPA	Metropolitan Planning Area
MTIP	Metropolitan Transportation Improvement Program
NHS	National Highway System
ODOT	Oregon Department of Transportation
OHP	Oregon Highway Plan
OTC	Oregon Transportation Commission
POC	People of Color
RTP	Regional Transportation Plan
SPIS	Safety Priority Index System
STIP	Statewide Transportation Improvement Program

## Appendix B. Interview Guide

### JURISDICTIONAL INTERVIEWS

During February and March 2020, JLA and WSP conducted 15 phone interviews with representatives from local counties and cities to understand the readiness level of the local jurisdiction to receive an arterial highway, as part of the overall jurisdictional transfer study and corridor segment selection recommendation. Below are the most common themes heard during the interviews:



#### Low or medium interest in segment transfer

- Cost to improve and maintain the segments is too high.
- Unclear on the benefit of transfer to jurisdictions with ODOT's new guidance "Blueprint for Urban Design" which is focused on flexible street design in urban areas.
- Low staff capacity for managing large projects or taking over increased maintenance (particularly related to bridges, signals, and paving).
- Bridge transfer was of particular concern (cost and staff experience).
- The segments serve a regional role, not a local one.
- Concern over multiple jurisdictions managing the same roadway.

*"Nervous about taking an asset that we can't maintain."*

*"Even if it was brought up to an urban standard, it would require a hard look to transfer due to the funding gap. We don't have resources to take on additional mileage. We don't have equipment, human power, or funds."*

#### High interest in segment transfer

- Larger cities where the segment runs through their downtown core were most interested.
- Larger cities where the segment doesn't currently meet their safety standards, particularly for alternative modes.
- Where there are currently negotiations or agreements with ODOT in place to transfer the segment.

*"From a non-ODOT perspective the jurisdictional transfer was driven because we couldn't operate the facility the way we wanted, but now we might be able to use the new "Blueprint for Urban Design."*

# Attachment C

## Interview Questions

Criteria	Interview Questions
Jurisdictional Interest	<ul style="list-style-type: none"> <li>Do you know if there is high, medium, or low local support for a jurisdictional transfer (political interest, risk tolerance, etc.) of this segment?</li> <li>If low or medium, why? What barriers are there to a “yes” or high rating?</li> </ul>
Segmentation	<ul style="list-style-type: none"> <li>Do the segments in your jurisdiction make sense?</li> <li>For which segment are you interested in a transfer?</li> <li>Do you think your jurisdiction would be interested in a larger/smaller segment transfer than what is proposed?</li> </ul>
Funding Capacity	<ul style="list-style-type: none"> <li>How familiar is the jurisdiction/staff with delivery of a large project?</li> </ul>
Maintenance Capacity	<ul style="list-style-type: none"> <li>Are there currently resources, staff capacity, or agreements to maintain the segment?</li> </ul>
Existing Conditions	<ul style="list-style-type: none"> <li>What is the current condition of the roadway?</li> </ul>
State of Maintenance	<ul style="list-style-type: none"> <li>On average, what is the pavement condition of the segment?</li> <li>Are there currently plans for future maintenance on the segment?</li> </ul>
Land Use	<ul style="list-style-type: none"> <li>Is your jurisdiction having land use change discussions (e.g., plan, development code, pedestrian-friendly design, etc.)?                             <ul style="list-style-type: none"> <li>What are those plans?</li> <li>Have the plans been formalized or are they still in development?</li> </ul> </li> </ul>

## Jurisdictions Interviewed

County
Clackamas
Multnomah
Washington
City
Beaverton
Cornelius
Forest Grove
Happy Valley
Hillsboro
Lake Oswego
Milwaukie
Oregon City
Portland
Tigard
Troutdale
Tualatin
West Linn
Wilsonville



## Appendix C. Round 2a: Technical Evaluation

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Appendix C. Round 2a. Technical Evaluation

Criteria	Measure	OR 8						OR 10			OR 26	OR 30B	OR 30E		OR 43					
		A1: Beaverton	A2: Washington County	A3: Hillsboro	A4: Washington County	A5: Cornelius	A6: Forest Grove	B1: Washington County	B2: Beaverton	B3: Washington County	C1: Portland	D1: Portland	E1: Multnomah County	E2: Troutdale	G1: Portland	G2: Multnomah County	G3: Clackamas County	G4: Lake Oswego	G5: West Linn	G6: Oregon City
High + Medium	Segment ID:	A1: Beaverton	A2: Washington County	A3: Hillsboro	A4: Washington County	A5: Cornelius	A6: Forest Grove	B1: Washington County	B2: Beaverton	B3: Washington County	C1: Portland	D1: Portland	E1: Multnomah County	E2: Troutdale	G1: Portland	G2: Multnomah County	G3: Clackamas County	G4: Lake Oswego	G5: West Linn	G6: Oregon City
	Milepost:	0.05 - 5.85	5.85 - 7.79	7.79 - 14.32	14.32 - 14.87	14.87 - 17.22	17.22 - 17.88	2.57 - 3.41	0.97 - 2.57	5.88 - 7.38	0.21 - 9.96	0 - 14.73	1.15 - 5.80	0 - 1.15	0 - 3.64	3.64 - 5.1	5.1 - 5.81	5.81 - 8.04	8.04 - 11.45	11.45 - 11.55
Local plans	Does the segment have a plan or vision?	High	High	High	High	High	High	Low	High	High	High	High	Low	High	High	Low	Low	High	High	Low
Access to business and housing	Is the segment located within a 2040 designated Central City, Regional Center, Town Center, Station Community or Main Street?	High	High	High	Low	High	Low	High	Low	Low	High	High	Low	High	High	Low	High	High	High	High
Historically marginalized communities	Is the segment located within a historically marginalized community (communities that exceed the regional rate for low income, people of color, or limited English proficiency)?	High	High	High	High	High	High	High	High	High	High	High	Low	Low	Med	Low	Low	Low	Low	Low
Crash frequency density	Is the segment identified on Metro's High Injury Corridors and Intersections in Greater Portland map and what is the density of Safety Priority Index System (SPIS) sites per mile?	High	High	High	Low	High	High	High	High	High	High	High	Low	Low	High	Low	Low	Low	Low	Low
Density of conflict points	What is the segment's driveway density per mile?	High	High	High	Med	High	High	High	High	High	High	High	High	High	Med	Med	Med	Med	High	Med
Freight connection	Is the segment not listed as a designated National Highway System (NHS) freight connector or RTP freight route?	High	High	High	High	High	High	High	High	High	High	Low	Low	Low	High	Low	Low	High	High	High
Pedestrian system priority	Is the segment part of the regional pedestrian network? Does the segment intersect with one or more regional pedestrian district(s)?	High	High	High	High	High	High	High	High	High	High	High	Low	High	High	High	High	High	High	High
Bicycle system priority	Is the segment part of the regional bicycle network?	High	High	High	High	High	High	High	High	High	High	Med	High	Med	High	High	High	High	High	High
	Does the segment intersect with one or more regional bicycle district(s)?	High	High	High	Low	High	Low	High	Low	Low	High	High	Low	High	High	Low	High	High	High	High
Transit priority	Is there existing frequent transit service or major transit investments planned along the segment?	High	High	High	High	High	High	High	High	Low	High	High	Low	Low	High	Med	Med	Med	Med	Low
	If yes, do the transit stops exist within ¼ mile of a Central City, Regional Center, or Town Center?	High	High	High	Med	High	Med	High	Low	Low	High	High	Low	Low	High	Low	High	High	High	High
Redundant route	Is the segment redundant to an RTP Throughway?	High	High	High	High	High	High	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
	High score 2-point:	26	26	26	14	26	18	22	16	14	24	22	2	12	18	4	12	16	18	14
	Med score 1-point:	0	0	0	2	0	1	0	0	0	0	0	1	0	3	2	2	2	1	1
	High + Med Score	26	26	26	16	26	19	22	16	14	24	22	3	12	21	6	14	18	19	15

Appendix C. Round 2a. Technical Evaluation

Segment ID:	OR 99E					OR 99W						OR 141							
	I2: Portland	I5: Milwaukie	I6: Clackamas County	I7: Gladstone	I8: Oregon City	J1: Portland	J2: Portland	J3: Tigard	J4: Washington County	J5: Tualatin	J6: Washington County	K1: Beaverton	K2: Washington County	K3: Tigard	K4: Tigard	K5: Durham	K6: Tualatin	K7: Wilsonville	
Milepost:	5.71 - 3.75	5.73 - 6.68	6.68 - 10.43	10.43 - 11.2	11.2 - 12.4	-5.98 - -4.75	1.24 - 7.61	7.61 - 11.49	11.49 - 12.2	12.2 - 13.32	13.32 - 14.53	2.57 - 3.32	3.32 - 4.08	4.08 - 7.07	7.69 - 7.82	7.82 - 8.88	8.88 - 8.91	12.47 - 13.14	
<b>High + Medium</b>																			
<b>Criteria</b>	<b>Measure</b>																		
Local plans	Does the segment have a plan or vision?	High	High	High	High	High	High	High	Low	High	High	High	Low	Low	High	Low	Low	Low	Low
Access to business and housing	Is the segment located within a 2040 designated Central City, Regional Center, Town Center, Station Community or Main Street?	Low	High	Low	High	High	Low	High	High	High	Low	Low	High	High	High	Low	Low	High	Low
Historically marginalized communities	Is the segment located within a historically marginalized community (communities that exceed the regional rate for low income, people of color, or limited English proficiency)?	Med	High	High	High	Low	Med	Med	High	Low	Low	Low	High	High	High	High	High	High	Med
Crash frequency density	Is the segment identified on Metro's High Injury Corridors and Intersections in Greater Portland map and what is the density of Safety Priority Index System (SPIS) sites per mile?	Low	High	High	High	High	Low	High	High	High	High	High	Med	Low	Low	Low	Low	Low	Low
Density of conflict points	What is the segment's driveway density per mile?	Med	Med	High	High	Med	Low	High	High	Med	Med	Low	Med	High	High	Med	High	Low	Low
Freight connection	Is the segment not listed as a designated National Highway System (NHS) freight connector or RTP freight route?	High	High	High	High	High	High	High	High	High	High	High	Low	Low	Low	Low	High	High	High
Pedestrian system priority	Is the segment part of the regional pedestrian network?	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	Med
	Does the segment intersect with one or more regional pedestrian district(s)?	Low	High	High	High	High	High	High	High	High	Low	Low	High	High	High	Low	Low	Low	Low
Bicycle system priority	Is the segment part of the regional bicycle network?	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	High	Med
	Does the segment intersect with one or more regional bicycle district(s)?	Low	High	High	High	High	High	High	High	High	Low	Low	High	High	High	Low	Low	Low	Low
Transit priority	Is there existing frequent transit service or major transit investments planned along the segment?	High	High	High	High	High	High	High	High	Med	Med	Med	Med	Med	High	Low	Low	Low	Med
	If yes, do the transit stops exist within ¼ mile of a Central City, Regional Center, or Town Center?	Low	High	Low	High	High	Low	High	High	High	Low	High	High	High	High	Low	Low	Low	Low
Redundant route	Is the segment redundant to an RTP Throughway?	Low	Low	Low	Low	Low	High	High	Low	Low	Low	Low	High	High	High	High	High	High	High
	<b>High score 2-point:</b>	10	22	20	24	20	16	24	22	18	10	12	16	18	22	8	12	12	4
	<b>Med score 1-point:</b>	2	1	0	0	1	1	1	0	2	2	1	3	1	0	1	0	0	4
	<b>High + Med Score</b>	12	23	20	24	21	17	25	22	20	12	13	19	19	22	9	12	12	8

# Attachment C

Appendix C. Round 2a. Technical Evaluation

		OR 210	OR 212				OR 213N		OR 219			
		L1: Beaverton	M4: Clackamas	M5: Happy Valley	M6: Clackamas	M7: Happy Valley	M8: Clackamas	N1: Portland	N2: Clackamas County	P1: Hillsboro	P2: Washington County	P3: Washington County
Criteria	Measure	Milepost: 9.07 - 9.6	0.61 - 1.03	0.52-0.61	0 - 0.52	5.45 - 8.19	4.94 - 5.45	0.14 - 7.24	7.24 - 10.39	0.0 - 0.62	0.62 - 0.75	1.16 - 1.31
High + Medium												
Local plans	Does the segment have a plan or vision?	Low	High	Low	High	Low	High	High	High	Low	Low	Low
Access to business and housing	Is the segment located within a 2040 designated Central City, Regional Center, Town Center, Station Community or Main Street?	High	Low	Low	Low	Low	Low	Low	High	High	High	Low
Historically marginalized communities	Is the segment located within a historically marginalized community (communities that exceed the regional rate for low income, people of color, or limited English proficiency)?	High	Low	Low	Low	High	Low	High	High	High	High	High
Crash frequency density	Is the segment identified on Metro's High Injury Corridors and Intersections in Greater Portland map and what is the density of Safety Priority Index System (SPIS) sites per mile?	High	High	High	High	High	High	High	High	Low	Low	Low
Density of conflict points	What is the segment's driveway density per mile?	Med	Med	Med	Med	Med	Med	High	High	High	Low	High
Freight connection	Is the segment not listed as a designated National Highway System (NHS) freight connector or RTP freight route?	High	High	High	High	High	High	High	High	High	Low	Low
Pedestrian system priority	Is the segment part of the regional pedestrian network?	High	High	High	High	High	High	High	High	High	High	High
	Does the segment intersect with one or more regional pedestrian district(s)?	High	Low	Low	Low	Low	Low	High	High	High	Low	Low
Bicycle system priority	Is the segment part of the regional bicycle network?	High	High	High	High	High	High	Med	High	High	Low	Low
	Does the segment intersect with one or more regional bicycle district(s)?	High	Low	Low	Low	Low	Low	High	High	High	High	Low
Transit priority	Is there existing frequent transit service or major transit investments planned along the segment?	Med	High	High	High	High	High	High	High	Low	Low	Low
	If yes, do the transit stops exist within ¼ mile of a Central City, Regional Center, or Town Center?	High	Low	Low	Low	Low	Low	Low	High	Low	Low	Low
Redundant route	Is the segment redundant to an RTP Throughway?	Low	Low	Low	Low	Low	Low	High	High	Low	Low	Low
High score 2-point:		18	12	10	12	12	12	20	26	16	8	6
Med score 1-point:		2	1	1	1	1	1	1	0	0	0	0
High + Med Score		20	13	11	13	13	13	21	26	16	8	6

## Appendix D. Round 2b: Readiness Evaluation

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# Attachment C

is Evaluation

Segment ID:	OR 8						OR 10		
	A1: Beaverton	A2: Washington County	A3: Hillsboro	A4: Washington County	A5: Cornelius	A6: Forest Grove	B1: Washington County	B2: Beaverton	B3: Washington County
Milepost:	0.05 - 5.85	5.85 - 7.79	7.79 - 14.32	14.32 - 14.87	14.87 - 17.22	17.22 - 17.88	2.57 - 3.41	0.97 - 2.57	5.88 - 7.38
potential interest for a jurisdictional transfer (political risk tolerance, etc.)? *	High	Med	Low	Med	Low	Low	Low	Low	High
segmentation make sense? *	Med	Low	Med	Low	Low	Low	Low	Low	Med
segmentation (based on total dollar amount of committed funds in 2018-2021-2024 STIP, MTIP or local capital investment is along the segment that could be used as justification for jurisdictional transfer?)	Med	Low	Med	Low	Low	Med	Low	Low	Low
segment is the jurisdiction with the largest liability for a larger-scale project? *	High	High	High	High	Med	Med	High	High	High
segment currently or could there be a need for additional staff capacity or resources to maintain the segment?	Med	Med	Low	Med	Med	Low	High	Med	High
segment: what is the current condition of the roadway assets? *	Med	Low	Low	Low	High	Low	Low	Low	Low
segment: what is the pavement condition of the segment?	Low	Low	Low	Med	Med	Med	Low	Low	Med
segment: how many lane miles of pavement are there on the segment?	Med	High	Med	High	High	High	High	High	High
segment: are there any bridges or structures exist on the segment?	Med	High	High	High	High	High	High	High	High
segment: do any sensitive areas (e.g., wetlands, riparian or other habitats, such that any ground disturbance would trigger a need for environmental permits?)	High	High	High	High	High	High	High	High	High
segment: are there any active land use changes in the area (e.g., plan, zoning code, pedestrian design, etc.)? *	High	Med	Med	High	Med	Med	Med	Med	High
High score 2-point:	8	8	6	10	8	5	10	8	14
Med score 1-point:	6	3	4	3	4	4	1	2	2
High + Med Score	14	11	10	13	12	10	11	10	16

\* was evaluated where possible via an interview with a representative from the local jurisdiction where the highway segment is located. Professional judgment was used in cases

Appendix D. Round 2b. Readiness Evaluation

High + Med	Segment ID:	US 26	US 30B	US 30E		OR 43					
		C1: Portland	D1: Portland	E1: Multnomah County	E2: Troutdale	G1: Portland	G2: Multnomah County	G3: Clackamas County	G4: Lake Oswego	G5: West Linn	G6: Oregon City
	Milepost:	0.21 - 9.96	0 - 14.73	1.15 - 5.80	0 - 1.15	0 - 3.64	3.64 - 5.1	5.1 - 5.81	5.81 - 8.04	8.04 - 11.45	11.45 - 11.55
Criteria	Measure										
Jurisdiction Interest	Is there potential interest for a jurisdictional transfer (political interest, risk tolerance, etc.)? *	Med	Low	Low	Low	Low	Low	Low	Med	High	Low
	Does the segmentation make sense? *	High	High	High	Low	High	High	Low	High	High	Low
Funding capacity	What level (based on total dollar amount of committed funds in 2018-2021 or 2021-2024 STIP, MTIP or local CIP) of capital investment is along the segment that could be used as leverage for jurisdictional transfer?	High	Med	Med	High	Low	Low	Low	Low	Med	Low
	How familiar is the jurisdiction with delivery of a larger-scale project? *	High	High	High	Low	High	High	High	Med	High	High
Maintenance capacity	Are there currently or could there be resources, staff capacity or agreements to maintain the segment? *	Med	Med	Med	Low	Med	Med	Low	Low	High	Med
Existing conditions and state of maintenance	What is the current condition of the existing roadway assets? *	Med	Low	Low	Med	Low	Low	Low	Low	Low	Med
	What is the pavement condition of the segment?	High	Low	Med	Med	Med	High	High	Med	Low	High
	How many lane miles of pavement are there in the segment?	Low	Low	High	High	High	High	High	High	High	High
Bridges/structures	Do bridges or structures exist on the segment?	Low	Low	High	High	High	High	High	High	High	High
Environmental	Does the segment pass through an environmentally sensitive areas (defined as wetlands, riparian or upland habitats, such that any ground disturbance would trigger a need for environmental permits?	High	High	High	Low	Med	High	High	High	High	Med
Land use	Are there active land use change discussions in the area (e.g., plan, development code, pedestrian-friendly design, etc.)? *	High	High	Low	Low	High	Low	Low	Med	High	High
	High score 2-point:	12	8	10	6	10	12	10	8	16	10
	Med score 1-point:	3	2	3	2	3	1	0	4	1	3
	High + Med Score	15	10	13	8	13	13	10	12	17	13

\* Measures with an asterisk were evaluated where possible via an interview with a representative from the local jurisdiction where the highway segment is located.

# Attachment C

Appendix D. Round 2b. Readiness Evaluation

High + Med	Segment ID:	OR 99E					OR 99W					
		J2: Portland	J5: Milwaukie	J6: Clackamas County	J7: Gladstone	J8: Oregon City	J1: Portland	J2: Portland	J3: Tigard	J4: Washington County	J5: Tualatin	J6: Washington County
Milepost:		-5.71 - -3.75	5.73 - 6.68	6.68 - 10.43	10.43 - 11.2	11.2 - 12.4	-5.98 - -4.75	1.24 - 7.61	7.61 - 11.49	11.49 - 12.2	12.2 - 13.32	13.32 - 14.53
Criteria	Measure											
Jurisdiction Interest	Is there potential interest for a jurisdictional transfer (political interest, risk tolerance, etc.)? *	Low	Low	Low	Low	Low	Low	High	Low	Low	Low	Low
	Does the segmentation make sense? *	Med	High	Med	Low	Med	Med	High	High	Low	Low	Low
Funding capacity	What level (based on total dollar amount of committed funds in 2018-2021 or 2021-2024 STIP, MTIP or local CIP) of capital investment is along the segment that could be used as leverage for jurisdictional transfer?	Med	Low	Low	Low	Low	Low	Med	Med	Med	Low	Med
	How familiar is the jurisdiction with delivery of a larger-scale project? *	High	High	High	Low	High	High	High	High	High	High	High
Maintenance capacity	Are there currently or could there be resources, staff capacity or agreements to maintain the segment? *	Med	Low	Low	Low	Med	Med	Med	Med	High	Low	High
Existing conditions and state of maintenance	What is the current condition of the existing roadway assets? *	Low	Low	Low	Low	Med	Low	Low	Low	Low	Low	Low
	What is the pavement condition of the segment?	Low	High	Med	High	Med	High	Med	Low	Low	High	High
	How many lane miles of pavement are there in the segment?	High	High	Med	High	High	High	Med	High	High	High	High
Bridges/structures	Do bridges or structures exist on the segment?	High	High	High	Med	High	Med	Low	High	High	High	High
Environmental	Does the segment pass through an environmentally sensitive areas (defined as wetlands, riparian or upland habitats, such that any ground disturbance would trigger a need for environmental permits?	High	High	High	Low	Med	Med	High	High	High	High	High
Land use	Are there active land use change discussions in the area (e.g., plan, development code, pedestrian-friendly design, etc.)? *	High	High	High	High	High	High	High	High	Med	Med	Med
	High score 2-point:	10	14	8	6	8	8	10	12	10	10	12
	Med score 1-point:	3	0	3	1	5	4	4	2	2	1	2
	High + Med Score	13	14	11	7	13	12	14	14	12	11	14

\* Measures with an asterisk were evaluated where possible via an interview with a representative from the local jurisdiction where the highway segment is located.



Appendix D. Round 2b. Readiness Evaluation

High + Med	Segment ID:	OR 141							OR 210
		K1: Beaverton	K2: Washington County	K3: Tigard	K4: Tigard	K5: Durham (Washington County)	K6: Tualatin	K7: Wilsonville	L1: Beaverton
Milepost:		2.57 - 3.32	3.32 - 4.08	4.08 - 7.07	7.69 - 7.82	7.82 - 8.88	8.88 - 8.91	12.47 - 13.14	9.07 - 9.6
Criteria	Measure								
Jurisdiction Interest	Is there potential interest for a jurisdictional transfer (political interest, risk tolerance, etc.)? *	Low	Med	High	High	Low	Low	Med	Low
	Does the segmentation make sense? *	Low	High	High	Med	High	High	Med	Low
Funding capacity	What level (based on total dollar amount of committed funds in 2018-2021 or 2021-2024 STIP, MTIP or local CIP) of capital investment is along the segment that could be used as leverage for jurisdictional transfer?	Low	Low	Low	Low	Low	Low	Low	Low
	How familiar is the jurisdiction with delivery of a larger-scale project? *	High	High	High	High	High	Med	High	High
Maintenance capacity	Are there currently or could there be resources, staff capacity or agreements to maintain the segment? *	Med	High	High	High	High	Low	High	Med
Existing conditions and state of maintenance	What is the current condition of the existing roadway assets? *	Med	Med	Med	Med	Med	Med	Low	Low
	What is the pavement condition of the segment?	Low	Low	Low	High	High	High	Med	Low
	How many lane miles of pavement are there in the segment?	High	High	High	High	High	High	High	High
Bridges/structures	Do bridges or structures exist on the segment?	High	High	High	High	High	High	High	High
Environmental	Does the segment pass through an environmentally sensitive areas (defined as wetlands, riparian or upland habitats, such that any ground disturbance would trigger a need for environmental permits?	High	Med	High	High	High	Low	High	High
Land use	Are there active land use change discussions in the area (e.g., plan, development code, pedestrian-friendly design, etc.)? *	Med	Med	High	High	Low	Low	High	Med
	High score 2-point:	8	10	16	16	14	8	12	8
	Med score 1-point:	3	4	1	2	1	2	3	2
	High + Med Score	11	14	17	18	15	10	15	10

\* Measures with an asterisk were evaluated where possible via an interview with a representative from the local jurisdiction where the highway segment is located.

# Attachment C

## Appendix D. Round 2b. Readiness Evaluation

High + Med	Segment ID:	OR 212					OR 213N		OR 219	
		M4: Clackamas	M5: Happy Valley	M6: Clackamas	M7: Happy Valley	M8: Clackamas	N1: Portland	N2: Clackamas County	P1: Hillsboro	P2: Washington County
	Milepost:	0.61 - 1.03	0.52-0.61	0 - 0.52	5.45 - 8.19	4.94 - 5.45	-0.14 - 7.24	7.24 - 10.39	0.0 - 0.62	0.62 - 1.39
Criteria	Measure									
Jurisdiction Interest	Is there potential interest for a jurisdictional transfer (political interest, risk tolerance, etc.)? *	Low	Low	Low	Low	Low	High	Low	Low	Low
	Does the segmentation make sense? *	Low	Low	Low	Low	Low	High	Med	Med	Low
Funding capacity	What level (based on total dollar amount of committed funds in 2018-2021 or 2021-2024 STIP, MTIP or local CIP) of capital investment is along the segment that could be used as leverage for jurisdictional transfer?	Low	Low	Low	Low	Low	Med	Med	Low	Low
	How familiar is the jurisdiction with delivery of a larger-scale project? *	High	Low	High	Low	High	High	High	High	High
Maintenance capacity	Are there currently or could there be resources, staff capacity or agreements to maintain the segment? *	Low	Low	Low	Low	Low	Med	Low	Low	High
Existing conditions and state of maintenance	What is the current condition of the existing roadway assets? *	Low	Low	Low	Med	Med	Low	Low	Low	Low
	What is the pavement condition of the segment?	Low	Low	Low	Low	Low	Low	High	High	High
	How many lane miles of pavement are there in the segment?	High	High	High	High	High	Med	High	High	High
Bridges/structures	Do bridges or structures exist on the segment?	High	High	High	High	High	Med	Med	High	High
Environmental	Does the segment pass through an environmentally sensitive areas (defined as wetlands, riparian or upland habitats, such that any ground disturbance would trigger a need for environmental permits?	High	High	High	High	High	High	High	High	Low
Land use	Are there active land use change discussions in the area (e.g., plan, development code, pedestrian-friendly design, etc.)? *	High	High	High	High	High	High	High	Med	Low
	High score 2-point:	10	8	10	8	10	10	10	10	10
	Med score 1-point:	0	0	0	1	1	4	3	2	0
	High + Med Score	10	8	10	9	11	14	13	12	10

\* Measures with an asterisk were evaluated where possible via an interview with a representative from the local jurisdiction where the highway segment is located.

# ATTACHMENT D - Equity Considerations

## METRO HIGHWAY JURISDICTIONAL TRANSFER FRAMEWORK

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### Equity considerations for highway jurisdictional transfer

April 2020

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#### 1 Purpose of the Study and Memorandum

The purpose of the regional framework for highway jurisdictional transfer study (study) is to identify state-owned routes in greater Portland that may be best suited for jurisdictional transfer from a technical or jurisdictional readiness standpoint to inform future conversations about potential jurisdictional transfer. For the purposes of this study, jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing ownership of a highway right of way from the State to a local jurisdiction – a city or county. The study will serve as a decision framework for state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer of roadway ownership. The study is convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

Metro’s 2018 Regional Transportation Plan (RTP) identified a jurisdictional transfer assessment as a necessary step to help the region meet its equity, safety and multimodal goals. In greater Portland, ownership patterns of streets, roads and highways reflect historical patterns, but do not necessarily reflect current transportation, land use and development needs.

Our country and region has a history of racism in its transportation and land use planning. The combination of siting decisions of the Interstate Highway system along with zoning and red-lining resulted in negative effects for people of color and the underserved communities in the region. The development of the Interstate system, by providing efficient long-distance travel options, replaced the function of original farm-to-market roads that had been developed into the state highway system. Many of these original roads now have multimodal demands, with people using them to walk, bike, use transit or drive short distances. The state highway designs of the past, coupled with limited design options available as these facilities grew from market road to highway, means that they do not always work for the multimodal needs of communities along the corridors, including for people of color, people with low incomes, or limited-English speakers. Highway management is increasingly complex due to competition for limited funds, resulting in underinvestment in these areas. Understanding the demographics of these corridors is critical to ensure highway transfer decisions address the needs of people of color, people with low-incomes, or limited-English speaking communities. Current decision-making has resulted in communities along these corridors experiencing disparate impacts relating to safety, access and noise.

This Equity Considerations Memorandum supplements and should inform the Corridor Segment Selection technical and readiness evaluations for jurisdictional transfer. The technical evaluation examines segments using technical considerations related to the existing and future function of the roadway. The readiness evaluation examines segments using readiness considerations related to local support and interest.

The equity considerations can inform efforts to reduce disparities and barriers faced by communities of color and other historically marginalized communities. They can inform identification of placemaking opportunities to help address the results of the region’s racist history of zoning.<sup>1</sup> Equity considerations can help identify corridors that would benefit from funding to make them better for walking, access to transit, and biking.

This memorandum is organized as follows:

1. Purpose of the Study and Memorandum
2. Demographic Data Collection Methodology
3. Existing Demographics
4. Future Population Trends
5. Conclusion

## 2 Demographic Data Collection Methodology

The study team identified the census tracts adjacent to each of the following 17 State-owned non-arterial highways within which to collect existing demographic data.

- |   |   |
|---|---|
| 1. <i>OR 8 (Tualatin Valley Highway)</i>        | 10. <i>OR 99W (Pacific Highway West)</i>        |
| 2. <i>OR 10 (Beaverton-Hillsdale Highway)</i>   | 11. <i>OR 141 (Beaverton-Tualatin Highway)</i>  |
| 3. <i>US 26 (Mount Hood Highway)</i>            | 12. <i>OR 210 (Scholls Highway)</i>             |
| 4. <i>US 30B (Northeast Portland Highway)</i>   | 13. <i>OR 212 (Clackamas-Boring Highway)</i>    |
| 5. <i>US 30E (Historic Columbia Highway)</i>    | 14. <i>OR 213N (Cascade Highway North)</i>      |
| 6. <i>US 30W (Lower Columbia River Highway)</i> | 15. <i>OR 213S (Cascade Highway South)</i>      |
| 7. <i>OR 43 (Oswego Highway)</i>                | 16. <i>OR 219 (Hillsboro-Silverton Highway)</i> |
| 8. <i>OR 47 (Nehalem Highway)</i>               | 17. <i>OR 224 (Clackamas / Sunrise Highway)</i> |
| 9. <i>OR 99E (Pacific Highway East)</i>         |   |

The study team divided each of the 17 highways into segments for analysis purposes. For the purposes of this study, a corridor segment is defined as a portion of an arterial highway within a single jurisdiction in the Portland Metropolitan Planning Area (MPA).<sup>2,3</sup> For each census tract, the study team used the U.S. Census Bureau American Community Survey (ACS) FactFinder to collect the following 2017 demographic data (density and percent):

- people of color (residents)
- people of color (unemployment)
- low-income residents
- low-income unemployment
- limited English proficiency

<sup>1</sup> “Historical Context of Racist Planning: A History of How Planning Segregated Portland” (2019) <https://beta.portland.gov/sites/default/files/2019-12/portlandracistplanninghistoryreport.pdf>

<sup>2</sup> The MPA is a federally-mandated boundary designated by Metro and encompasses all cities in the metropolitan area.

<sup>3</sup> Corridor segment definitions are for this evaluation only. Highway transfer recommendations may combine or split corridor segments based on what makes sense at the time of a transfer.

The study team imported census tract datasets into ArcGIS and pulled the data into tabular format. The study team then compared this data to the regional<sup>4</sup> density average determined by Metro, defined as twice the average density for the given population, and to the regional percentage average. Table 1 lists the regional average percent and density values for each demographic. Figure 1 shows the MPA, Metro’s equity focus areas, and the 17 highway segments.

**Table 1. Metro’s regional averages for demographic data**

Demographic Category	% <sup>1</sup>	Density <sup>2</sup>
People of color (residents)	28.6	1.11
People of color (unemployed)	4.6	0.03
Hispanic & Latino (unemployed)	4.9	0.02
Low-income (residents)	28.5	1.09
Low-income (unemployment)	13.0	0.04
Limited English proficiency	7.9	0.29
Notes:		
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.		
<sup>2</sup> Density is defined as the number of people per acre.		

The study team used Google Earth to manually count the number of gathering places and religious institutions along each segment. For the purposes of this study, public gathering spaces are defined as public libraries, schools and parks and religious institutions are defined as churches, mosques and seminaries.

### 3 Existing Demographics

The existing demographics for each of the census tracts adjacent to the 17 ODOT-owned non-arterial highway segments are listed in Tables 2 through 18. Results that fall above the Metro regional averages identified in Table 1 are highlighted in gray for each highway. Each table also includes a page reference to the Metro Highway Jurisdictional Transfer Framework Atlas. The Atlas includes graphics that visually depict the demographics listed in the tables.

Highways – or segments of highways – identified in the equity analysis as having high ratios of people of color, low income and unemployment compared to the Metro regional average are described below.

**TV Highway (OR 8):** TV Highway segments in Washington County, Hillsboro and Cornelius have high ratios of people of color, low income and unemployment compared to the Metro regional average.

**Beaverton-Hillsdale/Farmington Highway (OR 10):** Beaverton-Hillsdale/Farmington Highway segments in Beaverton and west Washington County have high ratios of people of color, low income and unemployment compared to the regional average.

<sup>4</sup> The region is defined as the Portland MPA.

**Mount Hood Highway (US 26):** The Mount Hood Highway segment in Portland from I-205 to the Gresham city line has high ratios of people of color, low income and unemployment compared to the regional average.

**NE Portland Highway (US 30B):** The NE Portland Highway corridor has high ratios of people of color, low income and unemployment compared to the regional average.

**Nehalem Highway (OR 47):** The Nehalem Highway segment that divides Forest Grove and Washington County has high ratios of people of color, low income and unemployment compared to the regional average.

**Pacific Highway East (OR 99E):** Pacific Highway East's most northern segment in Portland has high ratios of people of color, low-income and limited English proficiency, compared to the regional average. OR 99E segments farther to the south in Milwaukie have high ratios of low income and unemployment. This southern area does not have a high percentage of people of color.

**Pacific Highway West (OR 99W):** The Pacific Highway West segment in Tigard has high ratios of people of color, low income and unemployment compared to the regional average.

**Beaverton-Tualatin Highway (OR 141):** The Beaverton-Tualatin Highway segments in Beaverton and Tigard have high ratios of people of color, low income and limited English proficiency compared to the regional average.

**Scholls Highway (OR 210):** Scholls Highway has high ratios of people of color, low income and unemployment compared to the regional average.

**Cascade Highway North (OR 213N):** The Cascade Highway North segment from North Portland to Clackamas County has high ratios of people of color, low income and unemployment compared to the regional average.

**Hillsboro-Silverton Highway (OR 219):** Hillsboro-Silverton Highway has high ratios of people of color, low income and unemployment compared to the regional average.

**Table 2. OR 8, Tualatin Valley Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>A1. Beaverton (Mile Points 0.05 - 5.85)</b>													
313	40	3.2	8	0.1	2	0.0	51	4.1	12	0.1	18	1.4	
314.02	42	1.3	2	0.0	9	0.0	49	1.5	26	0.1	21	0.6	
316.13	42	3.5	11	0.1	7	0.0	40	2.5	39	0.2	9	0.6	
312	40	5.4	2	0.0	10	0.2	55	7.3	41	0.2	16	2.0	
303	15	0.8	0	0.0	10	0.0	20	1.1	6	0.0	3	0.2	
301.01	22	1.3	0	0.0	0	0.0	16	0.9	31	0.1	2	0.1	
302	23	1.3	14	0.1	0	0.0	21	1.2	26	0.0	3	0.1	
69	15	0.4	0	0.0	0	0.0	9	0.2	0	0.0	1	0.0	
Total													10
<b>A2. Washington County (Mile Points 5.85 - 7.79)</b>													
316.06	47	5.3	4	0.1	5	0.2	47	5.3	14	0.1	10	1.0	
317.05	46	5.8	3	0.1	3	0.1	42	5.2	0	0.0	17	2.0	
317.06	57	8.3	11	0.3	7	0.2	43	6.2	34	0.4	24	3.1	
317.03	39	3.3	8	0.1	4	0.0	39	3.3	32	0.2	14	1.1	
Total													2
<b>A3. Hillsboro (Mile Points 7.75 - 14.32)</b>													
316.15	47	4.7	7	0.1	7	0.1	36	3.5	36	0.2	13	1.2	
324.1	58	6.2	5	0.1	0	0.0	38	4.1	0	0.0	23	2.2	
325.02	38	1.4	0	0.0	0	0.0	19	0.7	18	0.0	12	0.4	
325.01	53	6.7	11	0.0	10	0.1	59	1.4	12	0.0	18	0.5	
324.09	76	14.6	11	0.2	7	0.4	68	13.1	18	0.5	36	5.9	
324.06	30	2.7	2	0.0	5	0.0	20	1.8	17	0.1	8	0.7	



Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
325.03	39	1.6	0	0.0	8	0.0	30	1.2	22	0.0	10	0.4	
323	42	0.2	9	0.0	5	0.0	25	0.1	19	0.0	13	0.1	
Total												16	
A4-A5. Washington County & Cornelius (Mile Points 14.32-17.22)													
332	46	1.4	8	0.0	4	0.0	56	1.6	0	0.0	14	0.4	
329.02	60	1.2	2	0.0	8	0.1	42	0.9	36	0.0	22	0.4	
329.01	46	1	8	0.0	12	0.1	32	0.7	12	0.0	17	0.4	
Total												4	
A6-A7. Forest Grove (Mile Points 17.22 - 19.38)													
331.02	46	0.9	15	0.1	11	0.1	41	0.7	45	0.0	14	0.2	
331.01	23	0.4	22	0.0	10	0.0	44	0.8	14	0.0	4	0.1	
Total												1	
A8. Washington (Mile Points 19.38 - 23.16)													
336	8	0	16	0.0	0	0.0	30	0	54	0.0	1	0.0	
330	23	0	9	0.0	5	0.0	20	0	7	0.0	8	0.0	
Total												1	
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 2 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

# Attachment D

Equity considerations  
for highway jurisdictional transfer

Highway Jurisdictional Transfer Framework 

**Table 3. OR 10, Beaverton Hillsdale / Farmington Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>B1. Washington County (Mile Points 2.57 - 3.41)</b>													
68.01	16	1.1	14	0.1	11	0.0	19	1.3	21	0.1	3	0.2	
67.01	19	1.3	5	0.0	0	0.0	19	1.3	42	0.0	2	0.1	
304.02	22	1.5	7	0.1	0	0.0	27	1.8	30	0.1	8	0.6	
303	15	0.8	0	0.0	10	0.0	20	1.1	6	0.0	3	0.2	
Total													0
<b>B2. Beaverton (Mile Points 0.97 - 2.57)</b>													
304.01	26	1.2	12	0.0	4	0.0	27	1.3	7	0.0	5	0.2	
313	40	3.2	8	0.1	2	0.0	51	4.1	12	0.1	18	1.4	
Total													3
<b>B3. Washington County (Mile Points 5.88 - 7.38)</b>													
318.05	33	3.0	5	0.1	16	0.1	16	1.5	43	0.1	9	0.8	
317.05	46	5.8	3	0.1	3	0.1	42	5.2	0	0.0	17	2.0	
317.04	28	3.5	5	0.1	4	0.1	21	2.6	57	0.2	4	0.5	
318.04	35	1.0	11	0.0	0	0.1	25	0.7	67	0.0	15	0.4	
Total													4
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 5 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													


Equity considerations  
for highway jurisdictional transfer

**Table 4. OR 26, Mount Hood Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>C1. Portland (Mile Points 0.21 - 9.96)</b>													
57	31	3.2	12	0.2	18	0.1	28	2.9	34	0.3	11	1.1	
83.01	55	5.9	12	0.4	0	0.0	62	6.6	45	0.3	35	3.5	
83.02	54	4.5	12	0.2	0	0.0	51	4.1	24	0.2	26	2.0	
84	39	5.4	5	0.1	9	0.1	54	7.4	20	0.2	29	3.6	
90	48	7.6	8	0.3	6	0.1	53	8.3	23	0.4	21	3.0	
91.02	38	1.9	9	0.1	6	0.0	46	2.4	22	0.1	18	0.8	
98.03	47	4.6	5	0.1	5	0.1	49	4.7	21	0.2	18	1.6	
91.01	47	7.2	16	0.6	4	0.0	47	7.1	38	0.7	25	3.6	
98.04	43	4.7	6	0.1	12	0.1	42	4.6	27	0.2	19	2.0	
7.01	12	3.9	13	0.3	13	0.1	28	3.9	35	0.3	9	1.1	
7.02	31	4.6	8	0.2	0	0.0	37	5.5	10	0.1	9	1.2	
8.01	22	2.7	8	0.1	9	0.1	31	3.8	12	0.1	4	0.5	
8.02	17	2.5	0	0.0	0	0.0	34	4.9	28	0.3	5	0.6	
9.02	30	5.8	12	0.3	7	0.1	50	9.2	29	0.6	8	1.3	
10	24	2.3	4	0.0	6	0.0	36	3.5	19	0.2	5	0.5	
11.01	20	1.1	18	0.1	26	0.0	57	3.1	40	0.3	2	0.1	
59	23	2.2	8	0.1	12	0.1	23	1.7	29	0.2	3	0.3	
1	12	0.5	11	0.0	1	0.0	14	0.6	33	0.0	0	0.0	
9.01	22	3.4	10	0.2	0	0.0	21	3.3	48	0.4	4	0.7	
Total													15
<b>C2-C3. Gresham &amp; Multnomah (Mile Points 14.22 – 16.77)</b>													
104.08	36	3.2	22	0.1	7	0.1	48	4.1	20	0.1	11	0.8	
104.09	21	1.2	6	0.0	0	0.0	15	0.8	28	0.0	5	0.2	
Total													0

# Attachment D

Equity considerations  
for highway jurisdictional transfer

Highway Jurisdictional Transfer Framework 

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>C4. Clackamas (Mile Points 16.77 - 19.63)</b>													
233	12	0.1	12	0.0	0	0.0	18	0.1	11	0.0	2	0.0	
234.01	19	0.1	0	0.0	2	0.0	24	0.1	0	0.0	9	0.0	
Total												0	
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 7 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 5. US 30B, Northeast Portland Highway: Demographic Data**


Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>D1. Portland (Mile Points 0-14.73)</b>													
36.01	34	4.1	12	0.3	0	0.0	30	3.6	42	0.3	2	0.2	
36.02	32	4.1	14	0.3	20	0.1	14	1.6	28	0.2	1	0.1	
36.03	33	2.3	8	0.1	0	36.03	22	1.5	0	0.0	5	0.3	
37.01	44	5.3	10	0.2	7	0.1	36	4.1	33	0.3	9	1.1	
38.01	27	2.7	5	0.1	19	0.0	33	3.4	0	0.0	3	0.3	
39.01	40	5.1	8	0.1	0	0.0	37	4.7	27	0.2	9	1.0	
39.02	18	2.2	7	0.1	0	0.0	18	2.2	22	0.0	2	0.2	
40.01	51	9.4	22	0.8	14	0.3	60	10.9	29	0.7	18	3.1	
40.02	24	2.0	8	0.1	0	0.1	37	2.1	11	0.1	1	0.1	
41.02	27	2.6	0	0.1	6	0.0	32	3.1	7	0.1	8	0.7	
42	30	2.0	12	0.1	0	0.0	32	2.2	20	0.1	4	0.3	

Census Tract <sup>3,4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
95.02	48	4.5	7	0.2	0	0.0	26	2.4	21	0.1	14	1.3	
74	58	6.5	21	0.3	17	0.2	60	6.7	27	0.3	14	1.4	
79	43	3.9	12	0.2	2	0.0	36	3.2	9	0.1	14	1.1	
95.01	50	5.2	6	0.1	10	0.0	36	3.7	20	0.1	12	1.2	
78	36	2.9	8	0.1	0	0.0	41	3.2	40	0.2	11	0.8	
102	39	0.2	13	0.0	11	0.0	37	0.2	21	0.0	12	0.1	
38.02	26	3.3	0	0.2	4	0.0	26	3.3	55	0.4	4	0.5	
43	13	0.0	0	0.0	0	0.0	16	0.0	13	0.0	0	0.0	
76	54	4.6	4	0.0	4	0.1	44	3.7	16	0.1	27	2.2	
77	53	4.7	1	0.0	11	0.1	41	3.6	0	0.0	26	2.1	
73	47	0.1	11	0.0	0	0.0	63	0.1	31	0.0	11	0.0	
<b>Total</b>													21

Notes:  
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.  
<sup>2</sup> Density is defined as the number of people per square acre.  
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.  
<sup>4</sup> Refer to page 10 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.

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**Table 6. US 30E, Historic Columbia Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>E1-E2. Multnomah &amp; Troutdale (Mile Points 0-5.8)</b>													
105	18	0.0	16	0.0	29	0.0	19	0.0	20	0.0	2	0.0	
103.05	11	0.6	9	0.0	0	0.0	24	1.3	48	0.1	1	0.1	
Total													1
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 13 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 7. US 30W, Lower Columbia River Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>F1. Portland (Mile Points 2.76 - 9.65)</b>													
50	19	3.1	13	0.3	0	0.0	18	2.9	27	0.2	2	0.3	
43	13	0.0	0	0.0	0	0.0	16	0.0	13	0.0	0	0.0	
45	17	1.0	0	0.0	0	0.0	21	1.2	0	0.0	2	0.1	
Total													7
<b>F2. Multnomah (Mile Points 9.65 - 13.26)</b>													
71	7	0.0	0	0.0	0	0.0	18	0.0	24	0.0	1	0.0	
Total													0
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													


<sup>4</sup> Refer to page 15 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.

**Table 8. OR 43, Oswego Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>G1-G2. Portland &amp; Multnomah (Mile Points 0 – 5.1)</b>													
63	22	0.5	10	0.0	15	0.0	15	1.0	54	0.1	3	0.1	
59	23	2.2	8	0.1	12	0.1	23	2.2	29	0.2	3	0.3	
57	31	3.2	12	0.2	18	0.1	28	2.9	34	0.3	11	1.1	
Total													7
<b>G3-G4. Clackamas &amp; Lake Oswego (Mile Points 5.1 - 8.04)</b>													
205.04	13	0.5	0	0.0	0	0.0	8	0.3	18	0.0	1	0.0	
205.03	8	0.3	0	0.0	24	0.0	10	0.4	0	0.0	2	0.1	
205.05	14	0.4	0	0.0	12	0.0	14	0.4	100	0.0	1	0.0	
201	13	0.4	0	0.0	0	0.0	17	0.6	0	0.0	3	0.1	
202	8	0.3	2	0.0	0	0.0	14	0.5	0	0.0	1	0.0	
Total													2
<b>G5. West Linn (Mile Points 8.04 – 11.45)</b>													
224	11	0.6	4	0.0	0	0.0	22	1	0	0	1	0.0	
Total													7
<b>G6. Oregon City (Mile Points 11.46 - 11.55)</b>													
206	20	1.0	0	0.0	0	0.0	17	0.9	0	0.0	6	0.3	
Total													0
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 17 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

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**Table 9. OR 47, Nehalem Highway: Demographic Data**


Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>H1-H2. Washington County &amp; Forest Grove (Mile Points 88.53 - 90.64)</b>													
333.01	25	2.3	15	0.1	3	0.0	33	2.9	23	0.1	6	0.5	
333.02	13	0.0	9	0.0	15	0.0	8	0.4	54	0.0	2	0.0	
331.02	46	0.9	15	0.1	11	0.1	41	0.7	45	0.0	14	0.2	
332	46	1.4	8	0.0	4	0.0	56	1.6	0	0.0	14	0.4	
Total													0
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 19 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 10. OR 99E, Pacific Highway East: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>I1-I2. Portland (Mile Points -5.92 - -3.75)</b>													
37.01	44	5.3	0	0.2	0	0.1	36	4.1	33	0.3	9	1.1	
36.01	34	4.1	0	0.3	0	0.0	30	3.6	42	0.3	2	0.2	
72.02	54	0.2	0	0.0	0	0.0	30	0.1	6	0.0	8	0.0	
Total													1
<b>I3. Portland (Mile Points 1.45 - 4.58)</b>													
1	12	0.5	11	0.0	1	0.0	14	0.6	33	0.0	0	0.0	
2	20	2.2	12	0.1	5	0.0	29	3.1	37	0.2	5	0.5	
3.02	12	1.1	0	0.0	8	0.0	9	0.8	13	0.0	1	0.1	



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Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
10	24	2.3	4	0.0	6	0.0	36	3.5	19	0.2	5	0.5	
11.01	20	1.1	0	0.1	0	0.0	57	3.1	0	0.3	2	0.1	
<b>Total</b>													0
<b>14-15. Milwaukie (Mile Points 4.58 – 6.68)</b>													
208	19	0.8	16	0.1	18	0.1	28	1.1	37	0.1	4	0.2	
<b>Total</b>													4
<b>16. Clackamas (Mile Points 6.68 - 10.43)</b>													
218.02	22	2.1	13	0.1	0	0.0	41	3.9	29	0.1	7	0.6	
212	20	1.3	0	0.0	6	0.0	34	2.2	0	0.0	4	0.2	
214	18	1.1	18	0.1	22	0.1	23	1.4	19	0.1	2	0.1	
213	9	0.5	0	0.0	0	0.0	17	1.0	72	0.0	3	0.1	
<b>Total</b>													3
<b>17. Gladstone (Mile Points 10.43 - 11.2)</b>													
217	20	1.1	8	0.0	6	0.0	39	2.2	20	0.0	7	0.4	
219	20	1.9	13	0.1	0	0.0	35	3.1	19	0.0	4	0.4	
223.01	7	0.1	0	0.0	0	0.0	21	0.2	0	0.0	3	0.0	
<b>Total</b>													0
<b>18-19. Oregon City (Mile Points 11.2 - 14.23)</b>													
225	16	0.9	7	0.0	0	0.0	32	1.8	11	0.0	3	0.2	
224	11	0.6	4	0.0	0	0.0	22	1.1	0	0.0	1	0.0	
226.02	10	0.2	17	0.0	0	0.0	7	0.1	0	0.0	0	0.0	
<b>Total</b>													2
<b>Notes:</b>													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 21 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

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**Table 11. OR 99W, Pacific Highway West: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>J1. Portland (Mile Points -5.98 - -4.75)</b>													
38.01	27	2.7	5	0.1	19	0.0	33	3.4	0	0.0	3	0.3	
72.02	54	0.2	0	0.0	0	0.0	30	0.1	6	0.0	8	0.0	
Total												0	
<b>J2. Portland (Mile Points 1.24 - 7.61)</b>													
66.02	11	1.0	0	0.0	0	0.0	29	2.6	20	0.2	3	0.2	
64.03	30	2.5	0	0.0	0	0.0	30	2.5	0	0.0	8	0.6	
60.01	15	0.5	0	0.0	0	0.0	16	0.5	0	0.0	1	0.0	
60.02	15	1.0	17	0.1	20	0.0	13	0.9	13	0.0	1	0.1	
65.02	17	1.6	24	0.2	0	0.0	25	2.4	37	0.2	2	0.2	
65.01	11	0.7	0	0.0	0	0.0	12	0.8	27	0.0	1	0.1	
64.03	30	2.5	5	0.0	0	0.0	33	2.8	7	0.0	8	0.6	
64.04	18	0.9	9	0.1	0	0.0	18	0.9	29	0.1	3	0.2	
57	31	3.2	12	0.2	18	0.1	28	2.9	34	0.3	11	1.1	
59	23	2.2	8	0.1	12	0.1	23	2.2	29	0.0	3	0.3	
Total												16	
<b>J3. Tigard (Mile Points 7.61-11.49)</b>													
309	35	2.1	7	0.1	6	0.0	36	2.2	23	0.2	17	0.9	
308.01	31	2.3	22	0.1	8	0.1	34	2.5	78	0.1	8	0.6	
319.1	32	2.8	1	0.0	0	0.0	13	1.2	21	0.0	8	0.7	
306	16	1.2	0	0.0	0	0.0	18	1.3	12	0.0	1	0.1	
307	21	0.3	19	0.0	14	0.0	49	0.7	11	0.0	4	0.1	
319.12	19	1.2	0	0.0	0	0.0	19	1.2	4	0.0	7	0.5	
319.04	14	0.9	0	0.0	16	0.0	21	1.4	17	0.0	2	0.1	
319.07	15	0.8	10	0.0	0	0.0	27	1.4	4	0.0	2	0.1	
319.08	32	0.9	5	0.0	0	0.0	11	1.4	0	0.0	6	0.2	

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
308.03	25	2.4	8	0.1	0	0.0	32	3.0	40	0.2	4	0.3	
308.05	14	0.9	9	0.0	0	0.0	16	1.0	0	0.0	1	0.1	
Total												6	
J4-J5. Washington County & Tualatin (Mile Points 11.48 - 13.32)													
320.01	16	0.4	2	0.0	0	0.0	27	0.7	11	0.0	4	0.1	
Total												0	
J6-J9. Washington County & Sherwood (Mile Points 13.32 – 17.9)													
321.03	15	0.4	2	0.0	0	0.0	13	0.3	10	0.0	4	0.1	
322	12	0.0	3	0.0	0	0.0	10	0.0	0	0.0	3	0.0	
Total												3	
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 24 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 12. OR 141, Beaverton-Tualatin Highway / SW Hall Blvd: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
K1-K2. Beaverton & Washington County (Mile Points 2.57-4.08)													
305.01	24	1.3	9	0.0	0	0.0	34	1.8	29	0.1	6	0.3	
305.02	16	1.3	7	0.1	13	0.0	20	1.7	0	0.0	3	0.2	
310.05	47	4.6	8	0.1	17	0.2	50	4.8	20	0.1	20	1.8	
310.06	32	3.0	15	0.3	19	0.2	30	2.8	37	0.2	9	0.8	
Total												0	

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Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>K3. Tigard (Mile Points 4.08 - 7.07)</b>													
308.01	31	2.3	22	0.1	8	0.1	34	2.5	78	0.0	8	0.6	
308.03	25	2.4	8	0.1	0	0.0	32	3.0	40	0.2	4	0.3	
308.05	14	0.9	9	0.1	0	0.0	16	1.0	0	0.0	1	0.1	
308.06	24	1.2	0	0.0	0	0.0	24	1.1	0	0.0	6	0.3	
309	35	2.1	7	0.1	6	0.0	36	2.2	23	0.2	17	0.9	
306	16	1.1	0	0.0	0	0.0	18	1.3	12	0.0	1	0.1	
307	21	0.3	19	0.0	14	0.0	49	0.7	11	0.0	4	0.1	
Total													0
<b>K4-K5. Tigard &amp; Durham (Mile Points 7.69 - 8.88)</b>													
320.05	50	2.9	6	0.0	3	0.0	51	2.9	10	0.1	13	0.7	
320.01	16	0.4	2	0.0	0	0.0	27	0.7	11	0.0	4	0.1	
Total													2
<b>K6-K7. Tualatin &amp; Wilsonville (Mile Points 12.47 - 13.14)</b>													
244	25	1.3	5	0.0	8	0.0	29	1.5	15	0.1	3	0.1	
321.1	26	0.4	0	0.0	0	0.0	16	0.1	15	0.0	2	0.0	
227.07	25	0.3	0	0.0	0	0.0	18	0.2	49	0.0	4	0.0	
Total													1
<b>Notes:</b>													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 27 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

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for highway jurisdictional transfer

**Table 13. OR 210, Scholls Highway/SW Scholls Ferry Rd: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>L1. Beaverton (Mile Points 2.57 – 3.32)</b>													
309	35	2.1	7	0.1	6	0.0	36	2.2	23	0.2	17	0.9	
305.01	24	1.3	9	0.0	0	0.0	34	1.8	29	0.1	6	0.3	
Total												0	
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 29 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 14. OR 212, Clackamas-Boring Highway: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>M1. Clackamas (Mile Points 1.87 - 8.59)</b>													
233	12	0.1	12	0.0	0	0.0	18	0.1	11	0.0	2	0.0	
232.01	11	0.1	9	0.0	0	0.0	17	0.1	0	0.0	2	0.0	
234.01	19	0.1	0	0.0	2	0.0	24	0.1	0	0.0	9	0.0	
Total												4	
<b>M2-M7. Happy Valley &amp; Clackamas (Mile Points 0.52 – 1.87)</b>													
232.02	15	0.2	19	0.0	33	0.0	17	0.2	35	0.0	4	0.1	
Total												1	
<b>M7-M8. Happy Valley &amp; Clackamas (Mile Points 0.04 – 5.45)</b>													
221.03	24	1.8	4	0.0	0	0.0	13	1.0	14	0.0	9	0.6	
221.08	31	0.5	15	0.0	0	0.0	53	0.9	58	0.1	13	0.2	

# Attachment D

Equity considerations  
for highway jurisdictional transfer

Highway Jurisdictional Transfer Framework 

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
221.05	31	1.7	5	0.0	0	0.0	22	1.2	8	0.0	8	0.4	
221.01	17	1.5	9	0.1	20	0.1	25	2.2	47	0.1	4	0.3	
Total												0	
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 31 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 15. OR 213N, Cascade Highway North: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>N1. Portland (Mile Points -0.14 - 7.24)</b>													
16.02	39	4.5	16	0.3	0	0.0	53	6.0	30	0.3	18	1.9	
76	54	4.6	4	0.0	4	0.1	44	3.7	16	0.1	27	2.2	
77	53	4.7	1	0.0	11	0.1	41	3.6	0	0.0	26	2.1	
86	40	5.0	1	0.0	10	0.1	48	6.0	23	0.3	15	1.8	
89.02	35	1.8	0	0.0	3	0.0	37	2.0	0	0.0	10	0.5	
29.03	41	3.3	9	0.1	1	0.0	32	2.5	50	0.2	13	1.0	
5.02	35	4.9	3	0.1	3	0.1	39	5.5	17	0.1	14	1.9	
6.01	39	4.0	1	0.0	1	0.0	47	4.9	11	0.1	16	1.6	
6.02	50	7.5	7	0.2	0	0.0	50	7.3	23	0.2	18	2.5	
222.01	46	5.0	3	0.0	8	0.2	39	4.0	15	0.1	17	1.8	
73	47	0.1	11	0.0	0	0.0	63	0.1	31	0.0	11	0.0	
29.01	19	2.2	12	0.1	0	0.0	16	1.9	19	0.1	9	1.0	

Census Tract <sup>3,4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
29.02	20	1.8	15	0.1	21	0.1	25	2.2	30	0.1	6	0.5	
17.01	27	3.8	0	0.0	0	0.0	23	3.1	14	0.1	2	0.2	
17.02	42	4.9	21	0.6	6	0.1	39	4.8	0	0.5	14	1.6	
16.01	21	1.7	8	0.0	29	0.1	23	1.7	24	0.1	6	0.5	
7.01	28	3.9	13	0.3	13	0.1	28	3.9	35	0.3	9	1.1	
7.02	31	4.6	8	0.2	0	0.0	37	5.5	10	0.1	9	1.2	
83.01	55	5.9	12	0.4	0	0.0	62	6.6	45	0.3	35	3.5	
<b>Total</b>													18
<b>N2. Clackamas (Mile Points 7.24 - 10.39)</b>													
216.01	22	2.3	11	0.1	19	0.2	22	2.3	23	0.2	7	0.7	
216.02	26	2.1	8	0.0	18	0.1	26	2.1	46	0.2	8	0.6	
221.07	29	1.1	0	0.0	12	0.1	36	1.4	11	0.0	6	0.2	
215	14	0.4	0	0.0	0	0.0	22	0.7	79	0.0	1	0.0	
221.01	17	1.5	9	0.1	0	0.1	25	2.2	47	0.1	4	0.3	
221.08	31	0.5	15	0.0	0	0.0	53	0.9	58	0.1	13	0.2	
<b>Total</b>													3
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 33 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

# Attachment D

Equity considerations  
for highway jurisdictional transfer

**Table 16. OR 213S, Cascade Highway South: Demographic Data**

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>O1. Oregon City (Mile Points 0 – 0.63)</b>													
223.01	7	0.1	0	0.0	0	0.0	21	0.2	0	0.0	3	0.0	
Total													0
<b>O2-O3. Clackamas &amp; Oregon City (Mile Points 0.63 – 1.25)</b>													
224	11	0.6	4	0.0	0	0.0	22	1.1	0	0.0	1	0.0	
Total													1
<b>O4. Clackamas (Mile Points 1.13 – 1.25)</b>													
225	16	0.9	7	0.0	0	0.0	32	1.8	11	0.0	3	0.2	
Total													0
<b>O5. Oregon City (Mile Points 2.63 - 4.18)</b>													
226.03	14	0.63	0	0.0	0	0.0	31	1.4	0	0.0	3	0.1	
223.02	9	0.1	11	0.0	0	0.0	25	0.3	17	0.0	2	0.0	
226.05	13	0.6	5	0.0	11	0.0	18	0.9	33	0.1	2	0.1	
Total													4
<b>O6. Clackamas (Mile Points 4.18 - 6.49)</b>													
230.02	14	0.0	0	0.0	0	0.0	19	0.1	69	0.0	2	0.0	
230.01	11	0.1	0	0.0	0	0.0	15	0.1	57	0.0	3	0.0	
Total													0
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 36 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													



Equity considerations  
for highway jurisdictional transfer

**Table 17. OR 219, Hillsboro-Silverton Highway: Demographic Data**

Census Tract <sup>3,4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>P1-P3. Hillsboro &amp; Washington County (Mile Points 0 – 1.31)</b>													
325.01	53	1.5	11	0.0	10	0.1	59	1.4	12	0.0	18	0.5	
Total													0
Notes:													
<sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.													
<sup>2</sup> Density is defined as the number of people per square acre.													
<sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.													
<sup>4</sup> Refer to page 38 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.													

