



# Metro | Agenda

Meeting: Metro Technical Advisory Committee  
 Date: Wednesday, November 5, 2014  
 Time: **9:00 a.m. to noon (note earlier start time)**  
 Place: Council Chamber

Time	Agenda Item	Action Requested	Presenter(s)	Materials
9:00 a.m.	<b>CALL TO ORDER</b> <b>Updates from the Chair</b> <ul style="list-style-type: none"> <li>Climate Smart Strategy Health Impact Assessment Final Report @ <a href="http://www.healthoregon.org/hia">www.healthoregon.org/hia</a></li> <li>Oregon Climate and Health Profile Report @ <a href="http://www.healthoregon.org/climatechange">www.healthoregon.org/climatechange</a></li> </ul>	Information	John Williams, Chair	
	<b>Citizen Comments to MTAC Agenda Items</b>		All	
9:10 a.m. 15 min.	<b>2015 Growth Management Decision:</b> Final recommendation to MPAC related to the 2014 Urban Growth Report (MPAC recommendation to Council on November 12)  <i>Purpose: Provide MTAC with an opportunity to recommend text edits to Metro Council Resolution No. 14-4582, For the Purpose of Accepting the Draft Urban Growth Report as support for determination of capacity of the urban growth boundary</i>	Recommendation	Ted Reid, Metro	In packet
9:25 25 min.	<b>Opt-In &amp; Other Engagement Materials</b>  <i>Purpose: To solicit MTAC's feedback and priorities for online engagement</i>	Presentation & Discussion	Jim Middaugh, Metro	At meeting
9:40 45 min.	<b>Climate Smart Communities:</b> Draft recommendations on legislation and staff recommended changes to public review materials. (Final recommendation to MPAC on Nov. 17)  <i>Purpose: Provide MTAC with the opportunity to provide feedback and make preliminary recommendations on draft legislation and staff recommended changes to public review materials.</i>	Discussion	Kim Ellis, Metro	In packet
10:25 a.m. 1 hour, 35 min.	<b>Community Planning &amp; Development Grants:</b> Review and revision of Administrative Rules for Construction Excise Tax and Community Planning & Development Grants  <i>Purpose: Provide MTAC with the opportunity to review and discuss changes to the CET-CPDG Administrative Rules</i>	Discussion	Gerry Uba, Metro	In packet
<b>Noon</b>	<b>Adjourn</b>			

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**2014 MTAC Tentative Agendas  
Updated 10/29/14**

<p><b>Left Blank on Purpose</b></p>	<p><b>November 19 MTAC meeting</b></p> <ul style="list-style-type: none"><li>• Climate Smart Communities: MTAC recommendation to MPAC on adoption of the preferred approach (MPAC recommendation to Council December 10) (Kim Ellis, Metro)</li><li>• Community Planning &amp; Development Grants (Gerry Uba, Metro)</li></ul>
<p><b>December 3 MTAC meeting</b></p>	<p><b>December 17 MTAC meeting</b></p>

**Parking Lot:**

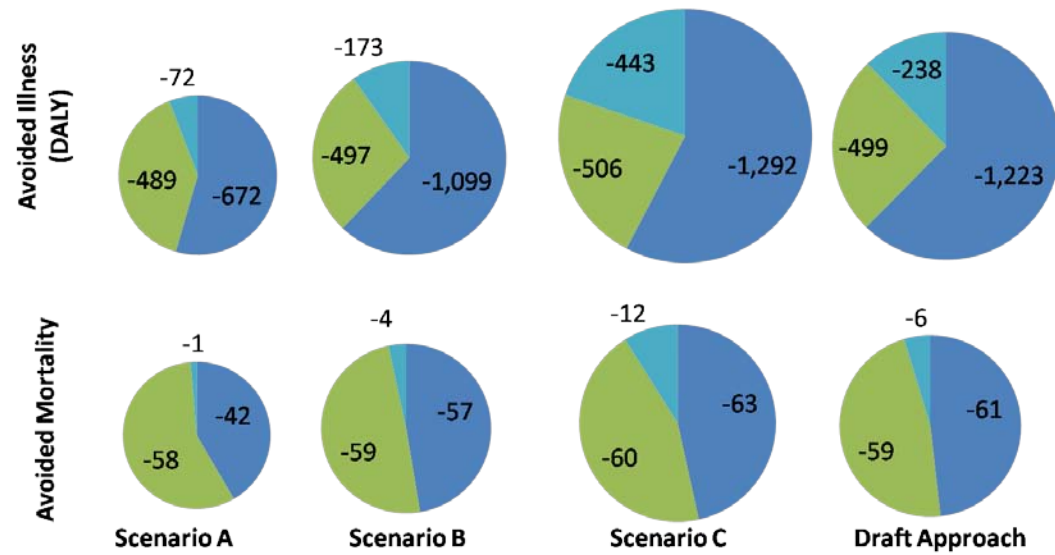
November/December 2014 – Travel Options topic plan

January 2015 – Tigard Tree Code presentation

Winter/Spring 2015 – Willamette Falls tour

## Annual Health Benefits by 2035

■ Physical Activity ■ Air Quality ■ Traffic Safety



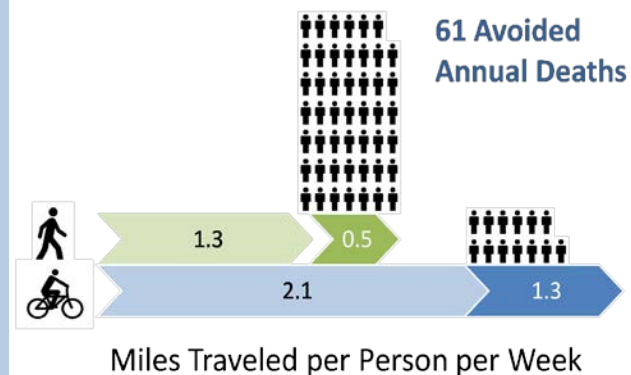
The Oregon Health Authority HIA Program used the Integrated Transport and Health Impact Model (ITHIM) to assess how increases in miles traveled by walking and biking combined with a decrease in per capita vehicle miles traveled would impact health. ITHIM estimates avoided deaths and avoided illness as measured by disability adjusted life years (DALYs) for 12 diseases over three domains: physical activity, air quality, and traffic safety. **ITHIM estimates that by 2035, the Draft Approach will prevent 126 premature deaths and reduce illness by 1.6% annually.** The vast majority of the health benefits from the draft approach are attributable to increased physical activity and improved air quality. (See above where attribution to pathways is represented as the size of the slice of the pie.)