**Table 18. OR 224, Clackamas Highway / Sunrise Expressway: Demographic Data**

Census Tract <sup>3,4</sup>	People of Color (Residents)		People of Color (Unemployment)				Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	Density	
<b>Q1-Q2. Clackamas &amp; Happy Valley (Mile Points 8.16 – 10.49)</b>													
232.02	15	0.2	19	0.0	33	0.0	17	0.2	35	0.0	4	0.1	
Total													1
<b>Q3. Clackamas (Mile Points 4.56 – 6.25)</b>													
221.07	29	1.1	0	0.0	12	0.1	36	1.4	11	0.0	6	0.2	
215	14	0.4	0	0.0	0	0.0	22	0.7	79	0.0	1	0.0	
221.05	31	1.7	5	0.0	0	0.0	22	1.2	8	0.0	8	0.4	
221.08	31	0.5	15	0.0	0	0.0	53	0.9	58	0.1	13	0.2	
Total													0
<b>Q4. Clackamas (Mile Points 2.71 – 3.82)</b>													
221.01	17	1.5	9	0.1	20	0.1	25	2.2	47	0.1	4	0.3	
Total													5

# Attachment D

Equity considerations  
for highway jurisdictional transfer

Census Tract <sup>3, 4</sup>	People of Color (Residents)		People of Color (Unemployment)			Low-Income (Residents)		Low-Income (Unemployment)		Limited English Proficiency		Religious Institutions/ Gathering Spaces
	% <sup>1</sup>	Density <sup>2</sup>	% People of Color	Density	% Hispanic & Latino	Density	%	Density	%	Density	%	
<b>Q5. Milwaukie (Mile Points -0.01 – 2.71)</b>												
208	19	0.8	16	0.1	18	0.1	28	1.1	37	0.1	4	0.2
<b>Total</b>												2
<p>Notes:</p> <p><sup>1</sup> Percentage is the number of people that fit the category per the total census tract population.</p> <p><sup>2</sup> Density is defined as the number of people per square acre.</p> <p><sup>3</sup> Cells highlighted in gray are values above the Metro regional average. Refer to Section 2 for a list of the Metro Regional averages.</p> <p><sup>4</sup> Refer to page 40 of the Metro Jurisdictional Transfer Framework Atlas for graphics representing the reported data.</p>												

## 4 Future Population Trends

The Portland Metro region must address planning and transportation inequities now as an acknowledgement of historic patterns and to shape an equitable future. Regional population forecasts reflect expectations of significant growth in populations of color over the next several decades. Metro estimates that the Portland Metro region's overall population will grow by 1 million to 3.5 million people during the next 40 years, according to Metro Research Center's 2060 Population Forecast, which is based on the Portland-Vancouver-Hillsboro Metropolitan Statistical Area. The number of people of color is expected to increase by 125 percent to 1.5 million by 2060.

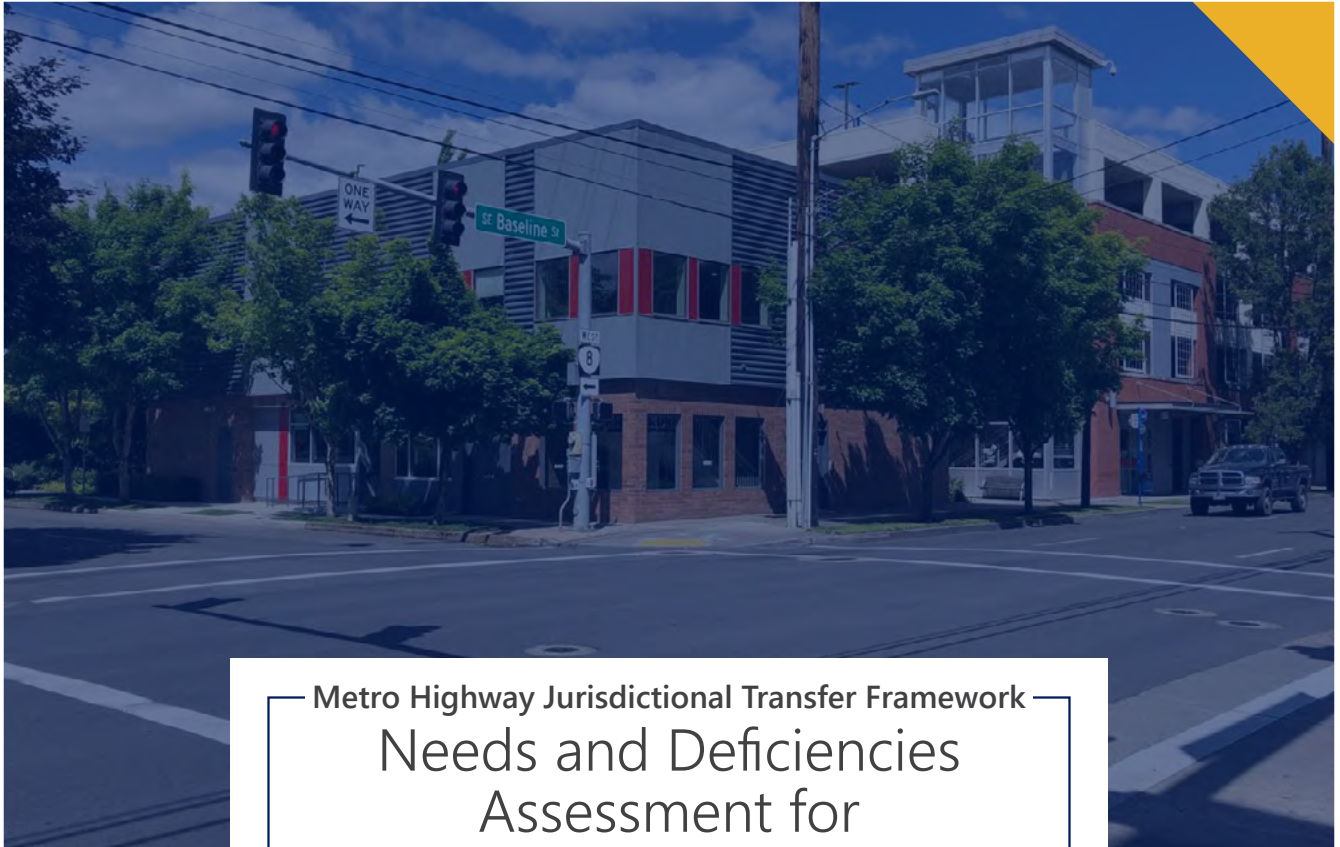
The Hispanic/Latino/a/x population is expected to continue to be the largest non-white group in the region, more than doubling in size to 910,000 by 2060 as migration and birth rates rise steadily. The Asian population is anticipated to double to 390,000 people, the second-largest ethnic minority in the area. The Black population is expected to increase about 50 percent to 120,000 by 2060. The white population, currently the largest population group in the area, is anticipated to grow about 9 percent to 2 million from 2020 to 2060.

## 5 Conclusion

The Equity Considerations Evaluation provides data to further inform the recommendations for jurisdictional transfer. Decision-makers and staff can use this analysis to help inform future decisions to positively impact people of color, low-income households, the unemployed and people with limited English proficiency and/or disabilities.

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# ATTACHMENT E - Needs and Deficiencies Assessment



Metro Highway Jurisdictional Transfer Framework  
Needs and Deficiencies  
Assessment for  
Potential Jurisdictional  
Transfer Candidates in the  
Portland Metro Area



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## Introduction

The purpose of the regional framework for highway jurisdictional transfer study is to identify which state-owned routes in greater Portland should be evaluated and considered for a jurisdictional transfer, sort them based on regional priorities, and address some of the opportunities and barriers to transferring the routes.

This report provides a high level snapshot assessment of the needs and deficiencies of potential jurisdictional transfer candidates in the Greater Portland Area to help inform future conversations about investment and/or jurisdictional transfer. It is designed and organized primarily as a tool for local

jurisdictions, and secondarily for regional and state agencies. The corridors featured in this report showed the strongest characteristics for potential jurisdictional transfer based on an assessment of technical, readiness, and equity considerations (see Metro Highway Jurisdictional Transfer Framework and Equity Considerations memos on the project website - <https://www.oregonmetro.gov/tools-partners/guides-and-tools/jurisdictional-transfer-assessment> - for additional information on the assessment). Many of these highway corridors are located in areas with high concentrations of people of color and people who are low-income compared to regional averages. In addition, many of these highway corridors demonstrate safety needs.

## CONTENTS

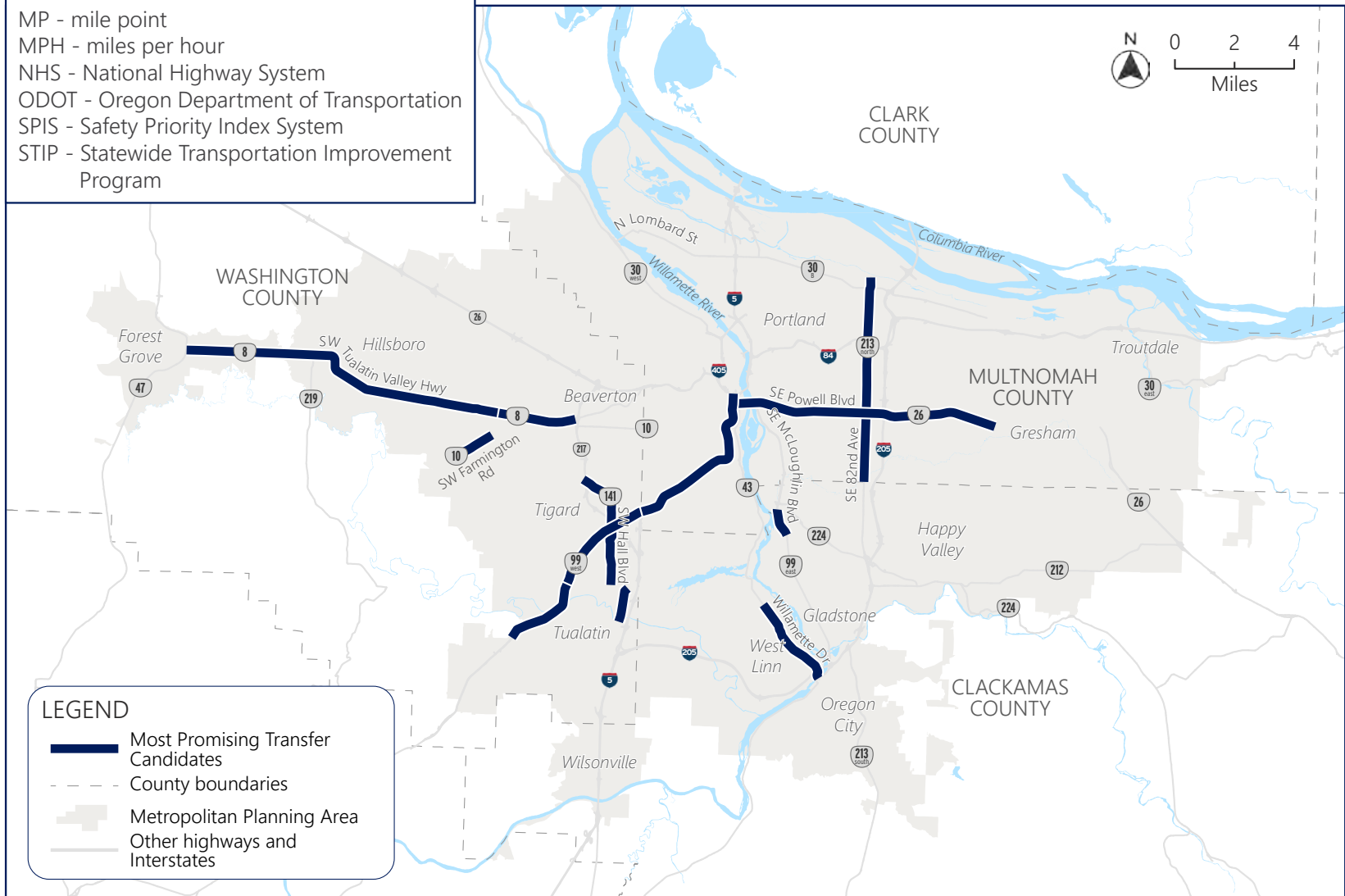
<b>City of Portland</b>	
Powell Blvd (US 26) .....	1
Barbur Blvd (OR 99W).....	5
SE/NE 82nd Ave (OR 213) .....	9
<b>City of Beaverton</b>	
Tualatin Valley Hwy (OR 8).....	13
<b>City of Tigard</b>	
Pacific Hwy W (OR 99W) .....	17
<b>Washington County</b>	
Tualatin Valley Hwy (OR 8).....	21
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Pacific Hwy W (OR 99W) .....	29
SW Hall Blvd / Upper Boones Ferry Rd (OR 141).....	33
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### List of acronyms

MP - mile point  
 MPH - miles per hour  
 NHS - National Highway System  
 ODOT - Oregon Department of Transportation  
 SPIS - Safety Priority Index System  
 STIP - Statewide Transportation Improvement Program



### LEGEND

- Most Promising Transfer Candidates
- County boundaries
- Metropolitan Planning Area
- Other highways and Interstates

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# Attachment E



## Corridor summary

The section of US 26 (Powell Boulevard) in this assessment is in Portland (a previously transferred section of US 26/Powell Boulevard is in Gresham). The westernmost portion of Powell Boulevard is in Portland's central city. West of Interstate 205 (I-205), land uses adjacent to Powell Boulevard are primarily commercial surrounded by residential. That section of the corridor lacks bike facilities. East of I-205, adjacent land uses are a mix of commercial and residential. This eastern section is undergoing major reconstruction to add sidewalks, continuous bike lanes, lighting and safer crossings. When this \$120 million-plus project is completed, that section of Powell Boulevard will be transferred to the City of Portland.

Powell Boulevard has a high crash rate with driveways and cross streets that create conflict points. TriMet bus line #9 provides frequent transit service, and runs along Powell Boulevard between the Willamette River and downtown Gresham. Six other TriMet lines provide standard service along this transit-dependent corridor that is home to some of the City's busiest bus routes. The area has high rates of people of color, people who are unemployed, people with low incomes and people who speak with limited English proficiency compared to the regional averages. In addition to the funded project to the east of I-205, the western section of the corridor has several planned and funded improvement projects.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway

Sidewalk gaps (miles)	5.4
Substandard sidewalk (miles)	2.7
Sidewalk meets standard (miles)	5.7
Crossings	55

### Bicycle network

Listed as Metro Bicycle Parkway and Regional Bikeway

Bike facility gaps (miles)	6.8
Substandard bike facility (miles)	4.5
Bike facility meets standard (miles)	0.9

### TriMet routes

Route	Frequency	Ridership (weekly)
9	Frequent	49,810
17	Standard	38,110
19	Standard	31,890
66	Standard	2,550
70	Standard	20,340
74	Standard	3,890
291	Standard	120

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	436 total

## Corridor data

Length	11.9	
Speed limit	35 - 40 mph	
Number of lanes	4 - 6	
Major intersections*	17	
Pavement condition	Fair:	Good:
	MP 1.02 – 3.46	MP 0.21 – 1.02 MP 3.46 – 9.96
Freight routes	Reduction review route (ORS 366.215)	
Bridges (MP): bridge rating (0-100)	MP 0.1: 26.9	MP 0.99: 76.4
	MP 0.13: 68.8	MP 1.01: 56.6

## Current roadway classification

Federal	Urban Other Principal Arterial (NHS)
State**	District Highway
Metro	Major Arterial
Local	Arterial
	Major City Traffic Street

## Demographics

Population	70,191
Employment	159,025

\* Major intersection defined as two arterial roadways intersecting  
 \*\* Current roadway function is consistent with the OHP definition, therefore Metro does not recommend an OHP reclassification.

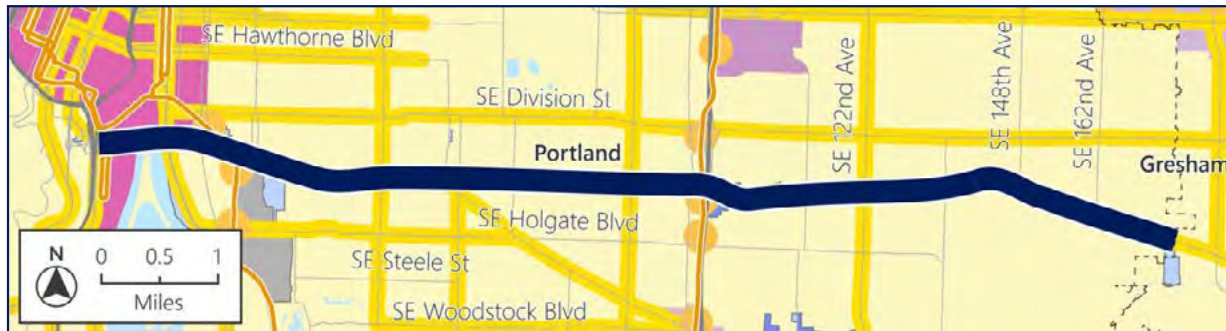
### Environmental



### Metro equity focus areas\*



### Regional land use and transportation



- Corridor
- County boundary
- City boundary
- Arterials
- TriMet MAX line
- 2040 corridor
- Central city
- Regional center
- Town center
- Employment areas
- Industrial areas
- Regionally significant industrial areas
- Neighborhoods
- Urban reserves
- Rural reserves
- Parks & open space
- River/waterbody
- Not designated

\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

## City of Portland (US 26)

### Upcoming Projects

Funded in adopted capital improvement program

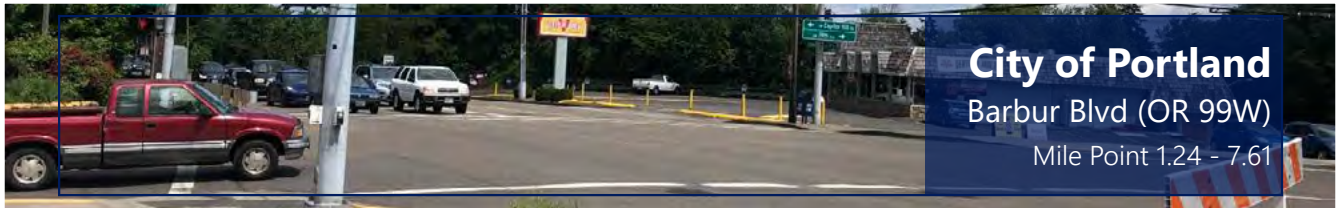
Project name	Project Cost	Location
US26: SE 8th Ave – SE 87th Ave (21614)	\$103,897	MP 1.14 - 5.35
US26/OR213 Curb Ramps (21255)	\$1,605,000	MP 5.24
(STIP 18-21) US26 (Powell Blvd): SE 122nd Ave – SE 136th Ave (19690)	\$20,343,363	MP 7.21 – 7.9
(STIP 21-24) US26 (Powell Blvd): SE 99th Ave – East City Limits (21178)	\$105,000,000	MP 6.03 - 9.96

### Segment Photos



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# Attachment E



## Corridor summary

OR 99W in the Metro region stretches from Portland through Tigard, King City, unincorporated Washington County and Tualatin to Sherwood. The OR 99W (Barbur Boulevard) corridor in the assessment travels through Portland's central city. The corridor extends south through residential neighborhoods to a town center in the southern area of the corridor. SW Corridor Light Rail Project planning and design work is underway in this area. The light rail project stands to significantly change the highway corridor with transit-oriented development, improved sidewalks and bike facilities and other improvements. The City of Portland and ODOT have agreed to transfer this section of Barbur Boulevard following completion of the light-rail line. The corridor

has a high crash frequency and density of conflict points. Frequent and standard transit lines serve Barbur Boulevard and the corridor is part of the regional pedestrian and bicycle network. Pavement condition ranges from poor to fair. This area has some sections with a high percentage of people of color and people with low-incomes compared to regional averages. A growing and vibrant Muslim community is developing near the West Portland Town Center. This section has some environmental challenges with slopes and poorly draining soils that require extra stormwater treatment efforts. The corridor has a moderate level of planned and funded improvement projects in addition to projects associated with the SW Corridor Light Rail Project.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway	
Sidewalk gaps (miles)	4.0
Substandard sidewalk (miles)	2.6
Sidewalk meets standard (miles)	2.0
Crossings	30

### Bicycle network

Listed as Metro Bicycle Parkway	
Bike facility gaps (miles)	2.0
Substandard bike facility (miles)	4.7
Bike facility meets standard (miles)	1.2

### TriMet routes

Route	Frequency	Ridership (weekly)
1	Standard	2,150
12	Frequent	48,890
38	Standard	2,250
39	Standard	1,000
45	Standard	5,900
54	Frequent	14,010
55	Standard	300
56	Frequent	11,010
64	Standard	2,200
65	Standard	650
92	Standard	1,650
94	Standard	11,700

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	22 total

## Corridor data

Length	6.4 miles	
Speed limit	30 - 45 mph	
Number of lanes	4 - 6	
Major intersections*	6	
Pavement condition	Poor: MP 3.86 – 4.35 MP 7.42 – 7.61	Fair: MP 1.24 – 7.42
Freight routes	None	
Bridges (MP): bridge rating (0-100)	MP 1.14: 53.6 MP 1.93: 49.4 MP 1.98: 76.4	MP 3.25: 74.7 MP 3.5: 42.1 MP 4.86: 62.3

## Current roadway classification

Federal	Urban Other Principal Arterial, Urban Minor Arterial (NHS)
State	Statewide, District Highway
Recommended future state classification**	District (MP 7.4 - 7.61)
Metro	Major Arterial
Local	Major City Traffic Street

## Demographics

Population	47,369
Employment	153,209

\* Major intersection defined as two arterial roadways intersecting  
 \*\* Based on comparison of current roadway function to OHP definitions, Metro recommends changing the OHP roadway classification.



## City of Portland (OR 99W)

Environmental



Metro equity focus areas\*



Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

City of Portland (OR 99W)

## Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 21-24) SW Barbur Blvd: SW Caruthers St – SW Capitol Hwy (18316)	\$590,661	MP 1.97 - 6.6

## Segment Photos



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# Attachment E



## Corridor summary

OR 213 runs from Portland through unincorporated Clackamas County and Gladstone to Oregon City in the Metro area. The OR 213 (SE/NE 82nd Avenue) corridor in this assessment is in Portland, and ODOT and the City of Portland are currently pursuing jurisdictional transfer, pending voter approval of funds. This section of 82nd Avenue travels through commercial and some industrial areas, and has a high frequency of crashes and conflict points. There are virtually no bicycle facilities on 82nd Avenue, and about 80% of the corridor has sidewalks. The City of Portland adopted the 82nd Avenue Plan in fall 2019 calling for wider sidewalks, bike facilities and other safety and signal improvements. Pavement condition along the corridor is poor or very poor. TriMet's busiest bus line (#72 Killingsworth/ 82nd Ave) serves 82nd Avenue with frequent service; there are a couple of other bus lines with standard frequency service. The area has a high rate of people of color, and people with low incomes and limited English proficiency compared to regional averages. 82nd Avenue passes through an environmentally sensitive area at Johnson Creek near the southern end of the segment. The corridor has a moderate level of planned and funded improvement projects.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway	
Sidewalk gaps (miles)	1.4
Substandard sidewalk (miles)	2.2
Sidewalk meets standard (miles)	6.0
Crossings	43

### Bicycle network

Not listed on the Metro Bicycle Network	
Bike facility gaps (miles)	7.5
Substandard bike facility (miles)	0.3
Bike facility meets standard (miles)	0.1

### TriMet routes

Route	Frequency	Ridership (weekly)
71	Standard	21,070
72	Frequent	84,480
272	Standard	140

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	309 total

## Corridor data

Length	9.1 miles	
Speed limit	35 - 45 mph	
Number of lanes	4	
Major intersections*	16	
Pavement condition	Very Poor: MP 4.24 – 6.73	Poor: MP -0.14 – 4.24 MP 6.73 – 7.24
Freight routes	None	
Bridges (MP): bridge rating (0-100)	MP 2.24: 91.8 MP 2.25: 82.4	MP 7.1: 81.6

## Current roadway classification

Federal	Urban Other Principal Arterial (NHS)
State**	District Highway
Metro	Major Arterial
Local	Major City Traffic Street

## Demographics

Population	31,637
Employment	15,990

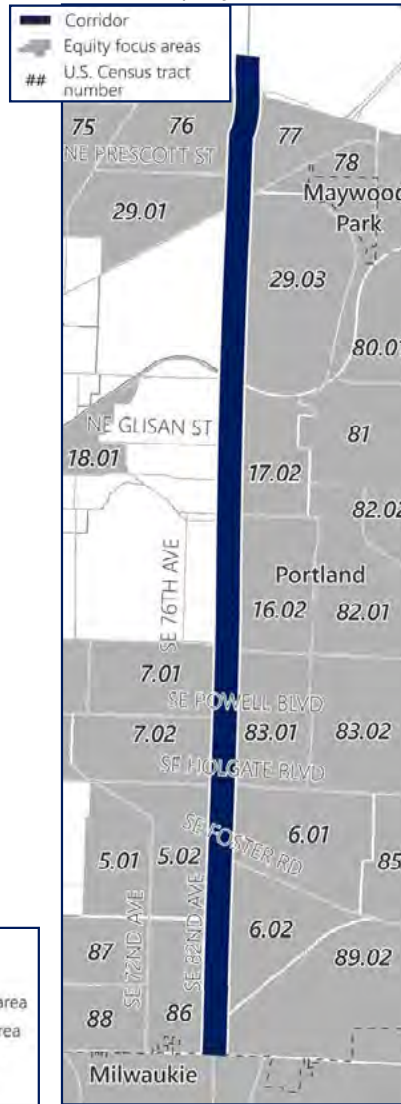
\* Major intersection defined as two arterial roadways intersecting  
 \*\* Current roadway function is consistent with the OHP definition, therefore Metro does not recommend an OHP reclassification.

## City of Portland (OR 213)

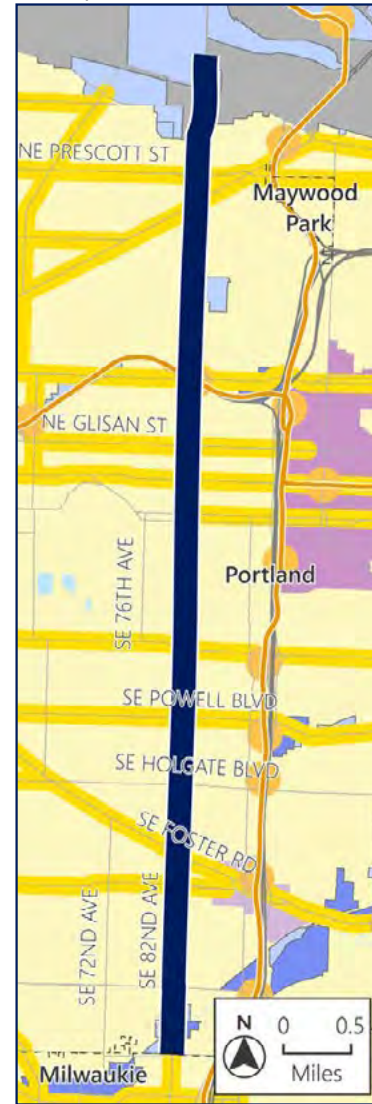
Environmental



Metro equity focus areas\*



Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

- Corridor
- County boundary
- City boundary
- Arterials
- TriMet MAX line
- 2040 corridor
- Central city
- Regional center
- Town center
- Employment areas
- Industrial areas
- Regionally significant industrial areas
- Neighborhoods
- Urban reserves
- Rural reserves
- Parks & open space
- River/waterbody
- Not designated

# Attachment E

## City of Portland (OR 213)

### Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 18-21) OR213 (82nd Ave) at Madison High School (20507)	\$1,120,500	MP 1.64 - 1.65
(STIP 21-24) US26/OR213 Curb Ramps (21255)	\$1,605,500	MP 5.24
(STIP 21-24) OR213 at NE Glisan St & NE Davis St (21607)	\$4,836,940	MP 2.75 & 2.87

### Segment Photos



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## Corridor summary

OR 8 is in Washington County and travels through Beaverton, Hillsboro, Cornelius and Forest Grove. The section of OR 8 in this assessment is within Beaverton. West of OR 217 in Beaverton, OR 8 is known as Tualatin Valley (TV) Highway; to the east it's known as SW Canyon Road. The City of Beaverton has expressed interest in jurisdictional transfer discussions for the downtown Beaverton section in particular. This section has a mix of regional center, employment and neighborhood land uses. The SW Canyon Road stretch of OR 8 is a mix of commercial uses near OR 217 and then transitions to a residential corridor as it moves east to the Camelot Court area. The OR 8 corridor has safety challenges and is a high crash rate facility with multiple driveways creating turning conflicts. Transit frequency is high to the west of OR 217, with bus #57 one of TriMet's busier routes. East of OR 217, the only bus route is #58 with non-frequent service. Pavement condition is rated poor to fair. The TV Highway portion of the corridor has a high percentage of people of color, people with low incomes, and unemployment rates compared to the Metro averages. This corridor has a few planned and funded improvement projects.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway

Sidewalk gaps (miles)	3.8
Substandard sidewalk (miles)	3.8
Sidewalk meets standard (miles)	2.2
Crossings	24

### Bicycle network

Listed as Metro Bicycle Parkway and Regional Bikeway

Bike facility gaps (miles)	3
Substandard bike facility (miles)	3.2
Bike facility meets standard (miles)	1.4

### TriMet routes

Route	Frequency	Ridership (weekly)
57	Frequent	45,430
58	Standard	5,550

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	138 total

## Corridor data

Length	5.8 miles	
Speed limit	35 - 45 mph	
Number of lanes	4	
Major intersections*	8	
Pavement condition	Poor:	Fair:
	MP 0.22 – 2.9	MP 0.05 – 0.22
	MP 3.18 – 5.85	MP 2.9 – 3.18
Freight routes	Reduction review route - Beaverton City Limits to OR 217 (ORS 366.215)	
Bridges (MP): bridge rating (0-100)	MP 3.28: 76.8	MP 4.97: 41
	MP 4.22: 82.2	MP 5.13: 85

## Current roadway classification

Federal	Urban Other Principal Arterial (NHS)
State	Statewide Highway, District Highway
Recommended future state classification**	District Highway (MP 2.8 - 5.85)
Metro	Major Arterial
Local	Principal Arterial
	Arterial

## Demographics

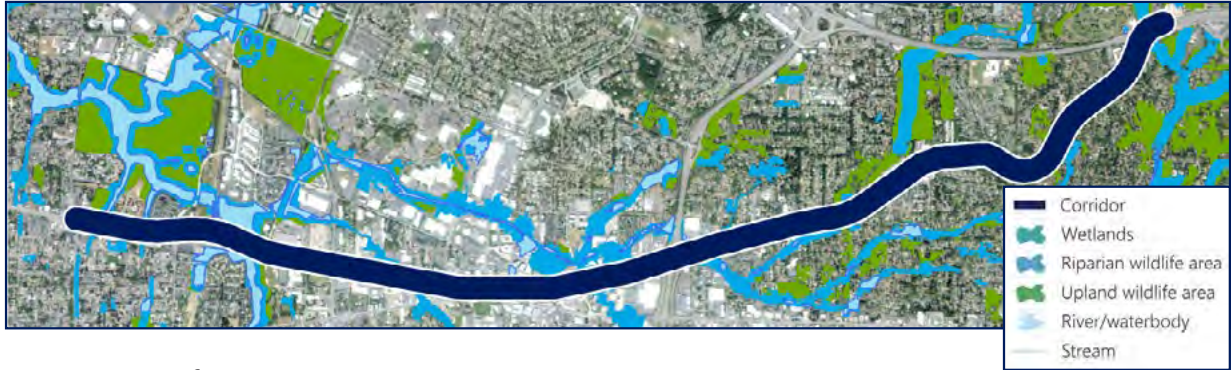
Population	25,888
Employment	23,699

\* Major intersection defined as two arterial roadways intersecting

\*\* Based on comparison of current roadway function to OHP definitions, Metro recommends changing the OHP roadway classification.



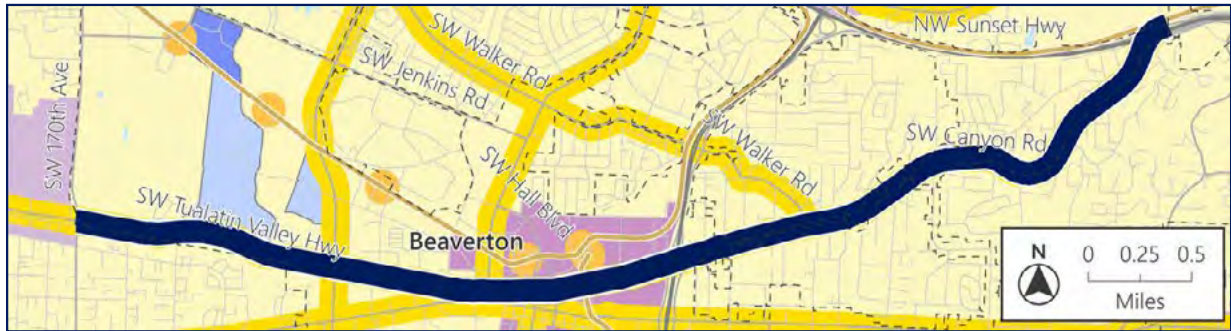
### Environmental



### Metro equity focus areas\*



### Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

## City of Beaverton (OR 8)

### Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 21-24) OR8 SW Hocken Ave – SW Short St (18758)	\$964,000	MP 3.22 – 4.07
(STIP 21-24) OR8 SW Watson Ave – SW 110th Ave, Beaverton (18794)	\$3,029,907	MP 2.75 – 3.6
(STIP 18-21) OR 8 Canyon Rd Streetscape & Safety Project (19275)	\$3,939,597	MP 3.18 – 4.0

### Segment Photos



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# Attachment E



## Corridor summary

OR 99W in the Metro region stretches from Portland through Tigard, King City, unincorporated Washington County and Tualatin to Sherwood. The OR 99W section in this assessment is within the city of Tigard, where the highway travels through town center and neighborhood land uses. The corridor features a high crash frequency rate and number of conflict points. OR 99W is part of the regional pedestrian and bicycle network; however, there are few multimodal facilities in much of the corridor. About half of OR 99W has substandard or no sidewalks while most of the corridor has substandard bike facilities. Along this section, there is frequent transit service. The pavement condition is poor. This area has sections with a high percentage of people of color and people with low-incomes compared to the regional averages. OR 99W within Tigard has a moderate level of funded improvement projects in development. ODOT with partners, Washington County, Tigard, King City, Tualatin, and Sherwood recently concluded the Highway 99W Corridor Study that called for the need of a comprehensive plan for the OR 99W corridor.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway

Sidewalk gaps (miles)	1.4
Substandard sidewalk (miles)	1.4
Sidewalk meets standard (miles)	2.3
Crossings	25

### Bicycle network

Listed as Metro Bicycle Parkway

Bike facility gaps (miles)	0.8
Substandard bike facility (miles)	3.0
Bike facility meets standard (miles)	0.8

### TriMet routes

Route	Frequency	Ridership (weekly)
12	Frequent	48,890
64	Standard	2,200
93	Standard	4,620
94	Standard	11,700

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	61 total

## Corridor data

Length	3.9 miles
Speed limit	30 - 45 mph
Number of lanes	4
Major intersections*	9
Pavement condition	Poor: MP 7.61 – 11.49
Freight routes	Designated OHP freight route, reduction review route (ORS 366.215)
Bridges (MP): bridge rating (0-100)	MP 8.65: 56.6

## Current roadway classification

Federal	Urban Other Principal Arterial
State	Statewide Highway
Recommended future state classification**	District Highway
Metro	Major Arterial
Local	Arterial Principal Arterial

## Demographics

Population	23,903
Employment	18,813

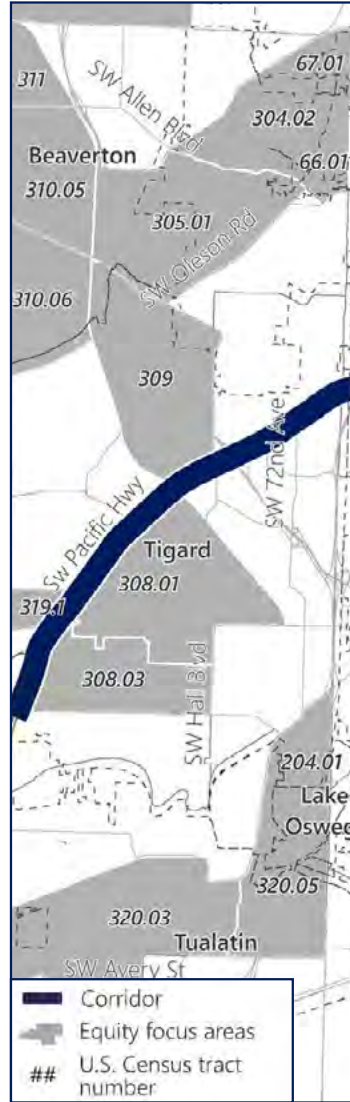
\* Major intersection defined as two arterial roadways intersecting  
 \*\* Based on comparison of current roadway function to OHP definitions, Metro recommends changing the OHP roadway classification.

## City of Tigard (OR 99W)

Environmental



Metro equity focus areas\*



Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

City of Tigard (OR 99W)

## Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 18-21) OR99W at Durham Rd (20436)	\$968,750	MP 11.45 - 11.47
(STIP 18-21) OR99W Barbur Blvd. Northbound Connection Bridge Over I-5 (20465)	\$1,669,975	MP 7.79 - 7.84

## Segment Photos



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# Attachment E



## Corridor summary

OR 8 (TV Highway) to the west of Beaverton travels through the cities of Hillsboro, Cornelius, Forest Grove, and unincorporated Washington County. Land use is mixed, with neighborhood, town center, regional center, employment and industrial designations along the corridor. The highway has a high crash frequency rate, multiple driveways and conflicts along the section, and poor pavement condition for a large part of the eastern section of the corridor (pavement in other sections ranges from fair to very good). Frequent transit service (route #57) runs along TV Highway from 10th Avenue in Hillsboro to B Street in Forest Grove. Sections of TV Highway with standard transit service include Hillsboro between Century and 10th Avenue (route #47) and a small section of TV Highway between 5th and 2nd Avenue in Hillsboro. The area includes a high percentage of people of color, people with low incomes and people with limited English proficiency compared to the Metro averages. The corridor has several planned and funded improvement projects. Forest Grove and Beaverton are currently working with ODOT on safety and multi-modal improvement planning.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway	
Sidewalk gaps (miles)	7.4
Substandard sidewalk (miles)	6.1
Sidewalk meets standard (miles)	5
Crossings	46

### Bicycle network

Listed as Metro Bicycle Parkway and Regional Bikeway	
Bike facility gaps (miles)	2.7
Substandard bike facility (miles)	7.4
Bike facility meets standard (miles)	5.5

### TriMet routes

Route	Frequency	Ridership (weekly)
47	Standard	5,350
48	Standard	10,640
57	Frequent	45,430

\* Major intersection defined as two arterial roadways intersecting

\*\* Based on comparison of current roadway function to OHP definitions, Metro recommends changing the OHP roadway classification.

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	348 total

## Corridor data

Length	12 miles	
Speed limit	30 - 50 mph	
Number of lanes	4	
Major intersections*	16	
Pavement condition	Poor:	Fair:
	MP 5.85 - 11.28	MP 14.28 - 17.88
	Good:	Very Good:
	MP 11.28 - 12.41	MP 12.41 - 14.28
Freight routes	Reduction review route (ORS 366.215)	
Bridges (MP): bridge rating (0-100)	MP 10.55: 83	
	MP 14.31: 62.3	

## Current roadway classification

Federal	Urban Other Principal Arterial (NHS)
State	Statewide Highway, District Highway, STA from 10th Ave to 20th Ave
Recommended future state classification**	District Highway
Metro	Major Arterial
Local	Arterial
	Principal Arterial

## Demographics

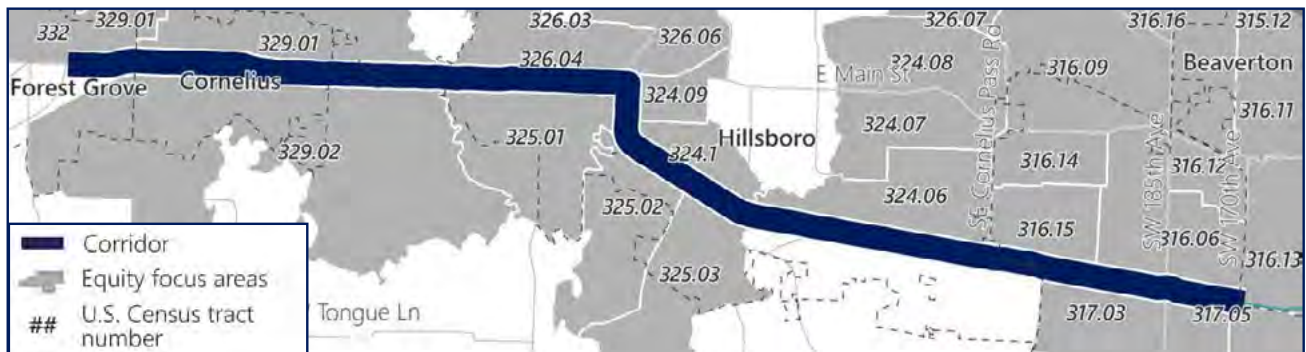
Population	71,491
Employment	28,793



### Environmental



### Metro equity focus areas\*



### Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

## Washington County (OR 8)

### Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 18-21) OR8 at OR219 and SE 44th – SE 45th Ave, Hillsboro (18791)	\$500,000	MP 10.12 & 13.21
(STIP 18-21) OR8 SW Adams Ave – SE 10th Ave and SE Baseline St – SE Maple St (18004)	\$557,227	MP 12.5 - 13.3
(STIP 18-21) OR8 Corridor Safety & Access to Transit (18839)	\$1,844,000	MP 1.14 - 7.8
(STIP 21-24) OR8 at River Rd (20451)	\$2,649,465	MP 11.7 - 11.75
(STIP 21-24) OR8 at 174th Ave, Armco Ave, Main St and A&B Row (21608)	\$2,750,000	MP 13.91 - 13.93
Hillsboro/Washington County – Century Boulevard/TV Highway Intersection (County MSTIP)	\$3,000,000	MP 9.08
(STIP 18-21) OR8 Corridor Safety & Access to Transit (18839)	\$3,742,902	MP 3.2 - 10.8
(STIP 21-24) OR8 at 174th Ave, Armco Ave, Main St and A&B Row (21608)	\$5,189,285	MP 6.07

### Segment Photos



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# Attachment E



## Corridor summary

OR 10 extends from Portland to Beaverton to unincorporated Washington County. The section of OR 10 (Farmington Road) in this assessment is a 1.5-mile stretch in Washington County. Most of Farmington Road has already been transferred from ODOT to Washington County. If this segment is transferred, the entire roadway would be an arterial owned and managed by the County. Land use along this section of Farmington Road is primarily residential with a couple of pockets of commercial enterprises at SW Kinnaman Road at the easternmost end and SW 185th Avenue to the west. There are safety concerns – crashes are frequent and there are many driveways and other conflict points along the corridor. Only about 25 percent of the corridor has standard sidewalks. There are two non-frequent bus routes on this corridor. The areas along the full corridor has higher rates of people of color and people with low income than Metro region averages. The pavement condition is fair with inconsistent facilities for people biking.

## Multimodal network

### Pedestrian network

Listed as a Metro Pedestrian Parkway and Regional Pedestrian Corridor

Sidewalk gaps (miles)	1.2
Substandard sidewalk (miles)	0.5
Sidewalk meets standard (miles)	0.4
Crossings	2

### Bicycle network

Listed as Metro Bicycle Parkway

Bike facility gaps (miles)	1.4
Substandard bike facility (miles)	0.3
Bike facility meets standard (miles)	0.1

### TriMet routes

Route	Frequency	Ridership (weekly)
52	Standard	25,550
88	Standard	8,950

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	34 total

## Corridor data

Length	1.5 miles
Speed limit	30 - 35 mph
Number of lanes	2
Major intersections*	2
Pavement condition	Fair: MP 5.88 – 7.38
Freight routes	None
Bridges (MP): bridge rating (0-100)	MP 7.14: 98.5

## Current roadway classification

Federal	Urban Other Principal Arterial (NHS)
State**	District Highway
Metro	Major Arterial
Local	Arterial

## Demographics

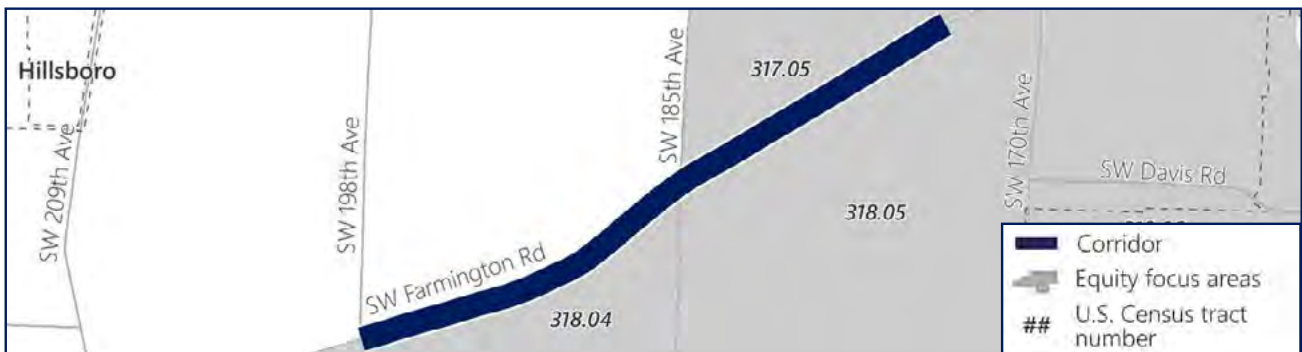
Population	17,646
Employment	1,374

\* Major intersection defined as two arterial roadways intersecting  
 \*\* Current roadway function is consistent with the OHP definition, therefore Metro does not recommend an OHP reclassification.

### Environmental



### Metro equity focus areas\*



### Regional land use and transportation



- |                |                 |             |   |
|----------------|-----------------|-------------|---|
| Dark blue line | Corridor        | Blue        | Employment areas                        |
| Dashed line    | County boundary | Purple      | Industrial areas                        |
| Solid line     | City boundary   | Dark purple | Regionally significant industrial areas |
| Thin grey line | Arterials       | Yellow      | Neighborhoods                           |
| Orange line    | TriMet MAX line | Light blue  | Urban reserves                          |
| Yellow         | 2040 corridor   | Green       | Rural reserves                          |
| Pink           | Central city    | Dark green  | Parks & open space                      |
| Purple         | Regional center | Light blue  | River/waterbody                         |
| Light purple   | Town center     | White       | Not designated                          |

\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

Washington County (OR 10)

## Upcoming Projects

Funded in adopted capital improvement program  
No projects along segment.

## Segment Photos



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# Attachment E



## Corridor summary

OR 99W in the Metro region extends from Portland through Tigard, King City, unincorporated Washington County and Tualatin to Sherwood. It is the gateway to the Metro area for those traveling north from Yamhill County or the coast. The section of OR 99W in this assessment is within Tigard, Tualatin and Washington County. The commercial character of OR 99W changes from numerous driveways in Tigard to more controlled access in Sherwood. There is a high frequency of crashes on this corridor. Pavement condition is very good in the Tualatin section of this corridor. Bus transit service (routes #93 and #94) is standard. This area has a low percentage of historically marginalized people compared to the regional average. OR 99W in this section passes by the Tualatin River National Wildlife Refuge. The corridor has a moderate level of planned and funded improvement projects.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway

Sidewalk gaps (miles)	2.3
Substandard sidewalk (miles)	0.4
Sidewalk meets standard (miles)	0.4
Crossings	10

### Bicycle network

Listed as Metro Bicycle Parkway

Bike facility gaps (miles)	0
Substandard bike facility (miles)	2.9
Bike facility meets standard (miles)	0.1

### TriMet routes

Route	Frequency	Ridership (weekly)
93	Standard	4,620
94	Standard	11,700

\* Major intersection defined as two arterial roadways intersecting

\*\* Based on comparison of current roadway function to OHP definitions, Metro recommends changing the OHP roadway classification.

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	38 total

## Corridor data

Length	3 miles	
Speed limit	45 - 55 mph	
Number of lanes	2	
Major intersections*	2	
Pavement condition	Poor:	Good:
	MP 11.49 – 12.1	MP 12.1 – 14.53
Freight routes	Very Good:	
	MP 12.1 – 14.53	
Bridges (MP): bridge rating (0-100)	MP 12.18: 60.4	MP 15.62: 74.6
	MP 12.2: 60.2	

## Current roadway classification

Federal	Urban Other Principal Arterial
State	Statewide Highway
Recommended future state classification**	District Highway
Metro	Major Arterial
	Arterial
Local	Principal Arterial
	Major Arterial

## Demographics

Population	14,193
Employment	5,490



### Environmental



### Metro equity focus areas\*



### Regional land use and transportation



- |                 |   |
|-----------------|---|
| Corridor        | Employment areas                        |
| County boundary | Industrial areas                        |
| City boundary   | Regionally significant industrial areas |
| Arterials       | Neighborhoods                           |
| TriMet MAX line | Urban reserves                          |
| 2040 corridor   | Rural reserves                          |
| Central city    | Parks & open space                      |
| Regional center | River/waterbody                         |
| Town center     | Not designated                          |

\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

## Washington County (OR 99W)

### Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 21-24) OR99W Rock Creek Bridge (21712)	\$763,184	MP 13.82 - 13.84
(STIP 21-24) OR99W Tualatin River Northbound Bridge (20471)	\$2,302,900	MP 12.14 - 12.23

### Segment Photos



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# Attachment E



## Corridor summary

OR 141 extends from Beaverton through unincorporated Washington County, Tigard, Durham, and Tualatin to Wilsonville. The segment of OR 141 (SW Hall Boulevard/ Upper Boones Ferry Road) in this assessment is in Beaverton, Washington County, Tigard, Durham and Tualatin. Hall Boulevard and Upper Boones Ferry Road's historic function, providing north/south through travel has largely been replaced by OR 217 and Interstate 5. Adjacent land uses are regional center, town center, employment, industrial and neighborhood designations. Crash frequency is low, though there is a high number of driveways and cross streets creating conflict points. Bus transit service ranges from frequent in Tigard to standard elsewhere along the corridor. OR 141 in Beaverton, unincorporated Washington County and parts of Tigard have high rates of people of color, people with low-incomes and people with limited English proficiency compared to regional averages. The pavement condition ranges from poor to good. OR 141 crosses an environmentally sensitive area at the Tualatin River at the south end of this corridor in Tualatin. The corridor has a low level of planned and funded improvement projects.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway	
Sidewalk gaps (miles)	2.2
Substandard sidewalk (miles)	3.9
Sidewalk meets standard (miles)	1.9
Crossings	20

### Bicycle network

Listed as Metro Bicycle Parkway	
Bike facility gaps (miles)	1.7
Substandard bike facility (miles)	2.8
Bike facility meets standard (miles)	5.2

### TriMet routes

Route	Frequency	Ridership (weekly)
43	Standard	1,600
76	Frequent	15,100
78	Standard	13,980
96	Standard	6,500

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	45 total

## Corridor data

Length	5.9 miles	
Speed limit	30 - 40 mph	
Number of lanes	2 - 4	
Major intersections*	10	
Pavement condition	Poor: MP 2.57 – 7.07	Good: MP 7.69 – 8.88
Freight routes	None	
Bridges (MP): bridge rating (0-100)	MP 2.71: 58.1 MP 4.24: 96.2 MP 4.71: 93.5	MP 5.73: 83.6 MP 8.88: 93.7

## Current roadway classification

Federal	Urban Minor Arterial
State**	District Highway, STA from SW Hemlock St to SW Scholls Ferry Rd
Metro	Major Arterial, Minor Arterial
Local	Arterial Major Arterial

## Demographics

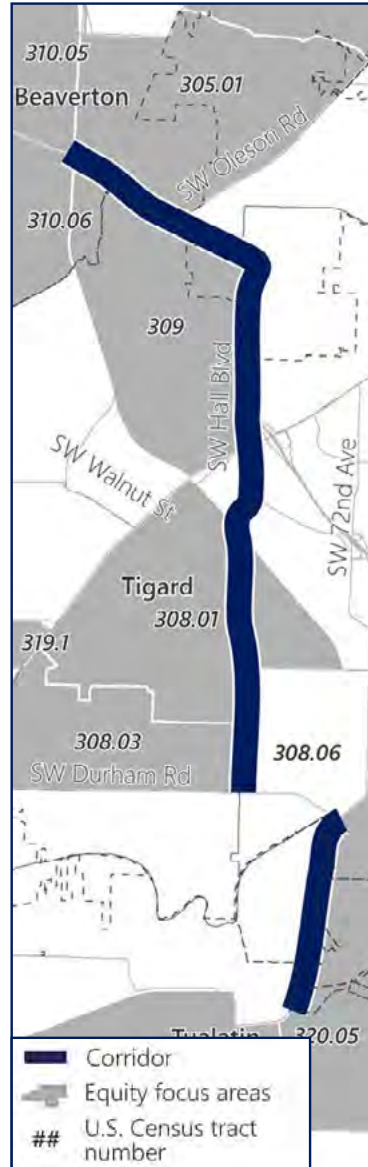
Population	28,413
Employment	49,189

\* Major intersection defined as two arterial roadways intersecting  
 \*\* Current roadway function is consistent with the OHP definition, therefore Metro does not recommend an OHP reclassification.

Environmental



Metro equity focus areas\*



Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

Washington County (OR 141)

## Upcoming Projects

Funded in adopted capital improvement program

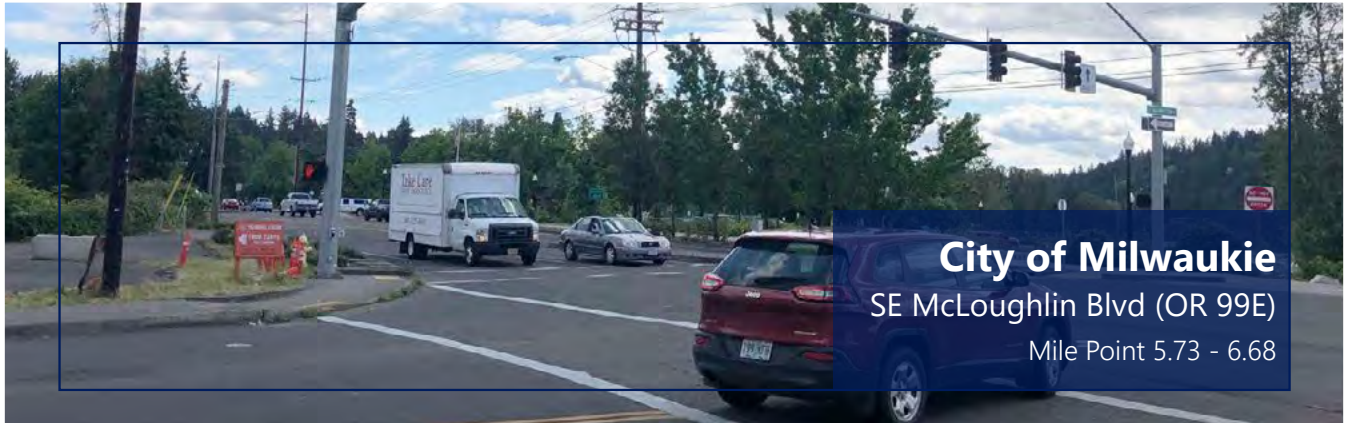
Project name	Project Cost	Location
(STIP 21-24) OR210 SW Scholls Ferry Rd – SW Hall Blvd ITS (21121)	\$835,841	MP 2.57 - 2.84

## Segment Photos



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# Attachment E



## Corridor summary

OR 99E extends from Portland through Milwaukie and Gladstone to Oregon City in the Metro area. The section of 99E in this assessment is within Milwaukie and is known as McLoughlin Boulevard. McLoughlin Boulevard travels through a mix of commercial and neighborhood land uses. This corridor has a high crash rate with a moderate number of conflict points. TriMet bus line #33 provides frequent service on McLoughlin Boulevard from Portland to Oregon City. Three other bus lines provide standard service on some sections of McLoughlin Boulevard. The adjacent area has a higher rate of people of color who are unemployed and people with low incomes or unemployed persons compared to the Metro averages. This corridor travels over Kellogg Creek, which is connected to a dam that the City would like to remove. The corridor has a low level of planned and funded improvement projects, though a recent project improved pavement condition to fair.

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway

Sidewalk gaps (miles)	0.4
Substandard sidewalk (miles)	0.5
Sidewalk meets standard (miles)	0.3
Crossings	5

### Bicycle network

Listed as Metro Bicycle Parkway and Regional Bikeway

Bike facility gaps (miles)	0.4
Substandard bike facility (miles)	0
Bike facility meets standard (miles)	0.8

### TriMet routes

Route	Frequency	Ridership (weekly)
29	Standard	800
33	Frequent	31,060
34	Standard	2,800
99	Standard	4,000

## Safety

Listed as a Metro High Crash Corridor?	Yes
Number of ODOT SPIS sites	10 total

## Corridor data

Length	0.9 miles
Speed limit	30 - 40 mph
Number of lanes	4
Major intersections*	3
Pavement condition	Fair: MP 5.73 – 6.68
Freight routes	Reduction review route (ORS 366.215)
Bridges (MP): bridge rating (0-100)	MP 5.97: 82.1

## Current roadway classification

Federal	Urban Other Principal Arterial (NHS)
State**	District Highway
Metro	Major Arterial
	Arterial
Local	Principal Arterial
	Major Arterial
	Regional Route

## Demographics

Population	10,908
Employment	5,730

\* Major intersection defined as two arterial roadways intersecting  
 \*\* Current roadway function is consistent with the OHP definition, therefore Metro does not recommend an OHP reclassification.



# Attachment E

## City of Milwaukie (OR 99E)

Environmental



Metro equity focus areas\*



Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

- Corridor
- County boundary
- City boundary
- Arterials
- TriMet MAX line
- 2040 corridor
- Central city
- Regional center
- Town center
- Employment areas
- Industrial areas
- Regionally significant industrial areas
- Neighborhoods
- Urban reserves
- Rural reserves
- Parks & open space
- River/waterbody
- Not designated

# Attachment E

City of Milwaukie (OR 99E)

## Upcoming Projects

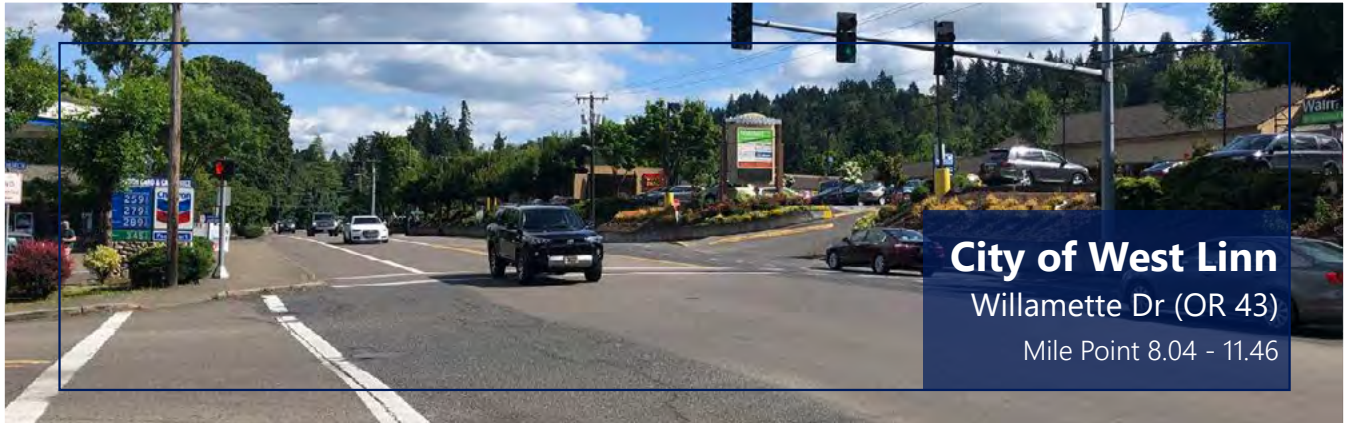
Funded in adopted capital improvement program  
No projects along segment.

## Segment Photos



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# Attachment E



## Corridor summary

OR 43 in the Metro region extends from Portland through unincorporated Multnomah County and Lake Oswego to West Linn. The section of OR 43 (Willamette Drive) in this assessment is within West Linn. The City has expressed interest in jurisdictional transfer if key safety and maintenance improvement projects are completed in the future. A \$6 million project is funded and in the design phase to add a cycle track and sidewalk along Willamette Drive from Arbor Drive to Hidden Springs Road. Residences dominate land use along Willamette Drive in West Linn with commercial enterprises at the southern end at the Willamette River. West Linn is looking at making land use changes to increase development density near the Arch Bridge over the Willamette River and at the Interstate 205/OR 43 interchange. Pavement condition ranges from poor to good. Bus transit service is standard. This section of Willamette Drive has a low rate of historically marginalized communities compared to the Metro regional average. The highway passes through environmentally sensitive areas.

## Corridor data

<b>Length</b>	4.4 miles	
<b>Speed limit</b>	25 - 35 mph	
<b>Number of lanes</b>	2 - 4	
<b>Major intersections*</b>	8	
<b>Pavement condition</b>	Poor: MP 8.04 – 11.29 Good: MP 11.4 – 11.45	Fair: MP 11.29 – 11.4
<b>Freight routes</b>	None	
<b>Bridges (MP): bridge rating (0-100)</b>	MP 11.43: 45.2	

## Multimodal network

### Pedestrian network

Listed as Metro Pedestrian Parkway

Sidewalk gaps (miles)	2
Substandard sidewalk (miles)	2.3
Sidewalk meets standard (miles)	1.1
Crossings	10

### Bicycle network

Listed as Metro Bicycle Parkway

Bike facility gaps (miles)	0.2
Substandard bike facility (miles)	3
Bike facility meets standard (miles)	0.9

### TriMet routes

Route	Frequency	Ridership (weekly)
35	Standard	21,110

## Safety

<b>Listed as a Metro High Crash Corridor?</b>	No
<b>Number of ODOT SPIS sites</b>	14 total

## Current roadway classification

<b>Federal</b>	Urban Other Principal Arterial (NHS), Urban Minor Arterial
<b>State</b>	Statewide Highway
<b>Recommended future state classification**</b>	District Highway
<b>Metro</b>	Major Arterial
<b>Local</b>	Principal Arterial Major Arterial

## Demographics

<b>Population</b>	14,035
<b>Employment</b>	3,357

\* Major intersection defined as two arterial roadways intersecting

\*\* Based on comparison of current roadway function to OHP definitions, Metro recommends changing the OHP roadway classification.

Environmental



Metro equity focus areas\*



Regional land use and transportation



\*Metro equity focus areas are defined as being above the regional average percent of the population and twice the density of people of color, people who are low-income, and people with disabilities as determined by the Metro 2018 Equity Evaluation.

# Attachment E

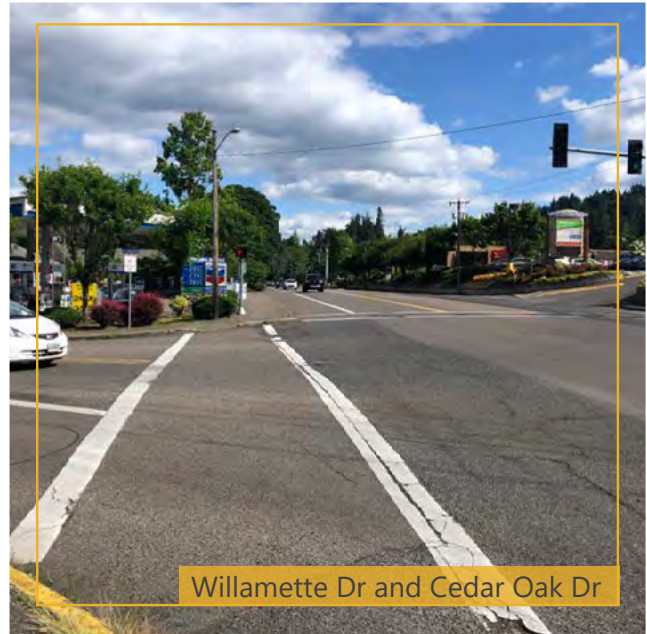
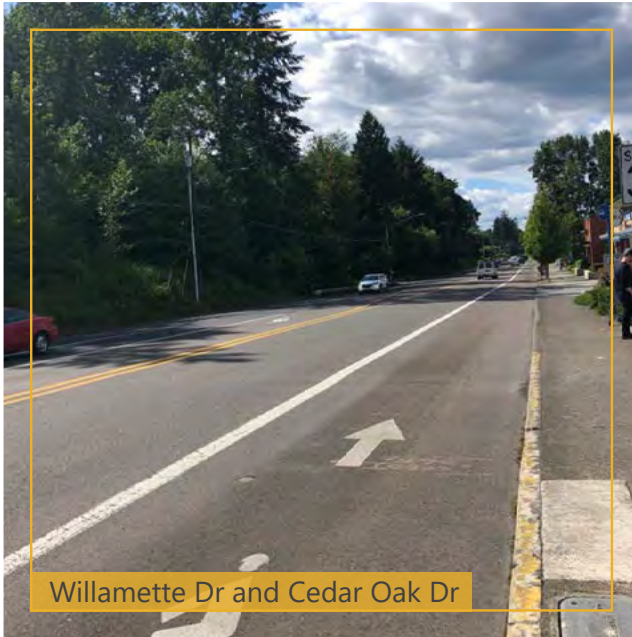
City of West Linn (OR 43)

## Upcoming Projects

Funded in adopted capital improvement program

Project name	Project Cost	Location
(STIP 21-24) OR43 Arbor Dr – Hidden Springs (20329)	\$6,118,203	MP 8.04 - 9.22

## Segment Photos



# ATTACHMENT F - Cost Estimating Methodology

## METRO HIGHWAY JURISDICTIONAL TRANSFER FRAMEWORK

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### Cost Estimating Methodology **DRAFT**

Date: October 2019

Subject: Cost Estimating Methodology Memo

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#### 1 Introduction

##### 1.1 Purpose of the Regional Framework for Highway Jurisdictional Transfer

The purpose of the regional framework for highway jurisdictional transfer study (study) is to identify which state-owned routes in greater Portland should be evaluated and considered for a jurisdictional transfer, identify gaps and deficiencies on those routes, regionally tier the routes, and address some of the opportunities and barriers to transfer the tiered routes. For the purposes of this study, jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing ownership of a highway right of way from the State to a local jurisdiction – a city or county. The decision framework will serve as a tool for state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer of roadway ownership. The study is convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

Metro’s 2018 Regional Transportation Plan (RTP) identified a jurisdictional transfer assessment as a necessary step to help the region meet its equity, safety and multimodal goals. In greater Portland, ownership patterns of streets, roads and highways reflect historical patterns, but do not necessarily reflect current transportation, land use and development needs.

Several arterials in greater Portland were originally constructed to provide connections from farmland to the city (referred to as “farm-to-market” roads). Over time, they grew to become highways. In 1956, the federal government began building the Interstate Highway System (known as the Dwight D. Eisenhower National System of Interstate and Defense Highways) and between 1960 and 1980 the highway system in the Portland area was built. It included limited access facilities such as Interstate (I-)5, I-205 and Highway 26, which provided more efficient long-distance travel options and replaced the function of the existing state system. Since then, much of the land surrounding these highways has evolved to accommodate population growth, new development and diversified land use. As a result, many of the original roads now serve multiple travel needs, providing space for people walking and biking, transit and short-distance travel for vehicles. Roadway designs that were useful last century do not always work for our communities today. Managing these roads that used to function as highways to meet the needs of our communities, especially people of color, people with low-incomes, or limited-English speakers has become increasingly complex.

While their function has changed, for many, their roadway classification and physical design has not; those that remain state highways retain the same classification identified in the 1999 Oregon Highway Plan (OHP), as amended. Transferring non-limited access state highways that function as urban arterials to local jurisdictions would allow them to be operated and maintained consistent with local design



standards that may respond better to modern transportation uses and mobility options, land use and development patterns, and community needs.

## 1.2 Purpose of the memorandum

This memorandum describes a methodology for estimating high-level planning costs associated with transferring ownership of a highway from one jurisdiction to another, typically ODOT to a city or county. It includes methodologies to estimate direct costs (e.g., upgrading roadway elements) and indirect costs (e.g., ongoing maintenance of roadway elements). This methodology is part of a toolkit that establishes a regional approach for how to assess needs and deficiencies for facilities under consideration for transfer and prepare assessments for each corridor segment. For the purposes of this study, a corridor segment is defined as the portion of a highway within a single jurisdiction, while recognizing that jurisdictional transfer can occur for more than one segments or a section of a segment, depending on local context.

The overall cost estimating methodology includes physical and programmatic cost considerations. Physical costs are immediate state of good repair upgrades, identified capital needs, or future maintenance projects that require construction work. Programmatic cost considerations are costs incurred as part of the ownership (i.e., soft costs) and management of a corridor over time. The following four categories address both physical costs and programmatic cost considerations to provide a full understanding of financial implications of jurisdictional transfer.

- State of good repair
- Regionally or locally identified capital needs
- Maintenance and operations
- Soft ownership costs

Subsequent sections of this memorandum describe these four categories.

The study team developed this cost estimating methodology to provide partners with a consistent process for use in developing and understanding the costs associated with a highway jurisdictional transfer in greater Portland. The methodology is based on industry practices, asset management strategies, past jurisdictional transfers, and technical expertise in consultation with ODOT staff and technical experts. Roadways require maintenance, improvements and oversight over the course of ownership. This methodology ensures partners have consistent, necessary tools to consider these variables as local jurisdictions, Metro and ODOT engage in conversations regarding highway jurisdictional transfer.

## 2 Methodology

The cost estimate methodology is a step-by-step process to develop cost estimates for a highway jurisdictional transfer from ODOT to a local jurisdiction; it does not estimate the costs for a specific potential transfer. It is a tool for decision-makers to understand the actual highway transfer costs and future costs (e.g., roadway maintenance). State, regional and local partners can use this methodology to determine near-term improvement costs, the cost of capital needs, long-term maintenance costs, and programmatic costs associated with a highway jurisdictional transfer.

The methodology consists of four components:

1. Establish state of good repair costs
2. Assess known or identified capital needs
3. Identify maintenance and operations costs
4. Identify soft ownership costs

## 2.1 Establish state of good repair costs

This section describes the methodology to evaluate existing conditions of typical corridor elements (e.g., pavement, signal systems, striping, signing, lighting, sidewalks, etc.), identify necessary improvements, develop corridor-based unit costs for improvements, and account for design and delivery costs of bringing the corridor to a state of good repair.

### **Why use a state of good repair approach?**

A state of good repair (SOGR) approach applies a fair cost estimate to determine which roadway elements need to be upgraded so they do not impart unknown costs onto the receiving jurisdiction. At its core, a SOGR approach ensures that all corridor elements function as intended. Corridor elements are components of a roadway facility that serve an important functional need such as pavement, drainage system or signal systems.

Follow these seven steps to bring a corridor segment to a SOGR.

1. Identify and delineate corridor segment
2. Inventory programmed funded projects
3. Agree on SOGR definitions and assessment methods
4. Understand and inventory current maintenance responsibilities
5. Conduct an existing inventory and assess SOGR conditions
6. Determine upgrades
7. Assess upgrade costs

#### Step 1. Identify and delineate corridor segment

The first step to develop a SOGR cost estimate is to determine the corridor length and endpoints for the transfer. Frequently, a highway extends through several jurisdictions. For example, 82<sup>nd</sup> Avenue (OR 213N) extends through two jurisdictions: the City of Portland and Clackamas County. For the purposes of this study, a corridor segment is defined as a portion of a highway within a single jurisdiction.

#### Step 2. Inventory programmed funded projects

Conduct an inventory of current programmed state and local projects at the beginning of the SOGR cost estimate process (e.g., those projects listed in a local Capital Improvement Program (CIP), the Statewide Transportation Improvement Program (STIP), or funded through other mechanisms, such as a Legislative bill or measure that becomes law). Costs for improvements associated with programmed projects are subtracted from a cost estimate because they are already programmed and funded. Include recently completed, under construction, and programmed projects along the highway segment. Improvements can be related to maintenance, upgrades, or replacement of any roadway element along the highway segment.

#### Step 3. Agree on SOGR definitions and assessment methods

SOGR is a condition in which the existing assets for an element are performing their intended purpose. To ensure that both partners use a consistent set of assumptions, ODOT and the local jurisdiction must agree on the SOGR definitions and assessment methods for application. Without agreement, a local jurisdiction and ODOT may have conflicting expectations for SOGR, resulting in differing cost estimates. The typical corridor element SOGR definitions and assessment methods shown in Table 1 are provided as a recommended starting place and have been used in jurisdictional transfer discussions. The local jurisdiction and ODOT should identify any additional elements for consideration, and define each element's SOGR definition. Assessment methods may vary depending on readily-available data regarding the corridor element's condition (see Step 5).

**Table 1. Corridor element descriptions, SOGR definitions, and assessment methods**

Element	Description	State of good repair definition	Assessment methods <sup>1</sup>
Pavement	The hard surface of the roadway that is specifically designed for vehicle traffic.	<ul style="list-style-type: none"> <li>Minimal hairline cracking (i.e., hard to detect)</li> <li>Minor patching and deformation</li> <li>Pavement rutting<sup>2</sup> is less than 0.5 inch deep</li> <li>Ride quality is considered very good and not noticeable to road user</li> </ul>	<ul style="list-style-type: none"> <li>Collect and review data including major maintenance efforts, pavement condition reports, pavement design features, traffic, and climate conditions, and available performance data</li> <li>Conduct field survey to verify pavement conditions with attention given to cracking, deformation, rutting, and ride quality</li> </ul>
Signals and signal systems <sup>3</sup>	The systems that control motor vehicle, bicycle, and pedestrian movements at intersections and crossings. These include vehicle signals, crossing signals, bike signals, and mid-block pedestrian crossing signals such as rectangular rapid flashing beacons (RRFB), pedestrian-activated signals, and high-intensity activated crosswalk (HAWK) signals.	<ul style="list-style-type: none"> <li>Signal does not have a “poor” or “very poor” rating in Oregon’s Traffic Signal Asset Management rating system</li> <li>Pedestrian pushbutton functions</li> <li>Pole and cabinet are in functional condition; hardware is mounted properly; Poles do not have visual structural damage that show significant deformation or cause the pole to lean and functions per their intended purpose</li> <li>For ITS devices, the device and support structures function properly</li> </ul>	<ul style="list-style-type: none"> <li>Review asset management documentation including ODOT’s traffic signal conditions rating system</li> <li>Conduct field survey to assess conditions of aboveground hardware</li> <li>Conduct field survey to assess the physical condition of supports and above ground hardware</li> </ul>

<sup>1</sup> Field surveys may need to be augmented with more detailed analysis of facilities dependent on agreement between agencies

<sup>2</sup> Rutting is a depression or groove worn into a road or path by the travel of wheels.

<sup>3</sup> Traffic signal communications and intelligent transportation systems (ITS) include variable message signs, traffic cameras, Bluetooth readers, and traffic signal communications network connectivity devices.

Element	Description	State of good repair definition	Assessment methods <sup>1</sup>
Pavement markings (striping)	All markings applied to the roadway surface including, but not limited to, lane pavement markings, turn arrows, bike lane markings and bike lane symbols, pavement bars, pavement text, and other markers applied to the roadway surface and paint for curbs (e.g., loading and emergency zones). Raised pavement markers (reflective and non-reflective) and surface-mounted tubular markers are also included.	<ul style="list-style-type: none"> <li>Pavement marking are not worn or missing</li> <li>Pavement markings are consistent with other pavement markings and signs in the corridor conveying information to road users</li> </ul>	<ul style="list-style-type: none"> <li>Conduct field survey of high traffic areas to evaluate wear from traffic and consistency between striping and signs and to develop an overall percentage of pavement marking replacement per section of corridor</li> </ul>
Signage	All regulatory, warning, and guide signs along the roadway used to direct traffic, warn road users of oncoming obstructions, or provide guidance where needed. Includes signs within an approved school zone. Signage includes sign panels, sign supports, and footings.	<ul style="list-style-type: none"> <li>Sign supports and footings function properly</li> <li>Signs are secured properly to a mounting structure</li> <li>Sign's message is legible and not obstructed by heavy wear, graffiti, or damage; sign face is not faded and has reflective background and legend (when required)</li> <li>Signs are consistent with pavement markings in directing road users</li> </ul>	<ul style="list-style-type: none"> <li>Obtain approved school zone documentation and crosswalk closure documentation</li> <li>Conduct visual field survey to assess condition of sign panels, post types, and footings and sight distance and obstructions to visibility</li> <li>Review ODOT's asset management documentation to support field evaluations</li> </ul>
Lighting	All lighting along corridor to intended to provide visibility and safety.	<ul style="list-style-type: none"> <li>Light poles do not have visible structural damage that show significant deformation or cause the pole to lean and function per their intended purpose</li> <li>Light bulbs function properly</li> </ul>	<ul style="list-style-type: none"> <li>Conduct field survey to assess poles/cabinets and light bulbs</li> </ul>

Element	Description	State of good repair definition	Assessment methods <sup>1</sup>
Utilities <sup>4</sup>	All supporting elements to a utility, box, or pipe including the mountings, grates, or any additional part of the utility that can impact the pavement, curb, or concrete. This element is not intended to address the condition or function of a utility to meet its purpose.	<ul style="list-style-type: none"> <li>▪ Condition of surface utility feature, such as manhole covers and valve covers, shows little to no wear and non-slip surfaces are not smooth</li> <li>▪ Pavement around surface utility feature is smooth with minimal cracks</li> <li>▪ Frames and slabs show no holes or cracks that affect function</li> <li>▪ Frame positions are flush to the surface</li> <li>▪ Metal grates are functional and have minimal damage</li> </ul>	<ul style="list-style-type: none"> <li>▪ Conduct field survey to assess existing surface utility features</li> </ul>
Existing Sidewalks	The hard, smooth surface located along the roadway, sometimes separated by a curb and/or a planting strip and swale.	<ul style="list-style-type: none"> <li>▪ No trip hazards that are 0.5 inch or greater</li> <li>▪ No cracks or openings that are 0.5 inch or greater</li> <li>▪ No chipping or general deterioration that creates a depth 0.5 inch or greater</li> </ul>	<ul style="list-style-type: none"> <li>▪ Conduct field survey to assess substandard sidewalks</li> </ul>

<sup>4</sup> In general, utilities are not ODOT-owned assets, but most are located on ODOT right-of-way by permit. Utilities are generally privately or publicly owned by other agencies. Power drops, fiber optic lines, or communications associated with ODOT-owned signals or ITS are not included in this element because they service a definable ODOT asset.

Element	Description	State of good repair definition	Assessment methods <sup>1</sup>
Drainage	<p>All stormwater collection, conveyance, treatment, and disposal facilities including:</p> <ul style="list-style-type: none"> <li>▪ curb and grate inlets</li> <li>▪ catch basins and manholes</li> <li>▪ sedimentation manholes</li> <li>▪ underground injection controls (UICs or sump systems)</li> <li>▪ water quality facilities such as stormwater planters, rain gardens and swales</li> <li>▪ storm sewer pipe</li> </ul>	<ul style="list-style-type: none"> <li>▪ The drainage facility operates properly</li> <li>▪ Functional amount of sediment accumulation</li> <li>▪ Functional amount of rust, pitting, or erosion on pipes</li> </ul>	<ul style="list-style-type: none"> <li>▪ Review ODOT Maintenance log of identified stormwater runoff locations</li> <li>▪ Conduct field survey to inspect existing surface drainage</li> </ul>
Structures	<p>All features designed to physically support a roadway, features designed to retain and protect a roadway, and features designed to withstand a required loading including:</p> <ul style="list-style-type: none"> <li>▪ bridges</li> <li>▪ walls</li> <li>▪ sound walls</li> <li>▪ traffic and lighting structures</li> </ul>	<ul style="list-style-type: none"> <li>▪ Structural ratings meet expected functionality for existing features</li> <li>▪ No visible structural damage that shows significant deformation</li> <li>▪ No excessive out of plane deflection</li> <li>▪ No excessive corrosion</li> <li>▪ No excessive concrete deterioration</li> </ul>	<ul style="list-style-type: none"> <li>▪ Review ODOT maintenance logs of identified issues</li> <li>▪ Review in-service inspection report</li> <li>▪ Review ODOT load ratings and structural deficiencies, if available</li> <li>▪ Conduct a field survey to inspect condition of structural elements, if needed</li> </ul>

#### Step 4. Understand and inventory current maintenance responsibilities

Given the history of the state highway system in Oregon, maintenance responsibilities are nuanced and important to understand. In some instances, ODOT owns the highway right-of-way, but specific elements may be owned or maintained by the local jurisdiction. For example, ODOT owns curb-to-curb on US 26 (Inner Powell), but the City of Portland owns the sidewalks and maintains the vegetation, medians, some signs, and some lighting. If a given roadway element is already maintained or owned by the receiving local jurisdiction, a cost estimate to transfer that element is not necessary because the local jurisdiction already maintains those responsibilities.

#### Step 5. Conduct an existing inventory and assess SOGR conditions

After SOGR is defined, inventory the existing roadway elements. This involves field visits during which qualified field engineers physically inspect each element to determine its condition. Collect data spatially to ensure that specific geographic constraints (e.g., the presence of historic buildings or protected habitats) are considered and that future proposed upgrades are not in conflict with each other. A geographic information system (GIS) application is an effective tool to record data geospatially. Include pictures and detailed notes from field work to ensure the appropriate upgrade and cost estimate can be applied and verified.

As the roadway elements are inventoried, rate the data based on the defined SOGR as “good,” “fair,” or “poor.” If an element is rated “good,” it meets or exceeds the established SOGR definition. If an element is rated “fair,” it does not meet the SOGR definition and requires minor repair. If an element is rated “poor,” it does not meet the SOGR definition and requires moderate or major repair or replacement. For example, sidewalk would be rated “fair” if it has a crack that exceeds the allowed thickness, but only requires minor crack repair and does not require full replacement. It would be rated “poor” if the crack is such that a full sidewalk replacement is required.

#### Step 6. Determine upgrades

Determine upgrades based on the roadway element’s rating. This requires determining necessary upgrades for each of the “fair” and “poor” roadway elements to bring that element to a SOGR. For example, when evaluating pavement markings an upgrade for striping that is rated as “fair” because it is generally faded but recognizable could be a spot treatment. An upgrade for striping that is rated as “poor” because it is missing or illegible could be a remove and restripe. Document a description of each proposed upgrade, including any details crucial for the cost estimate such as areas of repair (e.g., length of repaved pavement), anticipated work components, and potential impacts to other elements. For consistency, use corridor-based upgrades. Corridor-based upgrades are standardized work packages with a consistent set of upgrades needed to bring an element up to “good” SOGR. The corridor-based upgrades are defined such that they can be applied to reoccurring deficiencies along the corridor. This will simplify the applied upgrades and avoid unique upgrades for each deficiency. After identifying each of the proposed upgrades, document the quantities.

#### Step 7. Assess upgrade costs

Determine upgrade costs using an agency’s programmatic-based estimates for specific elements or corridor-based unit costs. Programmatic estimates are commonly used by agencies to scope projects and forecast upcoming work such as resurfacing roadways. These programmatic estimates can be used to address identified upgrades. Corridor-based unit costs identify typical conditions along the corridor, define the required work for an upgrade and use unit bid prices to determine a total unit cost for the upgrade. The cost estimator should apply a cost to each of the identified treatments and provide a description of work and assumptions included in each upgrade cost. The cost estimator should also

include costs to implement the upgrades. Implementation costs are typically defined as a percentage of the total upgrade costs and include the following:

- Mobilization: cost for a contractor to mobilize crews, equipment and materials to a project site
- Traffic control: cost for the contractor to maintain traffic during construction
- Preliminary engineering: cost to design proposed upgrades
- Utility relocations: cost to relocate utilities that have prior rights such as easements or past agreements that would require an agency to pay for or reimburse the utility to relocate any conflicts
- Right-of-way: cost of permanent and temporary impacts to right-of-way for proposed upgrades
- Construction management: cost to provide management and inspection during construction
- Contingency: general contingency to account for known and unknown costs that have not been identified or defined including hazardous materials
- Inflation: cost of the natural reduction in the value of a dollar over time

## 2.2 Capital Needs

In addition to state of good repair, it is important to account for capital needs identified in regional and local plans, programs, needs assessments or safety audits, per mutual discussion between ODOT and local jurisdictions. These identified, but unfunded, improvements require consideration as the agencies estimate and negotiate the costs associated with transfer. For example, in the 2018 RTP, local jurisdictions identified approximately \$800 million in capital projects on ODOT highways in the region. Each local jurisdiction used an identified RTP “allocation” to prioritize a larger list of capital projects identified in the 2018 RTP. The following capital needs are common local priorities to consider when estimating the cost to transfer:

- Crossings and lighting near key community places (e.g., schools, libraries, community centers)
- Medians at high crash locations
- Enhanced transit stops or safety improvements around transit stops
- Missing connections or gaps in the bicycle and pedestrian networks
- Improvements identified for safe routes to school and the Safe Routes to School (SRTS) program
- Other modernization improvements

In addition to the list of common capital needs, ODOT and the local jurisdiction must consider the costs associated with Americans with Disabilities Act (ADA) compliance. ADA compliance can be assessed by reviewing ODOT ADA inventory data and conducting ADA compliance assessments. It includes the following:

- ADA ramp compliance
- ADA clear width compliance
- ADA running grade and lateral grade compliance
- ADA sidewalk compliance

## 2.3 Maintenance and operation costs

This section describes the methodology to determine likely long-term maintenance costs for a corridor segment. Cost considerations include routine inspections of the corridor, basic maintenance of existing conditions, long-term improvement needs and contingency costs associated with potential asset damage due to unforeseen events or conditions. Maintenance and operation costs provide a forecast for future costs after a highway jurisdictional transfer is complete and should be considered during



negotiations. Local jurisdictions may consider contracting maintenance and operation responsibilities to other agencies. Costs associated with these arrangements should be considered.

As described in Table 2, maintenance and operation costs are categorized by (1) inspection and maintenance costs, (2) staff training, (3) operational costs, and (4) unforeseen repairs and replacements.

**Table 2. Maintenance and operation costs**

Cost	Description
Inspection and maintenance costs	Inspecting and maintaining pavement, structures, signals, and other roadway elements requires time, equipment, and expertise. The local jurisdiction will be responsible for inspection and maintenance and all costs associated with them, including equipment. Develop an inspection and maintenance schedule for the corridor elements based on expected useful life. The schedule must include inspection frequency, inspection time, and inspection equipment needed as well as short-term and long-term maintenance projects.
Staff training	Operating and maintaining certain corridor elements may require focused training. Local jurisdictions may acquire elements that they have not used or maintained in the past, and they will need to invest in staff training time and equipment to effectively maintain these elements. Identify any new skills needed to inspect and maintain corridor elements, determine the number of staff that need the new skills, and determine costs for training.
Operational costs	Long-range operation costs come with new elements and need to be considered by local jurisdiction. Operation costs could include electricity costs to power specific elements, traffic management operation costs to manage additional signals along the segment corridor, or incident response costs to handle the increase in traffic and potential collisions caused by that traffic.
Unforeseen repairs and replacements	Additional costs will occur when an unforeseen event requires the repair or replacement of roadway elements. For example, a jurisdiction will need to have available funds for a full signal replacement in the event that a collision destroys it.

## 2.4 Ownership costs

This section describes the methodology used to determine non-physical soft costs of owning the corridor segment. These costs are overarching, indirect costs associated with the acquisition of any new roadway to effectively manage it consistent with the local jurisdiction's defined policies and goals. While these costs do not directly inflate the cost of transferring a highway from ODOT to a local jurisdiction, they need to be considered for the increase in staff time and skills required to own them.

As described in Table 3, ownership costs are categorized by (1) increase in liability, (2) access management reviews, (3) programming and planning, and (4) reporting obligations.

**Table 3. Ownership costs**

<b>Cost</b>	<b>Description</b>
Increase in liability	Receiving a major roadway may increase the liability of the jurisdiction that owns and maintains them and therefore will increase costs associated with that increase in liability. Liability costs manifest mostly as insurance costs that protect the local jurisdiction from these sorts of events.
Access management reviews	With a new roadway, the local jurisdiction will likely have increased demand for access management. This will increase the level of effort that the local jurisdiction’s current access management department undertakes, and, given the functional class of the transferred roadway, could have higher costs attached to it.
Programming and planning	Planning and programming for a major corridor can increase the ownership costs associated with the roadway. Major roadways often have specific corridor plans to go along with their specific needs. Staff time and expertise are necessary to create the plan; design of the roadway elements, and updated maps.
Reporting obligations	Some corridors may have certain designations that require monitoring and reporting to ODOT or federal agencies such as freight corridors or “life-line” corridors. The local jurisdiction should understand those designations and the staff time needed to properly manage them.

### 3 Conclusion

Developing costs to support a highway jurisdictional transfer includes many considerations. This methodology establishes a baseline approach to determine costs that is founded on fundamental agreements between a local jurisdiction and ODOT. This approach will provide the costs and necessary supporting information for decision-makers to engage in negotiations for a highway jurisdictional transfer.

## Appendix A. List of Acronyms

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ADA	Americans with Disabilities Act
CIP	Capital Improvement Project
GIS	Geographic Information System
ITS	Intelligent transportation system
ODOT	Oregon Department of Transportation
RTP	Regional Transportation Plan
SOGR	State of good repair
SRTS	Safe Routes to School
STIP	Statewide Transportation Improvement Program

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# ATTACHMENT G - Roadway Classification Change Recommendations

## METRO HIGHWAY JURISDICTIONAL TRANSFER FRAMEWORK

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### Oregon Highway Plan (OHP) Roadway Classification Change Recommendations

Date: January 2020

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#### 1 Context and Recommendations

##### 1.1 Purpose of the study and memorandum

The purpose of the regional framework for highway jurisdictional transfer study (study) is to identify state-owned routes in greater Portland that may be best suited for jurisdictional transfer from a technical or jurisdictional readiness standpoint. For the purposes of this study, jurisdictional transfer (also referred to as interjurisdictional transfer) is the process of changing ownership of a highway right of way from the State to a local jurisdiction – a city or county. The study will serve as a decision framework for state, regional and local jurisdiction leaders to identify promising candidate roadways for transfer and facilitate successful transfer of roadway ownership. The study is convened by Metro in collaboration with the Oregon Department of Transportation (ODOT).

As a parallel effort, Metro and ODOT are reviewing existing state-owned arterial highways and their Oregon Highway Plan (OHP) roadway classifications within the Portland Metropolitan Planning Area (MPA) to identify those that no longer function consistent with their OHP classification. OHP roadway classifications inform the applicable highway mobility standards, access management standards and maintenance investment levels for state-owned roadways. **This memorandum provides recommendations to the Oregon Transportation Commission (OTC) about which state-owned arterial highways in the Portland MPA may be considered for reclassification to better align their functions and classifications.** The first step in the process is defining the facilities that no longer serve a statewide function and therefore have generally been given lower priority for state funding to build needed bike lanes, sidewalks and other designs that focus more on access than mobility.

This memorandum is organized to provide OTC with reclassification recommendations and the rationale to reach those recommendations:

- Section 1: Context and Recommendations
  - Section 1.1: Purpose of the Study and Memorandum
  - Section 1.2: Summary of Recommendations
- Section 2: Recommendations and Rationale
  - Section 2.1: Process to Develop Recommendations and Rationale
  - Section 2.2: Results

##### 1.2 Summary of recommendations

Figure 1 shows the current OHP classifications for all state-owned arterial highways (arterial highways) in the Portland MPA. All arterial highways in the MPA are classified by the OHP as Statewide, Regional or

District and retain the same classification identified in the 1999 OHP, as amended. Based on their current function, the study team recommends reclassifying the following arterial highways from Statewide to District:

- OR 8 (Tualatin Valley Highway) from mile point (MP) 2.9 to 17.9<sup>1</sup>
- OR 43 (Oswego Highway) from MP 6.13 to 11.29
- OR 99W (Pacific Highway West) from MP 7.4 to 14.5<sup>2</sup>
- OR 99E (Pacific Highway East) from MP 1.5 to 5.5

Figure 2 shows the arterial highways recommended for reclassification.

Based on the evaluation in Section 2.2, the study team does not recommend reclassifying any arterial highways from Statewide to Regional, Regional to District, District to Regional or Regional to Statewide. The arterial highways that are not recommended for reclassification are listed in Table 3 in Section 2.2.

## 2 Recommendations and Rationale

### 2.1 Process to develop recommendations and rationale

The study team compared the highways' existing classifications with their existing functions. Table 1<sup>3</sup> lists the classification definitions, as defined by OHP Action 1A (1999, as amended). For the arterial highways with inconsistent classification and functions, the study team assessed the existing function to recommend an appropriate classification.

ODOT Procedure PLA 03-01: Process for Classifying or Reclassifying Highways in the Statewide Highway System provides the following guidance to determine the appropriate highway classifications.

- Examine current and projected conditions as they relate to:
  - Current function of the state arterial highway locally and in relation to the state highway system, including how it relates to the movement of freight and oversize loads through the state
  - Existing and planned land uses and zoning in the vicinity of the facility
  - Indicators of a change in function since an earlier classification decision was made, such as a change in average daily trips, increased congestion, redevelopment or rezoning in the vicinity facility
  - Future local, regional and statewide travel and freight transport needs.

The study team examined the following characteristics, consistent with PLA 03-01 direction, to inform the reclassification recommendations.

- Change in planned regional land use, as identified by Metro's 2040 Growth Concept<sup>4</sup>
- Redundant freight routes
- Current function of the arterial highway as it relates to the surrounding state highway system

<sup>1</sup> The "Moving Forward TV Highway Enhanced Transit and Access Plan" is currently underway (expected completion by June 2020) and may impact the recommendation in this memo.

<sup>2</sup> Scoping for a 99W Corridor plan is underway, which could impact the recommendation in this memo.

<sup>3</sup> For reference, Table 1 also lists the 2018 Regional Transportation Plan (RTP) classifications that correspond with each OHP classification in the Portland MPA.

<sup>4</sup> The 2040 Growth Concept Map, adopted in the 2000 RTP, spatially portrays the hierarchical land use and transportation components that support the region's long-range plan for addressing expected growth while preserving the region's livability. The 2040 Growth Concept Map was last updated in 2014. The updated 2014 Growth Concept Map reflects how the region's land use and transportation has changed since 2000. The Growth Concept Map guides both current and future land use and transportation.

- Transit presence and ridership over time<sup>5</sup>
- Change in number of public destinations over time<sup>6</sup>
- Population and employment growth over time<sup>7</sup>
- Change in people of color (POC) population over time<sup>8</sup>

**Table 1. OHP Action 1A roadway classifications and corresponding RTP classification in Portland MPA**

OHP Roadway Classification	OHP Roadway Classification Definition	Corresponding RTP Classification
<b>Interstate Highways</b>	Provide connections to major cities, regions of the state, and other states. A secondary function in urban areas is to provide connections for regional trips within the metropolitan area. The Interstate Highways are major freight routes and their objective is to provide mobility. The management objective is to provide for safe and efficient high-speed continuous-flow operation in urban and rural areas.	Throughway
<b>Statewide Highways</b>	Typically provide inter-urban and inter-regional mobility and provide connections to larger urban areas, ports, and major recreation areas that are not directly served by Interstate Highways. A secondary function is to provide connections for intra-urban and intra-regional trips. The management objective is to provide safe and efficient, high-speed, continuous-flow operation. In constrained and urban areas, interruptions to flow should be minimal. Inside Special Transportation Areas (STAs), local access may also be a priority.	Throughway Major Arterial

<sup>5</sup> The study team compared fall 2000 ridership data with fall 2019 ridership data (TriMet publishes ridership data on a quarterly basis) for each TriMet transit line that operates along the arterial highway segment (not including those that cross the highway). Some routes operating along the segment in 2019 did not operate in 2000, and vice versa. For these routes, the study team analyzed comparable lines to understand the relative change in ridership.

<sup>6</sup> The study team gathered data on schools and parks located within 500 feet of the arterial highway centerline as a point of information.

<sup>7</sup> The study team gathered population data from the American Community Survey (ACS) for 2000 and 2017 and employment data from OnTheMap for 2002 (the oldest available data) and 2017. The team gathered ACS and OnTheMap data for all census tracts directly adjacent to the arterial highway.

<sup>8</sup> The study team gathered POC population data from ACS for 2000 and 2017. The team gathered ACS data for all census tracts directly adjacent to the arterial highway. It is important to understand a change in POC population in consideration of investment, maintenance management and the current state of a roadway in order to capture potential Environmental Justice and Civil Rights issues. Historically, public investments have been lower in communities of color over time.



OHP Roadway Classification	OHP Roadway Classification Definition	Corresponding RTP Classification
<b>Regional Highways</b>	Typically provide connections and links to regional centers, Statewide or interstate Highways, or economic or activity centers of regional significance. The management objective is to provide safe and efficient, highspeed, continuous-flow operation in rural areas and moderate to high-speed operations in urban and urbanizing areas. A secondary function is to serve land uses in the vicinity of these highways. Inside STAs, local access is also a priority. Inside Urban Business Areas, mobility is balanced with local access.	Throughway
<b>District Highways</b>	Facilities of county-wide significance and function largely as county and city arterials or collectors. They provide connections and links between small urbanized areas, rural centers and urban hubs, and also serve local access and traffic. The management objective is to provide for safe and efficient, moderate to high-speed continuous-flow operation in rural areas reflecting the surrounding environment and moderate to low-speed operation in urban and urbanizing areas for traffic flow and for pedestrian and bicycle movements. Inside STAs, local access is a priority. Inside Urban Business Areas, mobility is balanced with local access.	Throughway Major Arterial Minor Arterial

## 2.2 Results

Table 2 lists the arterial highways in the Portland MPA that currently have inconsistent classifications and functions along with rationale for the change. The table provides the existing classification, the recommended classification and the corresponding rationale based on the characteristics listed in Section 2.1.

Table 3 lists the arterial highways in the Portland MPA that have consistent classifications and functions; no reclassification is recommended.

The study team looked holistically at the highway classifications map in the Portland MPA (Figure 1) to determine arterial highways that may have inconsistent classifications and functions. Such arterial highways have known changes in adjacent land use over time, including increases in population and employment, and currently function as local streets (i.e., serve local transit and trips, and have identified alternative freight routes).

The arterial highways with multiple classifications are evaluated by segment according to their OHP classifications, delineated by start and end mile points (MPs). Each segment is evaluated separately.