### PHYSICAL ACTIVITY

Transportation and land use strategies in the Draft Approach are expected to result in modest increases of active transportation. This translates into impressive health gains across the region.

Increasing the average distance walked from 1.3 to 1.8 miles per week will result in 48 avoided premature deaths. An additional 13 premature deaths will be avoided if miles traveled per person per week by bicycle increase from 2.1 to 3.6. Illnesses studies will decrease by 1.3%.

- ✓ Integrate multi-modal design in road improvement and maintenance to support all users.
- ✓ Implement Complete Streets strategies
- ✓ Complete the active transportation network.
- ✓ Meet or exceed 1.8 miles walked and 3.4 miles cycled per person per week by 2035 as projected in the Draft Approach.

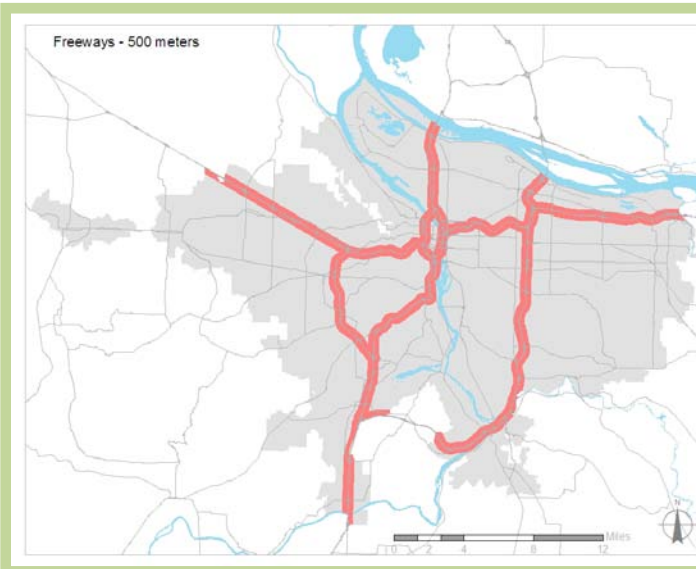
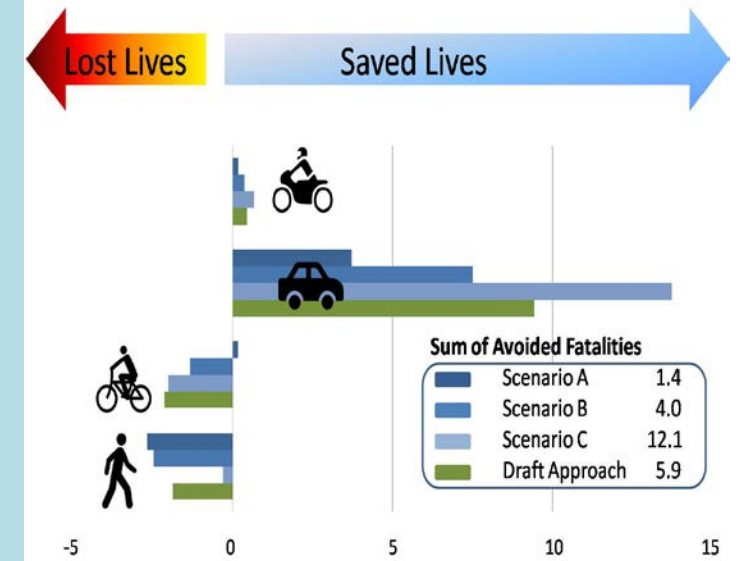


### TRAFFIC SAFETY

Reducing greenhouse gas emissions depends on expanded use of walking, biking, and transit. **Reductions in per capita vehicle miles traveled (VMT) improve traffic safety for all users.**

The Draft Approach would result in 5.9 avoided fatalities annually and decrease disabilities from severe injuries by 6.7%. However, the number of pedestrian and bicycle fatalities and severe injuries will increase even as overall injury and fatality rates fall for all modes. This absolute increase in bicycle and pedestrian fatalities and injuries can be avoided by designing for safety for non-motorized users.

- ✓ Adopt and implement investments and strategies that reduce per capital VMT from 130 to less than 107 miles per week.
- ✓ Prioritize expanding transit and providing travel information and incentives to reduce VMT and encourage active modes.



### AIR QUALITY

Improving overall air quality is an important health benefit of greenhouse gas emissions reduction. The combined effect of reduced per capita vehicle miles traveled and clean fuel technologies is expected to improve air quality.

Air pollution can be highly localized with high concentrations near transportation corridors such as freeways and major roads. In 2010, 12.6% of the population – including many vulnerable communities – lived within 500 meters of the freeways highlighted at the left. Care should be taken in siting facilities that serve vulnerable populations in these areas.

- ✓ Reduce regional ambient concentrations of PM2.5 to 6.41 ug/m3 or below as projected in the Draft Approach
- ✓ Support state efforts to transition to cleaner low carbon fuels, more fuel-efficient vehicles, and transit fleet upgrades.