**Table 2. State-owned arterial highways with inconsistent classification and function and recommended reclassification**

Highway Number and Name (start Mile Point and end Mile Point)	Current OHP Classification (current RTP Classification)	Recommended classification	Rationale for recommended classification
OR 8: TV Highway (2.8 -17.9)	Statewide (Major Arterial)	District	<ul style="list-style-type: none"> <li>▪ <b>Land use:</b> 2014 updates to the 2040 Growth Concept Map (adopted in 2000) include:               <ul style="list-style-type: none"> <li>○ a new town center at Aloha</li> <li>○ increased neighborhood land use between Aloha and Hillsboro in replace of urban reserves</li> <li>○ increase in regional center land use around Hillsboro</li> <li>○ a new town center at Cornelius</li> </ul> </li> <li>▪ <b>Redundant freight route:</b> US 26 (NW Sunset Highway) provides a parallel OHP designated freight route that serves to carry goods and people from the center of the region to the eastern portion</li> <li>▪ <b>Function within highway system:</b> The arterial highway carries vehicles from OR 217 (Statewide highway) to OR 47 (Regional and Statewide highway)</li> <li>▪ <b>Transit</b> <ul style="list-style-type: none"> <li>○ Total ridership (lines 57, 58 and 61): 19% increase from 7,280 passengers (fall 2000) to 8,670 passengers (fall 2019)</li> <li>○ Ridership for line 57 (runs the entire segment): 38% increase from 5,120 passengers (fall 2000) to 7,080 passengers (fall 2019)</li> </ul> </li> <li>▪ <b>Public destinations</b> <ul style="list-style-type: none"> <li>○ # of schools: 125% increase from 4 (2000) to 9 (2019)</li> <li>○ # of parks: 141% increase from 12 (2000) to 29 (2019)</li> </ul> </li> <li>▪ <b>Population and employment</b> <ul style="list-style-type: none"> <li>○ Population: 21% increase from 93,399 people (2000) to 113,224 people (2017)</li> <li>○ Employment: 13% increase from 49,851 jobs (2002) to 56,318 jobs (2017)</li> </ul> </li> <li>▪ <b>POC population</b> <ul style="list-style-type: none"> <li>○ 61% increase from 32,455 people (2000) to 52,146 people (2017)</li> </ul> </li> </ul>

Highway Number and Name (start Mile Point and end Mile Point)	Current OHP Classification (current RTP Classification)	Recommended classification	Rationale for recommended classification
OR 43: Oswego Highway (6.1 – 11.3)	Statewide (Major Arterial)	District	<ul style="list-style-type: none"> <li>▪ <b>Land use:</b> land use in the 2014 updated 2040 Growth Concept Map remained roughly the same as land use in the 2040 Growth Concept Map adopted in 2000</li> <li>▪ <b>Redundant freight route:</b> OR 224 from Milwaukie to I-205 provides a parallel OHP designated freight route to the northeast, connecting the center of the region to I-205 in Clackamas</li> <li>▪ <b>Function within highway system:</b> The arterial highway segment carries travelers from the northern portion of OR 43 (District highway) to I-205 (Interstate highway) just south of West Linn</li> <li>▪ <b>Transit</b> <ul style="list-style-type: none"> <li>○ Total ridership (lines 35 and 36): 49% increase from 2,670 passengers (fall 2000) to 3,970 passengers (fall 2019)</li> <li>○ Ridership for line 35 (runs the entire segment): 62% increase from 2,320 passengers (fall 2000) to 3,750 passengers (fall 2019)</li> </ul> </li> <li>▪ <b>Public destinations</b> <ul style="list-style-type: none"> <li>○ # of schools: 600% increase from 1 (2000) to 7 (2019)</li> <li>○ # of parks: 188% increase from 17 (2000) to 49 (2019)</li> </ul> </li> <li>▪ <b>Population and employment</b> <ul style="list-style-type: none"> <li>○ Population: 6% increase from 32,246 people (2000) to 34,214 people (2017)</li> <li>○ Employment: 6% decrease from 13,424 (2002) to 12,649 (2017)</li> </ul> </li> <li>▪ <b>POC population</b> <ul style="list-style-type: none"> <li>○ 77% increase from 2,634 people (2000) to 4,650 people (2017)</li> <li>○ Increase from 8% of the total population (2000) to 14% (2017)</li> </ul> </li> </ul>

Highway Number and Name (start Mile Point and end Mile Point)	Current OHP Classification (current RTP Classification)	Recommended classification	Rationale for recommended classification
OR 99W: Pacific Highway West (7.4 – 18.0)	Statewide (Major Arterial; Throughway)	District	<ul style="list-style-type: none"> <li>■ <b>Land use:</b> 2014 updates to the 2040 Growth Concept Map (adopted in 2000) include:               <ul style="list-style-type: none"> <li>○ land use in the triangle created by OR 99W, OR 217 and I-5 changed from employment area to town center and increased in size</li> </ul> </li> <li>■ <b>Redundant freight route:</b> I-5 provides a parallel OHP designated freight route connecting the region to and from the city center</li> <li>■ <b>Function within highway system:</b> The northern portion of the arterial highway segment connects I-5 (Interstate highway) and OR 217 (Statewide highway)</li> <li>■ <b>Transit</b> <ul style="list-style-type: none"> <li>○ Total ridership (lines 94, 95, 93, 12 and 64): 69% increase from 6,789 (fall 2000) to 11,463 (fall 2019)</li> </ul> </li> <li>■ <b>Public destinations</b> <ul style="list-style-type: none"> <li>○ # of schools: 50% increase from 2 (2000) to 3 (2017)</li> <li>○ # of parks: 58% increase from 12 (2000) to 19 (2017)</li> </ul> </li> <li>■ <b>Population and employment</b> <ul style="list-style-type: none"> <li>○ Population: 5% increase from 87,578 people (2000) to 91,570 people (2017)</li> <li>○ Employment: 21% increase from 47,166 jobs (2002) to 57,064 jobs (2017)</li> </ul> </li> <li>■ <b>POC population</b> <ul style="list-style-type: none"> <li>○ 38% increase from 13,661 people (2000) to 18,888 people (2017)</li> </ul> </li> </ul>

Highway Number and Name (start Mile Point and end Mile Point)	Current OHP Classification (current RTP Classification)	Recommended classification	Rationale for recommended classification
OR 99E: Pacific Highway East (1.5 – 5.5)	Statewide (Throughway)	District	<ul style="list-style-type: none"> <li>▪ <b>Land use:</b> 2014 updates to the 2040 Growth Concept Map (adopted in 2000) include:               <ul style="list-style-type: none"> <li>○ a new employment area surrounding the east side of OR 99E near the northern portion of the segment</li> </ul> </li> <li>▪ <b>Redundant freight route:</b> I-205 provides a parallel OHP designated freight route connecting the region to and from the Portland city center</li> <li>▪ <b>Function within highway system:</b> The arterial highway segment connects US 26 at the Ross Island Bridge (District highway) with OR 224 (Statewide highway) in Milwaukie</li> <li>▪ <b>Transit</b> <ul style="list-style-type: none"> <li>○ Total ridership (lines 30, 32, 33, 34, 40 and 99 and MAX orange line): 61% increase from 8,440 passengers (fall 2000) to 13,560 passengers (fall 2019)</li> <li>○ Ridership for MAX orange line (began operations in 2015): 12,160 passengers (fall 2019)</li> </ul> </li> <li>▪ <b>Public destinations</b> <ul style="list-style-type: none"> <li>○ # of schools: no change, with 0 in 2000 and 2017</li> <li>○ # of parks: 188% increase from 9 (2000) to 26 (2017)</li> </ul> </li> <li>▪ <b>Population and employment</b> <ul style="list-style-type: none"> <li>○ Population: 17% increase from 27,959 people (2000) to 32,653 people (2017)</li> <li>○ Employment: 61% increase from 18,475 jobs (2002) to 29,775 jobs (2017)</li> </ul> </li> <li>▪ <b>POC population</b> <ul style="list-style-type: none"> <li>○ 64% increase from 3,432 people (2000) to 5,636 people (2017)</li> </ul> </li> </ul>

Highway Number and Name (start Mile Point and end Mile Point)	Current OHP Classification (current RTP Classification)	Recommended classification	Rationale for recommended classification
<p>Notes:</p> <ul style="list-style-type: none"> <li>Land use is measured by comparing land uses surrounding the identified arterial highway segment in the 2040 Growth Concept Map (adopted in 2000) and in the 2040 Growth Concept Map (updated in 2014). The 2040 Growth Concept Map reflects both current and future land use and transportation.</li> <li>Transit ridership is measured by the total boarding passengers for the 2000 and 2019 fall quarters. Transit lines include all TriMet lines that run along the arterial highway segment (not including those that cross the arterial highway segment).</li> <li>Public destinations include parks and schools within 500 feet of the arterial highway centerline. Some increases may be due to more credible data available.</li> <li>Total population and POC population is measured by American Community Survey (ACS) data from all census tracts directly adjacent to the arterial highway, for 2000 and 2017 (the most recent available data).</li> <li>Employment is measured by OnTheMap census data from all census tracts directly adjacent to the arterial highway, for 2002 (the oldest available data) and 2017 (the most recent available data).</li> </ul>			

**Table 3. State-owned arterial highways with consistent OHP classifications and functions**

Highway Number and Name (start Mile Point and end Mile Point) <sup>1</sup>	OHP Classification	RTP Classification
OR 8: TV Highway (0.1 – 2.8)	District	Major Arterial
OR 47: TV Highway (17.9-23.1)	Regional	Throughway
OR 10: Beaverton-Hillsdale Highway (1.0 – 3.4)	District	Major Arterial
OR 10: Farmington Highway (5.9 – 7.4)	District	Major Arterial
US 26: Mount Hood Highway (0.0 – 10.0)	District	Major Arterial
US 26: Mount Hood Highway (14.2 – 19.6)	Statewide	Throughway
US 30B: Northeast Portland Highway (0.0 – 1.3)	Statewide	Major Arterial
US 30B: Northeast Portland Highway (1.3 – 9.2)	District	Minor Arterial/
US 30B: Northeast Portland Highway (9.2 – 11.3)	Statewide	Major Arterial
US 30B: Northeast Portland Highway (11.3 – 14.8)	District	Minor Arterial
US 30E: Historic Columbia Highway (0.0 – 5.8)	District	Minor Arterial/Arterial outside of UGB
US 30W: Lower Columbia River Highway (1.0 – 13.3)	Statewide	Throughway
OR 43: Oswego Highway (0.0 – 6.1)	District	Major Arterial
OR 47: Nehalem Highway (90.1 – 90.6)	District	Throughway
OR 47: Nehalem Highway (88.5 – 90.1)	Statewide	Throughway
OR 99E: Pacific Highway East (5.5 – 11.7)	District	Major Arterial
OR 99E: Pacific Highway East (11.7 – 16.4)	Regional	Major Arterial
OR 99E: North Swift Highway (2.5 – 2.7)	Statewide	Throughway
OR 99W: Pacific Highway West (-6.0 – 7.4)	District	Major Arterial
OR 141: Beaverton-Tualatin Highway (2.6 – 13.1)	District	Major Arterial
OR 210: Scholls Highway (9.0 – 9.6)	District	Major Arterial
OR 212: Clackamas-Boring Highway (0.0 – 8.5)	Statewide	Major Arterial
OR 213N: Cascade Highway North (-0.1 – 10.2)	District	Major Arterial
OR 213S: Cascade Highway South (0.0 – 7.7)	District	Throughway
OR 219: Hillsboro-Silverton Highway (0.0 – 1.3)	District	Minor Arterial
OR 224: Clackamas Highway/Sunrise Expressway (0.0 – 10.5)	District	Throughway
OR 224: Clackamas Highway/Sunrise Expressway (0.0 – 8.2)	Statewide	Throughway
Notes:		
<sup>1</sup> Some mile points are negative due to ODOT convention		

Date: November 5, 2020  
To: John Mermin and Tom Kloster  
From: Molly Cooney-Mesker, Community Engagement Specialist  
Subject: Regional Framework for Highway Jurisdictional Transfer Study public comment memorandum

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## Introduction

This memo summarizes the comments received during the public comment opportunity for the Regional Framework for Highway Jurisdictional Transfer Study report (the report). A jurisdictional transfer assessment was identified in the Regional Transportation Plan as a necessary step to help the greater Portland region meet its equity, safety and multimodal goals. The Jurisdictional Transfer Report will *not* result in specific transfers or commit any jurisdictions to a specific transfer. The purpose of the report is to set up a framework to help future transfer discussions. The comments and questions received during the comment period will help staff refine the report and will be available for jurisdictions using the jurisdictional transfer framework in the future.

## Public comment opportunity

Public comment on the draft Regional Framework for Highway Jurisdictional Transfer was solicited from September 15 through October 22, 2020. Notice of the public comment period was provided through Metro News and distributed to an email list of community members and organizations, the Project Steering Committee, Metro's Metropolitan Transportation Advisory Committee and the Joint Policy Committee on Transportation. Metro's Metropolitan Transportation Advisory Committee and the Project Steering Committee

Members of the public and other interested stakeholders were encouraged to review the draft document and comment:

- in writing to Metro Planning—Jurisdictional Transfer, 600 NE Grand Ave., Portland, OR 97232 or [transportation@oregonmetro.gov](mailto:transportation@oregonmetro.gov)
- by phone at 503-797-1750 or TDD 503-797-1804
- “in person” through online Zoom meetings with Metro and ODOT project managers
- Through an online comment survey

No comments were received by mail or phone. The project team received seven comment letters by email, two interested parties met with project managers and 40 people participated in the online comment survey. In addition to receiving the comment letters, survey responses, and in-person meetings, the project team also met with county coordinating committees. All comments received, meeting notes and survey results are attached to this report.



## Results of online survey and public comment

### Summary of comments from jurisdictions

Overall, jurisdictional staff and decision-makers who submitted comments are interested in continued dialogue about jurisdictional transfers. Levels of support for transferring roadways vary by roadway and jurisdiction. There is generally agreement that the roadways the report identifies as promising candidates for jurisdictional transfer need improvements to better meet local needs, uses and priorities, especially safety. There is a common concern among jurisdictions regarding the funding that would be needed at the local level for improvements and ongoing maintenance of transferred roadways.

The project team received comment letters from the following entities. The letters are included in Attachment A.

1. Concordia Neighborhood Association
2. City of Beaverton Council
3. Clackamas County Board of Commissioners
4. Clackamas County staff
5. Portland Bureau of Transportation staff
6. City of Tualatin Council
7. Washington County Board of Commissioners

The project team staff met with County Coordinating Committees including: including Clackamas County Coordinating Committee (C4), East Multnomah County Transportation Commission (EMCTC) and Washington County Coordinating Committee (WCCC). Notes from these meetings are included in Attachment B. Multnomah County Health Department staff met with the project team as well—see Attachment C.

### Online comment survey results and community comments

An online comment survey provided a platform for feedback on the draft Regional Framework for Highway Jurisdictional Transfer report. Forty people participated in the survey. Themes from the responses to the open-ended questions are included below. The complete survey results are included in Attachment D. Of the 40 people who responded to the online survey, three indicated they were responding in a professional capacity, including representatives from HAND, Brooklyn Action Corps and Portland Bureau of Transportation (PBOT). The open-ended responses from PBOT are not summarized in the themes below but are included in letter format as Attachment A-5.

### Survey responses regarding the effectiveness of the report

Survey respondents were asked if the report helps move the region forward in achieving jurisdictional transfers (26 responses). A majority (81%) of respondents indicated the report does help move the region forward in jurisdictional transfers and 15% indicated it is not helpful. One respondent was unsure.

Survey respondents were also asked for their ideas to improve the report to make it a stronger tool for achieving jurisdictional transfers (18 responses). The project team considered and

incorporated, as feasible, suggestions for improving the report. Attachment E includes the summary of the changes to the final report. Most of the responses requested more detail on the conditions of the roadways, costs, funding and timelines for transfers.

### Survey responses regarding community benefits of jurisdictional transfers

Survey respondents were asked if jurisdictional transfers will benefit their community and to explain how or how not (35 responses). 66% responded that yes, they believe jurisdictional transfers will benefit their community and 34% responded no, they did not think jurisdictional transfers would benefit their community.

Among the online survey respondents who indicated that jurisdictional transfers will benefit their communities, the most frequently mentioned reasons included:

- The expectation that local ownership will lead to improved safety, public health, multimodal infrastructure, and accessibility on the transferred roadways.
- A sense of urgency related to roadway improvements. Respondents felt that local ownership would lead to the faster implementation of improvements that meet the needs of the surrounding communities.
- Several roadways were mentioned by more than one respondent as needing improvements.
  - SE Powell Boulevard
  - Highway 43
  - 82<sup>nd</sup> Avenue

Among survey respondents who indicated that jurisdictional transfers will *not* benefit their communities, the most prominent concerns were:

- Local jurisdictions do not have the funding/capacity to maintain the roadways.
- Transfer to local jurisdictions would make the roads less accessible to cars and freight trucks.

### Other online survey comment themes

- There were a couple of comments related to the potential for transfers to result in roadway improvements that would increase land value. One commenter highlighted that increased land values would lead to displacement and suggested that anti-displacement measures be coordinated with transfers.
- There were several comments about the need to better understand the consequences of the transfers, including the financial impact on local community and how the transferred road would be maintained.
- Respondents appreciated the thorough background and explanation of the jurisdictional transfer process.

### Community comments

The project team received one comment letter from a community group— the Concordia Neighborhood Association—see Attachment A-1. The letter requests that the portion of Hwy 30

within Portland City Limits be added to the list of facilities for potential jurisdictional transfer from ODOT to PBOT, and to execute the transfer immediately. The Concordia Neighborhood Association's reasons for requesting the transfer echo the concerns expressed by other survey respondents regarding unsafe conditions and not serving the needs of local neighborhoods.

## Attachments

### **Attachment A: Comment letters**

1. Concordia Neighborhood Association
2. City of Beaverton Council
3. Clackamas County Board of Commissioners
4. Clackamas County staff
5. Portland Bureau of Transportation staff
6. City of Tualatin Council
7. Washington County Board of Commissioners

### **Attachment B: County coordinating committees – notes**

1. Clackamas County Coordinating Committee (C4)
2. East Multnomah County Transportation Commission (EMCTC)
3. Washington County Coordinating Committee (WCCC).

### **Attachment C: Meetings with project managers – notes**

### **Attachment D: Online comment survey results**

### **Attachment E: Summary of changes to Final Report**

## Attachment A: Comment Letters

1. Concordia Neighborhood Association
2. City of Beaverton Council
3. Clackamas County Board of Commissioners
4. Clackamas County staff
5. Portland Bureau of Transportation staff
6. City of Tualatin Council
7. Washington County Board of Commissioners

Dear Metro,

The Concordia Neighborhood Association is requesting the immediate transfer of the Hwy 30 / Lombard facility from ODOT to PBOT.

See the attached letter.

Our comment on the Jurisdictional Transfer Study would thus be to add the portion of Hwy 30 within Portland City Limits to the list of facilities for jurisdictional transfer from ODOT to PBOT, and to execute the transfer immediately. The Legislature should then work to fund needed improvements after the receiving jurisdiction has site control of the roadway facility, and has an opportunity to work with nearby residents to plan future facility improvements.

We also recommend that Metro and PBOT immediately abandon the use of LOS and Volume to Capacity ratios for the purpose of assessing the possibility of lane reductions, and replace them with metrics that are focused on saving lives and building communities, rather than allowing automobiles to travel at high rates of speed.

Thanks,

~Garlynn Woodsong for the Board of the Concordia Neighborhood Association



Concordia Neighborhood Association  
P.O. Box 11194  
Portland, OR 97211  
[www.concordiapdx.org](http://www.concordiapdx.org)

Re: Lombard/Hwy 30 Safety

September, 2020

To:

Senator Lew Frederick ([sen.LewFrederick@oregonlegislature.gov](mailto:sen.LewFrederick@oregonlegislature.gov))

Representative Tawna D. Sanchez ([rep.TawnaSanchez@oregonlegislature.gov](mailto:rep.TawnaSanchez@oregonlegislature.gov))

CC:

Oregon Governor Kate Brown ([kate.brown@oregon.gov](mailto:kate.brown@oregon.gov))

House Speaker Kotek ([rep.TinaKotek@oregonlegislature.gov](mailto:rep.TinaKotek@oregonlegislature.gov))

Congressman Earl Blumenauer ([congressman.EarlBlumenauer@mail.house.gov](mailto:congressman.EarlBlumenauer@mail.house.gov))

Commissioner Chloe Eudaly ([chloe@portlandoregon.gov](mailto:chloe@portlandoregon.gov))

PBOT Director Chris Warner ([PBOTDirector@portlandoregon.gov](mailto:PBOTDirector@portlandoregon.gov))

ODOT Director Kris Strickler ([kristopher.w.strickler@odot.state.or.us](mailto:kristopher.w.strickler@odot.state.or.us))

ODOT Region 1 Director Rian Windsheimer ([rian.M.WINDSHEIMER@odot.state.or.us](mailto:rian.M.WINDSHEIMER@odot.state.or.us)),

Metro President Lynn Peterson ([lynn.peterson@oregonmetro.gov](mailto:lynn.peterson@oregonmetro.gov)),

Metro Councilor Sam Chase ([sam.chase@oregonmetro.gov](mailto:sam.chase@oregonmetro.gov))

Dear decision makers,

In early August, a mother and her son, a student at Vernon Elementary School, were traveling on North Portland Highway (Hwy 30) when she lost control of her vehicle, it crossed the center line and impacted with an unoccupied truck and fifth-wheel on the opposite shoulder.

The car burst into flames, and both vehicle occupants died in the resulting fire. Police report the vehicle was traveling at a high rate of speed before impact.

A year ago, the Portland Bureau of Transportation (PBOT) embarked on the Columbia/Lombard project to study conditions along those roadways, and recommend safety improvements.

Since that time, absolutely no safety improvements have been made to Lombard Street, meaning nothing prevents future tragedies such as this one from occurring again, and again and again.

It's an unsafe highway, and the Oregon Department of Transportation (ODOT) does not appear to feel any motivation in the slightest to fix it to make it safer for travelers and nearby residents.

On the contrary, ODOT appears to feel its only required role is to justify why continuing the status quo is the only outcome the agency is interested in.

The time has thus come to remove North Portland Highway from ODOT's jurisdiction, and to transfer responsibility for the roadway to PBOT. This will free the roadway from needing to meet ODOT standards, and allow for alternative design solutions to be implemented.

This is not the first crash on this corridor. On Saturday, December 12, 2015, Martin Greenough was killed while riding his bicycle at the NE boundary of our neighborhood, on Lombard underneath the 42nd Ave overpass, at a pinch point where the bicycle lane vanishes and bicyclists are forced into high-speed traffic. Martin was a newcomer to our city, a recent transplant who wanted to live the Portland dream of riding his bicycle to and from work. Unfortunately, our region let him down, by not providing a safe and continuous bicycle route for him to use for his daily route. Now, he's dead, and his blood is on the hands of the agency responsible for designing and operating the facility that he was using. But, perhaps it is also on all of our hands, as a community, for not demanding better, safer facilities sooner.

So, as the neighborhood association that is responsible for that location, we feel a special responsibility to make the case that bicycle and pedestrian safety must come first, on all facilities that can be legally used by bicycles and pedestrians, and especially those that appear on city and regional bicycle maps or that might be recommended as routes by electronic way-finding apps.

When we asked ODOT staff to brief us on the agency's response to this tragic incident, as well as its future plans for making the entire Lombard / US 30 Bypass facility safe for all users, staff came out and met with us at our regular Land Use & Transportation Committee meeting, and gave us an overview of ODOT's plans for this facility through the year 2021. In reviewing these plans, we are struck by the fact that it will be many years before these safety improvements are complete, but even more critically, by the fact that once the planned improvements are complete, the facility as a whole will still not provide safe, continuous accommodation for bicycles and pedestrians along the stretch in question, from NE 181st ave on the east to the St Johns Bridge at the west.



Specifically, while ODOT has delivered a bike lane infill project on the south side of the highway at the NE 42nd Ave overpass, it has not yet developed a feasible proposal for the bicycle lane on the north side of the highway. Further, the bicycle lane disappears completely at the turn between NE Lombard Pl and NE 10th Ave, without any safe accommodation that would allow and direct bicycle users to a safe parallel facility. It would not be acceptable for a freeway to suddenly turn into a dirt road with no warning, and yet this sort of network incompleteness is apparently quite acceptable to ODOT when it comes to bicycle and pedestrian facilities. Sidewalks are completely discontinuous along this entire facility, despite the fact that it is lined by residential, commercial and industrial uses that see and produce pedestrian activity.

We would like to see a different approach taken to tackling this issue, one that prioritizes Vision Zero-type goals of eliminating traffic fatalities and minimizing serious crash injuries for vulnerable road users as soon as possible. Specifically, given the current shortage of available transportation funds for major projects, we would like to see the immediate re-stripping of this facility to create safe, protected bicycle lanes along its entire alignment.

We suggest the facility be put onto a “road diet.” The roadway cross-section would have a continuous sidewalk, street trees and a two-directional cycle track on the south side next to the neighborhood.

Then add another row of trees, on-street parking, a single eastbound traffic lane, a median with trees and turn pockets at intersections, and a single westbound traffic lane with a shoulder/break-down lane.

The trees would limit the ability of traffic to cross the center line, reducing the severity of crashes. With only one lane in each direction, the temptation to speed to pass other vehicles would be eliminated and, with lower speeds, would also come fewer crashes and deaths.

A protected cycle track and new sidewalk would allow bicycles and pedestrians to travel east and west along the corridor safely and comfortably. The trees would provide shade to reduce the urban heat island effect, where large expanses of asphalt cause excessive heat on hot summer days. They would also help to capture pollution, trapping it on their exposed leaf and branch surfaces until it can be washed away in the next rain.

While the funding and engineering for this long-term approach is underway, we urge the immediate implementation of a “road diet” approach of removing through traffic lanes to allow for a cross-section that includes safe, protected bicycle facilities, as this is an improvement that can be accomplished in the very near term using only “paint” (thermoplastic). We feel strongly that, in this age of COVID-related quarantine, there will be no resulting traffic delays from this approach, and even if minor delays did result, they would be more than mitigated by the reduction in potential loss of life or serious injury to road users.

We also urge the construction of pedestrian facilities, including sidewalks, wheelchair ramps at intersections, and marked crosswalks at all legal pedestrian crossings, along the entire length of this urban facility.

We feel strongly that even one death is too many to be acceptable, and we urge the prioritization of human life over traffic throughput, average traffic speed, or driver inconvenience.

It's past time to stop making excuses for why bad designs have to remain. It's time to start building the safer future that we need to manifest to stop the senseless deaths on this blood-stained piece of local infrastructure.

Signed,

A handwritten signature in black ink, appearing to read "A. Furstner", with a small flourish at the end.

Astrid Furstner  
Chair, Board of Directors

Concordia Neighborhood Association  
P.O. Box 11194  
Portland, OR 97211  
[landuse@concordiapdx.org](mailto:landuse@concordiapdx.org)

cc: Jon Makler, Region 1 Planning Manager ([jon.makler@odot.state.or.us](mailto:jon.makler@odot.state.or.us))



October 20, 2020

Metro Council  
600 NE Grand Ave  
Portland, OR 97232

RE: Regional Framework for Highway Jurisdictional Transfer  
September 2020 Draft Report

Dear Councilors,

Alongside my colleagues on the Beaverton City Council, I'm writing to offer our support in furthering the regional dialogue on highway jurisdictional transfer.

The September 2020 draft report, *Regional Framework for Highway Jurisdictional Transfer*, calls out Canyon Road in downtown Beaverton as one of the regions "most promising" corridors for transfer. We agree and we believe that Canyon Road should be one of the region's top priorities for jurisdictional transfer. For far too long, Canyon Road has been a barrier in realizing Beaverton's vision for a more vibrant downtown. Planning efforts have identified design and operational solutions to improve and calm the corridor, and we realize that jurisdictional transfer could be the mechanism to unlock opportunities for the transformative change the community has asked us to deliver.

The presentation by Metro and ODOT staff at our October 13, 2020 meeting sparked our interest and we appreciate the work to undertake this study. The report provides helpful guidance to cities and counties when considering the transfer process. In particular, the cost methodology identifies an approach to investigating the current conditions of a roadway, identifying capital needs, and estimating ownership costs that then become the basis of a decision-making process and negotiation. We will need to augment our available funding to support one-time investments and ongoing maintenance.

The draft report also identifies TV Highway west of downtown Beaverton and Hall Boulevard near Highway 217 as corridors with promise. On these corridors, we would work with our partners at Washington County to determine whether jurisdictional transfer is feasible and appropriate for the community and for the County.

We look forward to hearing updates on the progress of this study, and we are ready to lend our support to future efforts for legislation and funding strategies to advance jurisdictional transfers around the region. Let's create the communities we would like to see!

Sincerely,

*Denny Doyle*  
Mayor Denny Doyle

*Lacey Beaty*  
Councilor Lacey Beaty

*Cate Arnold*  
Councilor Cate Arnold

*Laura Mitchell*  
Council President Laura Mitchell

*Mark Fagin*  
Councilor Mark Fagin

*Marc San Soucie*  
Councilor Marc San Soucie



October 7, 2020

Metro Planning – Jurisdictional Transfer  
600 NE Grand Ave  
Portland, OR 97232

RE: Jurisdictional Transfer Study

Dear Mr. Mermin:

Thank you for the opportunity to comment on the “Regional Framework for Highway Jurisdictional Transfer Study.” We appreciate the inclusion of our staff on the Project Steering Committee as well as the input and review opportunities provided into developing the methodology and the final report.

The draft Regional Framework for Highway Jurisdictional Transfer report provides a clear methodology to identify state highways appropriate for jurisdictional transfer, including both a technical evaluation and a readiness evaluation that provides input into the candidates currently most promising for jurisdictional transfer. As is noted in the study, the methodology provides a foundation for the snapshot in time identification of the top eleven corridors appropriate for transfer.

Ultimately, the ability to undertake the jurisdictional transfers will require funding. The costing methodology demonstrates the breadth of items that need to be considered when assessing the cost of these projects.

The report mentions the development of funding strategies, but does not include these within the document. ***It is important to recognize that any funding for jurisdictional transfers that comes from the State resources will require reductions in other areas.*** Currently, ODOT has begun the conversation about priorities for the 2023-27 Statewide Transportation Improvement Program (STIP). **If STIP funding is intended for these projects, we encourage participation in the statewide discussion about STIP priorities so that implications and the trade-offs with other programs can be understood more holistically.** This is particularly critical for rural areas that depend on STIP funding.

Sincerely,

CLACKAMAS COUNTY BOARD OF COMMISSIONERS

Jim Bernard, Chair  
On Behalf of the Clackamas County Board of Commissioners

Hi John,

Thank you for the opportunity to comment. Clackamas County staff would like to provide the following comments.

1. It should be noted in this report that the readiness factor analysis is a snapshot in time and that many of the readiness factors will likely change in coming years. For example, During the funding measure discussions for HWY 212 jurisdictional transfer was discussed between ODOT and Clackamas County. The county asserted that if a new road was funded & constructed (i.e. Sunrise) and ODOT assumed jurisdiction over the new facility then Clackamas County would consider assuming jurisdiction over HWY 212. The jurisdictional process could in fact provide funding for the Sunrise which would facilitate a possible transfer of HWY 212. At that time, the Throughway designation would likely move from HWY 212 onto the Sunrise, therefore bringing it back in the mix as potentially appropriate for jurisdictional transfer.
2. It should also be noted in the report that this analysis should be updated every two years to ensure that the ever evolving nature of these factors be current prior to policy decisions being made based upon this analysis.

Many thanks & please let us know if you have questions.

Sincere best,  
Jamie Stasny



**Jamie Stasny**

she/her/hers [Why pronouns matter](#)

Regional Transportation

& Land Use Policy Coordinator

(971) 678-6406

[JStasny@clackamas.us](mailto:JStasny@clackamas.us)

*\*\*Please note: I will be working remotely during this time, I will be available by email or by phone at 971-678-6406\*\**



1120 SW Fifth Ave., Suite 800 Portland, OR 97204 503-823-5185  
Fax 503-823-7576 TTY 503-823-6868 www.portlandoregon.gov/transportation

**Chloe Eudaly** Commissioner **Chris Warner** Director

To: John Mermin, Metro

From: Kristin Hull, Planning Division Manager, PBOT

Re: PBOT Comments on Regional Framework for Highway Jurisdictional Transfer Report

Dear John,

This letter provides our feedback on the Regional Framework for Highway Jurisdictional Transfer Report. Our comments are formatted to respond to the survey questions from Metro, as requested. Survey questions are shown in *bold italics*.

*Does this [draft Regional Framework for Highway Jurisdictional Transfer report](#) help move the region forward in achieving jurisdictional transfers?*

It does. This project has resulted in the identification of a subset of ODOT-owned facilities that are good candidates for jurisdictional transfer. This will allow ODOT and the region to focus efforts at investing and achieving JT in areas where it is most likely to be beneficial and successful.

However, there are a few key topics needed to move forward, that could be clearer within this report.

1. **JT as one potential tool, not the solution.** We still would reiterate the point we've made in earlier rounds of comments, which is that the "problem" should not be defined as "ODOT owns the highway" – which leads to jurisdictional transfer as the only way to solve the problem. Instead, the "problem" is that the highways are no longer serving their original purpose – they need to serve a broader community purpose and function, and are not currently doing a good job of that. The solution, then, can be framed as a set of tools or options for addressing this issue and ensuring that streets can serve their communities. JT is just one of these tools.
2. **Significant unmet funding needed to make JTs viable.** Without significant funding and investment on these ODOT-owned facilities, JTs are not a likely tool for addressing needs. This report and work does not seek to solve the funding problem, but should acknowledge the issue and clearly state that it does not address this question.
3. **Funding for ongoing maintenance after transfers.** The report does not clearly address the question of ongoing maintenance in cases of jurisdictional transfer, but should also acknowledge this issue – with significant assets being transferred away from ODOT and to local jurisdictions, funding sources for ongoing maintenance also must be identified.

We would recommend updating the executive summary and the framing of the report to provide broader context and put jurisdictional transfer (and the whole study) into this appropriate context.

It also would be helpful to have the report articulate the "next steps" that are not achieved by this work, including:

- commitment from local agencies, ODOT, and Metro to keep moving forward;
- identifying funding to make JTs viable;
- identifying funding source for ongoing maintenance;
- outlining near term steps prior to JT (i.e. Given the extensive mileage of highways identified as suitable for transfer, and the fact that they will not all be transferred very quickly or at the same time, what can be done in the interim to better serve the surrounding communities?)

The final paragraph of the conclusion notes that this is forthcoming – we agree that it will be critical in making the most of the work that has been done.

### *What does the draft report do well?*

While we have previously commented on specifics related to the criteria and the evaluation (which in some cases have been addressed; in some cases not), we generally agree with the outcomes of the evaluation process and the 11 corridors that the report identifies as good opportunities.

### *How could the report be improved? Do you have specific suggestions to make this a stronger tool for achieving jurisdictional transfers?*

As a public document, it may lack some context in terms of explaining the reasons for pursuing JT, the pros and cons, and alternative solutions. It seems particularly important to reference ODOT's recently adopted a new Blueprint for Urban Design. If the Blueprint for Urban Design is applied as intended, it would direct ODOT to implement multimodal, community-driven designs on these urban arterials without a transfer to the local jurisdiction.

More specific areas of feedback:

1. Figure 4.3 on page 26 shows a symbology for "transfer in process". This is applied to Barbur, 82<sup>nd</sup> Ave, and Outer Powell. These highways are definitely not all at the same level of "in process" and this could be very confusing to the public. Outer Powell certainly seems to fit with our understanding of "in process" since it has been funded, a project is underway, and both agencies have agreed that it will transfer to Portland following its completion. From the public perspective, this one is a sure thing. However, 82<sup>nd</sup> Ave and Barbur Blvd are in a different place. Funding has not been allocated, and there is no transfer agreement. We would recommend either removing them from being shown as "in process" or come up with another category, such as "Negotiations initiated".
2. Table 4-3 – should the final heading say "readiness" rather than technically promising?
3. In the cost estimating methodology, on page 34, related to state of good repair – Section 6.1 should reference both that the corridor elements function as intended AND that they are expected to do so for a typical lifecycle of that asset. For example – doing a 1-2 inch repave may result in a surface that appears to meet the SOGR definition; however, if the roadway base is not in good condition, it will deteriorate much more quickly than the typical 15- or 20-year asset life of pavement.
4. Figure 6.1, step 3 "Agree on SOGR definitions and assessment methods" – this provides the opportunity for this JT study to take the region the next step forward towards successful JT. The City of Portland and ODOT have worked together extensively to figure out this process on 82<sup>nd</sup> Avenue. Though those conversations are not concluded, it would be nice to draw on them in coming to agreement, at the regional level, on SOGR definitions and assessment methods, rather than leaving jurisdictions and individuals to figure this out differently for each of the identified candidate corridors for JT. A very useful outcome of this study could be regional agreement on these definitions and methods. Table 1 in Attachment F is a good start for this, but doesn't yet represent agreement from all parties. Reaching an agreed-upon starting point would be a very useful next step. Some example specifics we would like to see added to this table would be:
  - a. For pavement – core samples to assess the condition of the roadway base in addition to the other elements listed (if there is not a recent pavement report with core samples)
  - b. For sidewalks – assessment of curb height and curb condition
  - c. For drainage – video assessment of pipe condition (not just surface conditions)
5. Under capital needs, Section 6.2 – rather than saying that ODOT and the local jurisdiction may consider ADA needs, it should be changed to **must** – ADA is not optional and must be considered in the negotiation.

### *Please explain how jurisdictional transfers might or might not benefit your community?*

Having a local jurisdiction owner can allow for a closer connection to the local community and a stronger focus on ensuring the street best meets the needs of that community. However, identifying funding for desired improvements will continue to be a challenge; simply stated, a transfer does not guarantee improvements to a facility. Further,



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ODOT's Blueprint for Urban Design allows for greater design flexibility under ODOT ownership which should remove some pressure to transfer facilities from ODOT to local jurisdictions.

There is the potential for jurisdictional transfers to create a greater burden over time on local jurisdiction funding if ongoing maintenance funding is not also included in the negotiations. ODOT highways are often larger streets with significant demands and are likely to have substantial ongoing maintenance costs. To ensure that communities *are* able to reap the advantages of JT, local jurisdictions need to have the ability to fund needed maintenance on these streets – without pulling resources away from other assets that are already locally owned and in need of maintenance.



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**From:** Gareth Prior [<mailto:gprior@tualatin.gov>]  
**Sent:** Tuesday, October 27, 2020 9:43 AM  
**To:** John Mermin; [glen.a.bolen@odot.state.or.us](mailto:glen.a.bolen@odot.state.or.us)  
**Cc:** Kim McMillan  
**Subject:** [External sender]Tualatin JT Study Comments

John and Glen,

The Tualatin City Council reviewed and discussed the findings of the Jurisdictional Transfer study at the October 12, 2020, meeting ([video 35:00](#)).

The Council reaffirmed the following staff comments:

1. Tualatin has no interest in taking ownership of 99W – we do want to see investment and a long-term plan
2. Study should provide a template for cost estimation
3. Support changes that allow for greater flexibility in design and speed control on state facilities

For the section of Lower/Upper Boones Ferry (Highway 141), we will have to learn more about the state of good repair and evaluate the pros/cons with future development or long-range planning projects (such as the SW Corridor or continued transit oriented development in the Bridgeport area).

Please reach out with any questions.

Thank you!

**Garet S. Prior, AICP** (*he/him*)  
Policy Analyst  
City of Tualatin | Community Development  
503.691.3020 | [www.tualatinoregon.gov](http://www.tualatinoregon.gov)



October 20, 2020

President Lynn Peterson  
Metro Regional Government  
600 NE Grand Ave  
Portland OR 97232

Dear President Peterson and Metro Councilors:

Thank you for the opportunity to comment on the Regional Framework for Highway Jurisdictional Transfer Study. The report presents a comprehensive documentation of state-owned urban arterials. We agree state highways change function over time and jurisdictional transfer can better align highway design treatments with community aspirations. We also appreciate the documentation of the step-by-step jurisdictional transfer process outlined in the report and the recognition no two transfers are the same. The consistent framework for evaluating potential transfers presented in the study will help navigate the process.

The report highlights the reality that a successful jurisdictional transfer requires both technical conditions and political support. Considering both factors, please review our comments on the priorities identified in Washington County for your use in finalizing the report and as input on future jurisdictional transfer discussions:

- **Farmington Road:** We support the proposed transfer between 173rd and 198th avenues (MP 5.9 to MP 7.3). This relatively short (1.5 mile) segment is a true “orphan” where the road is managed by the County on both ends of the state segment. The County has a long-standing agreement to work with ODOT to facilitate a jurisdictional transfer for this segment of Farmington, subject to developing a mutually agreeable funding strategy for needed improvements to bring the road up to urban standards. As with previous transfers, we expect an agreement to be based on dedicated funding by both ODOT and the County at levels to be determined.
- **Hall Boulevard in Tigard and Upper Boones Ferry Road in Durham and Tualatin (OR 141):** These roads are fragments of OR 141; northern segments of which have previously been transferred to Beaverton. We support the priority transfer designations where modest upgrades are needed and the transfer aligns with the community need and technical feasibility subject to city support for the transfers. Washington County would willingly expand our traffic control responsibilities for these highways with upgraded infrastructure as requested by the cities. With funding for upgrades, Washington County is willing to consider a jurisdictional transfer of the short segment of Hall Blvd in unincorporated Washington County to avoid future “orphans.”
- **TV Highway:** County staff do not support jurisdictional transfer for this 12-mile segment at this time as the associated costs and liabilities are significant based on planning-level analysis completed for the ‘Get Moving’ measure. However, we strongly support ODOT investment in this corridor to address deferred maintenance and improve safety. The high proportion of vulnerable populations and historically marginalized communities increases the need for

**Board of County Commissioners**

155 North First Avenue, Suite 300, MS 22, Hillsboro, OR 97124-3072

phone: (503) 846-8681 • fax: (503) 846-4545

upgrades. Conceptual designs developed for the 'Get Moving 2020' proposal reflect a sound basis for investment. Following substantial improvements to TV Highway, the Board may be willing to consider a potential future transfer.

- **Highway 99W:** Metro's study shows Highway 99W ranking as a priority based on several criteria, including its role in serving designated Town Centers and having frequent bus routes. County and city staff submitted comment to Metro staff that local agencies do not support this as a priority for transfer as recommended in the report due to its continued statewide transportation function. However, we support continued engagement between ODOT and the communities along the highway to make investments consistent with changing community needs along the corridor.

We strongly support the addition of **Beaverton Hillsdale Highway** as a candidate for a jurisdictional transfer in the longer term. The highway serves a Town Center and has frequent bus service. The intersection of this state highway and the County's Scholls Ferry and Oleson roads in the Raleigh Hills Town Center is well-known as a high-crash location. Future upgrades to this corridor can be planned in conjunction with a land use planning process in coordination with Beaverton, Portland, ODOT and TriMet. This multi-jurisdictional corridor is overdue for attention, and significant efforts will be needed to address the issues noted above.

Thank you for your work to bring the needs of these state-owned arterials in our region to our attention. We support additional investment in these urban arterials and ask the transfer process to be one, but not the only way to secure needed investments on these corridors. ODOT's new Blueprint for Urban Design provides an alternative to achieve local community aspirations without a jurisdiction transfer. With or without transfer, state-owned urban arterials need additional funding to meet the changing needs of the community.

Sincerely,



Kathryn Harrington  
Chair, Washington County Board of Commissioners

cc: Board of County Commissioners  
Stephen Roberts, Director, Land Use & Transportation  
Christina Deffebach, Senior Policy Analyst, Land Use & Transportation

## Attachment B: County coordinating committees – notes

1. Co Clackamas County Coordinating Committee (C4)
2. East Multnomah County Transportation Commission (EMCTC)
3. Washington County Coordinating Committee (WCCC)

Jurisdictional Transfer Study comments  
Clackamas County Coordinating Committee  
September 16, 2020

Here are some of the key questions or statements that came up during the meeting.

- Important to look at roadway width and radius during JT discussions
- Concern that findings for 43 did not take into account regional context – full corridor into Lake Oswego, Portland from West Linn
- Questions about how this effort affects funds available; and whether potential future funds would siphon dollars from a different bucket of funding
- Question about whether the ODOT-owned arterials are also regional emergency routes, and whether discussions would take this factor into account
- Concern about “being left out” if this effort is picked up again in the future and conditions change for a jurisdiction that does not currently float to the top in terms of the evaluation
- Questions about why ODOT has not transferred roadways in the past (disinvestment, lack of resources)
- 82<sup>nd</sup> Avenue in Portland is in dire need of transfer
- Appreciation for the presentation, especially Margi’s section on history

Jurisdictional Transfer Study comments  
East Multnomah County Transportation Commission  
October 12, 2020

- (1) Councilor Hinton (Gresham)
  - a. What were the components of the equity assessment and why was that done?
  - b. What is the purpose of a transfer?

Jurisdictional Transfer Study comments  
Washington County Coordinating Committee  
October 12, 2020

- (1) Mayor Snider (Tigard)
  - a. Surprised to see 99W on list, especially in Tigard – interest is low; there is a throughput function
  
- (2) Mayor Calloway (Hillsboro)
  - a. Does it affect funding allocation/priorities for upcoming RTP processes, etc.?
    - i. Margi response: hope is to help attract funding by having one voice on ODOT-owned arterials
  - b. Should not be a link to funding priorities in the RTP
  
- (3) Commissioner Rogers (Wash Co)
  - a. TV Hwy is complex and difficult to maintain; Washington County would be wary about taking it on
  - b. 99W has high use and plays a key role in throughput (does not act like an “orphan highway”)
  - c. Future funding for a roadway, e.g. TV Hwy, will not be conditional on a JT
  
- (4) Mayor Doyle (Beaverton)
  - a. Caution about the high price tag for these efforts
  
- (5) Mayor Truax (Forest Grove)
  - a. Caution to Metro and ODOT about the high cost, including high cost of maintenance
  - b. Prior transfer of OR 8 in Forest Grove has generally been a success

## Attachment C: Meetings with project managers – notes

1. Multnomah County
2. Clackamas Community College



### **Jurisdictional transfer public comment meeting**

Date: Thursday, October 8, 2020 10:00 a.m.

Location: Virtual meeting

Attendees:

Glen Bolen – ODOT

John Mermin – Metro

Brendon Haggerty – Multnomah County

Andrew Campbell – Multnomah County

Notes:

These state-owned arterial highways really impact health in multiple ways:

- They create barriers to physical activity
- They increase exposure to noise and air pollution
- They often lack basic access

Transferring these roadways can lead to improvements that improve health of the communities along them, but also create the possibility of gentrification and displacement, see past example on NE MLK Blvd in Portland. Please consider anti-displacement strategies along with any future transfers and improvements along these roadways.

Other topics discussed:

- How the evaluation/rankings of candidate roadways will be used
- US 30 - The readiness scoring of NE Lombard, the possibility for projects along the Sandy Blvd portion.
- What “transfer in process” means when shown on maps in the report
- How a transfer recipient is decided, e.g. City vs County

Notetaker: John Mermin

**Jurisdictional transfer public comment meeting**

Date: Friday, October 9, 2020 10:30 a.m.

Location: Virtual meeting

Attendees:

Glen Bolen – ODOT

John Mermin – Metro

Ray Atkinson, Clackamas Community College

Notes:

Today's discussion focused on 82<sup>nd</sup> avenue:

- Why is 82<sup>nd</sup> avenue segmented at the City/county boundary given the desire for some level of consistency throughout the corridor?
- Why did the portion of 82<sup>nd</sup> Ave within Clackamas County not rank as highly in the Jurisdictional Transfer Study's evaluation as the portion in Portland?
- How does this evaluation relate to the improvements for 82<sup>nd</sup> Avenue within Get Moving 2020?
  - o Could this evaluation impact funding or design of 82<sup>nd</sup> avenue within Clackamas County (if the Get Moving 2020 transportation measure were to pass in November)?
  - o How might the design of 82<sup>nd</sup> avenue differ if it were owned by ODOT vs Clackamas County?

Notetaker: John Mermin

## Attachment D: Online comment survey results

Share your feedback on the draft Regional Framework for Highway Jurisdictional Transfer report

## Q1 Please provide your zip code.

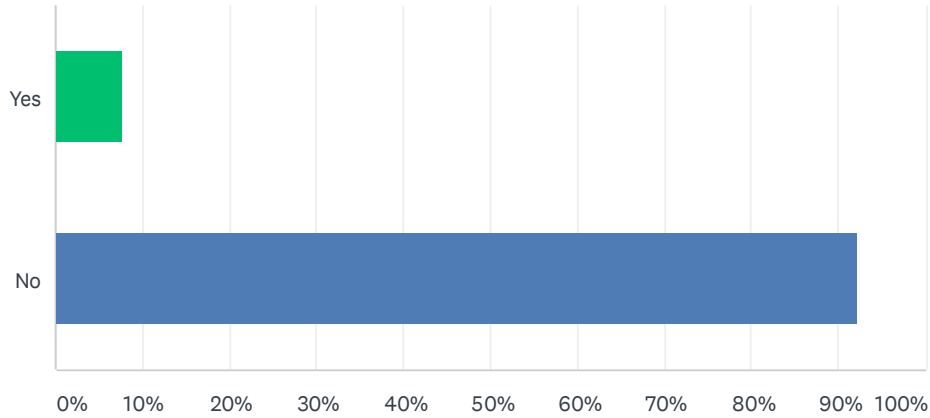
Answered: 36

Skipped: 4

Zip Code	No. of respondents
97034	1
97068	9
97086	1
97202	5
97204	1
97209	2
97211	1
97212	2
97213	2
97214	5
97215	1
97217	2
97221	1
97223	1
97232	1

Q2 Are you participating in this questionnaire in a professional capacity (i.e. as a staff member of a jurisdiction or member of a committee)? If so, please provide your agency or affiliation.

Answered: 39 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	7.69%	3
No	92.31%	36
TOTAL		39

### Q3 Does this draft Regional Framework for Highway Jurisdictional Transfer report help move the region forward in achieving jurisdictional transfers?

Answered: 26 Skipped: 14

11 people said yes.

2 people said sure.

Other responses:

Yes, give these streets back to the jurisdiction to manage and control

Yes, in many ways it reflects what needs to happen in Portland to reflect the changes in population density along certain "State" highways, as well as the potential for building safe communities and allowing businesses to thrive.

I believe so.

Yes, but reasoning is weak.

Somewhat. It is a step in the right direction.

It does. This project has resulted in the identification of a subset of ODOT-owned facilities that are good candidates for jurisdictional transfer. This will allow ODOT and the region to focus efforts at investing and achieving JT in areas where it is most likely to be beneficial and successful. However, there are a few key topics needed to move forward, that could be more clear within this report. 1. JT as one potential tool, not the solution. We still would reiterate the point we've made in earlier rounds of comments, which is that the "problem" should not be defined as "ODOT owns the highway" – which leads to jurisdictional transfer as the only way to solve the problem. Instead, the "problem" is that the highways are no longer serving their original purpose – they need to serve a broader community purpose and function, and are not currently doing a good job of that. The solution, then, can be framed as a set of tools or options for addressing this issue and ensuring that streets can serve their communities. JT is just one of these tools. 2. Significant unmet funding need to make JTs viable. Without significant funding and investment on these ODOT-owned facilities, JTs are not a likely tool for addressing needs. This report and work does not seek to solve the funding problem, but should acknowledge the issue and that it does not address this question. 3. Funding for ongoing maintenance after transfers. The report does not clearly address the question of ongoing maintenance, in cases of jurisdictional transfer, but should also acknowledge this issue – with significant assets being transferred away from ODOT and to local jurisdictions, funding sources for ongoing maintenance also must be identified. We would recommend updating the executive summary and the framing of the report to provide broader context and put jurisdictional transfer (and the whole study) into this appropriate context. It also would be helpful to have the report articulate the "next steps" that are not achieved by this work, including: - commitment from local agencies, ODOT, and Metro to keep moving forward; - identifying funding to make JTs viable; - identifying funding source for ongoing maintenance; - outlining near term steps prior

to JT (i.e. Given the extensive mileage of highways identified as suitable for transfer, and the fact that they will not all be transferred very quickly or at the same time, what can be done in the interim to better serve the surrounding communities?) The final paragraph of the conclusion notes that this is forthcoming – we agree that it will be critical in making the most of the work that has been done.

No a euphemism for absolving the state from maintenance only move the problem to communities that may not have the tax base to support

No. Need to know consequences of transfer. Both that and how well road will be maintained

I don't believe so at this time.

No

I don't know.

## Q4 What does the draft report report do well?

Answered: 22 Skipped: 18

It converts a hostile thoroughfare to a neighborhood friendly road. Shift responsibility from those who are responsible to those that don't have historical responsibility, funding or knowledge.

While we have commented on specifics related to the criteria and the evaluation (which in some cases have been addressed; in some cases not), we generally agree with the outcomes of the evaluation process and the 11 corridors that the report identifies as good opportunities.

Lays out a specious argument

I don't know. Haven't seen it yet.

General description of what's being done.

No

Thorough explanation of the process

Thorough

Give the cities/counties more control over the highway

Identify roads that are really hard to safe while biking/walking or doing anything other than driving a very large SUV.

Framework for trans, not reasoning

Identify the processes required and lay out a clear plan to make this achievable.

Lays out the framework for jurisdictional handover.

Move badly needed progress along. Finally. Thank you.

It spells out in clarity the benefits of moving the jurisdiction to Metro

Good detailed analysis

Explains how we got here, and what could be gained by transferring them.

Identifies major arterials that no longer act as highways as when they were first constructed, which should be managed by local agencies for more frequent and rapid maintenance and improvements.

It establishes a reasonable framework for jurisdictional transfer.

The report takes us thru the steps that were used, as well as the factors of measurement that were used to arrive at their final findings. It is a comprehensive "report".

Clarifies what segments of roads are currently being considered for transfer



**Q 5. How could the report be improved? Do you have specific suggestions to make this a stronger tool for achieving jurisdictional transfers?**

Answered: 18 Skipped: 22

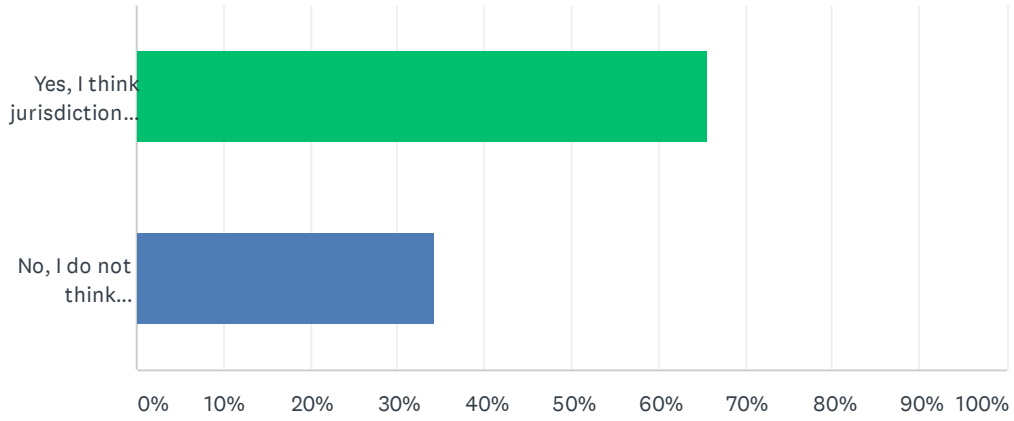
1. PDF page numbers and actual page numbers don't always match and it's difficult to navigate.
2. I'm opposed to jurisdictional transfer. Federal gas taxes have not been allocated to properly fund road transportation projects in the state. An audit should be conducted to see where the federal highway funds have been spent over the past 30 years. It appears that too many funds have been allocated to non-road projects that has contributed to increased congestion on Oregon, especially in the Portland metro area. For example, the I205 west side beltway with widening and third bridge to Vancouver 30 years ago, and highway 26 bypass around Sandy to name a couple.
3. As a public document it may lack some context in terms of explaining the reasons for pursuing JT, the pros and cons, and alternative solutions. ODOT has recently adopted a new Blueprint for Urban Design, and, if applied as intended, this document would direct ODOT to implement multimodal, community-driven designs on these urban arterials without a transfer to the local jurisdiction. More specific areas of feedback:
  - a. Figure 4.3 on page 26 shows a symbology for "transfer in process". This is applied to Barbur, 82nd Ave, and Outer Powell. These highways are definitely not all at the same level of "in process" and this could be very confusing to the public. Outer Powell certainly seems to fit with our understanding of "in process" since it has been funded, a project is underway, and both agencies have agreed that it will transfer to Portland following its completion. From the public perspective, this one is a sure thing. However, 82nd Ave and Barbur Blvd are in a completely different place. Funding has not been allocated, and there is no transfer agreement. We would recommend either removing them from being shown as "in process" or come up with another category, such as – "Negotiations initiated".
  - b. Table 4-3 – should the final heading say "readiness" rather than technically promising?
  - c. In the cost estimating methodology, on page 34, related to state of good repair – Section 6.1 should reference both that the corridor elements function as intended AND that they are expected to do so for a typical lifecycle of that asset. For example – doing a 1-2 inch repave may result in a surface that appears to meet the SOGR definition; however, if the roadway base is not in good condition, it will deteriorate much more quickly than the typical 15- or 20-year asset life of pavement.
  - d. Figure 6.1, step 3 "Agree on SOGR definitions and assessment methods" – this provides the opportunity for this JT study to take the region the next step forward towards successful JT. The City of Portland and ODOT have worked together extensively to figure out this process on 82nd Avenue. Though those conversations are not concluded, it would be nice to draw on them in coming to agreement, at the regional level, on SOGR definitions and assessment methods, rather than leaving jurisdictions and individuals to figure this out differently for each of the identified candidate corridors for JT. A very useful outcome of this study could be regional agreement on these definitions and methods. Table 1 in Attachment F is a good start for this, but doesn't yet represent agreement from all parties. Reaching an agreed-upon starting point would be a very useful next step. Some example specifics we would like to see added to this table would be:
    - a. For pavement – core samples to assess the condition of the roadway base in

addition to the other elements listed (if there is not a recent pavement report with core samples) b. For sidewalks – assessment of curb height and curb condition c. For drainage – video assessment of pipe condition (not just surface conditions)

- e. Under capital needs, Section 6.2 – rather than saying that ODOT and the local jurisdiction may consider ADA needs, it should be changed to must – ADA is not optional and must be considered in the negotiation.
4. Mode detail on what is to be transferred.
5. Need to know financial impact to jurisdictions taking over. And implications of how road will be maintained re: roads requirements when it's transferred.
6. Haven't seen the report or its structure yet.
7. Need to know financial impact to jurisdictions taking over. And implications of how road will be maintained re: roads requirements when it's transferred.
8. There needs to be a discussion about funding.
9. Bigger font.
10. None
11. I didn't see the opportunity cost in the costing analysis. Possibly, having these roads in poor condition create underinvestment in the property near the roads. If true, I would expect a rise in value for the adjacent property translating to additional metro revenue. In addition to more private wealth.
12. Cost benefit analysis
13. Liability is important, but concerns about it cannot get in the way of completing this expeditiously. This system doesn't serve anyone as is - if a jurisdiction takes on greater liability as a result of controlling its own road - so be it, it should've been that way all along.
14. MORE ALL CAPS EXCLAMATION MARKS!!! That always makes things more persuasive.
15. Would like to see strong and detailed timelines for next steps, and call out who the key players are that need to make those next steps.
16. Detailing the last time the proposed corridors received improvements from ODOT.
17. At this point, I think it is pretty comprehensive and a good start as it will need to evolve as things change over the next year or so.
18. It should include the information regarding the level of condition the road, infrastructure, and foundation need to be prior to the City(s) accepting their transfer. Also, where those funds will be coming from for those improvement and timeline.

### Q6 Do you think jurisdictional transfers will benefit your community? Please explain how or how not.

Answered: 35 Skipped: 5



ANSWER CHOICES	RESPONSES	
Yes, I think jurisdictional transfers will benefit my community.	65.71%	23
No, I do not think jurisdictional transfers will benefit my community.	34.29%	12
TOTAL		35

## Q7 Is there anything else you would like Metro, ODOT, cities and counties to know as they prepare to use the draft Regional Framework for Highway Jurisdictional Transfer report?