### COST SAVINGS

Using a cost-of-illness approach, the HIA program estimates that the region currently spends between \$4.8 and \$5.8 billion (in 2010\$) each year on diseases modeled in ITHIM. **The Draft Approach is expected to reduce illness and save the region \$100-\$125 million annually (in 2010\$).** This includes annual savings of nearly \$64 million in expenditures and lost productivity related to cardiovascular disease, \$35 million associated with traffic injuries, and \$26 million related to diabetes treatment.



## Target investments to improve health for all populations

Not all residents of the Portland metropolitan region have equal access to healthy transportation options or health-promoting community resources.

- ✓ Ensure social and health goals are considered when prioritizing investments by explicitly and transparently addressing how investments link low-income and other vulnerable households to health-promoting resources.
- ✓ Protect populations – including the elderly, children, and low-income individuals – who live, work, and attend school near highways and major roads through siting, design, and/or mechanical systems that reduce indoor air pollution.
- ✓ Maximize health benefits by monitoring key health indicators, expanding partnerships that promote health, and developing tools to support the consideration of health impacts in future land use and transportation decisions throughout the region.

## Health Impact Assessment

Health Impact Assessment (HIA) is a way to consider how a policy or plan affects community health before the final decision is made. By providing objective, evidence-based information, HIA can increase positive health effects and mitigate unintended health impacts. OHA conducted this assessment at Metro's request, with funds provided by the Health Impact Project, a collaboration of the Robert Wood Johnson Foundation and The Pew Charitable Trust.

An advisory group of more than 30 people representing local governments, state and regional agencies and public health nonprofits provided guidance and data for a series of three HIAs supporting Metro's Climate Smart Communities Project. Six members of the advisory committee provided a full technical review of the report.

### Climate Smart Scenarios Health Impact Assessment Scope

**Geography:** Portland, Oregon metropolitan region as defined by the Urban Growth Boundary

**Timeline:** 2010 (base year) to 2035 (horizon year)

**Scenarios:**

**A:** adopted plans with existing revenues

**B:** adopted plans with expanded revenues for priority investments

**C:** adopted plans plus additional policy and infrastructure development (requires additional revenue/funding sources)

**Draft Approach:** full implementation of adopted 2014 Regional Transportation Plan with additional investment in transit; lower-cost transportation system management and operations; and lower-cost information and incentive strategies.

**Exposure pathways:** physical activity, traffic safety, air quality

**Quantitative tool:** Integrated Transportation Health Impact Model (ITHIM)

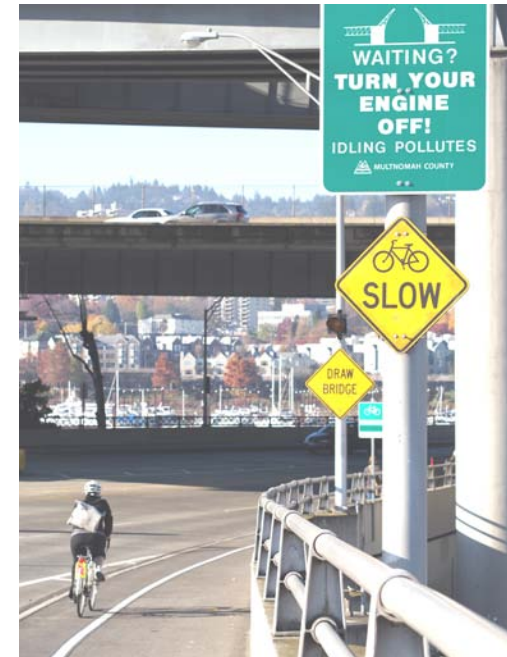
**Other considerations:** health costs associated with health pathways; vulnerable populations

The full report is available at [www.healthoregon.org/hia](http://www.healthoregon.org/hia).

Iroz-Elardo N, Hamberg A, Main E, Haggerty B, Early-Alberts J, Cude C. *Climate Smart Strategy Health Impact Assessment*. Oregon Health Authority. September 2014: Portland, Oregon



# Climate Smart Strategy Health Impact Assessment (HIA)



Climate change threatens human health and well-being in many ways, including from increased extreme weather, wildfire, decreased air quality, threats to mental health, and illnesses from food, water, and disease-carriers such as mosquitos and ticks. Climate change will, absent other changes, worsen existing health threats. Vulnerable communities, particularly children, older adults, poor, and some communities of color are particularly at risk. The changing climate has the potential to significantly impact health in the region. [www.healthoregon.org/climatechange](http://www.healthoregon.org/climatechange)

## Metro's Climate Smart Communities Scenarios

The Oregon Legislature has directed the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. Metro, the Portland metropolitan regional government, is leading in the Climate Smart Communities Scenarios Project – a community process to plan to meet this requirement.

The Climate Smart Strategy HIA found that strategies and investments considered in Metro's planning **reduce the risks of climate change, increase physical activity, improve air quality, and reduce traffic injuries and fatalities.**

- ✓ Demonstrate regional leadership and mitigate climate change by adopting and implementing a Scenario that meets or exceeds the GHG targets set for the Portland metropolitan area.

The Draft Approach is expected to result in **annual health benefits of 126 avoided premature deaths, a 1.6% reduction in diseases studied, and annual savings of \$100-125 million** (2010\$) in direct and indirect costs.

**Flexible, reliable transportation systems**

**PROVIDE HEALTHY CHOICES.**



## EXECUTIVE SUMMARY

### Climate change is happening in Oregon.

Oregon's climate is changing and will continue to change in the years to come.

- Summers are getting hotter and drier.
- The last freeze of winter is occurring earlier, while the first freeze of fall is starting later. By mid-century, much of Oregon is projected to have 20 fewer days below freezing per year.
- More precipitation will fall as rain rather than snow, increasing the risk of floods and landslides.
- Oregon is likely to experience more extreme events like heat waves, wildfires and storms.
- Sea level rise and ocean acidification are expected to continue.