Answered: 17 Skipped: 23

I'm concerned that it will not be equitably governed by the jurisdictions involved with the oversight. In other words, how will this change benefit my Clackamas county community when currently the transportation dollars are not equitably coming to Clackamas County now for road projects?

I will also email these comments to John Mermin in a word doc in case that's easier.

No

Financial and road maintenance impacts

The idea should be killed.

If you are going to toll 205, you need to spend the funds in the area that is being taxed. Highway 43 should definitely be first on the priority list.

Not at this time

I believe we should continue to invest in infrastructure that supports multiple modes of transportation.

Provide successful examples that benefit localities

Please leave all these arterials alone. Please.

Yes - this is long overdue and needs to be done expeditiously. I would also include Highway 10 (Beav Hills Highway) - there are tremendous amount of apartments and possibility to make it a better place between Hillsdale and Raleigh Hills and this needs for ODOT to leave the picture.

Extend the Willamette Drive improvements of HWY 43 to include State Street in Lake Oswego, a real choke point for people riding bikes.

Stop ignoring my community, our cut as out of the tax that pays for Metro and let us fix it ourselves. Stop taking our taxes and spending it in some of the wealthiest parts of the Metro.

82nd should be one of the highest priority corridor to be transferred.

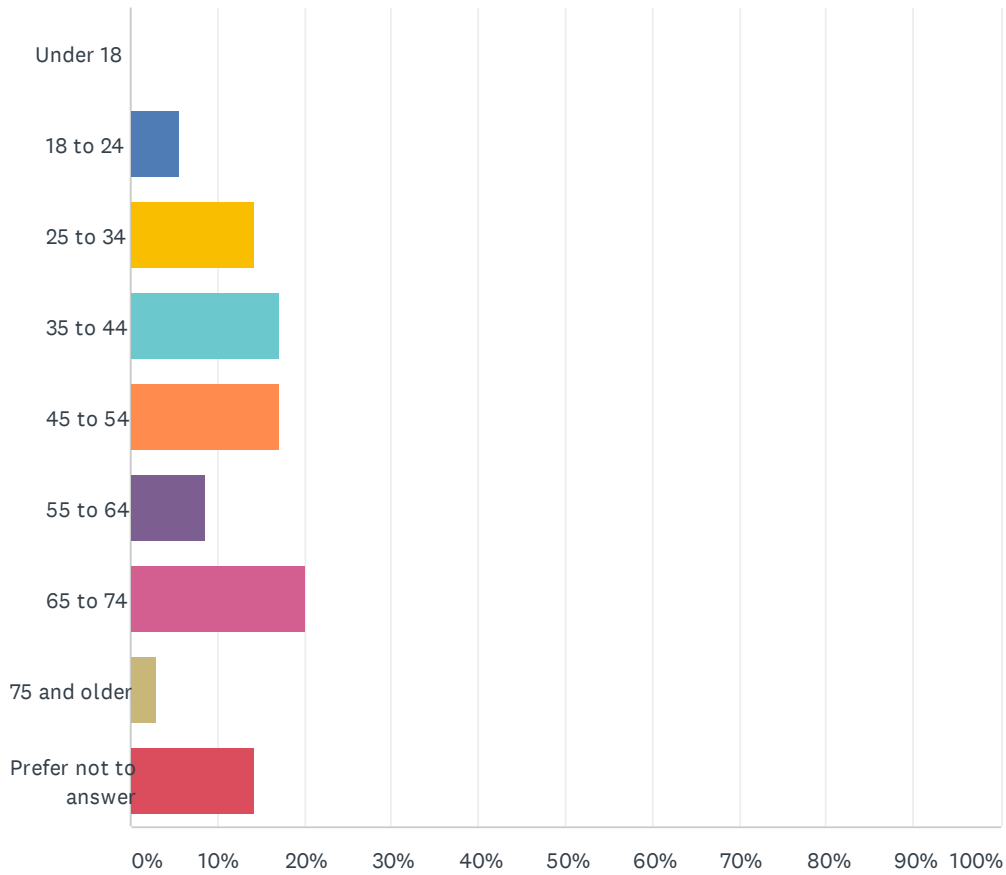
Nope

Safety and Accessibility are essential as Portland continues to grow. Add to that Interconnectivity and Public Transportation. We also need to consider making these corridors hospitable for businesses that serve and accommodate the communities that surround them. Therefore, we need to be more diligent in our design for these corridors to insure we are providing the residents with corridors that actually work to their benefit and not some "special sector", i.e. truckers, etc.

Do a MUCH better job in publicizing requests for comments like this! Hiding this opportunity 3 clicks down from a select list email is disingenuous to an open public comment process.

### Q8 Which of the following ranges includes your age

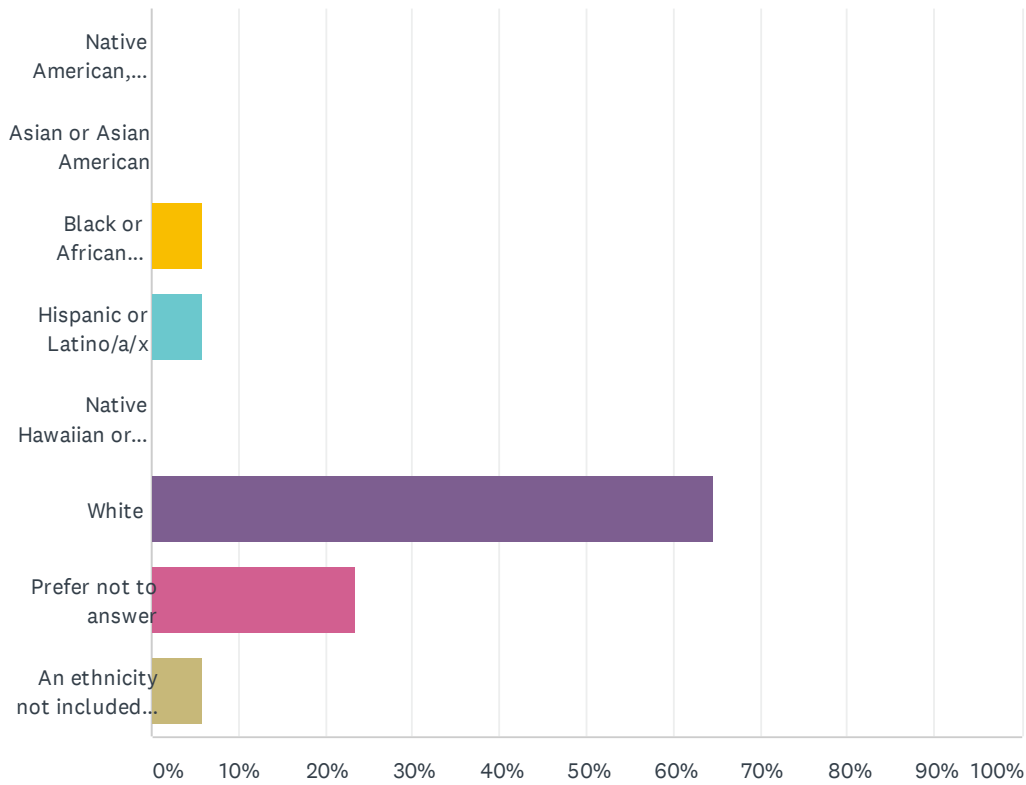
Answered: 35 Skipped: 5



ANSWER CHOICES	RESPONSES
Under 18	0.00% 0
18 to 24	5.71% 2
25 to 34	14.29% 5
35 to 44	17.14% 6
45 to 54	17.14% 6
55 to 64	8.57% 3
65 to 74	20.00% 7
75 and older	2.86% 1
Prefer not to answer	14.29% 5
<b>TOTAL</b>	<b>35</b>

**Q9 Within the broad categories below, where would you place your racial or ethnic identity?  
(Select all that apply)**

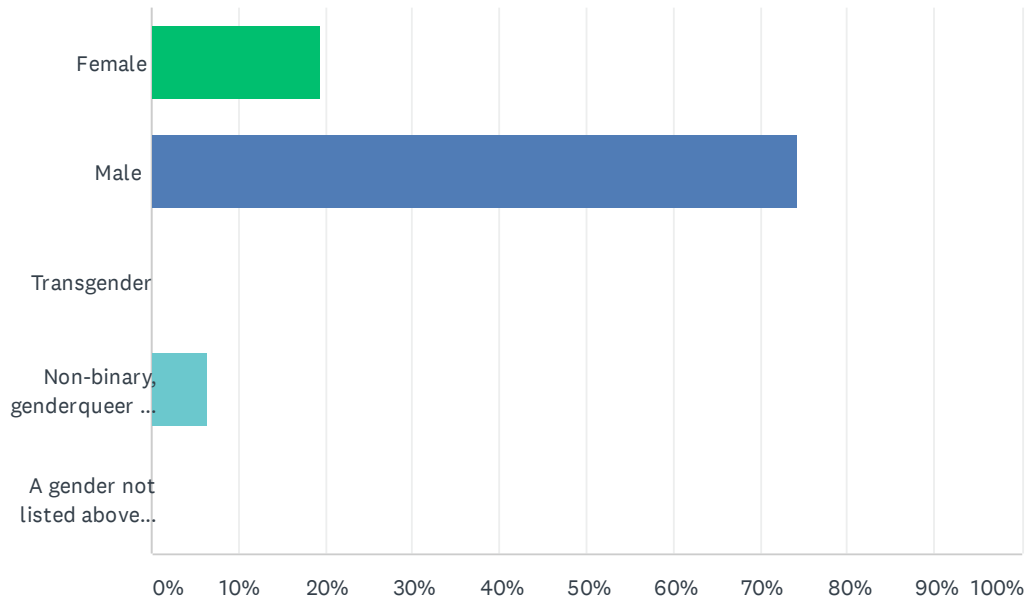
Answered: 34 Skipped: 6



ANSWER CHOICES	RESPONSES	
Native American, American Indian or Alaska Native	0.00%	0
Asian or Asian American	0.00%	0
Black or African American	5.88%	2
Hispanic or Latino/a/x	5.88%	2
Native Hawaiian or other Pacific Islander	0.00%	0
White	64.71%	22
Prefer not to answer	23.53%	8
An ethnicity not included above (please specify)	5.88%	2
Total Respondents: 34		

### Q10 How do you identify your gender? (Select all that apply)

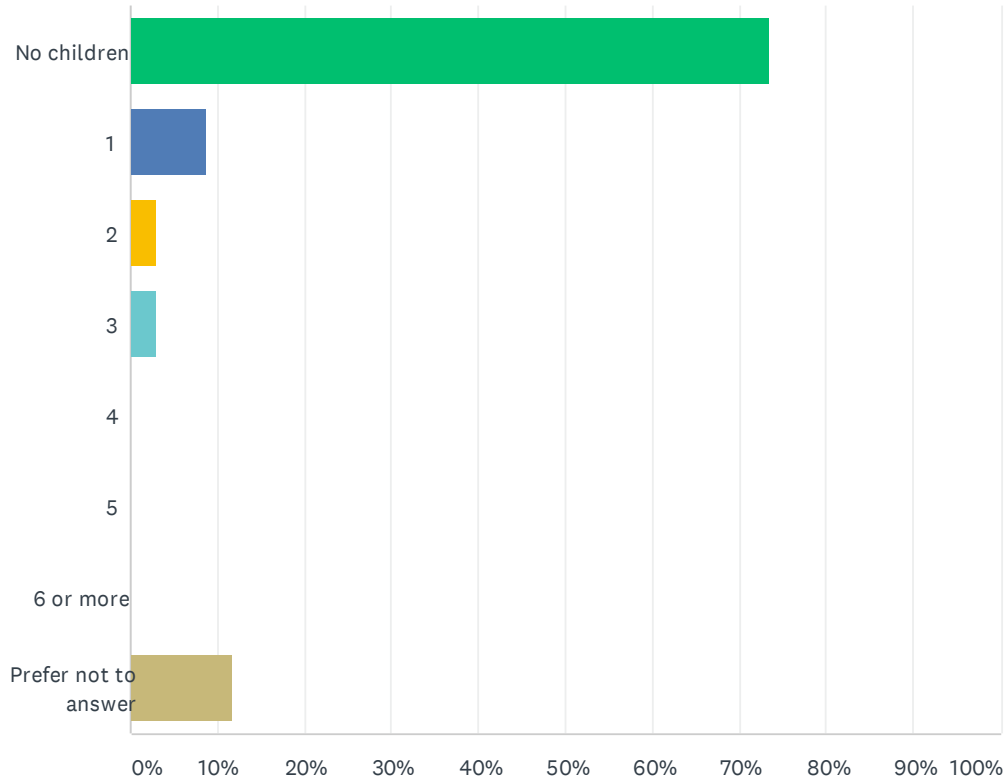
Answered: 31 Skipped: 9



ANSWER CHOICES	RESPONSES	
Female	19.35%	6
Male	74.19%	23
Transgender	0.00%	0
Non-binary, genderqueer or third gender	6.45%	2
A gender not listed above (please describe)	0.00%	0
Total Respondents: 31		

### Q11 How many children under the age of 18 live in your household? (Check one)

Answered: 34 Skipped: 6

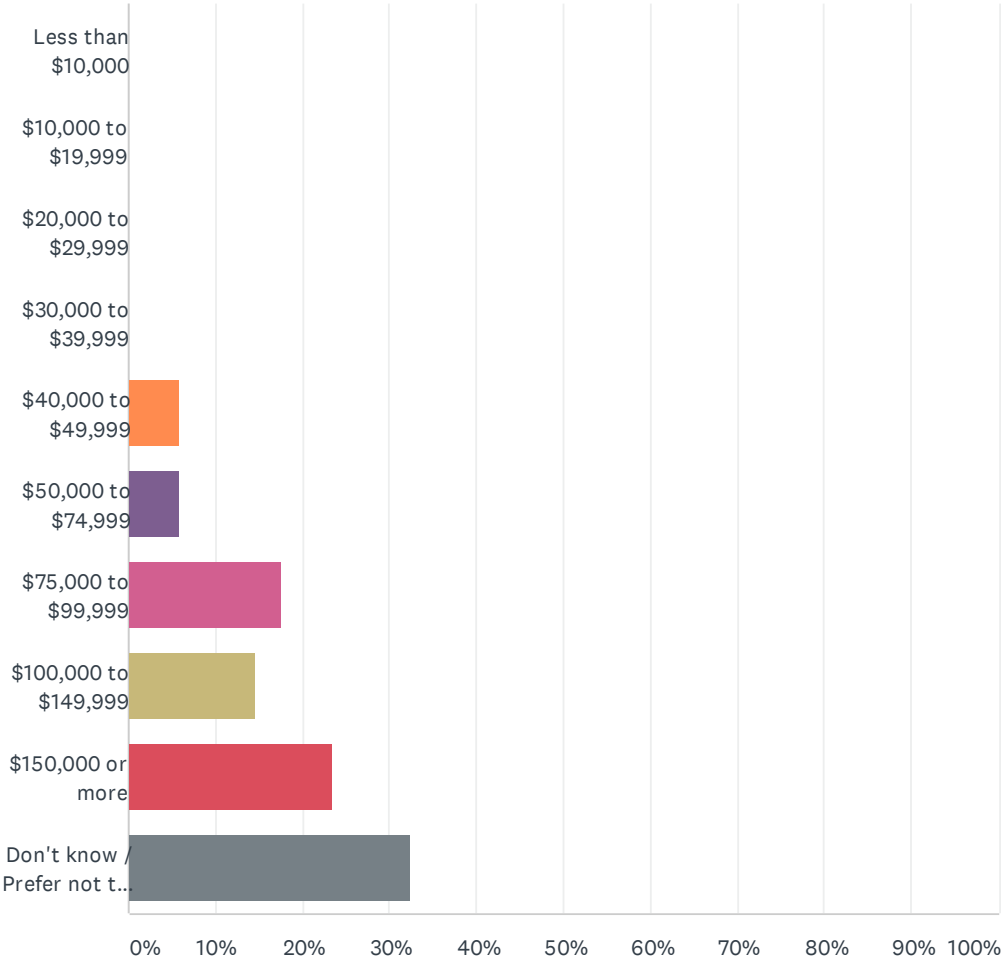


ANSWER CHOICES	RESPONSES	
No children	73.53%	25
1	8.82%	3
2	2.94%	1
3	2.94%	1
4	0.00%	0
5	0.00%	0
6 or more	0.00%	0
Prefer not to answer	11.76%	4
<b>TOTAL</b>		<b>34</b>



### Q12 Which of the following best represents the annual income of your household before taxes?

Answered: 34 Skipped: 6

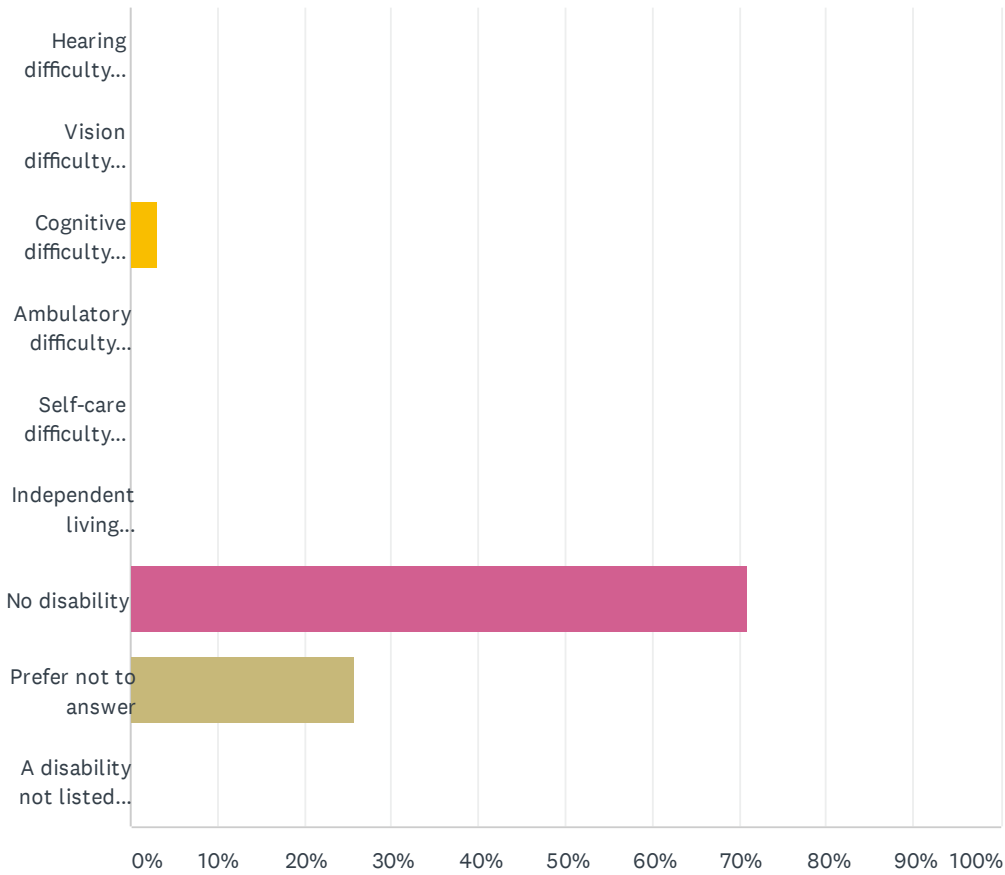


Share your feedback on the draft Regional Framework for Highway Jurisdictional Transfer report

ANSWER CHOICES	RESPONSES	
Less than \$10,000	0.00%	0
\$10,000 to \$19,999	0.00%	0
\$20,000 to \$29,999	0.00%	0
\$30,000 to \$39,999	0.00%	0
\$40,000 to \$49,999	5.88%	2
\$50,000 to \$74,999	5.88%	2
\$75,000 to \$99,999	17.65%	6
\$100,000 to \$149,999	14.71%	5
\$150,000 or more	23.53%	8
Don't know / Prefer not to answer	32.35%	11
<b>TOTAL</b>		<b>34</b>

### Q13 Do you live with a disability? (Select all that apply)

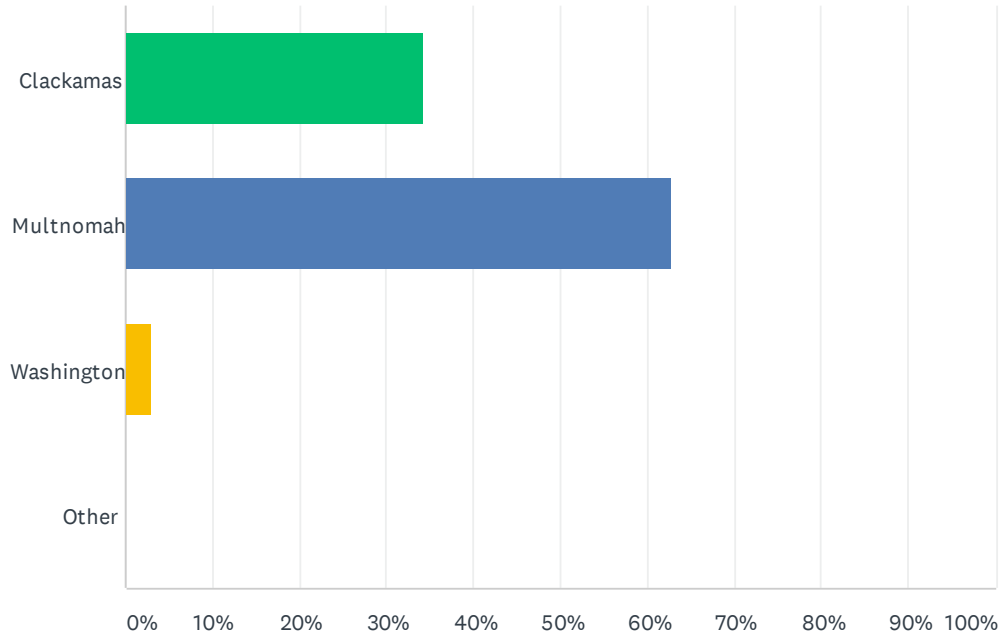
Answered: 31 Skipped: 9



ANSWER CHOICES	RESPONSES	
Hearing difficulty (deaf or have serious difficulty hearing)	0.00%	0
Vision difficulty (blind or have serious difficulty seeing, even when wearing glasses)	0.00%	0
Cognitive difficulty (because of a physical, mental or emotional problem, have difficulty remembering, concentrating or making decisions)	3.23%	1
Ambulatory difficulty (unable to walk or having serious difficulty walking or climbing stairs)	0.00%	0
Self-care difficulty (unable to bathe or dress or having difficulty doing so)	0.00%	0
Independent living difficulty (because of a physical, mental or emotional problem, unable to do errands alone or have difficulty doing so)	0.00%	0
No disability	70.97%	22
Prefer not to answer	25.81%	8
A disability not listed above (please describe)	0.00%	0
Total Respondents: 31		

### Q14 In which County do you live?

Answered: 35 Skipped: 5



ANSWER CHOICES	RESPONSES	
Clackamas	34.29%	12
Multnomah	62.86%	22
Washington	2.86%	1
Other	0.00%	0
<b>TOTAL</b>		<b>35</b>

## Attachment E: Summary of changes to Final Report

# METRO HIGHWAY JURISDICTIONAL TRANSFER FRAMEWORK

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Date: November 2020

Subject: Summary of changes to Final Report

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## Summary of changes

### Executive Summary (page viii)

- Added language:  
Historically, identifying a single, comprehensive funding source for jurisdictional transfers in the region has been a challenge. Jurisdictions are typically only interested in transfers when accompanied by funding to improve the roadway, and it is difficult to provide a meaningful funding amount by piecing different funding buckets together. The study team recognizes the need for a wholistic and comprehensive funding strategy to fully accomplish jurisdictional transfers. Refer to the Consultant Recommendation memorandum (November 2020) for a list of funding sources and a broader funding discussion.

### Figure 2-1 (page 9)

- Changed Phase 1 text: ~~Identify approvers~~ Identify decision makers

### Section 2.3, Phase 1 (page 10)

- Changed text: ~~Identify approvers~~ Identify decision makers

### Figures 4-3 and 4-4 (pages 26, 28) and Attachment C, Figures 3 and 4 (page 124, 125)

- “Transfer is progress” denotation has been removed from the legend
- “Transfer discussions are underway for the following segments:” and status update on the suggested three segments has been added as a footnote to the legend

### Table 4-3 (page 27)

- Changed right column heading: ~~Technically Promising for Transfer?~~ High rank for transfer readiness?

### Section 6.2, Capital Needs (page 34) and Attachment F (page 9)

- Changed text in final paragraph from “may” to “must”: ODOT and the local jurisdiction ~~may~~ must consider the costs associated with Americans with Disabilities Act (ADA) compliance.

### Section 7, Conclusion (page 37)

- Changed text:
  - ~~The study team will produce a separate recommendation document focused on regional next steps for local, regional, and state partners. It will include an overview of the most~~

~~promising funding strategies available from a variety of sources for jurisdictional transfers. The consultant recommendation will offer the most promising candidates to move forward in these state, regional and local jurisdictional transfer conversations. The recommendation also will include steps to keep partners engaged in the jurisdictional transfer topic.~~

- Historically, identifying a single, comprehensive funding source for jurisdictional transfers in the region has been a challenge. Jurisdictions are typically only interested in transfers when accompanied by funding to improve the roadway, and it is difficult to provide a meaningful funding amount by piecing different funding buckets together. The study team recognizes the need for a wholistic and comprehensive funding strategy to fully accomplish jurisdictional transfers. Refer to the Consultant Recommendation memorandum (November 2020) for a list of funding sources and a broader funding discussion.

#### **Attachment F (page 219)**

- Footnote added to Table 1 that reads, “Field surveys may need to be augmented with more detailed analysis of facilities dependent on agreement between agencies.”

## STAFF REPORT

### FOR THE PURPOSE OF ACCEPTING THE FINDINGS IN THE REGIONAL FRAMEWORK FOR HIGHWAY JURISDICTIONAL TRANSFER STUDY

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Date: December 17, 2020

Prepared by: John Mermin  
John.mermin@oregonmetro.gov

## BACKGROUND

The 2018 Regional Transportation Plan identifies the need and a process for completing several jurisdictional transfers in the Metro region for older, state-owned facilities that have lost their statewide function over time to urbanization and now function as urban arterial streets (e.g. 82<sup>nd</sup> Avenue in Portland). Most of these routes have been bypassed by modern, limited access freeways (e.g. I-205) that replace their statewide travel function. In recognition of this transition, the state has adopted policies to promote the jurisdictional transfer of these older routes to city or county ownership. However, future transfers have occurred.

Because of the delay in transferring ownership, most of these roadways have a backlog of pavement maintenance as well as gaps or deficiencies in basic urban pedestrian and bicycle facilities. Funding for near or long-term investments has not been identified by the state or local jurisdictions. Furthermore, there is no agreement in the region on which roads are the highest priorities when it comes to what to transfer, when, and at what cost. For this reason, these transfers will take time to accomplish on a case-by-case basis. However, the 2018 RTP also identified immediate concerns for safety and equity that are driving a more urgent need to accomplish these transfers.

The report included in Exhibit A provides a Policy Framework, Evaluation Methodologies, Findings, Needs and Deficiencies Assessment, and a Cost estimating Methodology. It highlights the key takeaways and provides attachments including the full deliverables for these components as well as for an Inventory of candidate roadways, Equity Considerations and Roadway Classification change recommendations.

A Public Comment Period for the report was held this Fall (9/15-10/22), Notice of the public comment period was provided through Metro News and distributed to an email list of community members and organizations, the Project Steering Committee, Metro's Metropolitan Transportation Advisory Committee and the Joint Policy Committee on Transportation. Metro's Metropolitan Transportation Advisory Committee and the Project Steering Committee

Members of the public and other interested stakeholders were encouraged to review the draft document and comment by letter, phone, "in person" through online Zoom meetings with Metro and ODOT project managers, through an online comment survey.

No comments were received by mail or phone. The project team received seven comment letters by email, two interested parties met with project managers and 40 people participated in the online comment survey. In addition to receiving the comment letters, survey responses, and in-person meetings, the project team also met with county coordinating committees. All comments received, meeting notes and survey results are included within the Public Comment Summary Memorandum in Exhibit B.

Overall, jurisdictional staff and decision-makers who submitted comments are interested in continued dialogue about jurisdictional transfers.

- Levels of support for transferring roadways vary by roadway and jurisdiction.
- There is generally agreement that the roadways the report identifies as promising candidates for jurisdictional transfer need improvements to better meet local needs, uses and priorities, especially safety.



- There is a common concern among jurisdictions regarding the funding that would be needed at the local level for improvements and ongoing maintenance of transferred roadways.

#### **ANALYSIS/INFORMATION**

1. **Known Opposition** – No known opposition
2. **Legal Antecedents** – this resolution accepts findings from a study that was called for in the 2018 RTP update as adopted in Ordinance 18-1421 FOR THE PURPOSE OF AMENDING THE 2014 REGIONAL TRANSPORTATION PLAN TO COMPLY WITH FEDERAL AND STATE LAW AND AMENDING THE REGIONAL FRAMEWORK PLAN.
3. **Anticipated Effects** – Findings included in Exhibit A will be considered in the 2023 update to the Regional Transportation Plan (RTP).
4. **Budget Impacts** – None.

#### **RECOMMENDED ACTION**

Approve Resolution No.20-5138 accepting the findings in the Regional Framework for Highway Jurisdictional Transfer study.

Agenda Item No. 4.2

**Resolution No. 20-5142**, For the Purpose of Adopting Solid Waste Fees at the Metro Transfer  
Stations and the Regional System Fee for FY 2020-21

*Resolution*

Metro Council Meeting  
Thursday, December 17, 2020

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING SOLID WASTE FEES AT THE METRO TRANSFER STATIONS AND THE REGIONAL SYSTEM FEE FOR FY 2021-22 ) RESOLUTION NO. 20-5142  
)  
) Introduced by Chief Operating Officer  
) Marissa Madrigal with the concurrence of  
) Council President Lynn Peterson

WHEREAS, Metro Code Chapter 5.02 establishes the regional system fee, which recovers the costs for all associated regional solid waste activities related to managing, planning and administering the entire recycling, processing and disposal system for the Metro region; and

WHEREAS, Metro Code Chapter 5.03 establishes the fees for solid waste at Metro Central and Metro South transfer stations; and

WHEREAS, Metro Code Chapters 5.01 and 5.02 establishes that all solid waste generated from inside the Metro jurisdictional boundary is subject to a regional system fee at the time the waste is delivered to a Metro transfer station or otherwise disposed; and

WHEREAS, Metro Code Section 5.06.030 establishes a community enhancement fee in an amount not to exceed \$1.00 on each ton of putrescible waste delivered to eligible solid waste facilities in the Metro region; and

WHEREAS, Metro Council finds that it is in the public interest for Metro to collect a community enhancement fee of \$1.00 per ton on all solid waste received at Metro's transfer stations; and

WHEREAS, Metro's costs for solid waste services and programs have changed; and

WHEREAS, the proposed fees comply with Metro Charter Section 15 ("Limitations on Amount of User Charges"); now therefore,

THE METRO COUNCIL RESOLVES AS FOLLOWS:

- Section 1. Solid Waste Fees and Charges. The schedule of solid waste fees and charges attached hereto as Exhibit "A" is approved, and shall be implemented on the Effective Date of this ordinance.
- Section 2. Effective Date. This resolution shall become effective on July 1, 2021.
- Section 3. Interim Fees. The Chief Operating Office may establish an interim fee for an additional service or waste material at Metro's transfer stations as provided in Administrative Rules No. 5.03-1000 through 1070.

ADOPTED by the Metro Council this \_\_\_\_\_ day of December 2020.

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Lynn Peterson, Council President

Approved as to Form:

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Carrie MacLaren, Metro Attorney

**Exhibit A to Resolution No. 20-5142**

**SCHEDULE OF SOLID WASTE FEES**

Effective July 1, 2021

**Fees at Metro Central Station and Metro South Station**

Tonnage Fees by waste class

In accordance with Metro Code Chapters 5.02 and 5.03, Metro will charge the following fee for each ton of solid waste received at a Metro transfer station

- (1) Mixed solid waste .....\$ 72.81
- (2) Clean Wood ..... 64.23
- (3) Yard Debris ..... 55.00
- (4) Residentially generated organic waste..... 76.99
- (5) Commercially generated organic waste (Metro Central only)..... 65.23

Transaction Fees by transaction class

In accordance with Metro Code Chapter 5.03, Metro will charge the following fee for each transaction at a Metro transfer station.

- (1) For users of staffed scales .....\$ 14.75
- (2) For users of automated scales ..... 2.75

Minimum Charges

In accordance with Metro Code Chapter 5.03, Metro will charge a minimum tonnage fee of \$35.00 on up to 360 pounds for all classes of solid waste.

**Fees on Disposal of Solid Waste**

Regional System Fees by waste class

In accordance with Metro Code Chapter 5.02, Metro will assess the following regional system fee on solid waste.

- (1) Cleanup material .....\$ 2.50
- (2) All other solid wastes .....25.65

Community Enhancement Fee

In accordance with Metro Code Chapter 5.06, Metro will collect the following community enhancement fee on solid waste at all eligible solid waste facilities and at Metro transfer stations.

- (1) Putrescible solid waste .....\$ 1.00
- (2) Non-putrescible solid waste (as authorized by Metro Chief Operating Officer) .....1.00

## **STAFF REPORT**

### **IN CONSIDERATION OF RESOLUTION NO 20-5142 FOR THE PURPOSE OF ADOPTING SOLID WASTE FEES AT THE METRO TRANSFER STATIONS AND THE REGIONAL SYSTEM FEE FOR FY 2021-22.**

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Date: December 9, 2020

Department: FRS

Meeting Date: December 17, 2020

Prepared by: Cinnamon Williams, FRS

Presenter(s): Brian Kennedy & Cinnamon Williams

Length: 10 Min

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#### **ISSUE STATEMENT**

This resolution will authorize increases to Solid Waste fees at the Metro transfer stations and regional system fee to take effect on July 1, 2021.

#### **ACTION REQUESTED**

Council adoption of Resolution 20-5142

#### **IDENTIFIED POLICY OUTCOMES**

Council adoption of this resolution will:

1. Increase the Solid Waste fees at the Metro transfer stations and regional system fee to be effective as of July 1, 2021;
2. Provide Council with the annual report of the amount of solid waste that was subject to reduced fees and taxes or exempted during FY 2018-19.

#### **POLICY QUESTION**

Should Council increase the Solid Waste fees at the Metro transfer stations (including the total disposal fee, transactions fees, materials charges, and minimum load size fees) and the regional system fee?

#### **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

1. Adoption of the resolution to increase Solid Waste fees at the Metro transfer stations and regional system fee to fund current Department expenses.
2. Reject the resolution and Solid Waste fees at the Metro transfer stations and regional system fee will be unchanged. This action will result in future operational budget shortfalls. This will require Metro to significantly reduce public services and make additional changes to programs and capital plans in order to keep spending in line with expected revenue collected.

#### **STAFF RECOMMENDATIONS**

The Chief Operating Officer recommends adoption of Resolution 20-5142.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

Solid Waste fees are generally evaluated every spring in concert with the budget development process and adopted to be effective on July 1. This evaluation uses an annual tonnage forecast of the number of tons of garbage expected to flow through the facilities and calculations of expected costs. When tonnage growth keeps pace with cost increases, per-ton costs will generally remain relatively constant. When tonnage increases faster than costs, per-ton costs decrease and fund balances grow. Slow tonnage growth or declines can put pressure on per-ton costs and force spending the fund at a faster rate.

This year, the COVID-19 pandemic produced so much new and profound uncertainty during the standard fee-setting process, Metro made the unprecedented decision to delay rate changes until staff could further evaluate the economic impacts on tonnage and more thoroughly evaluate any needed budget reductions. Eventually the decision was made to defer the Fiscal Year 2021 fee and charges increase and to fully fund operational losses with fund balance reserves.

Garbage follows the economy. Over the last decade, as the economy grew, Metro was able to keep fee increases minimal. But since the COVID recession hit, tons have declined. In addition to fewer tons of garbage being generated across the region, tonnage has largely shifted from the business sector to the residential sector as more people work from home. Residential tonnage brings in less revenue overall. It appears that tonnage is stabilizing, but there is significant uncertainty around tonnage forecasts given the state of the economy and the ongoing COVID pandemic.

At the same time, fixed and new costs to operate the facilities have increased. Metro has been working to get the long overstretched and outdated Metro South transfer station up to acceptable service standards to accommodate a significant increase in customers in the last several years. Metro has invested in less-polluting equipment and recently transitioned to using R99 fuel in its transportation to the landfill – a greener but more expensive option. These are just some of the important improvements Metro has made in recent years in the garbage and recycling system that serves greater Portland.

**Known Opposition:** A solid waste industry representative opposes the single disposal fee that Metro charges for solid waste received at its transfer stations. Some local government partners have also expressed concerns about increasing disposal fees during this economic downturn.

**Legal Antecedent:** ORS 294.471(h) allows for the governing body to reduce appropriations when there is a reduction in available resources.

The process for setting Metro's solid waste fees and taxes are set forth in Metro Code Chapters 5.02, 5.03, and 7.01. Metro reviews its solid waste fees annually. The proposed FY 2021-22 fees comply with the restriction set forth in Chapter III, Section 15 of the Metro Charter limiting user charges to the amount needed to recover the costs of providing goods and services.

**Anticipated Effects:** Fee changes are anticipated as displayed in the table below:



Projected Fee Schedule				
	Existing	Projected	Difference	
	2021	2022	\$	%
<b>Transaction Fees</b>				
Staffed Scalehouse - South	\$10.00	\$14.75	\$4.75	47.50%
Automated Scalehouse	\$2.00	\$2.75	\$0.75	37.50%
<b>Tipping Fees</b>				
Mixed Solid Waste (refuse)	\$64.41	\$72.81	\$8.40	13.04%
Clean Wood	\$64.23	\$64.23	\$0.00	0.00%
Yard Debris	\$55.00	\$55.00	\$0.00	0.00%
Residential Organics	\$76.99	\$76.99	\$0.00	0.00%
Commercial Organics	\$65.23	\$65.23	\$0.00	0.00%
<b>Fees and Taxes</b>				
Enhancement Fee	\$1.00	\$1.00	\$0.00	0.00%
Regional System Fee (MSW only)	\$18.58	\$25.65	\$7.07	38.05%
Metro Excise Tax (MSW Only)	\$12.47	\$12.47	\$0.00	0.00%
DEQ Fees (MSW Only)	\$1.89	\$1.89	\$0.00	0.00%
Environmental Cleanup Fee	\$2.50	\$2.50	\$0.00	0.00%
MSW Tipping Fee (including taxes)	\$98.35	\$113.82	\$15.47	15.73%
Minimum Fee (MSW)	\$28.00	\$35.00	\$7.00	25.00%

**Budget Impacts:** The fees established by this resolution are designed to raise \$87.2 million in enterprise revenue for FY 2021-22. This revenue would cover the cash requirements of the upcoming proposed FY 2021-22 Solid Waste Fund's budget.

**Other Fee Considerations:** Metro assesses the regional system fee and excise tax on waste at the time of disposal and generally assesses those fees and taxes under a three-tiered structure of full rate, reduced rate (often assessed on cleanup material), and exempt (often for recovered, recycled and/or diverted materials).

Metro Code Section 5.02.070(b) states that the Chief Operating Officer must provide the Metro Council with an annual report indicating the amount of solid waste recycled or disposed under special exemption permits and the total regional system revenue that was not collected during the fiscal year because of those special exemptions. A summary showing the total amount of Metro area waste that was subject to Metro's reduced rate or exempt from fees and taxes during FY 2018-19 is provided in **Attachment 1**.

**Independent Solid Waste Fee Review and Staff response:** Each year Metro employs a consultant to do an independent review of provisional solid waste fees. The consultant FCS Group has a three-year contract and reviews the Solid Waste Rate Model and provisional fees. This review includes a letter with their findings and recommendations during this review. The current letter provided the following recommendation in their report dated December 9, 2020 and the full letter is provided as **Attachment 2**.

Findings in the letter are as follows:

**Finding 1:**

*Metro's tonnage forecast is key to the analysis and affects revenue and expense levels. Due to COVID-19, the FY 2021-2022 tonnage forecast assumes a drop off from prior year levels, but recovers in the subsequent years. Future year growth is lower in comparison to the prior year's rate setting assumptions. With the change to the tonnage forecast the operating budget no longer assumes a cost reduction as was anticipated in the prior fee update. It will be important to monitor tonnage and expense projections closely as more information becomes available on the actual impacts of COVID-19 on tonnage and Metro's financial performance.*

**Staff Response:** Staff agrees and has implemented a quarterly tonnage forecast process to continue to monitor and right size the current economic situation. In addition, the Department (along with the rest of the Agency) is doing monthly forecasting to mitigate the financial risks from the pandemic.

**Finding 2:**

*The results of the cost of service analysis indicate that cost differences are present between existing fees and cost-based allocation. It should be noted that, typically, if the results of each individual service is within plus (+) or minus (-) 5.00 percent of the overall system average, they are generally considered to be within cost of service. This range of reasonableness is given since although there is an industry accepted methodology, the specific classification and allocation of expenses reflect cost and waste characteristics at a given point in time. With time, waste patterns, composition and facility requirements change resulting in changes to cost of service. The flexibility to work within the range of reasonableness can minimize annual peaks and valleys and help maintain stable charges from year to year.*

**Staff Response:** Staff agrees and will use a new Solid Waste Rate Toolkit in long-term planning that will allow future costs to spread out over years. In addition, it is the focus of the Department upon financial stability in the region to build a more robust rate stabilization reserve to do predictable incremental increases to sustain the peaks and valleys of tonnage in the region when economic conditions shift.

**BACKGROUND**

Garbage and recycling collection is a basic service, similar to utilities like electricity, sewer and water. The system of garbage collection was created as a "sanitation" system to keep communities clean and people healthy. Metro operates two transfer stations – one in Oregon City and one in Northwest Portland – that play a fundamental role in this system. There are also six private transfer stations of various sizes around greater Portland. Collectively, the transfer stations handle all the garbage generated in greater Portland.

People and businesses around greater Portland rely on Metro to get their trash to the right place. About 40% of all the garbage haulers collect from homes and businesses around greater Portland ends up at a Metro transfer station before it's transported to a landfill for disposal. Metro transfer stations also provide the most comprehensive and least expensive drop-off services in greater Portland, taking old appliances, remodeling leftovers and more from hundreds of thousands of customers each year. Metro recycles as much of the materials as possible, and Metro South recently started taking Styrofoam to help fill this regional recycling need. Metro also operates the only two facilities in greater Portland that take hazardous products like paint and pesticides, with some 55,000 visits last year.

The fees that customers pay at Metro transfer stations cover operating costs, such as wages, equipment, improvements, green fuel, and practices that protect the safety of our workers and our customers. Fees also cover the costs of recycling, transport and disposal of the garbage brought to the facilities.

The regional system fee, which this resolution would increase, is collected on garbage at all disposal facilities in greater Portland and pays for regional services that people and businesses rely on. These services include Metro's RID program, which cleans up hundreds of tons of garbage dumped on public property every year; education and technical assistance programs to improve recycling and reduce the use of toxic products at homes and businesses; and oversight of private garbage and recycling facilities to ensure they manage waste in a way that minimizes impacts on local communities.

## **ATTACHMENTS**

- 1** - Annual Credit & Exemptions Report
- 2** - Independent Review Letter
- 3** - Disposal and Processing Charges at Metro Transfer Stations

## Tons of Metro area waste subject to Metro's reduced rate or exempt from fees and taxes at a disposal site

July 1, 2018 - June 30, 2019

### Fiscal Year 2019

Reduced rate waste (cleanup material)	Tons
<b>Type:</b>	
Petroleum Contaminated Soil	163,903
Other	31,600
total	195,503

Exempt waste	Tons
<b>Generator:</b>	
Environmentally Conscious Recycling	29
Columbia Steel Casting Co Inc	2,187
Evraz NA	1,599
Greenway Recycling	10,167
Hickey Marine	14,624
Kleen Industrial Services	27
RA Roth / NW Shingle	8,307
RB Recycling	12,302
Rivergate Scrap Metals	43,713
Schnitzer Steel	88,158
Siltronics Corp	302
Tire Disposal and Recycling	2,050
Tualatin Valley Waste Recovery	7,344
Willamette Resources Inc	4,057
total	194,866

Special Exemption Permits	Tons
<b>Generator:</b>	
Oregon Department of Agriculture	3,828
(yard debris from beetle quarantined area - Wash Co) *	3,828
total	3,828

\* No lost revenue as material would have normally been composted

December 9, 2020

Metro  
600 NE Grand Avenue  
Portland, OR 97232-2736

**Subject: Review of FY 2021-2022 Solid Waste Disposal Fees**

Dear Ms. Madrigal, Chief Operating Officer

In December 2020, Metro engaged FCS GROUP to provide an independent review of the methodology for calculating proposed solid waste disposal fees for Fiscal Year (FY) 2021-2022. In response to this request we have reviewed Metro's updated Excel Rate Model and associated fees for accuracy, adequacy, reasonableness and compliance with industry standards. This review is in accordance with *Metro Code – Title V Solid Waste Section 5.03.070 “Independent Review of Fee Setting Process; Written Report”*.

In light of the coronavirus disease of 2019 (COVID19), Metro's Council directed staff to defer any rate action planned for mid-year FY 2020-2021. The updated analysis incorporated changes to assumptions regarding tonnage, revenues and costs. This review focused on the overall methodology and resulting fees for compliance with industry standards and best practices for FY 2021-2022. The review did not validate the accuracy of source documents or formulae and structure utilized in the Excel Rate Model.

The FY 2021-2022 findings and comments are summarizing below:


- The methodology utilized in the fee setting process follows industry standards and best practices. The overall analysis is structured around three (3) fee setting components, or steps:
  1. *Revenue requirement*: evaluates the overall revenue needs of the utility on a self-supporting basis, considering operating and maintenance expenditures, capital/equipment funding needs, debt requirements and fiscal policies.
  2. *Cost of service*: equitably distributes costs to services based on their proportional demand and use of the system.
  3. *Rate / fee design*: includes the development of fees that generate sufficient revenue to support the revenue requirement and address Metro's policy goals and objectives.
- The recommended overall fee strategy (step 1, revenue requirement) for FY 2021-2022 projects revenues after increase is slightly below the estimated revenue needs. The shortfall is met by drawing on available cash reserves which are sufficient to meet the shortfall and established reserve target balances. The benefit of projecting the revenue requirement beyond the immediate test year period is the ability to level out fee impacts over time. The Excel Rate Model does project the revenues after increase for subsequent years to meet the estimated revenue needs, assuming the proposed fees are implemented.
  - » Metro's tonnage forecast is key to the analysis and affects revenue and expense levels. Due to COVID-19, the FY 2021-2022 tonnage forecast assumes a drop off from prior year levels,

but recovers in the subsequent years. Future year growth is lower in comparison to the prior year's rate setting assumptions. With the change to the tonnage forecast the operating budget no longer assumes a cost reduction as was anticipated in the prior fee update. It will be important to monitor tonnage and expense projections closely as more information becomes available on the actual impacts of COVID-19 on tonnage and Metro's financial performance.

- The cost allocation (step 2, cost of service) utilized in developing service level charges appears technically sound and consistent with that deemed acceptable by industry standards. Costs appear to be allocated with cost causation principles, mimicking the nature of how they are incurred. Primary allocation occurs based on actual time spent by employees within each service level, contractual costs associated with each service level or a direct assignment of costs to a specific service level.
  - » The results of the cost of service analysis indicate that cost differences are present between existing fees and cost-based allocation. It should be noted that, typically, if the results of each individual service is within plus (+) or minus (-) 5.00 percent of the overall system average, they are generally considered to be within cost of service. This range of reasonableness is given since although there is an industry accepted methodology, the specific classification and allocation of expenses reflect cost and waste characteristics at a given point in time. With time, waste patterns, composition and facility requirements change resulting in changes to cost of service. The flexibility to work within the range of reasonableness can minimize annual peaks and valleys and help maintain stable charges from year to year.
- The proposed fees (step 3, rate / fee design) phase-in cost of service results over a 5-year period. Staffed and automated fees are phased-in to within 11.00 percent of their cost of service level. Mixed solid waste tipping fees and residential organics are set to recover allocated costs over the phase-in period. Fees impacted by decreases in contracted changes, are held constant and "grow" towards their allocated cost-based levels. The commercial organics fee is held below allocated costs, to support programmatic goals for this waste area.

We appreciate the opportunity to work with Metro on this project. Please do not hesitate to contact me if you have any questions regarding this letter or if additional information is needed.

Sincerely,  
FCS GROUP



Sergey Tarasov  
Senior Project Manager

cc: Financial Planning Director Cinnamon Williams, Chief Financial Officer Brian Kennedy, and Councilors Peterson, Craddick, Lewis, Dirksen, Gonzalez, Chase and Stacey

## Disposal and Processing Charges at Metro Transfer Stations Effective July 1, 2021

Disposal and processing charges at Metro transfer stations are composed of two parts: a fixed charge ("transaction fee") for each use of the transfer station, and a variable charge ("tip fee") for each ton of waste delivered for disposal or processing.

The transaction and tip fees on this sheet are the rates at Metro transfer stations only. Other solid waste facilities may have different rate structures and/or charge different rates.

Description	Mixed Solid Waste (refuse)	Clean Wood	Yard Debris	Residential Organics	Commercial Organics
<b>Transaction Fee</b>					
<i>Covers transaction costs and scalehouse operation.</i>					
Staffed Scalehouse (South)	\$ 14.75	\$ 14.75	\$ 14.75	\$ 14.75	\$ 14.75
Staffed Scalehouse (Central)	\$ 14.75	\$ 14.75	\$ 14.75	\$ 14.75	\$ 14.75
Automated Scalehouse	\$ 2.75	\$ 2.75	\$ 2.75	\$ 2.75	\$ 2.75
<b>Tip Fee</b>					
Total Tip Fee	\$ 113.82	\$ 65.23	\$ 56.00	\$ 77.99	\$ 66.23
Tip Fee Components:					
Tonnage Charge	\$ 72.81	\$ 64.23	\$ 55.00	\$ 76.99	\$ 65.23
<i>Covers the cost of Metro's disposal and recovery operations.</i>					
Fees and Taxes					
<i>Add-on and pass-through charges.</i>					
Regional System Fee	\$ 25.65	\$ -	\$ -	\$ -	\$ -
<i>Covers costs of regional solid waste programs and services</i>					
** Metro Excise Tax	\$ 12.47	\$ -	\$ -	\$ -	\$ -
<i>Contributes toward Metro general government revenue</i>					
DEQ Fees	\$ 1.89	\$ -	\$ -	\$ -	\$ -
<i>Fees collected on behalf of DEQ.</i>					
Enhancement Fee	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00	\$ 1.00
<i>Fee collected on behalf of host communities.</i>					
Minimum Charge (South)	\$ 35.00	\$ 26.00	\$ 25.00	\$ 29.00	\$ 27.00
Minimum Charge (Central)	\$ 35.00	\$ 26.00	\$ 25.00	\$ 29.00	\$ 27.00
<i>For users of staffed scales with loads of 360 pounds or less</i>					

### Explanation and Notes on the Table

Transaction Fees: Users of staffed scales pay the higher fee; users of automated scales pay the lower fee.

Disposal and recovery operations: Include transfer station operations, recovery, oversight, management, maintenance, and capital costs; and the cost of transport, organics processing, and waste disposal.

Regional programs and services: Revenue from the Regional System Fee is dedicated to Metro's regional solid waste programs and services: household hazardous waste, latex paint recovery, waste reduction planning and programs (including waste reduction education), St. Johns Landfill post-closure activities, solid waste facility regulation, and illegal dumpsite monitoring and cleanup. The Regional System Fee is charged on solid waste generated in the region and ultimately disposed. The fee is collected at all landfills and mass burners serving the region and at the Metro stations. Revenue from this fee does not cover any of Metro's direct cost for disposal and processing.

Metro general government: The excise tax is a source of revenue for Metro's general government activities including the Metro Council. Excise taxes are levied on Metro's Solid Waste Disposal and Metro Paint Product Sales. As with the Regional System Fee, the solid waste excise tax is charged on solid waste generated in the region and ultimately disposed. It is collected at the same disposal sites as the Regional System Fee.

\*\* Metro Excise Tax is at the 7/1/20 effective amount and has not been updated for a 7/1/21 effective date. Data is not available at 12/17/20.

Agenda Item No. 5.1

**Resolution No. 20-5148**, For the Purpose of Adopting the Supportive Housing Services Work Plan

*Resolution*

Metro Council Meeting  
Thursday, December 17, 2020



BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE	)	RESOLUTION NO. 20-5148
METRO SUPPORTIVE HOUSING SERVICES	)	
WORK PLAN	)	
	)	Introduced by Chief Operating Officer
	)	Marissa Madrigal in concurrence with
	)	Council President Lynn Peterson

WHEREAS, on February 25, 2020, the Metro Council adopted Ordinance 20-1442 which, among other things, imposed business and personal income taxes to fund a Supportive Housing Services Program; and

WHEREAS, as part of that Ordinance adoption, the Metro Council found that the greater Portland region is facing a severe housing affordability and homelessness crisis, which endangers the health and safety of thousands of our unhoused neighbors. Homelessness is a deeply traumatic and dehumanizing experience that no person should have to endure, regardless of their circumstances; and

WHEREAS, the Council further found that thousands of households in the greater Portland region need supportive housing, and thousands more need housing assistance and other supports to achieve housing stability, according to the February 2020 ECONorthwest report entitled “Potential Sources and Uses of Revenue to Address the Region’s Homeless Crisis,” and

WHEREAS, the Council further found that the housing affordability and homelessness crisis in the greater Portland region impacts us all and requires collective and individual action from every person, business, elected official, and resident that calls the region home; and

WHEREAS, the Council also found that the homelessness crisis is an issue of scale and services do not yet match the scope of the crisis, and additional revenue is required to scale services to meet the needs and scope of the crisis; and

WHEREAS, Resolution 20-5083 referred Ordinance 20-1442 (Supportive Housing Services) to the voters for approval, which was designated as Measure 26-210 by Multnomah County Elections and placed on the May 2020 ballot (the “Measure”); and

WHEREAS, on May 19, 2020, the Metro area voters approved the Measure, thereby approving Ordinance 20-1442; and

WHEREAS, since the election Metro has been collaborating with its jurisdictional partners and stakeholders to develop a regional Supportive Housing Services program, incorporating the goals and outcomes set forth in the Measure; and

WHEREAS, Metro staff now proposes a Metro Supportive Housing Services Work Plan which will serve as a framework for the Metro Supportive Housing Services implementation

activities in addition to the new Metro Code Chapter 11.01 (“Supportive Housing Services Program”); now therefore,

BE IT RESOLVED, that the Metro Council hereby adopts the Metro Supportive Housing Services Work Plan, a copy of which is attached hereto as Exhibit A.

---

Lynn Peterson, Council President

Approved as to Form:

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Carrie MacLaren, Metro Attorney



Metro

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

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# Supportive Housing Services Program Work Plan

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**DRAFT V.5**

November 2020

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

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Shirley Craddick, District 1

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Sam Chase, District 5

Bob Stacey, District 6

**Auditor**

Brian Evans

600 NE Grand Ave.  
Portland, OR 97232-2736  
503-797-1700

## **2020 SUPPORTIVE HOUSING SERVICES PROGRAM WORK PLAN**

Adopted by Resolution No. xx-xxxx on xxxx, 2020 by the Metro Council.

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## **1. INTRODUCTION**

On May 19, 2020, voters in the greater Portland region approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of experiencing homelessness. Community members and leaders from around the region developed the measure to provide the much-needed housing and wraparound services to effectively and permanently elevate people out of homelessness.

The ballot measure (see Addendum A) will fund a new Supportive Housing Services Program that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness. The program is guided by a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color (BIPOC) who are disproportionately impacted by housing instability and homelessness.

The Supportive Housing Services Program will directly fund Clackamas, Multnomah and Washington counties to invest in local strategies to meet the needs in their communities. Revenue will be distributed within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in those counties.

The program is funded through a 1 percent tax on all taxable income of more than \$125,000 for individuals and \$200,000 for joint filers and a 1 percent tax on profits from businesses with gross receipts of more than \$5 million. The new tax requirements begin in January 2021. Initial revenues are expected to be available for the first phase of program implementation by July 2021. The program will be funded through December 2030, unless reauthorized by the voters on or before that date.

In February 2020, the Metro Council adopted Ordinance No. 20-1442 which provided guidelines for Supportive Housing Services Program implementation including eligible services, priority populations, governance, local implementation plans, allocation of revenue, equity and community engagement, and tri-county planning. In June to September 2020, Metro convened a stakeholder advisory table that developed recommendations for regional values to guide program implementation and outcome metrics to ensure transparent oversight and accountability.

This Supportive Housing Services Work Plan provides a comprehensive plan for implementing the program. The Work Plan incorporates and supplements the guidelines in Ordinance No. 20-1442 and the recommendations of the stakeholder advisory table. In addition to Metro Chapter 11.01, it serves as the governing document for program implementation, addressing how Supportive Housing Services revenues will be administered to achieve the goals described in the ballot measure.

## **2. GUIDING PRINCIPLES AND RACIAL EQUITY**

Supportive Housing Services Program implementation will be guided by the following principles, which were developed by the stakeholder advisory table:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;

- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are, and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

Metro has adopted a Strategic Plan to Advance Racial Equity, Diversity and Inclusion which includes specific goals and objectives to ensure that all people who live, work and recreate in the greater Portland region have the opportunity to share in and help define a thriving, livable and prosperous region. A key objective for Supportive Housing Services Program implementation is a commitment to advance equity related to stable and affordable housing. In implementing the program, Metro will rely on the goals and objectives within the Strategic Plan to:

- Convene regional partners to advance racial equity outcomes in supportive housing services;
- Meaningfully engage with Black, Indigenous and people of color, people with low incomes, and other historically marginalized communities in establishing outcomes and implementing the program;
- Produce and provide research and information to support regional jurisdictions in advancing equity efforts;
- Increase accountability by ensuring involvement of Black, Indigenous and people of color in establishing goals, outcomes, and implementation and evaluation efforts;
- Increase participation of Black, Indigenous and people of color in decision-making; and
- Use equity criteria in resource allocation for the program.

Metro will actively work to remove barriers for organizations and communities to ensure full participation by providing stipends, scheduling events at accessible times and locations, and other inclusive engagement tactics.

### **3. GOVERNANCE**

On February 25, 2020, the Metro Council adopted Ordinance No. 20-1442 referring to voters the ballot measure authorizing Metro to impose a tax to fund supportive housing services. The Supportive Housing Services Program and this Work Plan must comply with the promises made to the voters in the ballot measure.



### **3.1 METRO COUNCIL**

The Metro Council provides policy direction for the Supportive Housing Services Program through:

- A. Adoption of this Work Plan;
- B. Appointment of Regional Oversight Committee members, chair and/or co-chairs, collectively charged with monitoring program implementation;
- C. Approval of Local Implementation Plans;
- D. Approval of intergovernmental agreements for implementation (each, an “Implementation IGA”) with Local Implementation Partners; and
- E. Monitoring of program outcomes, with guidance from the Regional Oversight Committee and tri-county advisory body.

### **3.2 METRO CHIEF OPERATING OFFICER AND STAFF**

The Metro Chief Operating Officer (COO) is authorized by the Metro Council to implement this Work Plan, and the COO will direct staff to conduct all Supportive Housing Services Program administration activities referenced herein, including (without limitation) the following:

- A. Ensure program implementation upholds promises made to voters;
- B. Develop and execute Implementation IGAs with Local Implementation Partners;
- C. Implement efficient and effective collection of personal and business income taxes;
- D. Develop and coordinate systems and structures to provide robust oversight and accountability and ensure transparency of public funds;
- E. Convene meetings and provide administrative support for the Regional Oversight Committee;
- F. Provide staffing and logistical support for a tri-county advisory body to identify regional goals, strategies and outcome metrics related to addressing homelessness in the region; and
- G. Conduct an annual independent financial audit with results made publicly available.

### **3.3 LOCAL IMPLEMENTATION PARTNERS**

Metro will partner with Clackamas, Multnomah and Washington county governments and their housing authorities to lead Supportive Housing Services Program implementation. The three county governments will serve as Metro’s Local Implementation Partners for the program. As experts in implementing programs that serve community members experiencing homelessness, the Local Implementation Partners will work with service providers and community partners to develop and implement programs that respond to the unique needs in their communities.

Local Implementation Partners must:

- A. Adopt a Local Implementation Plan, informed by community engagement, that describes local housing and homeless service needs, current programming and unmet programming capacities, proposed use of funds, and a strategy for advancing racial equity and ensuring community engagement in implementation (see Section 5.1 and Addendum D);

- B. Enter into an Implementation IGA with Metro, obligating the Local Implementation Partner to comply with this Work Plan and enter into certain covenants required to ensure compliance with the ballot measure and other applicable law; and
- C. Track and report on program outcomes annually as defined through this Work Plan.

### **3.4 REGIONAL OVERSIGHT COMMITTEE**

In accordance with Metro Code Section 2.19.270, Metro will appoint a Regional Oversight Committee to provide policy and programmatic guidance, monitor programmatic expenditures and evaluate outcomes (see Addendum B).

The committee will be charged with the following duties:

- A. Evaluate Local Implementation Plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
- B. Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals;
- C. Monitor financial aspects of program administration, including review of program expenditures; and
- D. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.

#### **Membership**

The committee will be composed of 15 voting members with 5 members each from Clackamas, Washington and Multnomah counties. Committee members will be appointed by the Metro Council.

The committee's membership will include a broad range of personal and professional experience, including people with lived experience of homelessness or housing instability. The committee will also reflect the diversity of the region. The membership will include people with the following experiences, perspectives and qualities:

- Experience overseeing, providing or delivering supportive housing services;
- Lived experience of homelessness or severe housing instability;
- Experience in the development and implementation of supportive housing and other services;
- Experience in the delivery of culturally specific services;
- Experience in the private for-profit sector;
- Experience in the philanthropic sector;
- Experience in a Continuum of Care organization; and
- People who identify as Black, Indigenous and people of color, people with low incomes, immigrants and refugees, the LGBTQ+ community, people with disabilities and other underserved and/or marginalized communities.

Stipends, childcare, technical assistance, interpretation, accessibility assistance and other supports for participation will be available.

Committee members will serve two-year terms.

#### **Jurisdictional representation**

One representative each from the Clackamas, Multnomah and Washington County Boards of Commissioners, Portland City Council and Metro Council will serve on the committee as non-voting delegates.

### **Accountability**

All committee meetings and materials will be available and accessible to the public, and appropriate notice will be given to inform all interested parties of the time, place and agenda of each meeting.

Committee members are considered public officials under Oregon law and will be responsible for complying with provisions in Oregon law regarding public records and public meetings, disclosure of conflicts of interest, prohibitions on the use of official positions to obtain financial benefit, and restrictions on political activity.

Metro may conduct a review of the committee's role and effectiveness as appropriate.

## **4. FUNDING DISTRIBUTION AND ELIGIBLE USES**

### **4.1. ALLOCATION AND DISTRIBUTION OF SUPPORTIVE HOUSING SERVICES REVENUE**

Supportive Housing Services revenue will be distributed as follows:

- A. After Metro has first retained funds necessary to pay for collection of the taxes, including debt service related to the implementation costs, Metro may retain up to 5 percent of the remaining collected revenue for administration, oversight and accountability, data collection, coordination, and other costs associated with management of the regional program.
- B. After the funds have been allocated as set forth in Section 4.1.A, Metro will then allocate the remaining Supportive Housing Services revenue within the portions of Clackamas, Multnomah and Washington counties that are inside the Metro jurisdictional boundary in amounts proportionate to the tax revenue estimated to be collected from individuals in those counties. Funds will be distributed to the Local Implementation Partner within each county using the following percentages: 21 1/3 percent to Clackamas County, 45 1/3 percent to Multnomah County and 33 1/3 percent to Washington County.
- C. The percentages set forth in Section 4.1.B apply to revenue for the first two tax years. Thereafter, the percentages may be adjusted to reflect the portion of Supportive Housing Services revenue actually collected in each county.
- D. Metro's Implementation IGAs with each Local Implementation Partner will specify how Supportive Housing Services funds will be released. Agreements will include specifications for annual program budgets, financial reporting, practices for reserving funds, and redistribution of funds if a jurisdiction fails to comply with the agreement.

### **4.2 PRIORITIZATION OF SUPPORTIVE HOUSING SERVICES FUNDS**

Each Local Implementation Partner must create a Local Implementation Plan outlining its proposed use of funds in accordance with the purposes of the program (see Section 5.1 and Addendum D). Local Implementation Plans must include a commitment that funding will be allocated as follows (see Addendum C for definitions of the terms used in Sections 4.2 and 4.3):

- A. Seventy-five percent of funds will be devoted to services for population A, defined as:

- Extremely low-income; AND
- Have one or more disabling conditions; AND
- Are experiencing or at imminent risk of experiencing long-term or frequent episodes of literal homelessness.

B. Twenty-five percent of funds will be devoted to services for population B, defined as:

- Experiencing homelessness; OR
- Have a substantial risk of experiencing homelessness.

This distribution of resources to serve priority populations may be adjusted over time as chronic and prolonged homelessness is reduced.

### **4.3 ELIGIBLE USES OF SUPPORTIVE HOUSING SERVICES FUNDS**

The Supportive Housing Services Program is guided by regional goals and oversight, but implemented by Local Implementation Partners who are best positioned to respond to community needs. Successful implementation requires flexibility for local jurisdictions to create and implement strategies that respond to local community needs and effectively leverage local capacity and expertise. The uses of Supportive Housing Services funds will be guided by each county’s Local Implementation Plan.

Eligible uses of funds include any of the supportive housing services defined in Addendum C as well as administrative costs within applicable limits (see Section 4.5).

Funds are prioritized for ongoing service and operating costs to support implementation of supportive housing services as defined in Section 4.5. Under certain circumstances, capital costs directly related to those supportive housing services may be eligible if necessary to support ongoing implementation of the services and when consistent with Local Implementation Plans.

Programmatic success will be based on housing stability achieved by people experiencing homelessness or at risk of homelessness. An approach that effectively balances supportive services with long-term rent assistance and other housing strategies will therefore be necessary.

Funds may only be used for services provided within the portion of each recipient county that is within the Metro jurisdictional boundary.

### **4.4 REGIONAL APPROACH TO MEETING SUPPORTIVE HOUSING NEED**

A regional approach is required to effectively address service and resource gaps to meet the needs of the Supportive Housing Services Program’s priority populations across the region. Local Implementation Partners will work together to enhance and expand local programs and services so that they share responsibility to address unmet needs across the region. Each county will develop and enhance local supportive housing services to address the needs of the portion of the region’s homeless population that is proportionate to the percentage of Supportive Housing Services revenues allocated to each county (see Section 4.1).

### **4.5 ADMINISTRATIVE COSTS**

It is the policy of the Metro Council to maintain low administrative costs to ensure that the maximum amount possible of Supportive Housing Services revenue is used to fund supportive housing services.

Administrative costs will be restricted as follows:

- A. As described in Section 4.1.A, after Metro’s tax collection costs are paid, Metro may retain up to 5 percent of the remaining funds to pay for the costs to disburse the funds and administer and oversee the program. This includes convening and supporting the Regional Oversight Committee, establishing a regional data collection and reporting program, and supporting tri-county regional collaboration.
- B. Administrative expenses incurred by Local Implementation Partners for provision of services are recommended not to exceed five percent of total annual funds allocated for provision of services, consistent with guidelines for similar programs funded by the State.
- C. Administrative expenses incurred by Local Implementation Partners and housing authorities for administering long-term rent assistance programs are recommended not to exceed 10 percent of total annual funds allocated for long-term rent assistance, consistent with guidelines for similar programs funded by HUD and the State.

Administrative costs do not include costs directly associated with program and service delivery.

At least annually, the Regional Oversight Committee will consider whether the recommended administrative costs should be reduced or increased.

## **5. ACCOUNTABILITY STRUCTURES AND PROCESS**

### **5.1 LOCAL IMPLEMENTATION PLANS**

Each county will prepare a Local Implementation Plan to describe their local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program. Plans must be created using a racial equity lens that ensures equitable participation, access and outcomes in all parts of the program and considers the best available quantitative and qualitative data.

#### **Development and approval process**

Each Local Implementation Plan must be developed using locally convened and comprehensive engagement processes that prioritize the voices of Black, Indigenous and people of color and people with lived experience. Plans must be developed in full partnership with advisory bodies that equitably reflect community expertise and experience. Each county may convene a new advisory body or use an existing body that fulfills the representation requirements.

Advisory body membership must include:

- People with lived experience of homelessness and/or extreme poverty;
- People from Black, Indigenous and people of color and other marginalized communities;
- Culturally responsive and culturally specific service providers;
- Elected officials, or their representatives, from the county and cities participating in the regional affordable housing bond;
- Representatives from the business, faith and philanthropic sectors;

- Representatives of the county/city agencies responsible for implementing housing and homelessness services, and that routinely engage with unsheltered people;
- Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use from culturally responsive and culturally specific service providers; and
- Representation ensuring geographic diversity.

Each Local Implementation Plan will be reviewed and approved by the respective county's local governing body, the Regional Oversight Committee and the Metro Council. Upon full approval, each Local Implementation Plan will be incorporated into the Intergovernmental Agreements between Metro and each respective county to govern transfer of funds, program implementation, and ongoing oversight and accountability.

### **Required elements**

Local Implementation Plans must include the following elements, described in greater detail in Addendum D:

- A. *Analysis of inequitable outcomes*: An articulation of racial inequities in housing stability and access to current services;
- B. *Racial equity strategies*: A description of mitigation strategies and how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion have been incorporated;
- C. *Inclusive community engagement*: An articulation of how perspectives of Black, Indigenous and people of color and culturally specific groups were considered and incorporated into the development of the plan and will continue to be engaged through implementation and evaluation;
- D. *Priority population investment distribution*: A commitment that funding will be allocated as specified in Section 4.2;
- E. *Current investments*: A review of current system investments or capacity serving priority populations, an analysis of the nature and extent of gaps in services to meet the needs of the priority population, and a commitment to prohibit displacement of current local funding commitments for such services;
- F. *Distribution*: A strategy for equitable geographic distribution of services with partnering jurisdictions and service providers across the region;
- G. *Access coordination*: A plan for coordinating access to services with partnering jurisdictions and service providers across the region;
- H. *Procurement and partners*: A description of how funds will be allocated to public and nonprofit service providers;
- I. *Planned investments*: An articulation of programmatic investments planned, including the types of services to be funded to address the gap analysis;
- J. *Outcomes, reporting and evaluation*: An agreement to track and report on program outcomes annually as defined through regional coordination and with regional metrics.

### **Updates and amendments**

Local Implementation Plans may be revised or amended only upon written agreement by the Local Implementation Partner, recommendation for approval by the Regional Oversight Committee and

approval by Metro Council. Proposed changes to a Local Implementation Plan will be presented as amendments to the Regional Oversight Committee for approval and confirmed by Metro Council.

## 5.2 REGIONAL OUTCOME METRICS

Regional outcome metrics will be used to understand the impacts and outcomes of the Supportive Housing Services Program. The required metrics will provide clear and consistent data sets that ensure transparent accountability and regional analysis of outcomes. They will be measured consistently in each county and reported to Metro and the Regional Oversight Committee. Staff will work to create standardized definitions and methodologies to achieve the intentions of the metrics as described below.

Additional collaboration between Metro, Local Implementation Partners and community experts will further refine and ensure quality control for each metric. Metrics will be phased in over time according to the regional system's capacity to comply with the newly established regional standards.

Required regional outcome metrics will include:

### A. Housing stability

#### *Measurable goals:*

- Housing equity is advanced by providing access to services and housing for Black, Indigenous and people of color at greater rates than Black, Indigenous and people of color experiencing homelessness.
- Housing equity is advanced with housing stability outcomes (retention rates) for Black, Indigenous and people of color that are equal or better than housing stability outcomes for non-Hispanic whites.
- The disparate rate of Black, Indigenous and people of color experiencing chronic homelessness is significantly reduced.

#### *Outcome metrics:*

- Number of supportive housing units created and total capacity, compared to households in need of supportive housing. This will measure change in supportive housing system capacity and need over time.
- Number of households experiencing housing instability or homelessness compared to households placed into stable housing each year. This will measure programmatic inflow and outflow.
- Number of housing placements and homelessness preventions, by housing intervention type (e.g. supportive housing, rapid rehousing) and priority population type. This will measure people being served.
- Housing retention rates. This will measure if housing stability is achieved with supportive housing.
- 'Length of homelessness' and 'returns to homelessness'. These will measure how effectively the system is meeting the need over time.
- Funds and services leveraged through coordination with capital investments and other service systems such as healthcare, employment and criminal justice. This will measure leveraged impact of funding in each county.

### B. Equitable service delivery

*Measurable goals:*

- Increase culturally specific organization capacity with increased investments and expanded organizational reach for culturally specific organizations and programs.
- All supportive housing services providers work to build anti-racist, gender-affirming systems with regionally established, culturally responsive policies, standards and technical assistance.

*Outcome metrics:*

- Scale of investments made through culturally specific service providers to measure increased capacity over time.
- Rates of pay for direct service roles and distribution of pay from lowest to highest paid staff by agency to measure equitable pay and livable wages.
- Diversity of staff by race, ethnicity, sexual orientation, gender identity, disability status and lived experience.

C. Engagement and decision-making

*Measurable goals:*

- Black, Indigenous and people of color are overrepresented on all decision-making and advisory bodies.
- Black, Indigenous and people of color and people with lived experience are engaged disproportionately to inform program design and decision making.

*Outcome metrics:*

- Percent of all advisory and oversight committee members who identify as Black, Indigenous and people of color or as having lived experience of housing instability or homelessness.

**Data disaggregation**

In keeping with Metro’s commitment to advance racial equity, and the Supportive Housing Services Program’s overarching goal to ensure racial justice, data will be disaggregated to evaluate existing and continued disparate impacts for BIPOC communities and other impacted populations. As such, all applicable data sets will be disaggregated by regionally standardized values and methodology to understand disparate outcomes for people by race, ethnicity, disability status, sexual orientation and gender identity.

**5.3 ANNUAL REVIEW PROCESS**

Each Local Implementation Partner will submit an Annual Progress Report to the Metro Council and the Regional Oversight Committee summarizing its progress and outcomes under the Local Implementation Plan, including:

- A. A full program accounting of investments or a financial report;
- B. Reporting on required outcome metrics; and
- C. An equity analysis incorporated into all facets of the report, including reporting on the success or failure of racial inequity mitigation strategies and steps being taken to improve racial equity outcomes.



A template for the Annual Progress Report will be developed by Metro with input from the Local Implementation Partners.

The Regional Oversight Committee will review each Annual Progress Report and may recommend changes to the Local Implementation Plan to achieve regional goals and/or to better align the Local Implementation Plan with the Work Plan. The Local Implementation Partner will identify proposed strategies to address the Regional Oversight Committee's recommendations. The proposed strategies will be submitted to the Regional Oversight Committee for approval and confirmed by Metro Council.

As part of the annual review process, the Regional Oversight Committee will evaluate tax collection and administrative costs incurred by Metro, Local Implementation Partners and service providers and consider if any costs should be reduced or increased. The committee will present any such recommendations to the Metro Council.

#### **5.4 AUDITS**

A public accounting firm must conduct an annual financial audit of the revenue generated by the Supportive Housing Services taxes and the distribution of that revenue. Metro will make public the audit and any report to the Metro Council regarding the results of the audit. Metro may use the revenue generated by the taxes to pay for the costs of the audit.

The revenue and expenditures from the taxes are also subject to performance audits conducted by the Office of the Metro Auditor.

### **6. REGIONAL COORDINATION**

#### **6.1 TRI-COUNTY ADVISORY BODY**

Metro will convene a tri-county advisory body to strengthen regional coordination in addressing homelessness in the region. The advisory body will identify regional goals, strategies and outcome metrics and provide guidance and recommendations to inform Supportive Housing Services Program implementation.

The advisory body will include people representing the following perspectives:

- People with lived experience of homelessness and/or extreme poverty;
- People from Black, Indigenous and people of color and other marginalized communities;
- Culturally responsive and culturally specific service providers;
- Elected officials, or their representatives, from the counties and cities participating in the regional affordable housing bond;
- Representatives from the business, faith and philanthropic sectors;
- Representatives of county/city agencies responsible for implementing housing and homelessness services, and that routinely engage with unsheltered people;
- Representatives from health and behavioral health who have expertise serving those with health conditions, mental health and/or substance use from culturally responsive and culturally specific service providers; and
- Representation ensuring geographic diversity.

Metro will work with the Local Implementation Partners to develop a proposed structure, charter and procedures for the tri-county advisory body, to be presented to Metro Council for approval.

Metro will provide ongoing staffing and logistical support to convene the advisory body and support its planning and coordination efforts. Local Implementation Partners will work to incorporate the advisory body's recommendations into their implementation strategies.

## **6.2 TRI-COUNTY PLANNING**

The tri-county advisory body will lead a planning process to develop recommendations for regional coordination related to these and other issue areas as identified:

- *Regional capacity*: strategies to strengthen regional supportive housing capacity, including but not limited to: coordination of capital investments funded by the regional affordable housing bond and other sources, development of a regional model of long-term rent assistance, and expanded system capacity for culturally specific housing and services;
- *Systems alignment*: coordination and integration between the housing and homeless service systems, as well as other systems serving people experiencing homelessness, including the healthcare, education, workforce and criminal justice systems; and
- *Standards and metrics*: regional performance metrics to measure the impact of specific program types, regional system indicators to measure changes in the population experiencing homelessness, consistency in program evaluation standards and procedures, standards for culturally responsive services, and standardized data definitions, data collection methods and quality control.

## ADDENDUM A

### BALLOT MEASURE 26-210

Ballot Title:	Supports homeless services through higher earners’ tax, business profits tax.
Question:	Should Metro support homeless services, tax income over \$200,000/\$125,000(joint/single), profits on businesses with income over \$5 million?
Summary:	<p>Measure funds supportive housing services to prevent and reduce homelessness in Washington, Clackamas, and Multnomah counties within district boundaries. Prioritizes services to address needs of people experiencing, or at risk of, long-term or frequent episodes of homelessness. Services funded by a marginal income tax of 1% on households with income over \$200,000 (over \$125,000 for single filers) and a business profits tax of 1%. Income tax applies to resident income, and to non-resident income earned from sources within district. Exempts businesses with gross receipts of \$5 million per year or less.</p> <p>Declares funding for homelessness services a matter of metropolitan concern, directs regional funding to local services agencies, requires community engagement to develop localized implementation plans. Allocates funds to counties by estimated revenue collected within each county. Establishes community oversight committee to evaluate and approve local plans, monitor program outcomes and uses of funds. Requires creation of tri- county homeless services coordination plan.</p> <p>Requires performance reviews and independent financial audits. Metro administrative and oversight costs limited to 5%. Requires voter approval to continue tax after 2030.</p>
Explanatory Statement:	<p>The greater Portland region is facing a severe housing affordability and homelessness crisis. Rents and housing prices have risen faster than wages, making it especially hard for people living on fixed retirement or disability incomes to afford housing. While it is difficult to accurately estimate the number of people experiencing homelessness, or at risk of becoming homeless, according to a February 2020 report by EcoNorthwest, an estimated 38,263 people (24,260 households) experienced homelessness in 2017 in Washington, Clackamas and Multnomah counties; thousands more were at risk.</p> <p>Homelessness disproportionately impacts people with disabilities, people of color, and seniors. For people who experience homelessness, disabling conditions such as mental illness, chronic medical conditions, and addiction are made worse, and become barriers to housing placement.</p> <p>Providing supportive housing services is a widely demonstrated approach to effectively end homelessness for individuals who have experienced</p>

	<p>prolonged and repeated homelessness, and protecting families from becoming homeless with prevention assistance. Supportive housing services include case management, mental healthcare, addiction and recovery treatment, employment services, rent assistance, and other care as needed. Despite state and local efforts to increase investment in supportive housing services, the need in greater Portland exceeds local capacity.</p> <p>This measure will authorize Metro to establish a regional supportive housing funding program, providing the resources to address unmet needs of people experiencing or at risk of experiencing long-term or frequent episodes of homelessness in the greater Portland region. The measure will result in a substantial increase in the delivery of supportive housing services.</p> <p>Supportive housing services will be funded by a marginal personal income tax of 1% on households with taxable income over \$200,000 (or taxable income over \$125,000 for individual tax filers) and a business profits tax of 1% with an exemption for small businesses that have gross receipts of \$5 million or less per year. The personal income tax will be assessed on residents of the Metro district, and on non-residents who have income earned from sources within the district. Only income above \$200,000 (\$125,000 individual) is taxed.</p> <p>In each county a local implementation plan will be developed to describe how supportive housing services will be prioritized and delivered to address local needs. Local plans must be developed using comprehensive community engagement that prioritizes those most directly affected by the homelessness crisis.</p> <p>A regional oversight committee with broad geographic representation will review and evaluate each local plan, monitor local implementation, and review spending. The oversight committee will report every year to Metro Council on program outcomes and areas for improvement, and annual performance and financial audits of funding for supportive housing services will be conducted. Metro administrative costs are limited to 5% and must be reviewed annually. The measure requires voter approval to continue after 2030.</p>
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On Behalf of:

- Metro Council President Lynn Peterson
- Councilor Shirley Craddick
- Councilor Christine Lewis
- Councilor Craig Dirksen
- Councilor Juan Carlos Gonzales
- Councilor Sam Chase
- Councilor Bob Stacey

Submitted by: Carrie MacLaren, Metro Attorney

## **ADDENDUM B**

### **REGIONAL OVERSIGHT COMMITTEE CHARTER**

#### **Background on the Supportive Housing Services Program**

On May 19, 2020, voters in the greater Portland region approved a measure to raise money for supportive housing services for people experiencing homelessness or at risk of experiencing homelessness. Community members and leaders from around the region developed the measure to provide the much-needed housing and wraparound services to effectively and permanently elevate people out of homelessness.

The ballot measure will fund a new Supportive Housing Services Program that will provide services for as many as 5,000 people experiencing prolonged homelessness with complex disabilities, and as many as 10,000 households experiencing short-term homelessness or at risk of homelessness. The program is guided by a commitment to lead with racial equity by especially meeting the needs of Black, Indigenous and people of color who are disproportionately impacted by housing instability and homelessness.

Implementation of the program will be guided by the following principles:

- Strive toward stable housing for all;
- Lead with racial equity and work toward racial justice;
- Fund proven solutions;
- Leverage existing capacity and resources;
- Innovate: evolve systems to improve;
- Demonstrate outcomes and impact with stable housing solutions;
- Ensure transparent oversight and accountability;
- Center people with lived experience, meet them where they are and support their self-determination and well-being;
- Embrace regionalism: with shared learning and collaboration to support systems coordination and integration; and
- Lift up local experience: lead with the expertise of local agencies and community organizations addressing homelessness and housing insecurity.

The Supportive Housing Services Program is guided by regional goals and oversight but implemented by Local Implementation Partners who are best positioned to respond to community needs. The program will directly fund Clackamas, Multnomah and Washington counties to invest in local strategies to meet the supportive housing and service needs in their communities.

#### **Regional Oversight Committee Authorizing Ordinance**

The Metro Council established the Regional Oversight Committee on xx, xx, 2020 by amending Metro Code Chapter 2.19.270 via Ordinance No. xx-xxxx.

#### **Regional Oversight Committee's Purpose and Authority**

The purpose of the Regional Oversight Committee is to provide program oversight on behalf of the Metro Council to ensure that investments achieve regional goals and desired outcomes and to ensure transparency and accountability in Supportive Housing Services Program activities and outcomes.

The committee is charged with the following duties:

- Evaluate Local Implementation Plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
- Accept and review annual reports for consistency with approved Local Implementation Plans and regional goals;
- Monitor financial aspects of program administration, including review of program expenditures; and
- Provide annual reports and presentations to Metro Council and Clackamas, Multnomah and Washington County Boards of Commissioners assessing performance, challenges and outcomes.

### **Committee Membership**

The committee is composed of 15 voting members (5 members each from Clackamas, Multnomah and Washington counties), appointed by the Metro Council President subject to Metro Council confirmation.

The committee's members represent a diversity of perspectives, geography, demographics, and personal and professional experience, including people with lived experience of homelessness or housing instability. Stipends, childcare, technical assistance, interpretation, accessibility assistance and other supports for participation are available.

The Metro Council President will designate at least one member to serve as chairperson of the committee or may elect to designate two members to serve as co-chairpersons of the committee.

- **Terms of service:** Nine of the initial committee members will be appointed to serve a one-year term and may be reappointed to serve up to two additional two-year terms. All other committee members will be appointed to serve two-year terms and may be reappointed to serve up to two additional two-year terms. The committee will be dissolved in 2031 or upon the issuance of a final report by the committee after all funds authorized by Ballot Measure 26-210 have been spent, whichever is earlier.
- **Attendance:** The committee will meet no fewer than four times a year. Meetings will be more frequent in the first year, and at least quarterly throughout program implementation. In the interest of maintaining continuity in discussions, members commit to attending all meetings unless they are prevented from doing so by reasonable excuse. Committee members will notify staff ahead of meetings if they are unable to be present, and will read materials and request briefings from staff on the information presented, deliberations and outcomes of the meeting. The committee will not use alternates or proxies.

### **Jurisdictional Representation**

One representative from each of the following will participate on the committee as non-voting delegates:

- Metro Council

- Clackamas County Board of Commissioners
- Multnomah County Board of Commissioners
- Washington County Board of Commissioners
- Portland City Council

### **Chairperson(s) Role**

Responsibilities of the committee chairperson(s) include:

- Allows facilitator to lead discussions and keep the group to time/task.
- Participates in committee discussions and forming committee recommendations.
- Starts and ends meetings on time unless the group agrees to extend the meeting time.
- Provides guidance (if needed) on content and ideas to meet the committee goals.
- Encourages consensus decision making.
- Leads discussions when all attempts at reaching consensus have been exhausted.
- May speak for the committee in any public requests for comment.
- Participates in development of meeting agendas, in coordination with Metro staff and facilitator.

### **Facilitator Role**

As necessary, a facilitator may be used. The facilitator’s role includes the following responsibilities:

- Draft meeting agendas and compile meeting materials in coordination with Metro staff.
- Facilitator has no stake in the outcome of the meeting.
- Does not evaluate or contribute content ideas.
- Keeps the group focused on the agreed upon time/task.
- Makes suggestions about alternative methods and procedures to achieve consensus.
- Encourages participation from all group members.
- Helps the committee find solutions that meet everyone’s needs.

### **Accountability**

All committee meetings and materials will be available and accessible to the public, and appropriate notice will be given to inform all interested parties of the time, place and agenda of each meeting.

Committee members are considered public officials under Oregon law and are responsible for complying with provisions in Oregon law, including:

- **Use of position:** Committee members are prohibited from using or attempting to use their position (including access to confidential information obtained through their position) to obtain a financial benefit for themselves, for a relative or for a business with which the member or relative is associated.
- **Conflicts of interest:** Committee members must publicly announce any potential or actual conflicts of interest on each occasion that they are met with the conflict. A conflict of interest occurs when a member’s official actions on the committee could or would result in a financial benefit or detriment to themselves, a relative or a business with which the member or relative is associated. In the case

of an actual conflict of interest, committee members must refrain from participating in any discussion or taking any action on the issue.

- **Restrictions on political activity:** Committee members may not engage in campaign-related political activity during committee meetings or while working in an official capacity as a committee member. Restricted activities include promoting or opposing candidates, ballot measures or political committees.
- **Public records and meetings:** Committee members are subject to the provisions of Oregon Public Records and Meetings Law. All committee meetings and records shall be open and available to the public. This includes discussions of committee business by email or in gatherings of a quorum of committee members outside of regular committee meetings.



## ADDENDUM C

### DEFINITIONS FOR SECTIONS 4.2 AND 4.3

**Extremely low income:** A household earning less than 30 percent of Area Median Income (AMI).

**Extremely rent burdened:** A household paying 50 percent or more of income toward rent and utilities.

**Homelessness:** An individual or family who lacks a fixed, regular and adequate nighttime residence including:

- Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason; are living in motels, hotels, trailer parks or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals;
- Individuals or families who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; or
- Individuals or families who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations or similar settings.

**Imminent risk of literal homelessness:** Any circumstance that provides clear evidence that an individual or family will become literally homeless without supportive housing services within 14 days of application for assistance. This includes but is not limited to:

- Individuals or families who are involuntarily doubled up and who face literal homelessness;
- Individuals exiting an institution (including but not limited to exiting incarceration or foster care) and who face literal homelessness; and
- Individuals or families fleeing a domestic violence or abuse situation and who face literal homelessness.

**Involuntarily doubled up:** Individuals or families who are sharing the housing of others due to loss of housing, economic hardship or a similar reason.

**Literal homelessness:** An individual or family who lacks a fixed, regular and adequate nighttime residence, meaning:

- Has a primary nighttime residence that is a public or private place not meant for human habitation;
- Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
- Is exiting an institution where the individual has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

**Long-term and frequent episodes of literal homelessness:** 12 or more months of literal homelessness over three years.

**Substantial risk of homelessness:** A circumstance that exists if a household is very low income and extremely rent burdened, or any other circumstance that would make it more likely than not that without supportive housing services the household will become literally homeless or involuntarily doubled-up.

**Supportive housing services:** Services for people experiencing homelessness and housing instability including, but not limited to:

- Housing services:
  - supportive housing
  - long-term rent assistance
  - short-term rent assistance
  - housing placement services
  - eviction prevention
  - transitional housing
  - shelter
- Outreach and engagement supports:
  - street outreach services
  - in-reach services
  - basic survival support services
- Health and wellness supports:
  - mental health services
  - interventions and addiction services (crisis and recovery)
  - physical health services
  - intervention services for people with physical impairments and disabilities
  - peer support services
  - discharge intervention services
- Employment and benefit supports:
  - financial literacy services
  - employment services
  - job training and retention services
  - educational services
  - workplace supports
  - benefits navigation and attainment services
- Advocacy supports:
  - landlord tenant education and legal services
  - fair housing advocacy

**Very low income:** A household earning less than 50 percent of AMI.

## ADDENDUM D

### LOCAL IMPLEMENTATION PLAN REQUIREMENTS

Each county will prepare a Local Implementation Plan to describe their local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program.

Local Implementation Plans must include:

- A. **Analysis of inequitable outcomes.** An articulation of racial inequities in housing stability and access to current services, including:
  - An analysis of the racial disparities among people experiencing homelessness and the priority service population;
  - An analysis of the racial disparities in access to programs, and housing and services outcomes, for people experiencing homelessness and the priority service populations; and
  - An articulation of barriers to program access that contribute to the disparities identified in the above analysis.
- B. **Racial equity strategies.** A description of mitigation strategies and how the key objectives of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion have been incorporated. This should include a thorough racial equity analysis and strategy that includes clearly defined mitigation strategies and resource allocations intended to remedy existing disparities and ensure equitable access to funds and services.
- C. **Inclusive community engagement.** An articulation of how perspectives and recommendations of Black, Indigenous and people of color, people with lived experiences, and culturally specific groups were considered and incorporated into the development of the plan and will continue to be engaged through implementation and evaluation. Including:
  - Advisory body membership that meets the criteria listed in Section 5.1; and
  - A description of how the plan will remove barriers to participation for organizations and communities by providing stipends, scheduling events at accessible times and locations, and other supportive engagement strategies.
- D. **Priority population investment distribution.** A commitment that funding will be allocated as defined in Section 4.2.
- E. **Current investments.** A review of current system investments or capacity serving priority populations, including:
  - An analysis of the nature and extent of gaps in services to meet the needs of the priority population, broken down by service type, household types and demographic groups.
  - A commitment to maintain local funds currently provided. Supportive Housing Services revenue may not replace current funding levels, with the exception of good cause requests for a temporary waiver such as a broad economic downturn.
- F. **Distribution.** A strategy for equitable geographic distribution of services within the respective jurisdictional boundary and the Metro jurisdictional boundary.

- G. **Access coordination.** A plan for coordinating access to services with partnering jurisdictions and service providers across the region. This includes a commitment that any documentation required for determining program eligibility will be low barrier and include self-reporting options.
- H. **Procurement and partners.** A description of how funds will be allocated to public and nonprofit service providers, including:
- Transparent procurement processes and a description of the workforce equity procurement standards;
  - A commitment to partner with service providers who affirmatively ensure equitable pay and livable wages for their workers, and who will provide anti-racist, gender-affirming services consistent with regionally established, culturally responsive policies and standards; and
  - A description of how funding and technical assistance will be prioritized for providers who demonstrate a commitment to serve Black, Indigenous and people of color with culturally specific and/or linguistically specific services, including programs that have the lowest barriers to entry and actively reach out to communities screened out of other programs.
- I. **Planned investments.** An articulation of programmatic investments planned, including:
- The types of housing services to be funded to address the gap analysis, including specifically:
    - Supportive housing
    - Long-term rent assistance
    - Short-term rent assistance
    - Housing placement services
    - Eviction prevention
    - Shelter and transitional housing
  - A description of the support services to be funded in tandem with these housing services;
  - A commitment to one regional model of long-term rent assistance;
  - A description of other program models for each type of service that define expectations and best practices for service providers;
  - A description of how investments by service type will be phased to increase over the first three years of program implementation as revenues grow, and how decisions will be made to scale investments by service types with funding increases and decreases over time, including a plan to ensure housing stability for program participants; and
  - A description of programming alignment with, and plans to leverage, other investments and systems such as Continuum of Care, Medicaid, behavioral health and capital investments in affordable housing.
- J. **Outcomes, reporting and evaluation.** An agreement to track and report on program outcomes annually as defined through regional coordination and with regional metrics, including:
- A description of annual outcomes anticipated. Goals will be updated annually as programming evolves and based on anticipated annual revenue forecasts. Goals may include:
    - number of supportive housing units created
    - numbers of housing placements made
    - number of eviction preventions
    - rate of successful housing retention, etc.
  - A commitment to tracking outcomes as established and defined through regional coordination and with regionally established metrics. This includes consistency in data disaggregation using regionally standardized values and methodology to understand

- disparate outcomes for people by race, ethnicity, disability status, sexual orientation and gender identity. (See Section 5.2 for the regionally required outcome metrics.)
- A commitment to regional measurable goals to decrease racial disparities among people experiencing homelessness. (See Section 5.2 for the regional measurable goals for advancing racial equity.)
  - A commitment to evaluation standards and procedures to be established through regional coordination. Evaluation will be conducted every three years and include performance of systems coordination, housing and service program types, and services provision.

**From:** [Metro Supportive Housing Services](#)  
**To:** [REDACTED]  
**Subject:** RE: [External sender]New ideas?  
**Date:** Monday, November 23, 2020 4:07:05 PM

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Dear Jonathan,

Thank you for providing your input on the Supportive Housing Services Work Plan. Staff will be reviewing all feedback received and providing a summary and updated staff recommendations to Council in response to the combined feedback. We have recorded your response and it will be included in the Metro Council materials as an attachment to the proposed resolution to adopt the Work Plan on December 10th.

We appreciate your engagement,  
Metro Housing

-----Original Message-----

From: Jonathan Blatt [REDACTED]  
Sent: Wednesday, November 18, 2020 1:54 PM  
To: Metro Supportive Housing Services <HousingServices@oregonmetro.gov>  
Subject: [External sender]New ideas?

CAUTION: This email originated from an External source. Do not open links or attachments unless you know the content is safe.

Hi, thank you for the difficult work you are doing on an important problem.

I humbly suggest the following idea can help get more people into housing:

1. Since new privately built apartments with inclusionary zoning don't get built fast enough; 2. Since new subsidized housing buildings and a few hotel purchases can't ever get done fast enough; 3. We simply need more ideas or we'll never catch up on housing people.

So here it is:

City, county and state additional money to landlords of already existing buildings in addition to the amount they would receive from housing vouchers, this would Incentivize landlords to take in people who need help. I have been a landlord and rented to someone in need when i was reassured by their family who I knew that they would back them up if needed. Some consideration to guaranteeing landlords for damage should also be considered.

The stock of existing housing vacancies is far far bigger than the very limited number of new units coming online. This is where we can create a huge dent in the problem.

Thank you for consideration of this idea.

Please reply as to your evaluation of this idea and confirm receipt of this email.

Thanks again, respectfully submitted,  
Jonathan Blatt

Sent from my iPhone

**From:** [Metro Supportive Housing Services](#)  
**To:** [REDACTED]  
**Subject:** RE: [External sender]Supportive Housing Services Program Work Plan  
**Date:** Monday, November 23, 2020 4:08:07 PM

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Dear Andy,

Thank you for providing your input on the Supportive Housing Services Work Plan. Staff will be reviewing all feedback received and providing a summary and updated staff recommendations to Council in response to the combined feedback. We have recorded your response and it will be included in the Metro Council materials as an attachment to the proposed resolution to adopt the Work Plan on December 10th.

We appreciate your engagement,  
Metro Housing

**From:** Andy Nelson [REDACTED]  
**Sent:** Wednesday, November 18, 2020 2:12 PM  
**To:** Metro Supportive Housing Services <HousingServices@oregonmetro.gov>  
**Subject:** [External sender]Supportive Housing Services Program Work Plan

**CAUTION:** This email originated from an **External source**. Do not open links or attachments unless you know the content is safe.

Thanks for the opportunity to review the plan and offer feedback. The plan connects well to the planning work done through the HereTogether Advisory process. My one suggestion is to expand the service strategy to call out culturally-responsive service providers. Culturally-specific organizations ought to be a priority. They won't be able to do the work alone. It's important to set criteria for what is a culturally-responsive organization. The Meyer Memorial Trust's [DEI Spectrum Tool](#) provides an excellent example.

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**ANDY NELSON**  
Executive Director [IMPACT NW](#)  
[REDACTED]  
He/Him/HIS

[Join the movement to prevent homelessness](#)



Metro SHS Staff:

Comments on SHS Program Work Plan, November, 2020

11/20/20

First, I concur with the comments from the Council during the 17 November Work Session to the effect that the proposed Work Plan represents a great deal of overwhelmingly solid work and forethought regarding how the region is to proceed in providing effective supportive services. I am entirely supportive of the goals and urgency to make this happen quickly and effectively.

That said, having listened to the 17 November Council presentation, and having had a bit more time to review the SHS Work Plan, I have a few comments that I feel deserve some additional thought or elaboration. Staff may already have taken these observations into account and I cannot claim to understand all the considerations that have been included.

Comment # 1:

My previous comment (e-mail - 17 November) regarding the tri-county advisory body needs some modification. On further reading I realized that, indeed, the Work Plan envisions an additional group that you have labeled the “tri-county advisory body”. My preliminary comment was the result of some misunderstanding on my part since it would seem that the Regional Oversight Committee (ROC) is also, by design, a “tri-county advisory group”. My first suggestion would be to give the second advisory body a specific name and acronym to avoid confusion. My first suggestion would be: SHS Advisory Group (SHSAG), which is catchy but not easy to pronounce, yet still better than TCSHSAG (tri-county SHS advisory group). I will use SHSAG for convenience.

Comment #2:

I found the apparent overlap between the 2 committees somewhat confusing and the role of the SHSAG somewhat lacking in clarity. The ROC is specifically constituted to “provide policy and programmatic guidance” [S. 3.4] which seems to overlap with the role of the SHSAG to “identify regional goals strategies and outcome metrics and....to inform the SHS program implementation.” [S. 6.1]. In addition, both committees seem to rely on overlapping membership criteria such as lived experiences, experience with critical homelessness issues, ethnic and geographic diversity, and having skills or expertise in such services. I understand that the ROC is largely specified by the ballot measure while the SHSAG must be created by Metro and that some overlap is unavoidable, but on a technical level, it might be clarified at the outset whether individuals may be members of both committees or only one. I assume the size of the SHSAG will be determined at a later date and note that the ROC might be asked to provide input on that matter.

Comment #3:

Perhaps I missed something but the level and type of authority and the channels of communication between the SHSAG and other groups was not very clear. The Work Plan calls for this group to be created by Metro and of course Metro can structure its



responsibilities at a later date, but it would seem valuable to provide an outline of its communication role and responsibilities vis a vis both the ROC and the Local Implementation Partners (LIPs) should be identified in the Work Plan. It would seem the benefits of an additional group (the SHSAG) would be in bringing in both more and more diverse regional “players”. It would seem that close coordination with the ROC might be a benefit to the process and help distill, for the Council, any proposed changes in policies or implementation strategies. It would seem potentially disadvantageous to have two independent groups trying to advise Metro Council on how to move forward. Since the SHSAG also envisions elected members, some formal pathways for interaction with the LIPs might also be needed.

Comment #4:

This is a comment regarding the timing and wording of the “charge” of the SHSAG as noted in 6.1. From a timing standpoint, it would seem that the current Work Plan provides much of the basis for “regional goals, strategies, and outcome metrics”, such that the real role of the SHSAG will be to suggest midcourse corrections. Since funding for full implementation will ramp up over 2021, it would seem that processes and goals (at least on an interim basis) would already be in place by the time the SHSAG has the full support it needs to function. In addition, one or two years of early implementation metrics will indubitably guide their analysis and input.

Comment #5:

Regarding metrics: Although I am by no means more than a novice in the field of SHS, it would be my hope that metrics beyond housing metrics might be developed. These might include the number of persons interacted with and response resource expenditures for services such as counseling, medical interventions, critical transportation, etc. I assume these have been considered but did not see them called out.

Comment #6:

The taxation plan seems quite thorough and well laid out, with suitable alterations to avoid double taxations. I did note one part of the verbal presentation that was not included in the written materials and that was regarding use of a basic calculation assumption based on Portland and Multnomah County vs. the method used by the State of Oregon. My only comment would be to ask for more information on how this calculatory assumption comports with the other larger cities in the region. I cannot comment further since this element does not seem to be covered in the supporting materials.

General Comments:

Overall I find the SHA Work Plan to be very good basis for moving forward and represents a great deal of excellent work. I support it and will work to make its goals into reality. I hope more detail on the structure and charge of the SHSAG will be developed in the early phases of the implementation. I hope these comments are helpful.

Gerritt Rosenthal

IN CONSIDERATION OF

- ORDINANCE 20-1452, FOR THE PURPOSE OF ADDING A NEW TITLE XI TO THE METRO CODE AND A NEW CHAPTER 11.01 “SUPPORTIVE HOUSING SERVICES PROGRAM” WITHIN THAT TITLE; and
- ORDINANCE 20-1453, FOR THE PURPOSE OF ADDING A NEW METRO CODE SECTION 2.19.270 ESTABLISHING A SUPPORTIVE HOUSING SERVICES REGIONAL OVERSIGHT COMMITTEE; and
- ORDINANCE 20-1454, FOR THE PURPOSE OF AMENDING METRO CODE TITLE VII TO ADD NEW CHAPTERS 7.05 “INCOME TAX ADMINISTRATION FOR PERSONAL AND BUSINESS TAXES,” 7.06 “PERSONAL INCOME TAX,” AND 7.07 “BUSINESS INCOME TAX”
- RESOLUTION 20-5148 TO ADOPT THE SUPPORTIVE HOUSING SERVICES WORK PLAN

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Date: November 24, 2020 *updated*  
*December 11, 2020*  
Department: Planning and Development  
Meeting Date: December 3, 2020 *updated*  
*prior to December 17, 2020 meeting*

Prepared and Presented by: Jes Larson  
and Rachael Lembo  
Length: 20 minutes

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**ISSUE STATEMENT**

In February 2020, the Metro Council referred a ballot measure to voters that would authorize funding for regional supportive housing services and in May 2020, voters approved it. The ordinance authorizing the income taxes stated that, upon passage of the ballot measure, the “Metro Council will take further action to establish rules to enforce and implement the taxes imposed by the measure.”

Following direction given by Metro Council during the November 17, 2020 work session, these ordinances update Metro code to establish the Regional Supportive Housing Services program and oversight committee and to enact the tax collection system. The resolution approves a programmatic work plan as needed to direct implementation for the Planning and Development department.

Certain sections of the tax code have prompted discussion and comments since the November 17 work session.

- **Apportionment methodology.** Apportionment refers to the way a business allocates their net income when they also operate outside the Metro district, in this case specifically of services and other intangible items. Multnomah County and the City of Portland use a cost of performance method, and the State of Oregon uses a market based method. Metro’s charter authority to impose income taxes also provides latitude on how it structures those taxes. With respect to apportionment,

Metro can choose either a cost of performance or market based methodology for apportionment of income. At the work session, staff proposed we adopt the method consistent with Multnomah County and the City of Portland because it will result in lower collection costs. However, Metro could alternatively choose the market based method and align with the State of Oregon. The City has estimated this would increase collection costs by approximately \$500,000 per year. Metro staff do not have access to data to analyze the impact to tax revenue, however, this would result in a higher number of nonresident businesses subject to tax, which can be more challenging for enforcement.

- **Head of household filing status.** As noted at the November 17 work session, Metro has two filing statuses, single and joint, however there are five filing statuses available at the State level. Staff proposed individuals using head of household filing status on their State tax return would file a Metro single tax return, which has an income exemption of \$125,000. Alternatively, those filers could file a Metro joint tax return, which would result in an income exemption of \$200,000. The estimated maximum tax revenue impact from this change is a reduction of \$2,812,500, based on available State data.

*Update: Metro Council amended the code to provide that taxfilers using head of household filing status would file a joint Metro tax return. Exhibit B of Ordinance No. 20-1454 has been updated.*

- **Employer withholding.** At the November 17 work session, staff proposed Metro require employers to *offer* withholding, but not require mandatory withholding. This was primarily due to the challenge for employers in determining the correct withholding amount and the risk of over-withholding. Since that work session, staff have been working with Multnomah County staff as they prepare their code for the Preschool for All income tax, with the goal of aligning the codes to provide consistency to tax filers. Through those discussions Metro and Multnomah County have agreed on a revised withholding recommendation: voluntary employer withholding in calendar year 2021, and mandatory employer withholding for employees earning more than \$200,000 beginning calendar year 2022 unless an employee chooses to “opt out” of withholding. Thus, although employers would be required to withhold, employees would still have the option to opt in or out of withholding, just as with most income taxes. Requiring employer withholding at the higher threshold of \$200,000 results in less risk of over-withholding than if a lower threshold was used. The attached code proposal reflects this updated recommendation.
- **Pass-through entity taxation.** In the ordinance which referred this measure to the voters, Metro stated it would utilize, as guidance, the Multnomah County Business Income Tax rules and procedures for the business income tax. The County taxes all businesses, including pass through entities such as s-corporations and partnerships. At a State level, pass through entities do not pay business tax based on net income, instead they report net income to their owners, who then pay personal income tax

on that income. As a result of this, Metro developed a solution to ensure pass through income was not taxed twice. Alternatively, Metro could exempt pass through entities from the business tax, and tax the owners via the personal income tax. Due to the income exemption on the personal income tax, this would result in lower tax revenue. The estimated maximum tax revenue impact from this change is a reduction of \$15,000,000, based on staff analysis on double taxation. This alternative would result in a number of complex changes throughout both the business and personal income tax codes. If Metro Council directs staff to prepare this code change it may be prudent to delay adoption of the ordinance by another week in order for the technical experts on the tax table to review the proposed changes and their possible effects.

*Update: After additional review and discussion with members of the tax implementation advisory table, these changes would require significant re-drafting and could delay adoption by months.*

- **PBA Testimony (November 19).** The Portland Business Alliance (PBA) provided oral and written comment at the November 19 Council Meeting, asserting that the “voter-approved ordinance and proposed code may run afoul of a state law requiring any Metro income tax to be consistent with the Oregon income tax.” PBA specifically asserted that Metro’s approach to income apportionment and entity-level taxation were not “consistent” with how the state administers its business income taxes. The PBA’s “consistency” assertions rely on ORS 268.505.

However, Metro has both Charter authority (Metro Charter, Chapter III, Section 11) and statutory authority (ORS 268.505) to impose personal and business income taxes. Accordingly, Metro has two completely independent sources of authority– or options – for imposing income taxes, though both require voter approval. At the time of adoption, and in the Measure itself, Metro was clear in its intent to use the Multnomah County Business Income Tax as guidance for implementing Metro’s business income tax. This provided direction to staff developing the proposed Code. Metro’s independent charter authority to impose these taxes does not require it to “be consistent” with state law (although it may choose to do so). Rather, it provides the Metro Council with flexibility in how the Council chooses to structure these taxes.

### **ACTION REQUESTED**

Staff requests adoption of Ordinances No. 20-1452, 20-1453, 20-1454 and Resolution 20-5148.

Ordinance No. 20-1454, for the purpose of amending Metro code title VII to add new Chapters 7.05, “Income Tax Administration for Personal and Business Taxes”, 7.06 “Personal Income Tax”, and 7.07 “Business Income Tax” contains an emergency clause and would become effective immediately upon adoption. This will allow staff to proceed with adoption of administrative rules to assist taxfilers with these new tax codes.

## **IDENTIFIED POLICY OUTCOMES**

The establishment of the Supportive Housing Services program and the regional oversight committee in the Metro Code and programmatic work plan will define and describe the roles, responsibilities and administrative actions needed for implementation of the program.

The Metro income tax codes codify certain provisions of the Supportive Housing Services Measure approved by the voters, and the codes will also establish rules to implement the taxes imposed by the measure in an effective and efficient manner. These rules provide details and also address tax considerations which were not addressed in the measure yet impact the tax paid by individuals and businesses and the total tax collected by Metro.

## **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

- Adoption of these ordinances and resolution. This will allow staff to proceed with establishment of the Supportive Housing Services program, regional oversight committee and implementation of the tax system.
- Adoption of these ordinances and resolution with revisions or modifications as described by Council.
- Rejection of these ordinances and resolution with other direction to staff for development of this program and the tax system. This would delay implementation.

## **STAFF RECOMMENDATIONS**

Staff recommend that Metro Council adopt Ordinances No. 20-1452, 20-1453, 20-1454 and Resolution 20-5148.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

Implementation of the regional affordable housing bond program has been guided by a work plan developed by staff to define and develop the intentions described in the ballot measure. Staff have taken a similar approach with the Supportive Housing Services program to further develop and define the programmatic intentions of the ballot measure with a programmatic work plan.