### Our health and safety are at risk.

Climate change affects our health in many ways.

Climate change threatens our access to clean air, clean water and healthy food.

Climate already affects health in Oregon.

- Changes are likely to lead to health impacts from drought, deteriorating air quality, wildfires, heat waves, water-borne disease, increased allergens and diseases spread by ticks and mosquitoes
- Climate change could also increase and worsen chronic diseases such as asthma and mental health issues such as depression and anxiety.
- Air pollution from increased ground-level ozone and wildfire smoke could worsen respiratory illness.
- Water sources can become contaminated from drought or flooding.
- Drought in Oregon or elsewhere could cause food insecurity, especially among vulnerable populations.
- Hospitalizations increase during extreme heat events.
- Wildfire smoke is a problem in many communities.
- In many rural communities, drought threatens family incomes and quality of life.

## Some communities will be affected more than others.

Climate change is likely to make health disparities worse.

Risk is higher among certain groups.

- Some populations, like communities of color and low-income households, already bear a disproportionate burden of disease.
- These groups face more exposures to hazards and have fewer resources to recover from climate change related impacts.
- American Indians risk further loss of cultural traditions, sustenance and way of life.
- Older adults are more at risk of heat-related illness and death.
- People in low-income urban neighborhoods are at greater risk of heat-related illness due to the urban heat island effect.
- People living on steep slopes are at risk of landslides and those living at the interface of wildlands are more at risk of wildfire.
- Residents on the coast are more at risk from extreme storms.
- Private well users may be at greater risk of water insecurity.
- People working outside, such as farmworkers and construction workers, are more at risk of negative health effects
- People working on the front lines of emergencies, including firefighters and first responders, are more at risk of injury and death.
- Children face cumulative impacts over their lifetime, which will be greater than those of earlier generations

## We can work together to protect our families and communities.

Oregon's Public Health Division is taking action to reduce risks.

Collaboration is essential to building our resilience.

Everyone has a role to play.

- Oregon's Public Health Division recognizes that climate affects health in many ways. We are working to further understand our risks and what we can do to prepare for the changes ahead.
- Addressing health disparities and prioritizing the needs of our most vulnerable communities will build Oregon's overall resilience.
- Taking action requires collaboration across agencies, sectors and cultures.
- Innovative solutions come from our many diverse communities.
- Adapting to climate change includes building local capacity and leadership in traditionally underrepresented communities.
- Everyone has a role to play in protecting and improving our quality of life in Oregon.
- Learn more at: [www.healthoregon.org/climatechange](http://www.healthoregon.org/climatechange)

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ACCEPTING THE ) RESOLUTION NO. 14-4582  
DRAFT URBAN GROWTH REPORT AS )  
SUPPORT FOR DETERMINATION OF )  
CAPACITY OF THE URBAN GROWTH ) Introduced by Chief Operating Officer Martha  
BOUNDARY ) Bennett with the Concurrence of Council  
) President Tom Hughes  
)

WHEREAS, state law requires Metro to determine the capacity of the urban growth boundary (UGB) to accommodate the next 20 years' worth of population and employment growth by the end of December 2014; and

WHEREAS, regarding housing, ORS 197.296(3) requires Metro to inventory the supply of buildable lands within the UGB, determine the housing capacity of the buildable lands, and analyze housing need by type and density range in order to determine the number of dwelling units and amount of land needed for each housing type for the next 20 years; and

WHEREAS, regarding employment land, Goal 14 and its implementing rules require Metro to inventory existing vacant and developed employment lands within the UGB and to provide an adequate supply of land to accommodate demonstrated need for employment opportunities; and

WHEREAS, Metro convened a peer review panel consisting of economists and demographers to review the assumptions and results of its population and employment forecasts; and

WHEREAS, from February 2013 to September 2013 Metro convened a technical working group consisting of public and private sector experts to develop a methodology for identifying the region's buildable land inventory; and

WHEREAS, from October 2013 to December 2013 Metro made available to all local jurisdictions in the region its preliminary buildable land inventory; and

WHEREAS, Metro incorporated local jurisdiction input on the buildable land inventory; and

WHEREAS, in March and April of 2014 Metro convened public and private sector experts to discuss methods for determining how much of the region's buildable land inventory may be market-feasible by the year 2035; and

WHEREAS, in April 2014 Metro convened public and private sector experts to review assumptions about space usage by different employment sectors; and

WHEREAS, on July 15, 2014 Metro published a Draft 2014 Urban Growth Report that incorporates the regional forecast and buildable land inventory and assesses the capacity of the existing UGB to accommodate the range of new dwelling units and jobs included in the forecast; and

WHEREAS, state law requires Metro to provide capacity to encourage the availability of dwelling units at price ranges and rent levels, and of transportation choices, that are commensurate with the financial capabilities of households expected over the planning period; and

WHEREAS, as part of the 2014 Draft Urban Growth Report, Metro published a draft Housing Needs Analysis that showed the effects on housing affordability and household transportation costs of forecast growth under existing policies and investment levels; and

WHEREAS, Metro sought and received comments on the draft analyses of housing and employment capacity from its Metro Policy Advisory Committee (MPAC), its Metro Technical Advisory Committee (MTAC), its Transportation Policy Alternatives Committee (TPAC), local governments in the region, public, private and non-profit organizations; and

WHEREAS, the Metro Council intends to continue a discussion in 2015 regarding several policy considerations reflected in the Draft Urban Growth Report including: land readiness for job creation and community development; the market feasibility of the region's buildable land inventory; the possible outcomes of implementing existing plans and policies, including implications for the region's housing mix; actions needed to provide family-friendly housing and workforce housing; and city plans for urban reserves; and

WHEREAS, the Metro Council held a public hearing on the draft analysis on December 4, 2014; now, therefore,

BE IT RESOLVED that:

1. The Council accepts the 2014 Draft Urban Growth Report dated September 2014, attached and incorporated into this resolution as Exhibit A, as a draft analysis of need for capacity in the UGB to accommodate growth to the year 2035 and for actions the Council may take to add housing and employment capacity by ordinance in 2015, pursuant to ORS 197.296(6) and statewide planning goals 14 and 10.
2. Acceptance of Exhibit A by the Council meets Metro's responsibility under state law to analyze the capacity of the UGB in order to accommodate growth to the year 2035 as a preliminary step toward providing sufficient capacity to accommodate that growth. The Council will formally adopt the Urban Growth Report by ordinance in 2015, along with any actions the Council may take to add housing and employment capacity.

ADOPTED by the Metro Council this \_\_\_\_ day of December 2014

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Tom Hughes, Council President

Approved as to form:

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Alison R. Kean, Metro Attorney





Date: October 15, 2014  
To: Metro Council, MPAC, MTAC  
From: Ted Reid, project manager for the 2015 urban growth management decision  
Re: Employment gains and losses since the Great Recession

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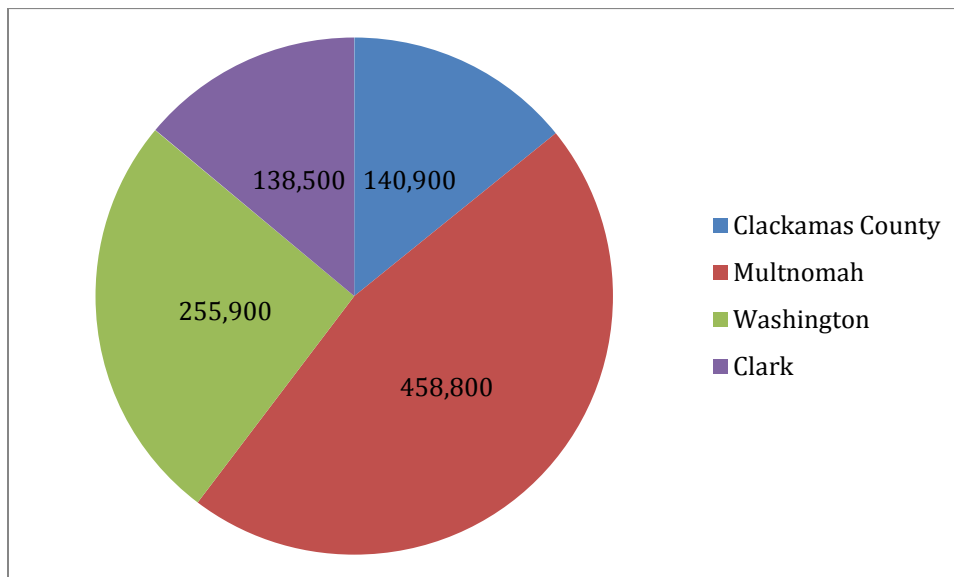
### Background

The Metro Council intends to make a regional growth management decision by the end of 2015. On December 4, the Council will be considering acceptance of the draft 2014 Urban Growth Report as a basis for that decision. In the course of discussing the employment component of the draft Urban Growth Report at an October 9, 2014 work session, councilors had questions about employment trends by sector and by county since the region emerged from the Great Recession. This memo summarizes employment trends from 2011 through 2013. Also attached is the September 2014 summary of economic indicators for the Metro region from the State of Oregon's Employment Department, which provides additional information about trends over the last year.

### Employment distribution in 2013

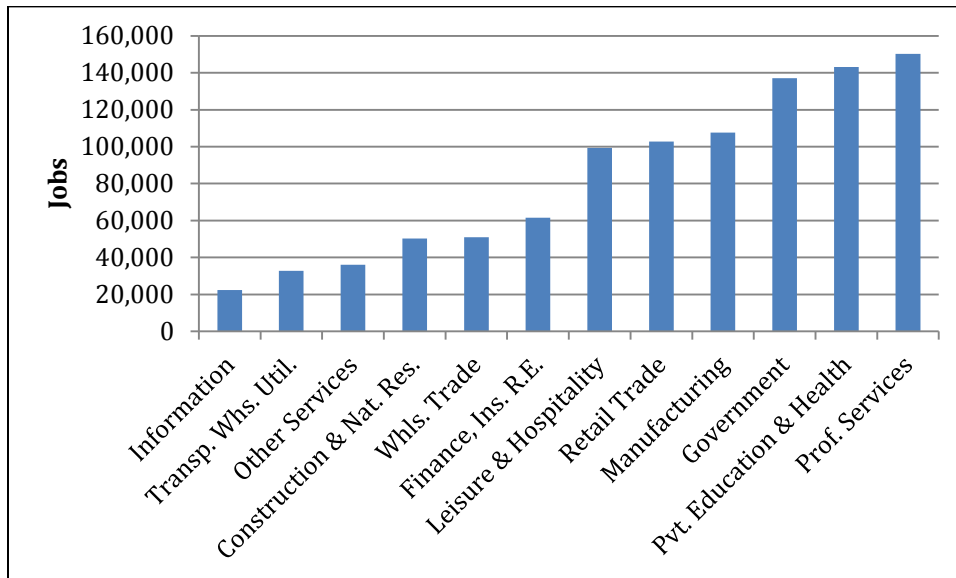
In 2013, Multnomah County had the largest share of the four-county area's jobs, almost equaling the number of jobs in the other three counties combined.

Figure 1: Jobs per county in 2013



In 2013, the professional services sector comprised the largest share (15 percent) of the four-county area's jobs.