Over the summer, a regional stakeholder advisory table was convened to provide guidance on early implementation questions. It was composed of a broad-based group of community stakeholders including culturally specific organizational leaders, housing, homeless and social service providers, behavioral health and healthcare providers and business interests. The table also included agency leadership from the three housing authorities and county homeless services agencies. The table met four times over the summer to prepare recommendations for the Metro Chief Operating Officer to inform development of the programmatic work plan and code, to be brought before Metro Council for consideration in the fall.

Development of the work plan has been further advised by Metro Council direction at the November 17<sup>th</sup> work session, and a public comment period that concluded on November 30<sup>th</sup>.

Metro staff formed a tax implementation advisory table to advise on technical aspects of tax implementation, technical issues, and provide recommendations to ensure a smooth, legal and easy tax collection process. Members included experts in taxation, tax policy, tax implementation and business stakeholders. The table met with staff five times this year and provided input on development of the tax codes.

## **BACKGROUND**

Homelessness and housing prices have increased dramatically in the Portland area over the past decade. Estimates of homelessness in the region range between 6,000 and 12,000 people. In January 2019, officials counted 5,711 people experiencing homelessness in Clackamas, Multnomah and Washington counties. Additionally, the Oregon Department of Education counted more than 7,000 students who experienced homelessness in the 2018 school year in Metro-area school districts. These reports undercount people experiencing homelessness while staying with a friend or family, or living in vehicles.

In recent years, more people are experiencing 'chronic' or prolonged homelessness. Approximately 3,123 to 4,935 people in the region experience homelessness related to complex and disabling conditions.

Additionally, Black, Indigenous and People of Color (BIPOC) disproportionately experience homelessness. BIPOC make up 21% of the total population in the tri-county area but comprise 31% of the homeless population. More specifically, Black and Indigenous people make up 5% of the total population but comprise over 20% of the homeless population.

The HereTogether coalition, a broad group of service providers, business leaders and advocates worked over the course of the last two years to develop the Regional Supportive Housing Services measure. As a broad coalition they identified the regional supportive housing need, developed programmatic and taxation strategies, engaged communities and built broad consensus for their programmatic and governance framework. With the support of elected leadership in Clackamas, Multnomah and Washington counties, they approached Metro in the Fall of 2019 requesting that Metro refer a measure to the region's voters. In February 2020, the Metro Council unanimously referred the measure to voters and the voters passed the measure with 58% support in May 2020.

## **ATTACHMENTS**

- Ordinance 20-1452, For the Purpose of Adding a New Title XI to the Metro Code and a New Chapter 11.01 "Supportive Housing Services Program" within that Title; and
- Ordinance 20-1453, For the Purpose of Adding a New Metro Code Section 2.19.270 Establishing a Supportive Housing Services Regional Oversight Committee; and
- Ordinance 20-1454, For the Purpose of Amending Metro Code Title VII to Add New Chapters 7.05 "Income Tax Administration for Personal and Business Taxes", 7.06 "Personal Income Tax", and 7.07 "Business Income Tax"; and
- Resolution 20-5148 to adopt the Supportive Housing Services work plan

Agenda Item No. 5.2

**Ordinance No. 20-1452**, For the Purpose of Adding a New Title XI to the Metro Code and a New Chapter 11.01 “Supportive Housing Services Program” within that Title

*Ordinance (Second Reading)*

Metro Council Meeting  
Thursday, December 17, 2020

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING A NEW TITLE	)	ORDINANCE NO. 20-1452
XI TO THE METRO CODE AND A NEW	)	
CHAPTER 11.01 “SUPPPORTIVE HOUSING	)	Introduced by Chief Operating Officer
SERVICES PROGRAM” WITHIN THAT TITLE	)	Marissa Madrigal in concurrence with
	)	Council President Lynn Peterson

WHEREAS, on February 25, 2020, the Metro Council adopted Ordinance 20-1442 which, among other things, imposed business and personal income taxes to fund a Supportive Housing Services Program and found that homeless and housing services is a matter of metropolitan concern; and

WHEREAS, as part of that Ordinance adoption, the Metro Council found that the greater Portland region is facing a severe housing affordability and homelessness crisis, which endangers the health and safety of thousands of our unhoused neighbors. Homelessness is a deeply traumatic and dehumanizing experience that no person should have to endure, regardless of their circumstances; and

WHEREAS, the Council further found that thousands of households in the greater Portland region need supportive housing, and thousands more need housing assistance and other supports to achieve housing stability, according to the February 2020 ECONorthwest report entitled “Potential Sources and Uses of Revenue to Address the Region’s Homeless Crisis,” and

WHEREAS, the Council further found that the housing affordability and homelessness crisis in the greater Portland region impacts us all and requires collective and individual action from every person, business, elected official, and resident that calls the region home; and

WHEREAS, the Council also found that the homelessness crisis is an issue of scale and services do not yet match the scope of the crisis, and additional revenue is required to scale services to meet the needs and scope of the crisis; and

WHEREAS, Resolution 20-5083 referred Ordinance 20-1442 (Supportive Housing Services) to the voters for approval, which was designated as Measure 26-210 by Multnomah County Elections and placed on the May 2020 ballot (the “Measure”); and

WHEREAS, on May 19, 2020, the Metro area voters approved the Measure, thereby approving Ordinance 20-1442; and

WHEREAS, Resolution 20-5083 authorized the Metro Attorney to assign the Measure’s sections with title, chapter and section numbers for the Metro Code as the Metro Attorney deemed appropriate based on current Metro Code titles, chapters and sections; and

WHEREAS, this ordinance codifies, amends and supplements the Measure; and

WHEREAS, the sections of the Measure regarding imposition of the personal and business income taxes are being codified in new Metro Code Chapter 7.05 (Tax Administration), Chapter 7.06 (Personal Income Tax), and Chapter 7.07 (Business Income Tax); and

WHEREAS, the sections of the Measure regarding the establishment of a Regional Oversight Committee are being codified in Metro Code Chapter 2.19 (Regional Oversight Committee); and



WHEREAS, this Ordinance codifies the sections of the Measure regarding the programmatic aspects of providing Supportive Housing Services into a new Title XI, Chapter 11.01 of the Metro Code, with certain amendments as appropriate; now therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. A new Metro Code Chapter 11.01 attached as Exhibit A and entitled “Supportive Housing Services Program” is added to a new Metro Code Title XI.
2. This ordinance codifies, amends and supersedes the language in Measure 26-210. To the extent that any terms or conditions in Measure 26-210 conflict with the terms and conditions in this ordinance, this ordinance prevails.

ADOPTED by the Metro Council this \_\_\_\_ day of December 2020.

---

Lynn Peterson, Council President

Attest:

Approved as to Form:

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Jaye Cromwell, Recording Secretary

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Carrie MacLaren, Metro Attorney

**SUPPORTIVE HOUSING SERVICES PROGRAM**

<b>Section</b>	<b>Title</b>
11.01.010	Title
11.01.020	Finding of Metropolitan Concern
11.01.030	Purpose
11.01.040	Definitions
11.01.050	Services and Priorities
11.01.060	Local Implementation Plan
11.01.070	Local Implementation Plan Development; Approval Process
11.01.080	Annual Reporting by Local Implementation Partners
11.01.090	Allocation of Revenue and Program Funds
11.01.100	Failure to Comply with Local Implementation Plan
11.01.110	Equity and Community Engagement
11.01.120	Use of Revenues
11.01.130	Administrative Cost Recovery
11.01.140	Oversight Committee Review of Administrative Costs
11.01.150	Use of Funds in Metro Jurisdictional Boundary Only
11.01.160	Accountability of Funds
11.01.170	Tri-County Advisory Body
11.01.180	Tri-County Planning
11.01.190	Administrative Rulemaking Authority

**11.01.010 Title**

This chapter is known and may be cited as the Supportive Housing Services Program.

**11.01.020 Finding of Metropolitan Concern**

Homeless and housing services are matters of metropolitan concern over which Metro may exercise jurisdiction.

**11.01.030 Purpose**

The Supportive Housing Services Program will use revenue derived from the Metro Income Tax Laws (Chapters 7.06 and 7.07) to fund services for people experiencing homelessness and housing instability.

**11.01.040 Definitions**

**Implementation Intergovernmental Agreement** means the intergovernmental agreement between Metro and the Local Implementation Partner that governs the disbursement and uses of Program Funds.

**Local Implementation Partner** means a local government that receives Program Funds from Metro to implement the Supportive Housing Services Program and which enters into an Intergovernmental Agreement to receive those funds. Local Implementation Partners are generally Clackamas, Washington and Multnomah Counties.

**Local Implementation Plan** means the document that establishes the proposed use of the Supportive Housing Services Revenue and how these uses align with the purposes of the Supportive Housing Services Program.

**Program Funds** means funds available to a Local Implementation Partner, which generally consists of the Supportive Housing Services Revenue minus Metro’s administrative and collection costs.

**Regional Oversight Committee** means the committee established to oversee the Supportive Housing Services Program as more fully described in Metro Code Section 2.19.270.

**Supportive Housing Services Program Work Plan** or **Work Plan** means the Supportive Housing Services Program Work Plan adopted by the Metro Council on **December 10, 2020**.

**Supportive Housing Services Revenue** means all funds received from the taxes imposed by Metro

Code Chapters 7.06 and 7.07.

**11.01.050 Services and Priorities**

- (a) Supportive housing services revenue will fund supportive housing services that include housing services, outreach and engagement supports, health and wellness supports, employment and benefit supports and advocacy supports.
- (b) Supportive Housing Services Revenue and Supportive Housing Services will first address the unmet needs of people who are experiencing or at risk of experiencing long-term or frequent episodes of homelessness. Metro will prioritize the Supportive Housing Services Revenue and Supportive Housing Services in a manner that provides equitable access to people of color and other historically marginalized communities.

**11.01.060 Local Implementation Plan**

- (a) To receive Supportive Housing Services funds, each Local Implementation Partner must prepare a Local Implementation Plan. The Plan will describe the Local Implementation Partner's local housing and homeless service needs, current programming and unmet programming capacities, and proposed use of funds in accordance with the purposes of the regional Supportive Housing Services Program.
- (b) Each Local Implementation Partner must create its Plan using a racial equity lens that ensures equitable participation, access and outcomes in all parts of the program and considers the best available quantitative and qualitative data.
- (c) Metro recognizes that each Local Implementation Partner may approach program implementation differently depending on the unique needs of its residents and communities. Therefore, it is the policy of the Metro Council that there be sufficient flexibility in implementation to best serve the needs of residents, communities, and those receiving Supportive Housing Services from program funding.

**11.01.070 Local Implementation Plan Development; Approval Process**

- (a) A Local Implementation Partner must develop its Local Implementation Plan using locally convened and comprehensive engagement processes that prioritize the voices of Black, Indigenous and people of color and people with lived experience. Plans must be developed in full partnership with advisory bodies that equitably reflect community expertise and experience. Each Local Implementation Partner may convene a new advisory body or use an existing body that fulfills the representation requirements.
- (b) In order for a Local Implementation Partner to receive Supportive Housing Services funds, the

Local Implementation Plan must be recommended for approval by the Supportive Housing Services Regional Oversight Committee and then approved by the Local Implementation Partner's governing body and the Metro Council.

#### **11.01.080 Annual Reporting by Local Implementation Partners**

Each Local Implementation Partner must submit an Annual Progress Report to the Metro Council and the Regional Oversight Committee summarizing its progress and outcomes under the Local Implementation Plan.

#### **11.01.090 Allocation of Revenue and Program Funds**

- (a) After Metro has first retained funds necessary to pay for collection of the taxes, Metro may retain up to five percent of the remaining collected tax revenue for administration and oversight as more fully described in Section 11.01.130.
- (b) After funds have been allocated for collection, administration and oversight as set forth in subsection (a), Metro will then allocate the remaining Program Funds within each county using the following percentages: 21 1/3 percent to Clackamas County, 45 1/3 percent to Multnomah County and 33 1/3 percent to Washington County.
- (c) The percentages set forth in subsection (b) apply to revenue for the first two tax years. Thereafter, the percentages may be adjusted to reflect the portion of Supportive Housing Services Revenue actually collected in each county.

#### **11.01.100 Failure to Comply with Local Implementation Plan**

- (a) In coordination with the Regional Oversight Committee, Metro may adjust the allocation formula if program funds are unable to be fully spent in accordance with the regional program. Metro may also establish a regional reserve fund in order to address unanticipated expenses and cash flow needs.
- (b) Metro's Implementation Intergovernmental Agreements with each Local Implementation Partner will specify how Supportive Housing Services tax collections will be released. Agreements will include specifications for annual program budgets, financial reporting, practices for reserving funds, and redistribution of funds if a jurisdiction fails to comply with the Agreement.

#### **11.01.110 Equity and Community Engagement**

Metro has adopted a Strategic Plan to Advance Racial Equity, Diversity, and Inclusion which

includes specific goals and objectives to ensure that all people who live, work and recreate in the greater Portland region have the opportunity to share in and help define a thriving, livable and prosperous region. A key objective throughout the strategy is a commitment to advance equity related to stable and affordable housing. Metro will rely on the goals and objectives within the Strategic Plan to implement the Supporting Housing Services Program.

#### **11.01.120 Use of Revenues**

Unless expressly stated otherwise in this chapter, Supportive Housing Services Revenue may only be used for the purposes set forth in Sections 11.01.030 and 11.010.050, in addition to Metro's costs of collection and administration. Metro may establish a separate fund or funds for the purpose of receiving and distributing Supportive Housing Services Revenues.

#### **11.01.130 Administrative Cost Recovery**

After Metro's tax collection costs are paid, Metro may retain up to five percent of the remaining funds to pay for the costs to disburse the funds and administer and oversee the program. This includes convening and supporting the Regional Oversight Committee; establishing a regional homelessness data collection and reporting program; and supporting tri-county regional collaboration.

#### **11.01.140 Oversight Committee Review of Administrative Costs**

At least annually the Regional Oversight Committee will consider whether Metro's collection and administrative costs and each Local Implementation Partner's administrative costs could or should be reduced or increased. The Regional Oversight Committee will recommend to the Metro Council at least once a year as to how Metro can best limit collection and administrative costs.

#### **11.01.150 Use of Funds in Metro Jurisdictional Boundary Only**

Although some portion of each of the three recipient counties (Multnomah, Washington and Clackamas) are outside of the Metro jurisdictional boundary, Supportive Housing Services Revenue may be spent only for Supportive Housing Services provided within the Metro jurisdictional boundary.

#### **11.01.160 Accountability of Funds**

- (a) Each county or local government receiving funds must make an annual report to the Metro Council and the Regional Oversight Committee on how funds from the taxes have been spent and how those expenditures have affected established homelessness metrics.

(b) In the annual report, the Local Implementation Partner must demonstrate that County General Fund monies and other dedicated funding levels allocated for homelessness were at least as much as FY 20-21, in addition to the Supportive Housing Services program funds. A Local Implementation Partner may not displace funds committed before FY 20-21 except in extenuating circumstances and through a temporary waiver for good cause.

#### **11.01.170 Tri-County Advisory Body**

Metro will convene a tri-county advisory body to strengthen regional coordination in addressing homelessness in the region. The advisory body will identify regional goals, strategies and outcome metrics and provide guidance and recommendations to inform Supportive Housing Services Program implementation.

#### **11.01.180 Tri-County Planning**

Each county must annually contribute no less than five percent of that county's share of the Supportive Housing Services Revenue towards regional strategies as identified through Tri-County planning and approved by the Regional Oversight Committee.

#### **11.01.190 Administrative Rulemaking Authority**

- (a) The Chief Operating Officer may adopt administrative rules to further implement this chapter. This specifically includes the authority to establish representation requirements for the body that develops a Local Implementation Plan.
- (b) Until the Chief Operating Officer adopts administrative rules to further implement this chapter, the Supportive Housing Services Program Work Plan will further implement this chapter. However, if any term, requirement or condition in the Work Plan is in conflict with this chapter, the terms, requirements and conditions of this chapter prevail.

Agenda Item No. 5.3

**Ordinance No. 20-1453**, For the Purpose of Adding a New Metro Code Section 2.19.270  
Establishing a Supportive Housing Services Regional Oversight Committee

*Ordinance (Second Reading)*

Metro Council Meeting  
Thursday, December 17, 2020



BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADDING A NEW )      ORDINANCE NO. 20-1453  
METRO CODE SECTION 2.19.270 )  
ESTABLISHING A SUPPORTIVE HOUSING )      Introduced by Chief Operating Officer  
SERVICES REGIONAL OVERSIGHT )      Marissa Madrigal in concurrence with  
COMMITTEE )      Council President Lynn Peterson

WHEREAS, on February 25, 2020, the Metro Council adopted Ordinance 20-1442 which, among other things, imposed business and personal income taxes to fund a Supportive Housing Services Program; and

WHEREAS, Resolution 20-5083 referred Ordinance 20-1442 (Supportive Housing Services) to the voters for approval, which was designated as Measure 26-210 by Multnomah County Elections and placed on the May 2020 ballot (the “Measure”); and

WHEREAS, on May 19, 2020, the Metro area voters approved the Measure, thereby approving Ordinance 20-1442; and

WHEREAS, recognizing the importance of independent oversight for new Metro programs, the Measure established a Supportive Housing Services Regional Oversight Committee; and

WHEREAS, on November 19, 2020, the Metro Council appointed members to the Regional Oversight Committee in a manner and under the membership requirements as set forth in the Measure; and

WHEREAS, Resolution 20-5083 authorized the Metro Attorney to assign the Measure’s sections with title, chapter and section numbers for the Metro Code as the Metro Attorney deemed appropriate based on current Metro Code titles, chapters and sections; and

WHEREAS, this ordinance codifies, amends and supplements the Measure; and

WHEREAS, the sections of the Measure regarding imposition of the personal and business income taxes are being codified in new Metro Code Chapter 7.05 (Tax Administration), Chapter 7.06 (Personal Income Tax), and Chapter 7.07 (Business Income Tax); and

WHEREAS, the sections of the Measure regarding the programmatic aspects of providing Supportive Housing Services are being codified into a new Title XI, Chapter 11.01 of the Metro Code; and

WHEREAS, this Ordinance codifies the Measure’s Supportive Housing Services Regional Oversight Committee and its requirements, membership and responsibilities into a new Metro Code Section 2.19.270; now therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. A new Metro Code Section 2.19.270 attached as Exhibit A and entitled “Supportive Housing Services Regional Oversight Committee” is added to Metro Code Chapter 2.19.

2. This ordinance codifies, amends and supersedes the language in Measure 26-210. To the extent that any terms or conditions in Measure 26-210 conflict with the terms and conditions in this ordinance, this ordinance prevails.

ADOPTED by the Metro Council this \_\_\_\_ day of December 2020.

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Lynn Peterson, Council President

Attest:

Approved as to Form:

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Jaye Cromwell, Recording Secretary

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Carrie MacLaren, Metro Attorney

### **2.19.270 Supportive Housing Services Regional Oversight Committee**

- (a) Committee Established. A 15-member regional oversight committee (hereafter, “Supportive Housing Services Regional Oversight Committee” or “Regional Oversight Committee”) will oversee the Supportive Housing Services Program.
- (b) Purpose and Authority. The purpose and authority of the Supportive Housing Services Regional Oversight Committee is to:
1. Evaluate local implementation plans, recommend changes as necessary to achieve program goals and guiding principles, and make recommendations to Metro Council for approval;
  2. Accept and review annual reports for consistency with approved local implementation plans;
  3. Monitor financial aspects of program administration, including review of program expenditures; and
  4. Provide annual reports and presentations to Metro Council and Clackamas, Multnomah, and Washington County Boards of Commissioners assessing performance, challenges, and outcomes.
- (c) Membership. The Supportive Housing Services Community Oversight Committee is composed of 15 members, as follows:
1. Five members from Clackamas County.
  2. Five members from Multnomah County.
  3. Five members from Washington County.
- (d) Jurisdictional Representation. In addition to the 15 members described in subsection (c), one representative each from the Clackamas, Multnomah and Washington County Boards of Commissioners, Portland City Council and Metro Council will serve on the committee as non-voting delegates.
- (e) Membership Attributes. The committee’s membership will include a broad range of personal and professional experience, including people with lived experience of homelessness or housing instability. The committee will also reflect the diversity of the region. The membership will include people with the following experiences, perspectives and qualities:

1. Experience overseeing, providing, or delivering supportive housing services;
2. Lived experience of homelessness or severe housing instability;
3. Experience in the development and implementation of supportive housing and other services;
4. Experience in the delivery of culturally-specific services;
5. Experience in the private-for-profit sector;
6. Experience in the philanthropic sector;
7. People who identify as Black, Indigenous and people of color, people with low incomes, immigrants and refugees, the LGBTQ+ community, people with disabilities, and other underserved and/or marginalized communities; and
8. Experience in a continuum of care organization.

A person may represent more than one of the subsections above. The membership must have broad representation and geographical diversity.

- (f) Terms. Nine of the initial Committee members will serve a one-year term, and the Council may reappoint those nine members for up to two additional two-year terms.
- (g) Meetings. The Committee will meet no less than quarterly and more frequently as necessary.
- (h) Oversight Committee Review. Metro may conduct a review of the regional oversight committee's role and effectiveness as appropriate.

Agenda Item No. 5.4

**Ordinance No. 20-1454**, For the Purpose of Amending Metro Code Title VII to Add New Chapters 7.05 “Income Tax Administration for Personal and Business Taxes”, 7.06 “Personal Income Tax”, and 7.07 “Business Income Tax”

*Ordinance (Second Reading)*

Metro Council Meeting  
Thursday, December 17, 2020

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF AMENDING METRO	)	ORDINANCE NO. 20-1454
CODE TITLE VII TO ADD NEW CHAPTERS	)	
7.05 "INCOME TAX ADMINISTRATION FOR	)	Introduced by Chief Operating Officer
PERSONAL AND BUSINESS TAXES," 7.06	)	Marissa Madrigal in concurrence with
"PERSONAL INCOME TAX," AND 7.07	)	Council President Lynn Peterson
"BUSINESS INCOME TAX"	)	

WHEREAS, on February 25, 2020, the Metro Council adopted Ordinance 20-1442.

WHEREAS, Ordinance 20-1442 imposed a tax of one percent beginning in tax year 2021 on the entire taxable income over \$200,000 if filing jointly and \$125,000 if filing singly on every resident of the district subject to tax under ORS chapter 316 and upon the taxable income over \$200,000 if filing jointly and \$125,000 if filing singly of every nonresident that is derived from sources within the district which income is subject to tax under ORS chapter 316 (the "Personal Income Tax"); and

WHEREAS, Ordinance 20-1442 also imposed a tax of one percent upon each person doing business within Metro if the gross receipts from all business income, both within and without Metro, is over \$5 million (the "Business Income Tax"); and

WHEREAS, the revenue derived from the taxes imposed by Ordinance 20-1442 will fund Supportive Housing Services; and

WHEREAS, before the taxes imposed by Ordinance 20-1442 could take effect, they required approval of the Metro area voters; and

WHEREAS, Resolution 20-5083 referred Ordinance 20-1442 (Supportive Housing Services) to the voters for approval, which was designated as Measure 26-210 by Multnomah County Elections and placed on the May 2020 ballot (the "Measure"); and

WHEREAS, on May 19, 2020, the Metro area voters approved the Measure, thereby approving the Personal Income Tax and Business Income Tax imposed in Ordinance 20-1442; and

WHEREAS, Ordinance 20-1442 stated that upon approval by the voters, the Metro Council would take further action to establish rules to enforce and implement the taxes imposed by the Measure, including: establishing rules to enforce and implement the Personal Income Tax include rules regarding penalties, interest, filing dates, required forms and documentation, residency determinations for income tax payment purposes, refunds and deficiencies, audit authority, overpayments, estimated payments, exemptions, appeals from income determinations, legal collection actions and any other provision deemed necessary to effectively and efficiently administer the taxes and achieve the purposes of the Measure; and

WHEREAS, Resolution 20-5083 stated that upon approval by the voters the Metro Attorney would assign the Measure's sections with title, chapter and section numbers for the Metro Code as the Metro Attorney deemed appropriate based on current Metro Code titles, chapters and sections; and

WHEREAS, this ordinance codifies, amends and supplements the Measure; and

WHEREAS, the sections of the Measure establishing a Regional Oversight Committee are being codified in Metro Code Chapter 2.19 (Regional Oversight Committee); and

WHEREAS, the sections of the Measure regarding the programmatic aspects of providing Supportive Housing Services are being codified in a new Title XI, Chapter 11.01 of the Metro Code, with certain amendments as appropriate; and

WHEREAS, codifying the Measure's sections regarding tax imposition and establishing new code chapters to enforce, collect and implement the Personal Income Tax and Business Income Tax will ensure efficient and transparent enforcement and collection of the taxes; now therefore,

THE METRO COUNCIL ORDAINS AS FOLLOWS:

1. A new Metro Code Chapter 7.05 attached as Exhibit A and entitled "Income Tax Administration for Personal and Business Taxes" is added to Metro Code Title VII.
2. A new Metro Code Chapter 7.06 attached as Exhibit B and entitled "Personal Income Tax" is added to Metro Code Title VII.
3. A new Metro Code Chapter 7.07 attached as Exhibit C and entitled "Business Income Tax" is added to Metro Code Title VII.
4. This ordinance codifies, amends and supersedes the language in Measure 26-210. To the extent that any terms or conditions in Measure 26-210 conflict with the terms and conditions in this ordinance, this ordinance prevails.
5. Upon adoption of this ordinance, the Chief Operating Officer may adopt administrative rules to further implement any provision found in Chapters 7.05, 7.06 and 7.07. The Chief Operating Officer must provide a public comment period of not less than 30 days and notice of the public comment period in a manner reasonably calculated to reach interested parties. Any administrative rule adopted by the Chief Operating Officer pursuant to this ordinance will take effect immediately upon adoption.

6. The Metro Council finds that the homelessness crisis is an emergency that affects the health, safety and welfare of Metro area residents. The Metro Council further finds the need for this ordinance to become effective immediately upon adoption to avoid potential administrative issues that could possibly delay funding for the supportive housing services, as well as to allow the Chief Operating Officer to proceed with public comment and adoption of administrative rules to assist taxfilers and remove potential uncertainty. Finally, the Metro Council finds that because this ordinance does not impose a new tax, an emergency clause is appropriate under Metro Charter Section 38(1).

ADOPTED by the Metro Council this \_\_\_\_ day of December 2020.

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Lynn Peterson, Council President

Attest:

Approved as to Form:

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Jaye Cromwell, Recording Secretary

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Carrie MacLaren, Metro Attorney



**CHAPTER 7.05**

**INCOME TAX ADMINISTRATION FOR PERSONAL AND BUSINESS TAXES**

<b>Section</b>	<b>Title</b>
7.05.010	Purpose and Applicability
7.05.020	Definitions
7.05.030	Conformity to State Income Tax Laws; Tax Guidance
7.05.040	Nexus
7.05.050	Tax as a Debt; Collection Authority
7.05.060	Administration
7.05.070	Administrative Authority
7.05.080	Ownership of Taxfiler Information
7.05.090	Confidentiality
7.05.100	Persons to Whom Information May Be Furnished
7.05.110	Taxfiler Representation
7.05.120	Representation Restrictions
7.05.130	Information Request; Examination of Books, Records or Persons
7.05.135	Subpoena Powers
7.05.140	Taxfiler Records Retention
7.05.150	Deficiencies and Refunds
7.05.160	Protests and Appeals; Penalty Waiver
7.05.170	Return Due Date; Extensions
7.05.180	Payment of Estimated Tax
7.05.190	Schedule for Payment of Estimated Tax
7.05.200	Tax Return Payment; Minimum
7.05.210	Payment Plan; Fee
7.05.220	Settlement Offers and Agreements
7.05.230	Changes to Federal or State Tax Returns
7.05.240	Criminal Penalties
7.05.250	Civil Penalty for Unauthorized Access of Tax Information
7.05.260	Penalties for Violations of Business Income Tax Law
7.05.270	Penalties for Violations of Personal Income Tax Law
7.05.280	Interest
7.05.290	Payments Applied
7.05.300	Interest on Refunds
7.05.310	Accountability of Funds; Audits
7.05.320	Severability

### **7.05.010 Purpose and Applicability**

The purpose of this chapter is to provide consistent, efficient and transparent administration of Metro's Business Income Tax Law and Personal Income Tax Law (collectively, "Metro's Income Tax Laws."). The provisions of this chapter apply to the administration of both the Business Income Tax Law and Personal Income Tax Law, as applicable, unless Chapter 7.06 or Chapter 7.07 specifically exempts a provision.

### **7.05.020 Definitions**

For the purpose of this chapter and Metro Code Chapters 7.06 and 7.07, the terms used are defined as provided in this section unless the context requires otherwise.

**Administrator** means Metro's agent for purposes of administering and enforcing the Business and Personal Income Tax Laws.

**Appeals Board** means the hearings body designated by the Administrator to review taxfiler appeals from final determinations by the Administrator.

**Business** means an enterprise, activity, profession or undertaking of any nature, whether related or unrelated, by a person in the pursuit of profit, gain or the production of income, including services performed by an individual for remuneration, but does not include wages earned as an employee.

**Business Income Tax Law** means the taxes imposed on businesses under the provisions of Metro Code Chapter 7.07.

**Chief Financial Officer** means the Metro Chief Financial Officer and the Officer's designee(s).

**Chief Operating Officer** means the Metro Chief Operating Officer and the Officer's designee(s).

**District** means all the territory within the jurisdictional boundary of Metro as provided by law.

**Doing Business** means to engage in any activity in pursuit of profit or gain, including but not limited to, any transaction involving the holding, sale, rental or lease of property, the manufacture or sale of goods or the sale or rendering of services other than as an employee. Doing business includes activities carried on by a person through officers, agents or employees as well as activities carried on by a person on their own behalf.

**Domicile** means the place an individual considers to be the individual's true, fixed, permanent home. Domicile is the place a person intends to return to after an absence. A person can only have one domicile at a given time. A person's domicile continues as their domicile until the person demonstrates (1) an intent to abandon the current domicile and acquire a new domicile, and (2) then actually resides in the new domicile. Factors that contribute to determining domicile include family, business activities and social connections. A person is domiciled in the District if the person's domicile is located within the District.

**Employee** means any individual who performs services for another individual or organization and whose compensation is reported by an IRS Form W- 2.

**Gross Receipts** means all income from whatever source derived.

**Individual** means a natural person, including a natural person who reports that person's income to the State of Oregon in a joint personal State income tax return. In such case, Individual refers to the joint taxfiler.

**Metro** means the Metropolitan Service District of the Portland metropolitan area, a municipal corporation established and existing pursuant to Section 14 of Article XI of the Oregon Constitution, ORS Chapter 268 and the Metro Charter.

**Metro Income Tax Laws** means, collectively, the Business Income Tax Law, the Personal Income Tax Law and the code chapters and administrative rules that administer and govern those taxes.

**Metro Taxable Income** means income attributable to sources within the District less deductions from income attributable to sources within the District. This includes, but is not limited to:

- (a) Wages received by a nonresident taxfiler attributable to work performed within the District;
- (b) Items reported to a nonresident taxfiler attributable to the taxfiler's ownership interest in a pass-through entity that does business in the District and reports tax items attributable to that ownership interest to the taxfiler on a Schedule K-1; and
- (c) Income and expenses from a sole proprietorship or disregarded entity attributable to business in the District and reported on a nonresident taxfiler's individual return.

**Net Operating Loss** means the negative taxable income that may result after the deductions allowed by the Business Income Tax Law in determining net income for the tax year.

**Nonbusiness Income** means income not created in the course of the taxfiler's business activities.

**Nonresident** means an individual who is not a resident of the District.

**Oregon Taxable Income** means the taxable income of residents or part year residents as reported or as reportable to the State of Oregon for personal income tax purposes.

**Part-year Resident** means a taxfiler who changes status during a tax year from resident to nonresident or from nonresident to resident.

**Person** means, but is not limited to, an individual, a natural person, married couple filing jointly, proprietorship, partnership, limited partnership, family limited partnerships, association, cooperative, trust, estate, corporation, personal holding company, limited liability company, limited liability partnership or any other form of organization for doing business. Each person who is not a natural person must designate a natural person in writing as its designated representative who is authorized to act and testify on behalf of such person.

**Personal Income Tax Law** means the personal income taxes imposed on District residents and nonresidents under the provisions of Metro Code Chapter 7.06.

**Received** means the postmark date affixed by the United States postal service if mailed, the date stamp if delivered by hand or sent by facsimile, or the receipt date from the online file and pay application confirmation notice.

**Resident** means (1) an individual whose domicile is within the District for the entire taxable year unless the individual maintains no permanent place of abode in the District, does maintain a permanent place of abode outside of the District, and spends on aggregate not more than 30 days per tax year in the District; or, (2) an individual who is not domiciled in the District but maintains a permanent place of abode in the District and spends in the aggregate more than 200 days or any part of a day of the tax year in the District unless the individual proves that the individual is in the District for only a temporary or transitory purpose. Resident does not include: an individual who is a qualified individual under section 911(d)(1) of the Internal Revenue Code for the tax year; the spouse of a qualified individual under Section 911(d)(1) of the Internal Revenue Code, if the spouse is not a resident of the District; a resident alien under section 7701(b) of the Internal Revenue Code who would be considered a qualified individual under Section 911(d)(1) of the Internal Revenue Code if the resident alien were a citizen of the United States; a member of the Armed Forces who performs active service as defined in 10 U.S.C. 101(d)(3), other than annual training duty or inactive-duty training, if the member's residency as reflected in the payroll records of the Defense Finance and Accounting Service is outside the District.

**Tax Year** means the taxable year of a person for Federal or State income tax purposes.

**Taxfiler** means any person whose income in whole or in part is subject to Metro Income Tax Laws and is required to file a return under Metro Income Tax Laws.

#### **7.05.030 Conformity to State Income Tax Laws; Tax Guidance**

- (a) The Administrator will construe the Business Income Tax Law, when applicable, in conformity with the laws and regulations that govern the Multnomah County Business Income Tax as those laws existed for that tax year. The Administrator will construe the Personal income Tax Law, when applicable, in conformity with the laws and regulations of the State of Oregon imposing taxes on or measured by net income as those laws existed for that tax year.
- (b) Any interpretation under subsection (a) may not conflict with any provision of this chapter, Chapter 7.06, or Chapter 7.07.
- (c) The Administrator has the authority by written policy to connect to or disconnect from any legislative enactment regarding income or excise taxation or the definition of income.

#### **7.05.040 Nexus**

The taxes imposed by Chapter 7.06 and Chapter 7.07 apply to all taxpayers that have substantial nexus with the District, subject only to constitutional limitation on Metro's authority.

#### **7.05.050 Tax as a Debt; Collection Authority**

- (a) The taxes imposed by Chapter 7.07 and Chapter 7.06 become a debt due to Metro at the time such liability for the tax is incurred. This includes any penalties and interest.
- (b) The Chief Financial Officer or Administrator is authorized to collect any deficient taxes, interest and penalties owed. This includes initiating and defending any civil actions and other legal proceedings.
- (c) Metro or the Administrator, as appropriate, may assign a delinquent tax account to a collection agency for collection.
- (d) Any assignment to an outside collection agency is subject to a reasonable collection fee, as allowed by law, above and beyond any amount owed to Metro.

#### **7.05.060 Administration**

- (a) The Administrator is the administrator of record and has the authority to administer and enforce the Metro Income Tax Laws including, but not limited to, administrative return processing, auditing, and determinations; collection of taxes, penalties and interest

(including instituting legal action in any court of competent jurisdiction by or on behalf of the Metro); and protests and appeals.

- (b) The Administrator has access to and maintains all tax filings and records under this chapter and the Metro Income Tax Laws on behalf of Metro. The Administrator may, upon taxfiler's written request and at the sole discretion of the Administrator, interpret how this chapter or the Metro Income Tax Laws apply to taxfiler's facts and circumstances. Nothing in this chapter or Chapters 7.06 and 7.07 preclude or is intended to preclude, the informal disposition of controversy by stipulation or agreed settlement, through correspondence or a conference with the Administrator.

#### **7.05.070 Administrative Authority**

- (a) The Administrator may implement procedures, forms, and written policies for administering the provisions of the Business Income Tax Law and Personal Income Tax Law.
- (b) The Administrator will coordinate with Metro to adopt administrative rules relating to matters within the scope of this chapter to administer compliance with the Business Income Tax Law and Personal Income Tax Law.

#### **7.05.080 Ownership of Taxfiler Information**

Metro is the sole owner of all taxfiler information under the authority of the Metro Income Tax Laws. The Chief Operating Officer, Metro Attorney, Chief Financial Officer, Administrator, and their agents have the right to access all taxfiler information for purposes of administration.

#### **7.05.090 Confidentiality**

- (a) No Metro elected official, employee, or agent, nor any person who has acquired information pursuant to the Metro Income Tax Laws, may divulge, release, or make known in any manner any financial information, social security numbers or any other elements of a tax return or tax account, including fact of filing and collection activity submitted or disclosed to Metro or the Administrator under the provisions of this chapter, the Metro Income Tax Laws, and any applicable administrative rules, unless otherwise provided in this chapter or as required by law.
- (b) Nothing in this section prohibits:
  1. The disclosure of general statistics in a form that would prevent the identification of financial information or social security numbers regarding an individual taxfiler;

2. The filing of any legal action by or on behalf of the Administrator or Metro to obtain payment on unpaid accounts or the disclosure of information necessary to do so; or
  3. The assignment to an outside collection agency of any unpaid account balance receivable provided that the Administrator notifies the taxfiler of the unpaid balance at least 60 days before the assignment of the claim.
- (c) Any person that violates this section may be subject to criminal penalties as set forth in Section 7.05.240.

#### **7.05.100 Persons to Whom Information May Be Furnished**

- (a) The Administrator and Metro Chief Operating Officer may disclose and give access to information described in Section 7.05.090 to an authorized representative of the Department of Revenue, State of Oregon, or of any local government of the State imposing taxes upon or measured by gross receipts or net income, for the following purposes:
1. To inspect the tax return of any taxfiler;
  2. To obtain an abstract or copy of the tax return;
  3. To obtain information concerning any item contained in any return;
  4. To obtain information of any financial audit of the tax returns of any taxfiler; or
  5. To maintain compliance with State or Federal Law (such as providing social security numbers to the Internal Revenue Service with 1099G filings for refunds issued).

Disclosure and access will be granted only if the laws, regulations or practices of the other jurisdiction maintain the confidentiality of this information at least to the extent provided by the Business Income Tax Law or Personal Income Tax Law, as applicable.

- (b) Upon request of a taxfiler, or authorized representative, the Administrator will provide copies of any tax return information filed by the taxfiler in the Administrator's possession to the taxfiler or authorized representative.
- (c) If a court of competent jurisdiction issues a court order requiring the disclosure of a taxfiler's tax return information, the Administrator will comply with the terms of that court order after providing written notice to the taxfiler at taxfiler's last known address.
- (d) The Administrator may also disclose and give access to information described in Section 7.05.090 to:

1. The Metro Attorney, the Attorney's assistants and employees, or other legal representatives of Metro, to the extent disclosure or access is necessary for the performance of the duties of advising or representing Metro.
  2. The Administrator's Attorney, the Attorney's assistants and employees, or other legal representatives of the Administrator, to the extent the Administrator deems disclosure or access necessary for the performance of the duties of advising or representing the Administrator, including but not limited to instituting legal actions on unpaid accounts.
  3. Other Metro employees and agents, to the extent disclosure or access is necessary for such employees or agents to perform their duties regarding or under contracts or agreements between Metro and the Administrator.
  4. The Administrator's employees, agents and officials, to the extent the Administrator deems disclosure or access necessary for such employees, agents or officials to:
    - A. Aid in any legal collection effort on unpaid accounts;
    - B. Perform their duties under contracts or agreements between the Administrator and Metro or between the Administrator and any other department, bureau, agency or subdivision of the Administrator relating to the administration of the Metro Income Tax Laws; or
    - C. Aid in determining whether a Metro Income Tax Law account is in compliance with all City, County, State and Federal laws or policies.
- (e) All employees and agents specified in Section 7.05.100(d) above, prior to the performance of duties involving access to financial information submitted to Metro or the Administrator under the terms of the Personal Income Tax Law or Business Income Tax Law, must be advised in writing of Section 7.05.240 relating to penalties for the violation of Sections 7.05.090 and 7.05.100. Such employees and agents must execute a certificate in a form prescribed by the Chief Operating Officer or Administrator, stating that the person has reviewed these provisions of law, has had them explained, and is aware of the penalties for the violation of Sections 7.05.090 and 7.05.100.
- (f) No person described in subsection (a) to whom disclosure or access to financial information has been given may make a disclosure under this section unless that person:
1. Is advised in writing of Section 7.05.240 relating to penalties for the violation of Section 7.05.090; and
  2. Executes a certificate in a form prescribed by the Chief Operating Officer or Administrator, stating these provisions of law have been reviewed and that person is aware of the penalties for the violation of Section 7.05.090. The Chief Operating



Officer's or Administrator's signature on the certificate, required by this subsection, constitutes consent to disclosure to the persons executing the certificate.

- (g) Any person that violates this section may be subject to criminal penalties as set forth in Section 7.05.240.

#### **7.05.110 Taxfiler Representation**

Third parties, such as attorneys or certified public accountants, may represent taxfilers before the Administrator. The Administrator may establish procedures for taxfilers to authorize a third party to represent the taxfiler, which may include a written authorization submitted to the Administrator. The Administrator is not required to recognize a third party who claims to represent a taxfiler if that third party does not comply with the established procedures.

#### **7.05.120 Representation Restrictions**

- (a) No employee or official of Metro, the Administrator, or any public agency authorized to collect taxes imposed by this chapter may represent any taxfiler in any matter before the Administrator. This restriction against taxfiler representation continues for two years after termination of employment or official status.
- (b) Members of the appeals board may not represent a taxfiler before the appeals board. No member of the appeals board may participate in any matter before the board if the appellant is a client of the member or the member's firm.

#### **7.05.130 Information Request; Examination of Books, Records or Persons**

- (a) The Administrator may require a taxfiler to produce documents. The Administrator may also examine any books, papers, records, or memoranda, including State and Federal income or excise tax returns, to ascertain the correctness of any tax return or to make an estimate of any tax. The Administrator has the authority, after notice, to:
1. Require the attendance of any person required to file a tax return under the Metro Income Tax Laws, or officers, agents, or other persons with knowledge of the person's business operations, at any reasonable time and place the Administrator may designate;
  2. Take testimony, with or without the power to administer oaths to any person required to be in attendance; and
  3. Require proof for the information sought, necessary to carry out the provisions of this

chapter.

- (b) The Administrator will designate the employees who have the power to administer oaths under this section.

#### **7.05.135 Subpoena Powers**

- (a) The Administrator may subpoena and examine witnesses, administer oaths, and require the production of any books or papers in the hands of any person, company or corporation, whenever necessary for the prosecution of any inquiries deemed necessary or proper.
- (b) If any person fails to comply with any subpoena of the Administrator or refuses to testify when the Administrator requires that person to testify, the Administrator may apply to a court of competent jurisdiction for an order to the person to produce the books and papers or attend and testify, or otherwise comply with the demand of the Administrator.
- (c) The Administrator will apply to the court by ex parte motion, upon which the court will make an order requiring the person against whom it is directed to comply with the Administrator's request or demand within 10 days after the service of the order, or within the additional time granted by the court, or to justify the failure within that time. The order will be served upon the person to whom it is directed in the manner required by the State of Oregon or other applicable jurisdiction for service of process, which is required to confer jurisdiction upon the court.
- (d) Upon petition of the person subpoenaed, the court will make an order determining if the evidence sought by the subpoena is relevant to the pending proceeding and, if requested by the person subpoenaed, an order as required in the interests of justice to protect the confidentiality of the information subpoenaed. Upon failure of the subpoenaed person to show cause for noncompliance, the court will make an order requiring the person to comply with the demand of the Administrator within such time as the court directs.
- (e) Failure to obey any order issued by the court under this section is contempt of court. The remedy provided by this section is in addition to other remedies, civil or criminal, that may exist.
- (f) The Administrator will designate the employees who have the power to administer oaths under this section.

#### **7.05.140 Taxfiler Records Retention**

Every person required to file a return under the Business Income Tax Law or Personal Income

Tax Law must keep and preserve for not less than seven years such documents and records, including State and Federal income and excise tax returns, accurately supporting the information reported on the taxfiler's return and calculation of tax for each year.

#### **7.05.150 Deficiencies and Refunds**

- (a) The Administrator may assess deficiencies and grant refunds any time within the periods set forth for deficiencies or refunds under ORS Chapter 314. The Administrator may by agreement with the taxfiler extend the time periods to the same extent as provided by statute.
- (b) When no tax return has been filed, there is no time limit for a notice of deficiency or the assessment of taxes, penalty and interest due.
- (c) Notwithstanding subsections (a) and (b), the Administrator is not required to accept any tax return for any tax period from a taxfiler if:
  - 1. The Administrator obtains a money judgment against the taxfiler for failure to pay an unpaid account balance due; and
  - 2. The Administrator or its designee lawfully served the taxfiler with the lawsuit pursuant to the Oregon Rules of Civil Procedure; and
  - 3. The tax return is for a taxable year that is the subject of the general money judgment; and
  - 4. The Administrator gave written notice stating that the taxfiler had an outstanding balance due at least 30 days before the Administrator (or its designee) filed a lawsuit for those particular taxable years.

#### **7.05.160 Protests and Appeals; Penalty Waiver**

- (a) A taxfiler may protest any determination by the Administrator. The Administrator must receive written notice of the protest within 30 days after the Administrator mailed or delivered the notice of determination to the taxfiler. The protest must state the name and address of the taxfiler and an explanation of the general grounds for the protest. The Administrator must respond within 30 days after the protest is filed with either a revised determination or a final determination. The Administrator's determination must include the reasons for the determination and state the time and manner for appealing the determination. The time to file a protest or the time for the Administrator's response may be extended by the Administrator for good cause. Requests for extensions of time must be

received before the original 30-day protest deadline expires. The Administrator will give written notice to the taxfiler if the Administrator's deadline is extended.

(b) A taxfiler may appeal any final determination by the Administrator to the appeals board. The Administrator must receive written notice of the appeal within 30 days after the Administrator mailed or delivered the final determination to the appellant. The notice of appeal must state the name and address of the appellant and include a copy of the final determination.

(c) Within 90 days after the Administrator mails or delivers the final determination to the appellant, the appellant must file with the appeals board a written statement containing:

1. The reasons the Administrator's determination is incorrect; and
2. What the correct determination should be.

Failure to file this a written statement within the time permitted is a waiver of any objections, and the appeal will be dismissed.

(d) Within 150 days after the Administrator mails or delivers the final determination to the appellant, the Administrator will file with the appeals board a written response to the appellant's statement. A copy of the Administrator's response must be mailed to the address provided by the appellant within 10 days after the Administrator files it with the appeals board.

(e) The Administrator must provide the appellant written notice of the hearing date and location at least 14 days before the hearing. The appellant and the Administrator may present relevant testimony, evidence, and oral argument at the hearing. The appeals board may request additional written comment and documents as the board deems appropriate.

(f) Decisions of the appeals board must be in writing, state the basis and legal authority for the decision and be signed by the appeals board chair.

(g) The decision of the appeals board is final as of the issue date and no further administrative appeal will be provided.

(h) The filing of an appeal with the appeals board temporarily suspends the obligation to pay any tax that is the subject of the appeal pending a final decision by the appeals board.

(i) Penalty waiver or reduction requests are not subject to the protest/appeal process or timeline outlined in subsections 7.05.160(a) through 160(h). The taxfiler must file a written request with the Administrator detailing why a penalty should be waived within 30 days of receipt of a billing notice that assesses a penalty. The Administrator must respond to requests to reduce or waive penalties within 60 days from the date the written request is

received. As provided in subsections 7.05.260(f) and 7.05.270(e), the Administrator may waive or reduce penalties in certain situations. If the taxfiler has requested that penalties be waived and the Administrator denies the taxfiler's request for this discretionary waiver of penalties, the taxfiler may request a conference with the Administrator (or Administrator's designee) within 30 days of the date of the Administrator's notice of denial. If the conference with the Administrator results in a denial of the penalty waiver request, that decision is final and may not be appealed to the Appeals Board.

#### **7.05.170 Return Due Date; Extensions**

- (a) Tax returns must be on forms provided or approved by the Administrator. All tax returns must be filed together with payment of the specified tax by the fifteenth day of the fourth month following the end of the tax year. If the due date falls on a weekend or Federal or State holiday, the due date is the first business day following the weekend or holiday. With respect to the Business Income Tax Law, for cooperatives and non-profit corporations that have later due dates under Oregon tax law, the due date for filing tax returns with the Administrator must conform to the due date under Oregon tax law.
- (b) The Administrator may, for good cause, grant extensions for filing returns. However, no extension may be granted for more than six months beyond the initial due date. This extension does not extend the time to pay the tax. Payments made after the due date may be subject to interest and penalties as provided in this chapter.
- (c) The tax return must contain a written declaration, verified by the taxfiler, to the effect that the statements made therein are true.
- (d) The Administrator will prepare blank tax returns and make them available upon request. Failure to receive a form does not relieve any person from the obligation to pay a tax under either the Business Income Tax Law or Personal Income Tax Law.

#### **7.05.180 Payment of Estimated Tax**

- (a) Every taxfiler expecting to have a tax liability under Chapter 7.06 or Chapter 7.07 of \$1,000 or greater must estimate and pay the taxfiler's tax liability for the current tax year as follows:
  - 1. Quarterly payments as provided in Section 7.05.190; or
  - 2. Employer provided withholding from taxfiler's wages as provided in Section 7.06.120.

- (b) If a taxfiler is required to remit estimated tax payments, such amounts remitted must total either the lesser of ninety percent of the taxfiler's current year tax liability or one hundred percent of the taxfiler's reported prior year tax liability.
- (c) The Administrator will not impose underpayment interest for failure to make quarterly estimated payments for tax year 2021 (tax year beginning on or after January 1, 2021). For tax years beginning on or after January 1, 2022, the Administrator will impose penalties and interest as provided in this chapter.

#### **7.05.190 Schedule for Payment of Estimated Tax**

- (a) A taxfiler required under Section 7.05.180 to make payments of estimated tax must make the payments in installments as follows:
  - 1. One quarter or more of the estimated tax on or before the fifteenth day of the fourth month of the tax year;
  - 2. One quarter or more of the estimated tax on or before the fifteenth day of the sixth month of the tax year;
  - 3. One quarter or more of the estimated tax on or before the fifteenth day of the ninth month of the tax year; and
  - 4. For business income taxfilers, the balance of the estimated tax must be paid on or before the fifteenth day of the twelfth month of the tax year;
  - 5. For personal income taxfilers, the balance of the estimated tax must be paid on or before the fifteenth day of the first month of the subsequent tax year.
- (b) Any payment of the estimated tax received by the Administrator for which the taxfiler has made no designation of the quarterly installment to which the payment is to be applied, will first be applied to underpayments of estimated tax due for any prior quarter of the tax year. Any excess amount will be applied to the installment that next becomes due after the payment was received.

#### **7.05.200 Tax Return Payment; Minimum**

- (a) Business Income Tax. Each business income tax return must be accompanied by a tax payment at the rate established in Metro Code Section 7.07.030, provided that each tax return must be accompanied by a minimum tax of \$100. The minimum payment may have previously been paid by quarterly payments, an extension payment, or credit available from a prior tax year.

- (b) Personal Income Tax. Each personal tax return must be accompanied by a tax payment at the rate established in Metro Code Section 7.06.040.

#### **7.05.210 Payment Plan; Fee**

If a person fails to pay the Business Income Tax or Personal Income Tax when due, the Administrator may establish a payment plan pursuant to written policy. The Administrator may charge a setup fee for each payment plan established.

#### **7.05.220 Settlement Offers and Agreements**

- (a) The Administrator may, upon good and sufficient cause, make settlement agreements with taxfilers in the recomputation of taxes payable or in the collection of those taxes. These agreements must be consistent with ORS 305.150 and 305.155 and corresponding OARs. The Administrator will provide applications for settlement offers to taxfilers proposing settlement offers.
- (b) In addition to the general power granted under this section, the Administrator may, upon a showing of good and sufficient cause, grant a taxfiler's request when the Oregon Department of Revenue has granted relief to a taxfiler under ORS 316.368 or ORS 316.369. In such case, a taxfiler who is granted relief will be treated as a single taxfiler for purposes of the tax imposed under this Chapter.

#### **7.05.230 Changes to Federal or State Tax Returns**

- (a) If a taxfiler's reported income under applicable State laws imposing a tax on or measured by income is changed by the Federal Internal Revenue Service or the State Department of Revenue, or amended by the taxfiler to correct an error in the original Federal or State return, the taxfiler must file a report of that change with the Administrator within 60 days after the date of the notice of the final determination of change or after an amended return is filed with the Federal or State agencies. The report must be accompanied by an amended tax return with respect to such income and by any additional tax, penalty, and interest due.
- (b) The Administrator may assess deficiencies and grant refunds resulting from changes to any relevant Federal, State or local income tax return within the time periods provided for in Section 7.05.150, treating the report of change in Federal, State or business income tax return as the filing of an amended tax return.
- (c) The Administrator may assess penalties and interest on the additional tax due as provided in Sections 7.05.260, 7.05.270, and 7.05.280 or may refuse to grant a refund of taxes as a

result of the amended return if the amended return is not filed with the Administrator within the time limits set forth in subsection (a).

#### **7.05.240 Criminal Penalties**

A violation of Section 7.05.090 or Section 7.05.100 is punishable, upon conviction thereof, by a fine not exceeding \$500 or by imprisonment for a period not exceeding six months, or by both fine and imprisonment. In addition, any Metro employee convicted for violation of Section 7.05.090 or Section 7.05.100 is subject to possible dismissal from employment and a possible prohibition from employment for a period of five years thereafter. Any agent of Metro who is convicted is ineligible for participation in any Metro contract for a period of five years thereafter.

#### **7.05.250 Civil Penalty for Unauthorized Access of Tax Information**

(a) Definitions. As used in this section, the following definitions apply:

*Computer Database* means any computer application(s) used by the Administrator to calculate or store business, personal, and financial data collected under the authority granted by Metro Income Tax Laws.

*Loss* means any reasonable cost incurred by Metro or the Administrator, including but not limited to the cost of responding to an offense, conducting a damage assessment, and restoring the data, program, system, or information to its condition prior to the offense, and any revenue lost, cost incurred, or other consequential damages incurred because of interruption of service.

(b) Any individual who intentionally accesses the Computer Database without authorization will be fined:

1. \$10,000 if the individual acquires any information regarding any business or personal account found in the Computer Database;
2. \$10,000 or the cost of the loss (whichever is greater) if the individual uses or attempts to use the acquired information for financial gain of any kind; or
3. \$10,000 or the cost of the loss (whichever is greater) if the individual causes the transmission of a program, information, code, or command to the Computer Database, and, as a result of such conduct, causes damage to the Computer Database.

#### **7.05.260 Penalties for Violations of Business Income Tax Law**



(a) A penalty will be assessed if a person:

1. Fails to file a tax return or extension request at the time required under Section 7.05.170(a) or 7.05.230(a); or
2. Fails to pay a tax when due.
3. The penalty under subsection (a) is:
  - A. Five percent of the total tax liability if the failure is for a period less than four months;
  - B. An additional penalty of twenty percent of the total tax liability if the failure is for a period of four months or more; and
  - C. An additional penalty of one hundred percent of the total tax liability of all tax years if the failure to file is for three or more consecutive tax years.

(b) A penalty will be assessed if a person who has filed an extension request:

1. Fails to file a tax return by the extended due date; or
2. Fails to pay the tax liability by the extended due date.
3. The penalty under subsection (b) is:
  - A. Five percent of the total tax liability if the failure is for a period of less than four months; and
  - B. An additional penalty of twenty percent of the total tax liability if the failure is for a period of four months or more.

(c) A penalty will be assessed if a person:

1. Fails to pay at least ninety percent of the total tax liability by the original due date; or
2. Fails to pay at least one hundred percent of the prior year's total tax liability by the original due date.
3. The penalty under subsection (c) is five percent of the tax underpayment, but not less than \$5.

- (d) The Administrator may impose a civil penalty of up to \$500 for each of the following violations of this chapter:
1. Failure to file any tax return within 60 days of the Administrator's original written notice to file; or
  2. Failure to pay any tax within 60 days of the Administrator's original written notice for payment; or
  3. Failure to provide either documents or information as required by this chapter or Chapter 7.07 within 60 days of the Administrator's original written notice to provide the documents or information; or
  4. Failure to fully complete any form required under the Business Income Tax Law; or
  5. Failure to fully comply with the requirements of any section of Chapter 7.05 or Chapter 7.07 unless the section has a separate penalty calculation.
- (e) The Administrator may impose a civil penalty under subsection (d) only if the Administrator gave notice of the potential for assessment of civil penalties for failure to comply or respond in the original written notice.
- (f) The Administrator may waive or reduce any penalty determined under subsections (a) through (d) for good cause, according to and consistent with written policies.
- (g) Frivolous Return Position. If the Administrator determines that taxfiler has taken a frivolous position in preparing the taxfiler's tax return, the Administrator will add a \$500 penalty to the amount of tax required to be shown on the tax due under this chapter or Chapter 7.07. For purposes of this subsection, a tax return position is considered frivolous if a taxfiler does not provide information on which the substantial correctness of the self-assessment may be judged or if the tax return contains information that on its face indicates that the self-assessment is substantially incorrect. Examples of "frivolous positions" as provided in Oregon Administrative Rule 150-316-0652(2) are adopted by direct reference, but are not a definitive list of those positions.
- (h) The provisions set forth in Metro Code Chapter 2.03 do not apply with respect to any penalty that maybe be assessed under this chapter or the Business Income Tax Law.

#### **7.05.270 Penalties for Violations of Personal Income Tax Law**

The Administrator will assess the following penalties upon personal income taxfilers:

- (a) Failure to File a Return; Failure to Pay Tax When Due. If a taxfiler fails to file a return or fails to pay a tax by the date on which the filing or payment is due, the Administrator will add a delinquency penalty of:
1. Five percent of the amount of the unpaid tax if the failure is for a period less than four months;
  2. An additional penalty of twenty percent of the unpaid tax if the failure is for a period of four months or more; and
  3. An additional penalty of one hundred percent of the unpaid tax of all tax years if the failure to file is for three or more consecutive tax years.
  4. For purposes of this section, unpaid tax is the taxfiler's tax liability reduced by payment of tax and any credit against tax that is claimed on the return.
- (b) Underpayment of Tax. A penalty will be assessed if a person:
1. Fails to pay at least ninety percent of the total tax liability by the original due date; or
  2. Fails to pay at least one hundred percent of the prior year's total tax liability by the original due date.
  3. The penalty under subsection (b) is five percent of the tax underpayment, but not less than \$5.
- (c) Intent to Evade. If a taxfiler fails to file a return with the intent to evade the tax imposed under this chapter or Chapter 7.06, or a taxfiler prepares or causes to be prepared a return and files that return with the intent to evade the tax imposed under this chapter or Chapter 7.06, the Administrator will impose a penalty in the amount of one hundred percent of any deficiency that the Administrator determines is due.
- (d) Substantial Understatement of Tax. If the Administrator determines that there is a substantial understatement of tax due under this chapter or Chapter 7.06, the Administrator will add to the amount of tax required to be shown on the return a penalty equal to twenty percent of the amount of any underpayment of tax attributable to the understatement.
1. For purposes of this subsection, a substantial understatement of tax exists if the amount of the understatement exceeds \$1,000 of tax otherwise due.
  2. In the case of any item attributable to an abusive tax shelter: no reduction of the amount of the understatement will be made with regard to that item regardless of the existence of substantial authority for the treatment of the item by the taxfiler; and, no

reduction of the amount of the understatement will be made with regard to that item regardless of the disclosure of the facts affecting the tax treatment of the item unless, in addition to the disclosure, the Administrator determines in the Administrator's sole discretion, that the taxfiler reasonably believed that the tax treatment of the item was more likely than not the proper treatment. This chapter expressly adopts the definitions contained in ORS 314.402 and the administrative rules thereunder.

3. The Administrator may waive all or any part of the penalty imposed under this subsection on a showing by the taxfiler that there was reasonable cause for the understatement or any portion thereof, and that the taxfiler acted in good faith.
- (e) Frivolous Return Position. If the Administrator determines that taxfiler has taken a frivolous position in preparing the taxfiler's tax return, the Administrator will add a \$500 penalty to the amount of tax required to be shown on the tax due under this chapter or Chapter 7.06. For purposes of this subsection, a tax return position is considered frivolous if a taxfiler does not provide information on which the substantial correctness of the self-assessment may be judged or if the tax return contains information that on its face indicates that the self-assessment is substantially incorrect. Examples of "frivolous positions" as provided in Oregon Administrative Rule 150-316-0652(2) are adopted by direct reference, but are not a definitive list of those positions.
- (f) Failure of Administrative Compliance. The Administrator may impose a penalty of up to \$500 for the following violations of this chapter:
1. Failure to file any tax return within 60 days of the Administrator's original written notice to file;
  2. Failure to pay any tax within 60 days of the Administrator's original written notice for payment;
  3. Failure to provide either documents or information as required by this chapter or Chapter 7.06 within 60 days of the Administrator's original written notice to provide the documents or information;
  4. Failure to fully complete any form required under the Personal Income Tax Law; or
  5. Failure to fully comply with the requirements of any section of Chapter 7.05 or Chapter 7.06 unless the section has a separate penalty calculation.

The Administrator may impose a civil penalty under this subsection only if the Administrator gave notice of the potential for assessment of civil penalties for failure to comply or respond in the original written notice. The Administrator may waive all or any part of the penalty imposed under this paragraph on a showing by the taxfiler that there was

reasonable cause for the Failure of Administrative Compliance, and that the taxfiler acted in good faith.

- (g) Penalties cumulative. Each penalty imposed under this section is in addition to any other penalty imposed under this section.
- (h) The provisions set forth in Metro Code Chapter 2.03 do not apply with respect to any penalty that maybe be assessed under this chapter or the Personal Income Tax Law.

#### **7.05.280 Interest**

- (a) Interest will be assessed on any unpaid tax at the rate in subsection (c), computed from the original due date of the tax to the fifteenth day of the month following the date of payment.
- (b) Interest will be assessed on any unpaid or underpaid quarterly estimated payment required by Section 7.05.180 and Section 7.05.190 at the rate in subsection (c), computed from the due date of each quarterly estimated payment to the original due date of the tax return to which the estimated payments apply.
- (c) Unless specifically provided otherwise by administrative rule as provided in subsection (d), the interest rate is 0.833% simple interest per month or fraction thereof (ten percent per annum).
- (d) If the Administrator determines that the interest rate provided in subsection (c) is at least one percentage point more or less than the effective interest rate on January 1 charged by the State of Oregon Department of Revenue, the Administrator may adjust the interest rate by administrative rule to match the State of Oregon Department of Revenue interest rate. The Administrator may not adjust the interest rate more than once in a calendar year. The adjusted interest rate applies to unpaid tax or underpaid estimated payments outstanding on or after the effective date of the adjusted interest rate.
- (e) Notwithstanding subsection (b), there is no interest on underpayment of quarterly estimated payments if:
  - 1. The total tax liability of the prior tax year was less than \$1,000;
  - 2. An amount equal to at least ninety percent of the total tax liability for the current tax year was paid in accordance with Section 7.05.190; or
  - 3. An amount equal to at least one hundred percent of the prior year's total tax liability was paid in accordance with Section 7.05.190.

- (f) For purposes of subsection (b), the amount of underpayment is determined by comparing ninety percent of the current total tax liability amount to quarterly estimated payments made prior to the original due date of the tax return. However, if one hundred percent of the prior year's total tax liability is paid to the Administrator by the due date of the fourth quarterly payment, the Administrator may use the prior year's tax liability if doing so will reduce the amount of interest owed.
- (g) For purposes of subsection (a), the amount of tax due on the tax return will be reduced by the amount of any tax payment made on or before the date for payment of the tax in accordance with Section 7.05.170(a) or Section 7.05.190.
- (h) Interest at the rate specified in subsection (a) accrues from the original due date without regard to any extension of the filing date.
- (i) Any interest amounts properly assessed in accordance with this section may not be waived or reduced by the Administrator, unless specifically provided for by written policy.

#### **7.05.290 Payments Applied**

Tax payments received will be applied first to any penalty accrued, then to interest accrued, then to taxes due, unless the Administrator determines in accordance with its written policies that a more equitable method exists for a particular taxfiler's account. The Administrator will apply tax payments received without a designation for a specific period to the oldest periods first in the order set forth above.

#### **7.05.300 Interest on Refunds**

When a taxfiler is entitled to a refund of a portion or all of a tax paid to the Administrator, the taxfiler will receive simple interest on that amount at the rate specified in Section 7.05.280(c), subject to the following:

- (a) Any overpayments will be refunded with interest for each month or fraction thereof for a period beginning four months after the later of:
  - 1. The due date of the tax return;
  - 2. The date the tax return was filed or the refund was otherwise requested; or
  - 3. The date the tax was paid, to the date of the refund.
- (b) Any overpayments of taxes that are the result of an amended return being filed will be refunded with interest for each month or fraction thereof for the period beginning four

months after the date the taxfiler filed the amended return. This subsection applies to tax returns that are amended due to a change to any relevant Federal, State or local income tax return.

**7.05.310 Accountability of Funds; Audits**

- (a) Every year a public accounting firm must conduct a financial audit of the revenue generated by the Business Income Tax and Personal Income Tax Laws and the distribution of that revenue. Metro will make the audit public as well as any report to the Metro Council regarding the results of the audit. Metro may use the revenue generated by the taxes to pay for the costs of the audit required under this section.
- (b) The revenue and expenditures from the taxes are subject to performance audits conducted by the Office of the Metro Auditor.

**7.05.320 Severability**

If a court of competent jurisdiction finds that any part, section or provision of this chapter is unconstitutional, illegal or invalid, that finding affects only that part, section or provision of the chapter and the remaining parts, sections or provisions remain in full force and effect.

**CHAPTER 7.06**

**PERSONAL INCOME TAX**

<b>Section</b>	<b>Title</b>
7.06.010	Title
7.06.020	Administration of Personal Income Tax Law
7.06.030	Definitions
7.06.040	Personal Income Tax Imposed; Filing Status
7.06.050	Effective Date and Reauthorization; Term
7.06.060	Tax Exemptions
7.06.070	Individuals Required to File a Tax Return
7.06.080	Taxfiler Identification Number
7.06.090	Deduction for Pass-through Income
7.06.100	Proration of Income for Part Year Residents
7.06.110	Overpayments of Personal Income Tax
7.06.120	Withholding Tax on Wages
7.06.130	Withholding Reconciliation by Employer for Payment of Withheld Tax
7.06.140	Final Tax Returns(s) of Deceased Taxfiler
7.06.150	Severability



### **7.06.010 Title**

This chapter is known and may be cited as the Metro Personal Income Tax Law.

### **7.06.020 Administration of Personal Income Tax Law**

The Personal Income Tax Law will be administered under the provisions set forth in this chapter and Metro Code Chapter 7.05, as applicable.

### **7.06.030 Definitions**

For purposes of this chapter, the terms used are defined as provided in Chapter 7.05, unless the context requires otherwise.

### **7.06.040 Personal Income Tax Imposed; Filing Status**

- (a) A tax of one percent is imposed on the entire Oregon Taxable Income of every resident of the District subject to tax under ORS chapter 316. Taxfilers that file a joint Metro return may exempt the first \$200,000 of taxable income; taxfilers that file a single Metro return may exempt the first \$125,000 of taxable income.
- (b) A tax of one percent is imposed upon the Metro Taxable Income of every nonresident of the District subject to tax under ORS chapter 316. Taxfilers that file a joint Metro return may exempt the first \$200,000 of taxable income; taxfilers that file a single Metro return may exempt the first \$125,000 of taxable income.
- (c) Taxfiler filing status must follow the filing status of the taxfiler's Oregon income tax return.
  - 1. Taxfilers using Oregon filing statuses married filing jointly, head of household and qualifying widow(er) must file a joint Metro return.
  - 2. Taxfilers using Oregon filing statuses single and married filing separately must file a single Metro return.

### **7.06.050 Effective Date and Reauthorization; Term**

- (a) The Metro Personal Income Tax takes effect in Tax Year 2021 (Tax Year beginning on or after January 1, 2021).

- (b) The Metro Personal Income Tax will remain in effect for all periods through Tax Year 2030 (Tax Year beginning on or after January 1, 2030).
- (c) After Tax Year 2030, the tax will expire unless reauthorized by Metro voters on or before that date. After the tax expires, Metro or the entity authorized to collect the Personal Income Tax may continue to take all reasonable and necessary actions to ensure that taxes still owing are paid in full.

#### **7.06.060 Tax Exemptions**

- (a) Exemptions Required by Law. A person whom Metro is prohibited from taxing under the Constitution or laws of the United States, the Constitution or laws of the State of Oregon or the Metro Charter is exempt from payment of the tax set forth in this chapter.
- (b) Notwithstanding the exemptions listed in subsection (a), the Administrator may require the filings of tax returns or other documentary verification of any exemption claimed under this section.

#### **7.06.070 Individuals Required to File a Tax Return**

- (a) Every resident of the District who is required to file an Oregon income tax return for the taxable year and who reports Oregon Taxable Income over \$200,000 using Oregon filing status married filing jointly, head of household or qualifying widow(er), or over \$125,000 using Oregon filing status single or married filing separately is required to file a Metro Personal Income Tax return.
- (b) Every nonresident of the District who is required to file an Oregon income tax return for the taxable year and who reports Metro Taxable Income over \$200,000 using Oregon filing status married filing jointly, head of household or qualifying widow(er), or over \$125,000 using Oregon filing status single or married filing separately is required to file a Metro Personal Income Tax return.
- (c) Nothing contained in this section precludes the Administrator from requiring any individual to file a return when, in the judgment of the Administrator, the individual should file a return.
- (d) The Administrator will release the form that the taxfiler must file. The Administrator may accept substitute forms (such as created by tax software) provided the forms include identical information in comparable format as provided on the Metro tax return form.
- (e) A copy of the taxfiler's Oregon tax return is required to be filed with the tax return. If the personal income tax has been withheld from wages, a copy of Form W-2 is required to be

filed with the Personal Income Tax return unless otherwise notified by the Administrator. The Administrator is authorized to require a taxfiler to submit additional information with the taxfiler's report if, in the Administrator's sole discretion, such information is necessary to effectively administer the tax imposed under this chapter.

#### **7.06.080 Taxfiler Identification Number**

- (a) A taxfiler must provide information on tax records as required on and forms established by the Administrator. This includes tax returns, refund claims, applications, registrations, records, requests for information, reports, and other items of a similar nature filed with the Administrator as required by the item being filed.
- (b) The Administrator uses Tax Identification Numbers as a part of providing expeditious and practicable processing systems in the administration of the laws by the Administrator, including (but not limited to) such matters as the issuance of tax refunds, allocation or application of incoming tax payments and other matters of a similar nature. The Administrator may require a taxfiler to provide a copy of the taxfiler's social security card.
- (c) A social security number used as a taxfiler identification number is confidential information. Disclosure of social security numbers resulting in a breach of confidentiality will result in penalties pursuant to Metro Code Section 7.05.240.

#### **7.06.090 Deduction for Pass-through Income**

- (a) A taxfiler is allowed a deduction from taxable income for pass-through income subject to tax under Metro Chapter 7.07 Business Income Tax. Pass-through income comes from a business whose net income is taxed on the owners' or partners' personal tax returns. This includes, but is not limited to, entities taxed as partnerships and S-corporations.
- (b) The deduction amount allowed in subsection (a) is the individual owners' or partners' distributive share of taxable income on the Metro Business Income Tax return, as calculated and reported to the owner or partner by the business.
- (c) If the taxable income per the Metro Business Income Tax return is zero, the taxfiler is not allowed a deduction.

#### **7.06.100 Proration of Income for Part-Year Residents**

If a taxfiler is a part-year resident of the District for the tax year at issue, the taxfiler's taxable income includes:

- (a) For the portion of the year in which the taxfiler was a resident of Metro, the taxfiler's Oregon Taxable Income;
- (b) For the portion of the year in which the taxfiler was a nonresident, the taxfiler's Metro Taxable Income.

#### **7.06.110 Overpayments of Personal Income Tax**

The Administrator will apply overpayments of the personal income tax in the following manner:

- (a) Overpayments will first be applied against any outstanding balances due from prior years (with the net overpayment, if any, to be refunded).
- (b) If the Administrator determines that prior Metro tax returns were due but have not yet been filed, overpayments will be transferred to the prior year(s) yet to be filed.
- (c) If the Administrator determines that no outstanding balances are due and no prior returns are outstanding, the Administrator will refund all overpayments.

#### **7.06.120 Withholding Tax on Wages**

##### **(a) Employer Withholding from Employee Wages.**

1. Beginning January 1, 2021 withholding will be voluntary. However, an employer must offer to its employees in writing to withhold the Metro personal income tax from the employees' wages as soon as the employer's payroll system(s) can be configured to capture and remit the taxes withheld.
2. Beginning January 1, 2022, and each year thereafter, withholding is mandatory for all employees that work in the Metro District and earn \$200,000 or more during the calendar year. This applies to residents and nonresident employees.
3. An employee below the \$200,000 earning threshold in subsection (2) may choose to "opt in" to withholding with the employer, based on the employee's tax situation. An employee who meets the mandatory withholding criteria in subsection (2) may choose to "opt out" of withholding by the employer based on the employee's tax situation. The Administrator will provide guidance to employers on the information a taxfiler (employee) must provide to taxfiler's employer to "opt in" or "opt out" of withholding. Once provided, the employer must honor the employee's withholding election until notified of a change.

4. An employer must provide all "opt out" information to the Administrator on an annual basis in such form as the Administrator prescribes or upon a withholding audit by the Administrator.

- (b) Due Date of Withheld Taxes to Administrator by Employer. An employer who withholds the Personal Income Tax from employee payroll must remit the withheld amounts to the Administrator within the time that each employer is required to remit taxes withheld for state income tax purposes for any period.

Withheld amounts remitted to the Administrator must be accounted for as part of the collections under this section. No employee has any right of action against an employer in respect of any moneys deducted from wages and remitted in compliance or intended compliance with this section.

- (c) Personal Liability of Responsible Officers, Partners, Members, or Employees. If an employer withholds amounts due under this chapter from an employee's wages with proper authorization from the employee, the employer must remit that withheld tax on the due date as set forth in subsection (b). This chapter provides no extension of time, nor can the Administrator grant an extension. The employer holds the funds involved in trust for Metro, and any use of the funds by the employer is an illegal conversion.

1. When an employer fails to remit in whole or in part any tax withheld at the time required under this section, the Administrator will assess a late payment penalty. The penalty is:
  - A. Five percent of the balance of the tax paid after the original due date if the failure to remit is for a period less than or equal to four months;
  - B. An additional 20 percent of the balance of the tax paid after the original due date if the failure to remit is for a period greater than four months; and,
  - C. An additional penalty of 100 percent of the balance of the tax paid after the original due date of all tax years if the failure to remit is for three or more consecutive tax years.

The Administrator may waive all or any part of the penalty imposed under this subsection on a showing by the employer that there was reasonable cause for the failure to remit the withheld taxes or any portion of the withheld taxes and that the employer acted in good faith.

2. If an employer fails to remit to the Administrator amounts that have been withheld under this section, any Responsible Officer, Partner, Member, or Employee of the employer is personally responsible for the amounts that were withheld but not remitted. A Responsible Officer, Partner, Member, or Employee is included in the definition of "employer." This subsection specifically adopts the criteria set forth in OAR 150-316-0243(2) and (3) to determine whether an individual is a Responsible Officer, Partner, Member, or Employee.

3. The Administrator is authorized to collect from the Employer, including any individuals who are included in the definition of employer, pursuant to subsection 2 above, or any combination thereof, up to 100 percent of the tax that was withheld but not remitted to the Administrator. In addition, the employer is subject to interest for unpaid taxes as set forth in Chapter 7.05.
- (d) Credit for Tax Withheld. If the tax has actually been withheld by an employer and reported to the Administrator, credit or refund will be made to the employee even though the employer has not paid the tax to the Administrator. When the employer has neither reported nor paid the tax required to be withheld from an employee's wages but the employee submits evidence proving to the satisfaction of the Administrator that the employer actually did withhold the tax, the Administrator will allow the employee credit or refund for the amount so proved. Ordinarily, minimum satisfactory evidence will consist of a pay statement from the employer showing the amount of tax withheld and an affidavit of the employee as to the facts upon which the claim for credit or refund is based.

#### **7.06.130 Withholding Reconciliation by Employer for Payment of Withheld Tax**

- (a) Quarterly Withholding Reconciliation. On or before the last day of the month following the quarter in which withholdings pursuant to 7.06.120(a) have been made, the employer must file a quarterly tax report.
- (b) Annual Withholding Reconciliation. On or before the last day of January following any calendar year in which withholdings pursuant to 7.06.120(a) have been made, the employer must file with the Administrator a reconciliation of taxes withheld and taxes remitted.
- (c) The Administrator will determine by administrative rule the required format and information necessary to comply with subsections (a) and (b) above.

#### **7.06.140 Final Tax Return(s) of Deceased Taxfiler**

The Administrator may grant a fiduciary's request or enter into a settlement agreement with respect to the estates of decedents that are consistent with ORS 316.387 and corresponding Oregon Administrative Rules.

#### **7.06.150 Severability**

If a court of competent jurisdiction finds that any part, section or provision of this chapter is unconstitutional, illegal or invalid, that finding affects only that part, section or provision of the chapter and the remaining parts, sections or provisions remain in full force and effect.

**CHAPTER 7.07**

**BUSINESS INCOME TAX**

<b>Section</b>	<b>Title</b>
7.07.010	Title
7.07.015	Administration of Business Income Tax Law
7.07.020	Definitions
7.07.030	Business Income Tax Imposed
7.07.040	Effective Date and Reauthorization; Term
7.07.050	Tax Exemptions
7.07.060	Presumption of Doing Business
7.07.070	Income Determinations
7.07.080	Apportionment of Income
7.07.090	Presumptive Tax
7.07.100	Reporting for Pass-through Through Entities
7.07.110	Severability

### **7.07.010 Title**

This chapter is known and may be cited as the Metro Business Income Tax Law.

### **7.07.015 Administration of Business Income Tax Law**

The Business Income Tax Law will be administered under the provisions set forth in this chapter and Metro Code Chapter 7.05, as applicable.

### **7.07.020 Definitions**

For the purpose of this chapter, the terms used are defined as provided in in Chapter 7.05, unless the context requires otherwise.

### **7.07.030 Business Income Tax Imposed**

A tax of one percent is imposed on the net income of each person doing business within the District.

### **7.07.040 Effective Date and Reauthorization; Term**

- (a) The Metro Business Income Tax takes effect in Tax Year 2021 (Tax Year beginning on or after January 1, 2021).
- (b) The Metro Business Income Tax will remain in effect for all periods through Tax Year 2030 (Tax Year beginning on or after January 1, 2030).
- (c) After Tax Year 2030, the tax will expire unless reauthorized by Metro voters on or before that date. After the tax expires, Metro or the entity authorized to collect the Business Income Tax may continue to take all reasonable and necessary actions to ensure that taxes still owing are paid in full.
- (d) The payment of a tax required under this chapter and the acceptance of that tax payment does not entitle a taxfiler to carry on any business not in compliance with all the requirements of this code and all other applicable laws.

### **7.07.050 Tax Exemptions**



The following exemptions apply:

- (a) Small Business Exemption. A person whose gross receipts from all business income, both within and without the District, that is equal to or less than \$5 million is exempt from the payment and filing requirements of the tax set forth in this chapter.
- (b) Sole Proprietorships and Disregarded Entities. Sole proprietorships and disregarded entities are not subject to tax under this chapter and are subject to tax under the Personal Income Tax Law in Chapter 7.06.
- (c) Exemptions Required by Law. A person whom Metro is prohibited from taxing under the Constitution or laws of the United States, the Constitution or laws of the State of Oregon or the Metro Charter is exempt from payment of the tax set forth in this chapter.
- (d) Corporations exempt from the State of Oregon Corporation Excise Tax under ORS 317.080, provided that any such corporation subject to the tax on unrelated business income under ORS 317.920 to 317.930 must pay a tax based solely on such income.
- (e) Trusts exempt from federal income tax under Internal Revenue Code Section 501, provided that any exempt trust subject to tax on unrelated business income and certain other activities under Internal Revenue Code Section 501(b) are subject to the tax under this chapter based solely on that income.
- (f) Any person whose only business transactions are exclusively limited to operating within a permanent structure a display space, booth or table for selling or displaying merchandise by an affiliated participant at any trade show, convention, festival, fair, circus, market, flea market, swap meet or similar event for less than 14 days in any tax year.
- (g) Notwithstanding the exemptions listed in subsections (a)-(f), the Administrator may require the filings of tax returns or other documentary verification of any exemption claimed under this section.

#### **7.07.060 Presumption of Doing Business**

A person is presumed to be doing business in the District and subject to this chapter if engaged in any of the following activities:

1. Advertising or otherwise professing to be doing business within the District;
2. Delivering goods or providing services to customers within the District;
3. Owning, leasing or renting personal or real property within the District;

4. Engaging in any transaction involving the production of income from holding property or the gain from the sale of property, which is not otherwise exempted in this chapter. Property may be personal, including intangible, or real in nature;
5. Engaging in any activity in pursuit of gain which is not otherwise exempted in this chapter; or
6. Engaging in any activity that constitutes substantial nexus with the District.

#### **7.07.070 Income Determinations**

The net income arising from any business, as reportable to the State of Oregon (State) for corporation excise or income tax purposes, before any allocation or apportionment for operation out of state, or deduction for a net operating loss carry-forward or carry-back is subject to the Metro Business Income Tax.

- (a) Partnerships, S-corporations, limited liability companies (excluding disregarded entities), limited partnerships, limited liability partnerships, family limited partnerships, estates, and trusts are liable for the business tax and not the individual partners, shareholders, members, beneficiaries or owners. The income of these entities must include all income received by the entity including ordinary income, interest and dividend income, income from sales of business assets and other income attributable to the entity.
- (b) If one or more persons are required or elect to report their income to the State for corporation excise or income tax purposes in a consolidated, combined or joint return, a single return must be filed by the person filing such return. In such cases, net income means the net income of the consolidated, combined or joint group of taxfilers before any allocation or apportionment for operation out of the state, or deduction for a net operating loss carrying-forward or carry-back.
- (c) The absence of reporting income to the Internal Revenue Service or the State of Oregon does not limit the ability of the Administrator to determine the correct income of the taxfiler through examination under Section 7.05.130.
- (d) Estates and trusts. In determining income for estates and trusts, income is measured after distribution of profits to beneficiaries. No additional deduction is allowed.
- (e) Nonbusiness income. In determining income under this section, an allocation is allowed for nonbusiness income as reported to the State of Oregon. However, income treated as nonbusiness income for State of Oregon tax purposes may not necessarily be defined as nonbusiness income under the Business Income Tax Law. Interest and dividend income, rental income or losses from real and personal business property, and gains or losses on sales of property or investments owned by a trade or business are treated as business

income for purposes of the Business Income Tax Law. Income derived from non-unitary business functions reported at the state level may be considered nonbusiness income. Non-unitary income will not be recognized at an intra-state level. The taxfiler has the burden of showing that income is nonbusiness income.

- (f) Certain Deductions Not Allowed. In determining income, no deduction is allowed for:
1. Taxes based on or measured by net income;
  2. The federal built-in gains tax; or
  3. The City of Portland Clean Energy Surcharge.
- (g) Ordinary gain or loss. In determining income, gain or loss from the sale, exchange or involuntary conversion of real property or tangible and intangible personal property must be included as ordinary gain or loss.
- (h) Net operating loss. In determining income, a deduction is allowed equal to the aggregate of the net operating losses incurred in prior years, not to exceed 75% of the income determined for the current tax year before this deduction but after all other deductions from income allowed by this section and apportioned for business activity both within and without the District.
1. When the operations of the taxfiler from doing business both within and without the District result in a net operating loss, that loss will be apportioned in the same manner as the net income under Section 7.07.080. A net operating loss may not be carried forward from any tax year during which the taxfiler conducted no business within the District or the taxfiler was otherwise exempt from payment of the Business Income Tax unless specifically provided for by administrative rule or written policy.
  2. In computing the net operating loss for any tax year, the net operating loss of a prior tax year is not allowed as a deduction.
  3. The net operating loss of the earliest tax year available must be exhausted before a net operating loss from a later tax year may be deducted.
  4. The net operating loss in any tax year is allowed as a deduction in any of the five succeeding tax years until used or expired. Any partial tax year will be treated the same as a full tax year in determining the appropriate carry-forward period.

#### **7.07.080 Apportionment of Income**

- (a) "Jurisdiction to tax" occurs when a person engages in business activities in a jurisdiction that is not protected from taxation by Public Law 86- 272 (15 U.S.C. Section 381-384). Public Law 86-272 applies to interstate sales of tangible personal property. For purposes of the

Business Income Tax Law, the limits imposed by Public Law 86-272 for interstate jurisdiction to tax are also presumed to apply on an intrastate basis. If a taxfiler's business is based in the District, a taxfiler must have business activity outside the District that results in a jurisdiction to tax outside the District to apportion the income of the business. Without jurisdiction to tax outside the District, all income of a business is taxable by Metro.

- (b) "Business activity" means any of the elements of doing business. The income reportable as income earned from business activity within the District will include all business income from sources within the District that is taxable income under Oregon tax laws and regulations unless otherwise exempted or excluded in this chapter.
- (c) In computing the tax, taxfilers that have income from business activity both within and without the District must determine the income apportioned to the District by multiplying the total net income from the taxfiler's business by a fraction, the numerator of which is the total gross income of the taxfiler from business activity in the District during the tax year, and the denominator of which is the total gross income of the taxfiler from business activity everywhere during the tax year.
- (d) In determining the apportionment of gross income within the District under subsection (c):
  - 1. Sales of tangible personal property are deemed to take place in the District if the property is delivered or shipped to a purchaser within the District regardless of the f.o.b. point or other conditions of sale. If sales of tangible personal property are shipped from the District to a purchaser located where the taxfiler is not taxable, those sales are not apportioned to the District.
  - 2. Sales other than sales of tangible personal property are deemed to take place in the District, if the income producing activity is performed in the District.
- (e) Certain industries or incomes are subject to specific apportionment methodologies. These methodologies are described in administrative rules adopted in accordance with Section 7.05.070 or Metro ordinance. Industry specific or income specific apportionment methodologies required by Oregon Revised Statutes for apportionment of gross sales will be used in cases in which the Administrator has not adopted a rule regarding the apportionment of that industry or income. When gross sales as reported to Oregon are used for apportionment purposes, those gross sales are defined as gross income for apportionment purposes under this chapter. All apportionment methodologies directed under this subsection will be a single factor gross income apportionment as directed under subsection 7.07.080 (c) and subsection 7.07.080 (d). In those specific cases where the state has directed allocation of income, that income will be apportioned for purposes of this chapter, unless allocation is otherwise allowed in this chapter.
- (f) If the apportionment provisions of subsection (c) do not fairly represent the extent of the taxfiler's business activity in the District and result in the violation of the taxfiler's rights

under the Oregon Constitution or the United States Constitution, the taxfiler may petition the Administrator to permit the taxfiler to:

1. Use the method of apportionment used by the taxfiler under the applicable laws of the state imposing taxes upon or measured by net income; or
2. Use any other method to effectuate an equitable apportionment of the taxfiler's income.

#### **7.07.090 Presumptive Tax**

- (a) If a person fails to file a return, a rebuttable presumption exists that the tax payable amounts to \$500 for every tax year for which a return has not been filed.
- (b) Nothing in this section prevents the Administrator from assessing a tax due that is less than or greater than \$500 per tax year.
- (c) If the taxfiler filed a tax return the previous tax year, then presumptive taxes assessed under this section will be considered a tax return. Presumptive taxes assessed under this section are considered filed documents and are subject to the time limitations for deficiencies and refunds as described in Metro Code Section 7.05.150.
- (d) Taxes determined under this section are subject to penalties and interest from the date the taxes should have been paid as provided in Section 7.05.170 in accordance with Sections 7.05.260 and 7.05.280. The Administrator will send notice of the determination and assessment to the taxfiler.

#### **7.07.100 Reporting for Pass-through Through Entities**

- (a) Chapter 7.06, Personal Income Tax, allows a deduction for pass-through income subject to tax under this chapter. For purposes of this section, pass-through income subject to tax means income from a business whose net income is taxed on the owners' or partners' personal tax returns. This includes, but is not limited to, entities taxed as partnerships and S-corporations.
- (b) A business must calculate and report the amount allowed in subsection (a) to the owners or partners. The total amount of pass-through income subject to tax an entity reports to owners or partners on Schedule K-1 cannot exceed the taxable income of the business for that tax year.

#### **7.07.110 Severability**

If a court of competent jurisdiction finds that any part, section or provision of this chapter is unconstitutional, illegal or invalid, that finding affects only that part, section or provision of the chapter and the remaining parts, sections or provisions remain in full force and effect.

Materials following this page were distributed at the meeting.

## Testimony for 12.17.20 Council meeting

I have a concern about the taxation of income under Ballot Measure 26-210.

It seems proper to me that tax deductible contributions to retirement plans (IRA, 401(k), 403(b), etc) in years prior to 2021 have created basis for the Metro tax. Because an Oregon taxpayer never received a tax benefit of contributions for Metro tax purposes, the taxpayer should not have to pay tax on the subsequent distribution.

For example, an Oregon taxpayer makes a deductible IRA contribution of \$6,000 for each of 2019 and 2020. In 2021 when the IRA is worth \$12,400, the taxpayer closes out the IRA. The taxpayer will be taxed on the full \$12,400 on the Oregon tax return. I believe that Metro is entitled to tax only \$400.

Thank you for your consideration of this matter.

Jim Brinkman, CPA

*Submitted electronically on 12.10.20*

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It was suggested I forward you my testimony for the record:

METRO Testimony 12/10/2020—Willamette Cove Clean Up and Restoration Measure  
Council President & Members of the Council. “We support the measure before you.”

Jeffrey Lang-7240 Fulton Park Blvd, Portland- Business Owner and an Advocate for Willamette Greenway for 35 years. Goal is to complete Greenway, N. to the Columbia River.

I Recently joined the Board of the North Portland Greenway (NPG) and today I represent the Organization before you. The NPG mission is to EXTEND PORTLAND’S EAST BANK Greenway from the ESPLANADE NORTH TO THE CONFLUENCE OF THE WILLAMETTE AND COLUMBIA RIVERS. Create a world class off-road trail for recreation & job access.

I’m glad to be here today at Metro our Regional Planning Agency, to share our thoughts on the Restoration of Willamette Cove. I hope to encourage Metro to use the same intelligence, determination and collaboration you used with the Homeless Tax 26-210. The Tax was a unique and creative approach to getting at a long standing problem. This approach has been recognized nationally. My hope is you will use the same verve, intelligence and collaboration to move the restoration of Willamette Cove; another long standing problem; forward faster, comprehensively and now.

Specifically, the NPG advocates for the following:

The restoration of Willamette Cove, a pre-eminent, world class regional public River access, has taken much too long.

We need a commitment from Metro Council today that it will be done expeditiously and thoroughly, and while we look forward to this critical section of the N. Portland Willamette Greenway Trail, it must be part of a full clean up and restoration package with maximum public access to the Willamette River.



We are encouraged to see that this Resolution adds the Willamette Cove as an eligible project for potential funding through the “taking care of metro parks” bond program. We urge Metro to give the community certainty that there will be funding from the bond program and not just “potential funding”. Lastly NPG fully supports the position of PHCC and Sam Chase’s amendment.

When one travels, rarely does one remember regions for their built world, but rather for their access and beauty to wild places that introduce us to the scenic world. Greenways and what Ebenezer Howard called “GREENBELTS” refresh us, provide transit, offer connection to the natural world and allow native habitat to flourish. The Willamette River Greenway should join the worlds great Greenways: High-line in Manhattan - River Walk in San Antonio - Inca Trail in Peru - El Camino in Spain - Greenway Trail in Austin, Texas

Today, METRO must think BIG. When finishing the North Greenway, include our region to this esteemed list of great walks, trails and Greenways. Innovate and as we complete the Greenway, heal, cure WILLAMETTE COVE and respect this sacred tribal land for ever. Thanks (442)

Jeff Lang  
JM Lang, LLC  
(503) 703-3035

*Submitted Electronically on 12.15.20*



Metro

**Regional Framework for Highway Jurisdictional Transfer  
Request for Action on Final Report**

**December 17, 2020**

**Margi Bradway, Metro**

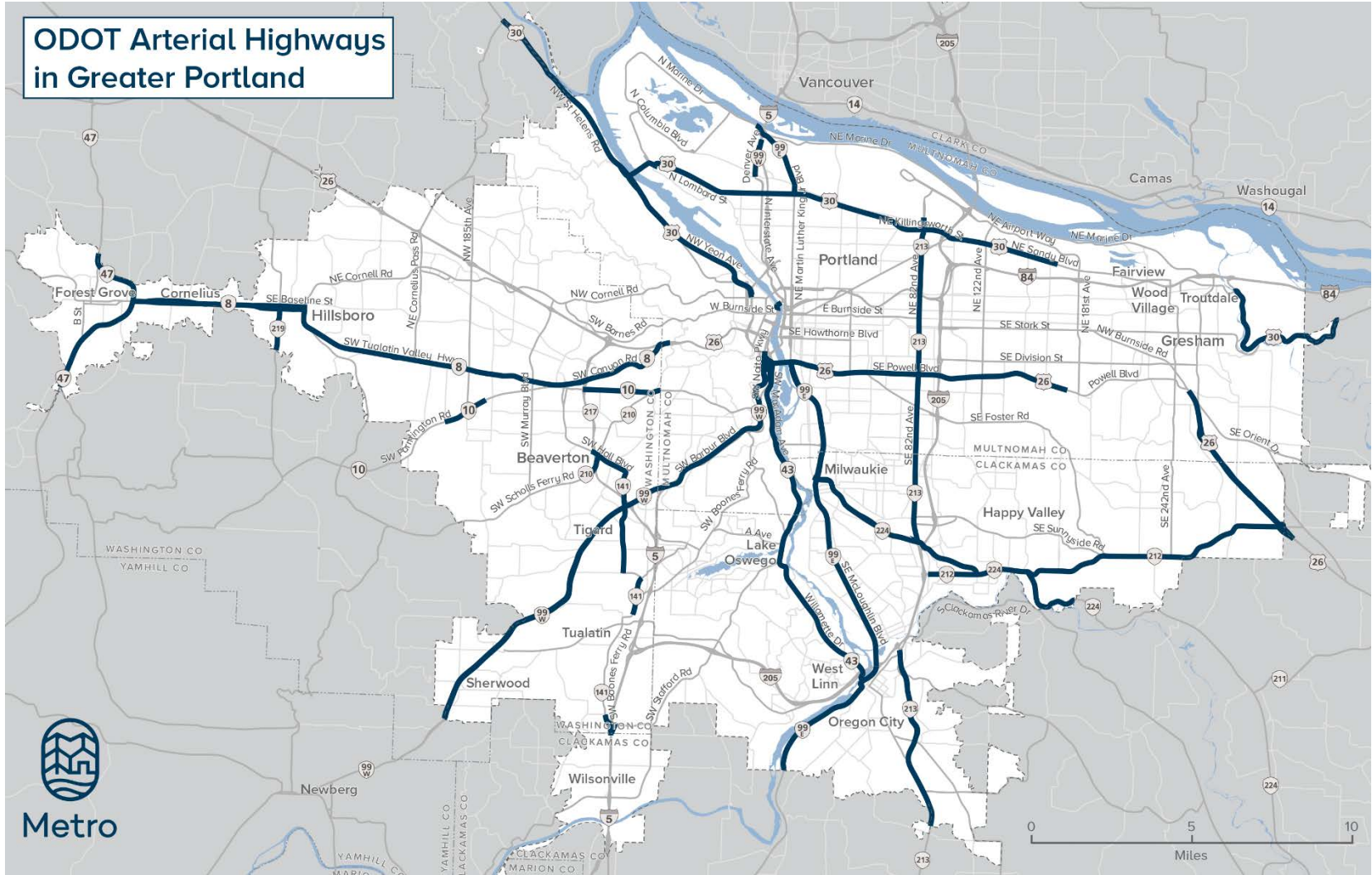
**John Mermin, Metro**

# What we'd like to share with you today

- Why Jurisdictional Transfer?
- Summary of project work
- Public Comment recap
- Consultant Recommendations for next steps
- Request for Action

# ODOT-owned arterial highways

ODOT Arterial Highways  
in Greater Portland



# Historical background

1934

Today



Portland Archives, A2009-009.3120

*N.E. 82nd Ave - 5-28-'34*

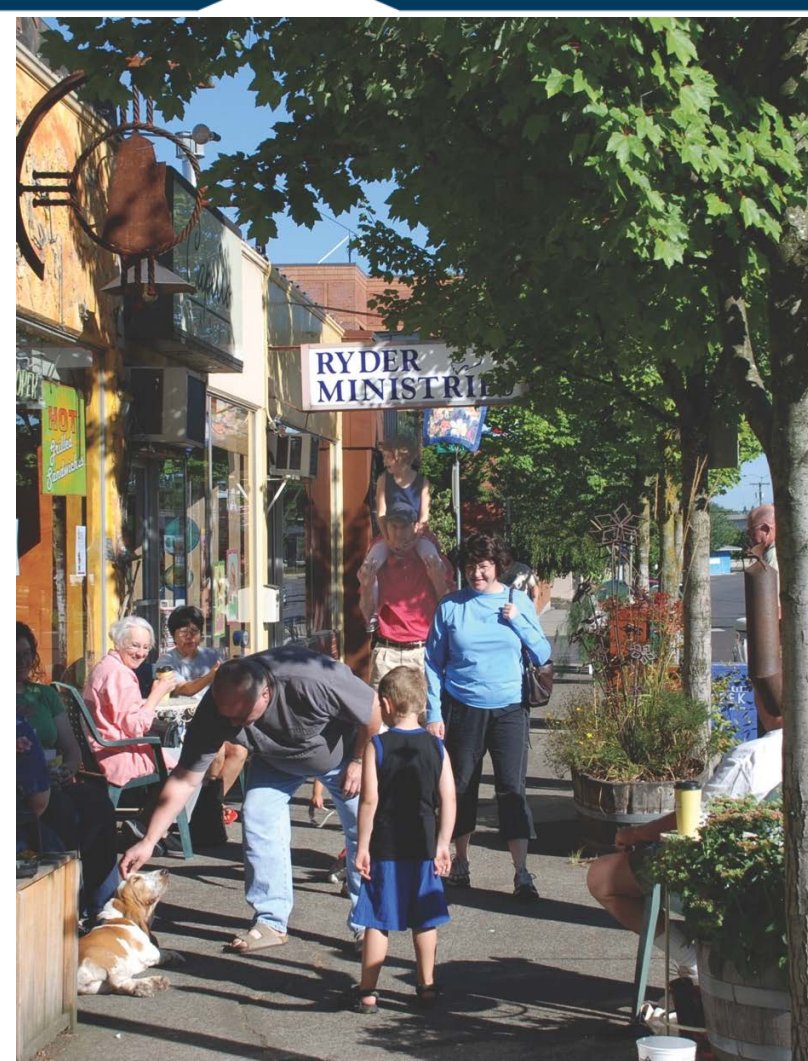


Photo credit: City of Portland

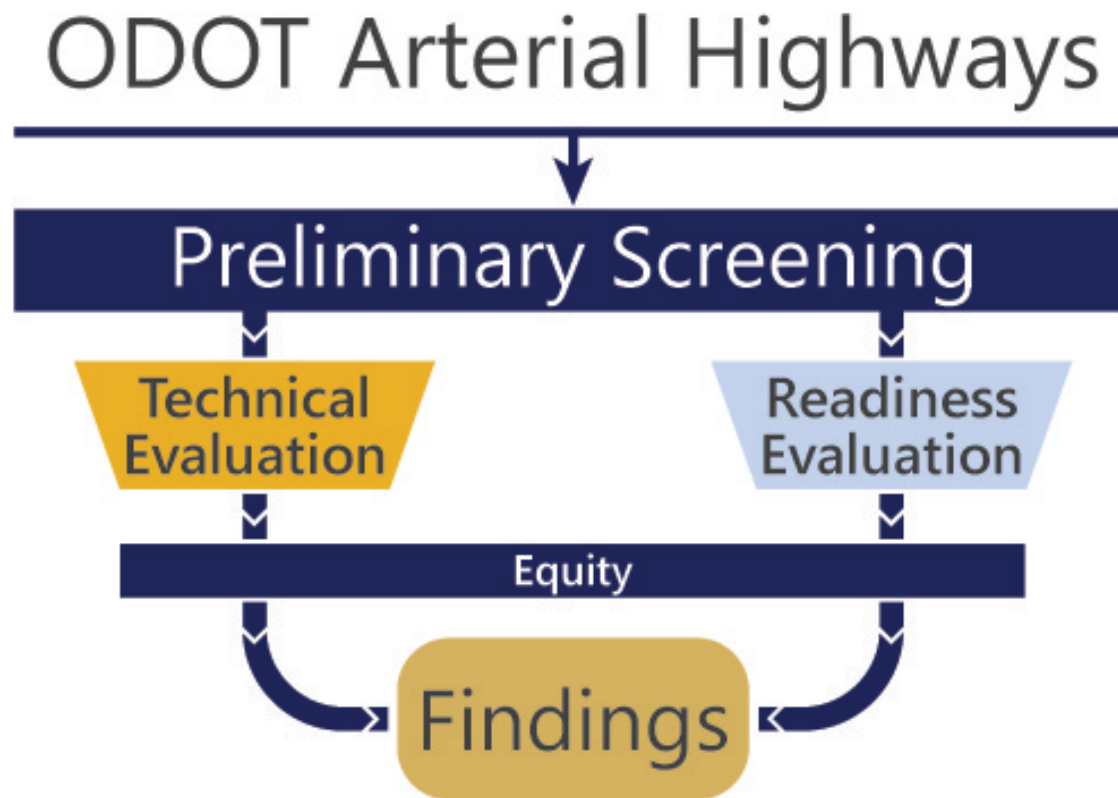
**82<sup>nd</sup> Avenue (Hwy 213)**

# Project overview

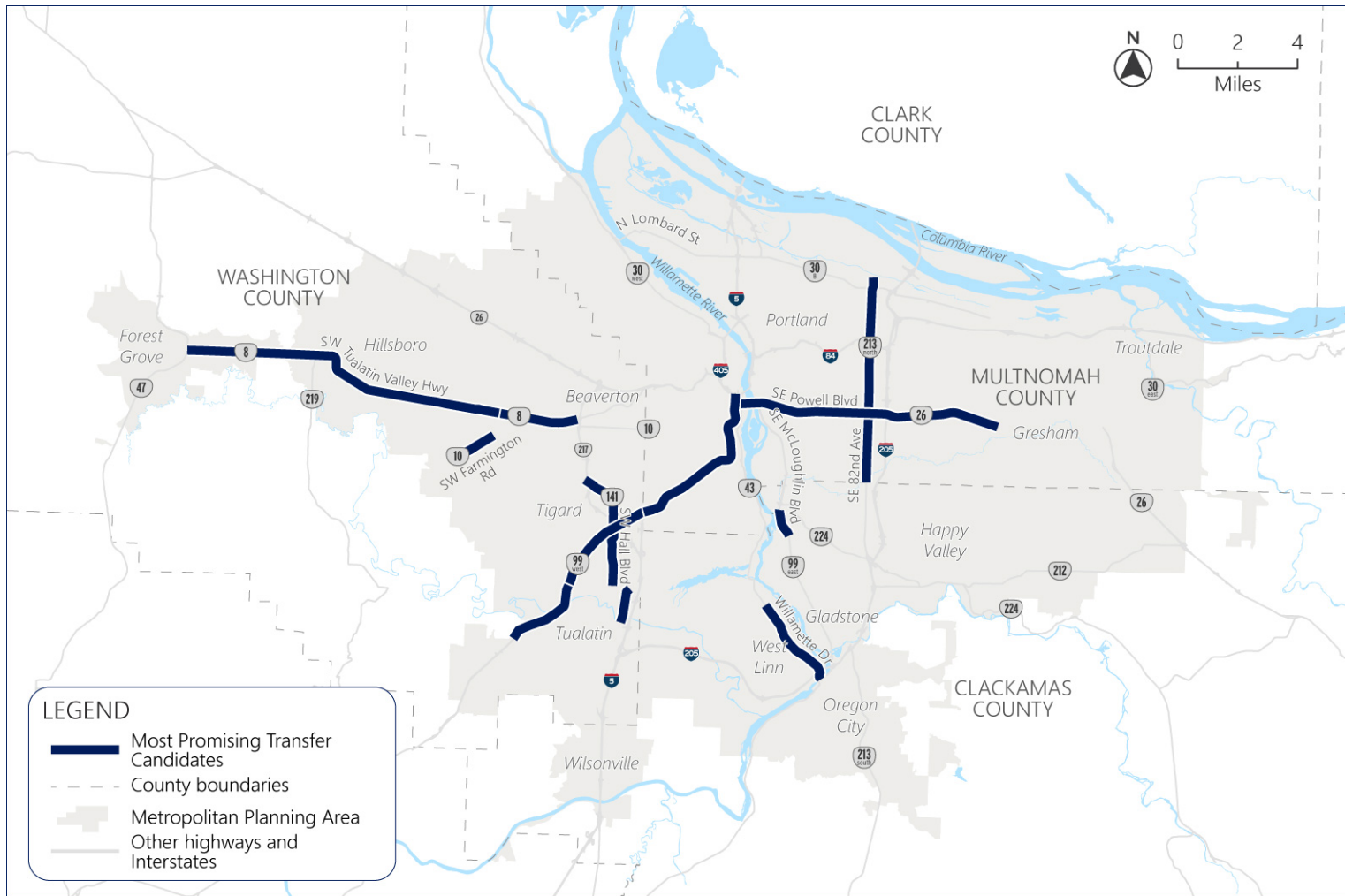
- Included in the 2018 Regional Transportation Plan (RTP)
- Aims to create framework for regional action on jurisdictional transfer
- Opportunity to address issues related to classifications, cost estimates and mechanisms for transfer
- Does *not* commit funds or commit a jurisdiction to transfer



# Evaluation approach



# Top tier corridors based on technical & readiness evaluations





# Work completed

- Policy Framework with best practices
- Inventory & Atlas of candidate corridors
- Evaluation of corridors
- Cost Estimation Methodology
- Roadway classification recommendations
- Equity considerations memo
- Needs Assessment of top tier corridors

*Download and review report at:*

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

# Public Comment period recap

- Project team met with county coordinating committees
- 40 people participated in online comment survey
- 7 comment letters received
- 2 interested parties met with project managers
- All comments received, meeting notes and survey results are included within the Public Comment Summary Memorandum in Exhibit B.

# Public Comment themes

- Levels of support for transfers vary by roadway and jurisdiction.
- General agreement that the roadways identified as promising should be priorities to transfer.
- Concern among jurisdictions regarding funding required to complete transfers

# Consultant Recommendations to Metro and ODOT for next steps

- Align on regional priorities
- Keep parties active
- Maintain relevant information
- Commit to moving forward

# Request for Action

- Staff recommends that TPAC recommends acceptance of the final report in Resolution 20-5138 to JPACT



Metro



**Thank you!**

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

# 2018 Regional Transportation Plan

2018 REGIONAL TRANSPORTATION PLAN

## CONNECTING OUR PRIORITIES TO OUR VISION



Metro

REGIONAL LEADERSHIP FORUM 3

- STAY FLEXIBLE
- CREATING SHARED VALUE
- JPACT MAKES THE PLAN
- WE HAVE CHALLENGES, AND WE NEED TO BE **COURAGEOUS**
- WE NEED TO ALIGN WITH PUBLIC TO FIND LONG-TERM SOLUTIONS
- DEFINE INVESTMENTS - WHAT ARE WE BUYING?

THERE ARE BARRIERS, BUT WE HAVE A LOT OF MOMENTUM

- PLEASE **SHARE**
- BE OPEN-MINDED
- LET'S WORK TOGETHER

STOP BEING CAUTIOUS - BE COURAGEOUS

CONFIRMING OUR SHARED **BOLD VISION**

WHAT DO WE THINK ABOUT OUR DRAFT VISION?

- IS IT TOO VAGUE?
- DEFINE ECONOMIC PROSPERITY BETTER
- INCLUDE AN EFFICIENCY STATEMENT
- 'GET AROUND' COULD BE MORE PURPOSEFUL
- ADD WORDS ABOUT SPEED & CONGESTION
- A GREATER SENSE OF EQUITY
- STRONGER LOOK TOWARD THE FUTURE
- TRANSPORTATION ISSUES FIRST?
- 'GET AROUND' IS NOT INCLUSIVE OF MODES/NEEDS
- BETTER STATE PROBLEMS TO SOLVE
- IMPLY THE EFFORT BEING MADE
- KEEP THE IDEA OF OPTIONS IN MIND

STAND UP FOR EACH OTHER - DEMAND ACCOUNTABILITY

WHY & HOW

- GAS TAX IS 1/2 OF OUR RESOURCES BUT... CAN'T KEEP UP WITH INFLATION... AND... FUEL EFFICIENCY DIMINISHES INCOME

- CONGRESS IS HOLDING UP THE HIGHWAY TRUST FUND... (SUPPORTING)
- MAINTAINING EXISTING IS PRIMARY; CONGESTION, SEISMIC RETROFIT AND TRANSIT INVESTMENT FOLLOW

PROCESS:

- FOCUSED TEAMS AND DEDICATION
- OPENNESS, AND COMMUNITY INVOLVEMENT
- FUNDING FOR TRANSIT NEEDS ADDRESSING

WE MUST **GO BIG**

FEDERAL CONVERSATION HAS BEEN ABOUT FINANCING, NOT FUNDING... WHICH REQUIRES A FUNDING SOURCE...

FOCUS IS ON THE STATE

THE STATE HAS A REVENUE ISSUE... STILL... TRANSPORTATION IS A PRIORITY

TECH IS KEY TO THE FUTURE

REGIONAL VOICES - SOLUTIONS

AND MAKE OUR PLANS LONG-TERM FOCUSED

# Seed Corn