Figure 2: Jobs by sector in 2013 (four-county area)



### Employment trends since the Great Recession

In 2011, the region began to see employment gains coming out of the Great Recession. Data below are for the time period 2011 through 2013 for the four-county area including Clackamas, Clark, Multnomah, and Washington counties. A few highlights of the employment trends described in Figures 3 through 10 are:

- The four-county area added 45,600 jobs from 2011 through 2013
- Multnomah County added about as many jobs as the other three counties combined:
  - Multnomah County added 21,800 jobs
  - Washington County added 12,300 jobs
  - Clark County added 6,800 jobs
  - Clackamas County added 4,700 jobs
- Manufacturing led job growth in Clackamas County, adding 1,600 jobs.
- Post-recession, Washington County's information sector continued to shed jobs (loss of 600 jobs) while its manufacturing sector added 1,000 jobs.
- Professional services led job growth in Multnomah (6,400 new jobs), Washington (11,200 new jobs), and Clark counties (1,300 new jobs).
- Clark County added jobs in almost all sectors.
- In percentage growth terms, construction made a strong rebound, followed by the information sector, professional services and leisure and hospitality services (generally the lowest paying of the sectors that rebounded).

Figure 3: Clackamas County changes in number of jobs by sector, 2011 through 2013

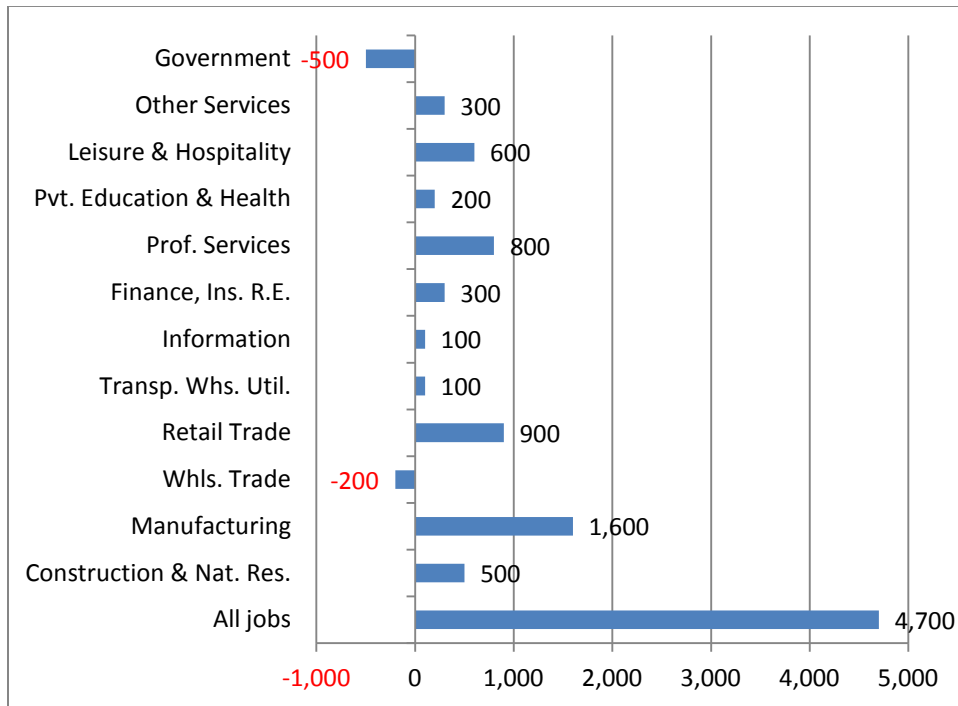


Figure 4: Clackamas County percent changes in jobs by sector, 2011 through 2013

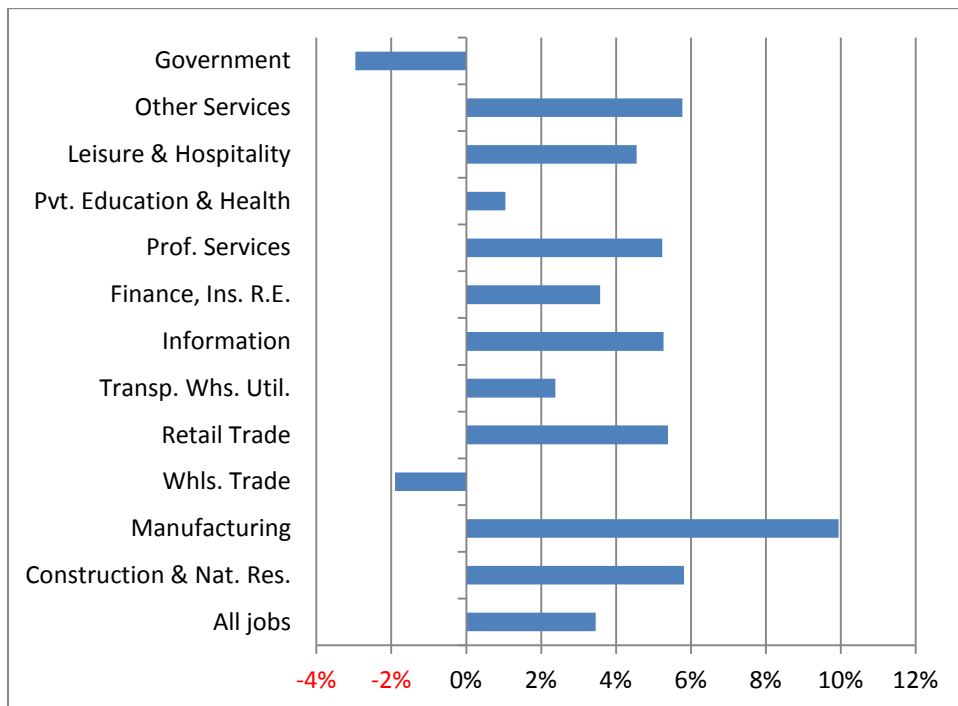


Figure 5: Clark County changes in number of jobs by sector, 2011 through 2013

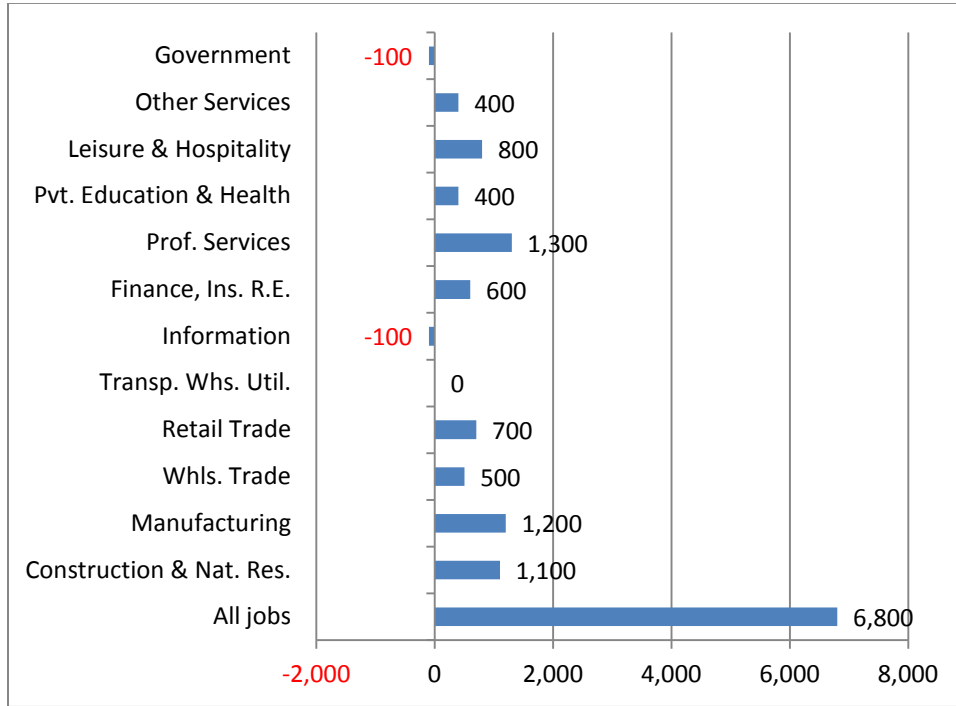


Figure 6: Clark County percent changes in jobs by sector, 2011 through 2013

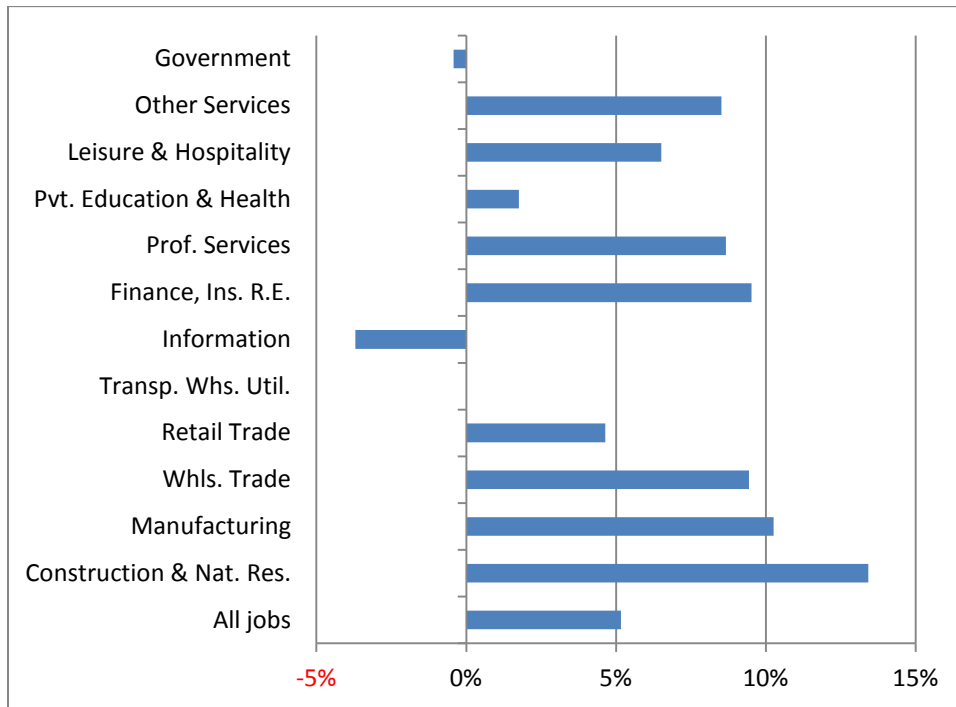


Figure 7: Multnomah County changes in number of jobs by sector, 2011 through 2013

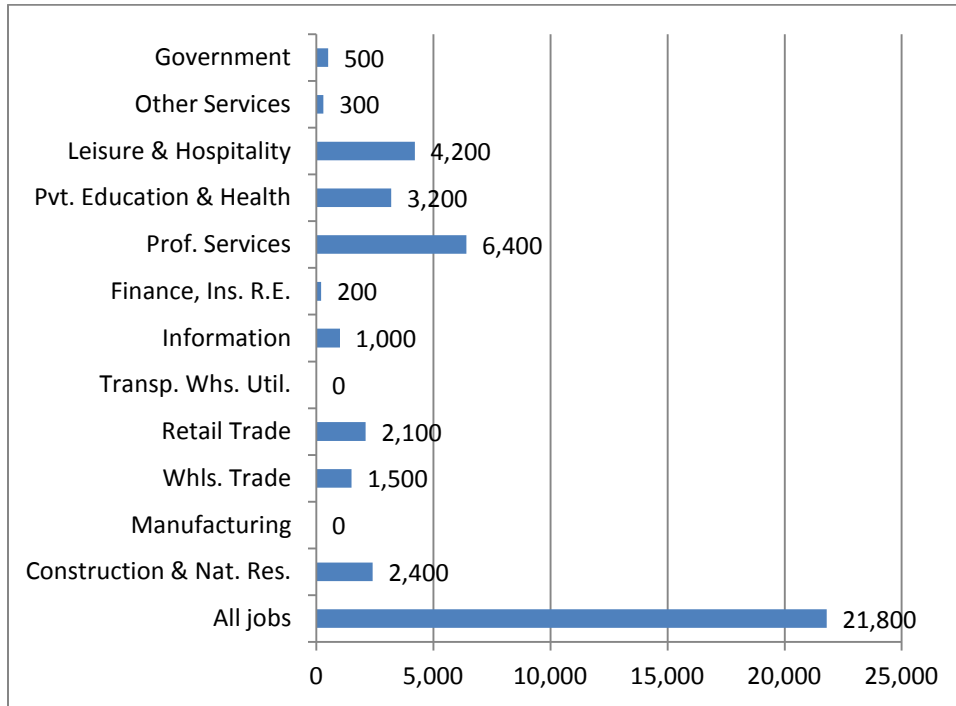


Figure 8: Multnomah County percent changes in jobs by sector, 2011 through 2013

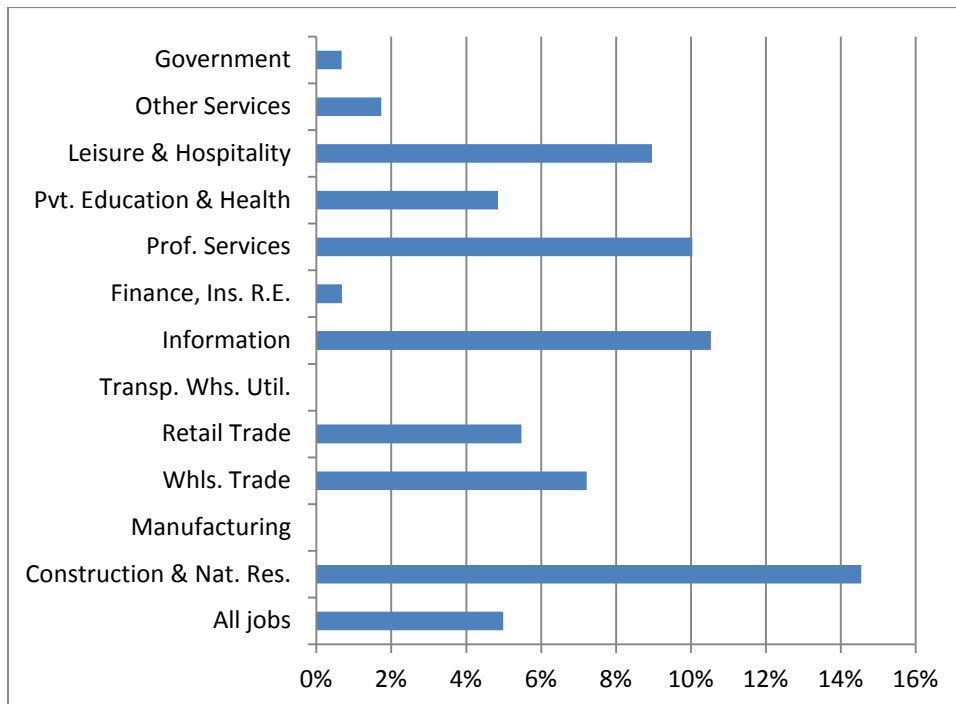


Figure 9: Washington County changes in number of jobs by sector, 2011 through 2013

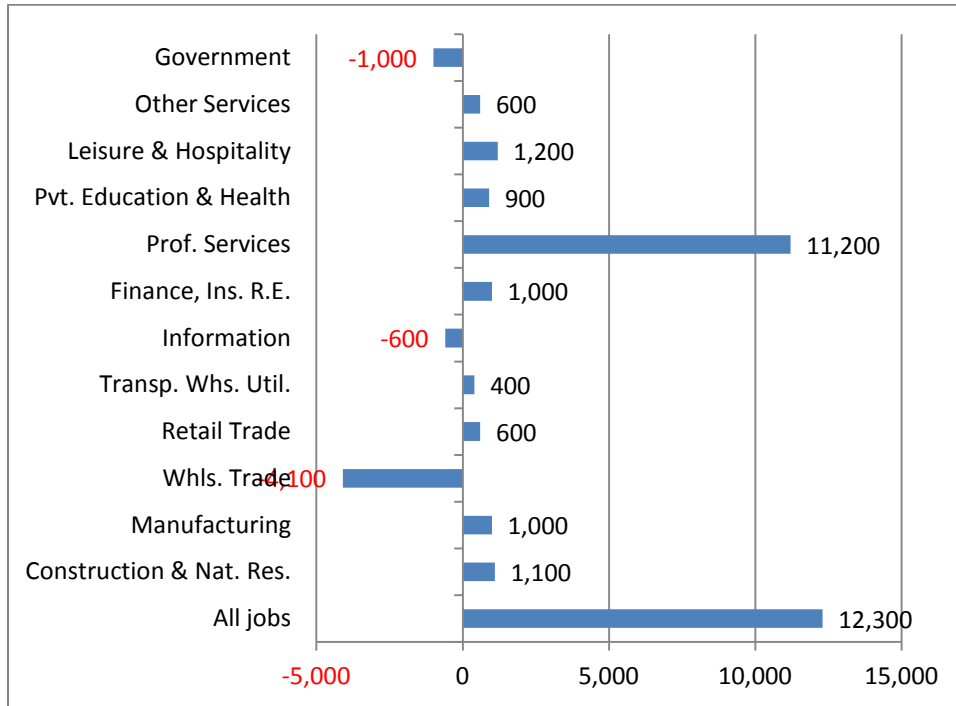
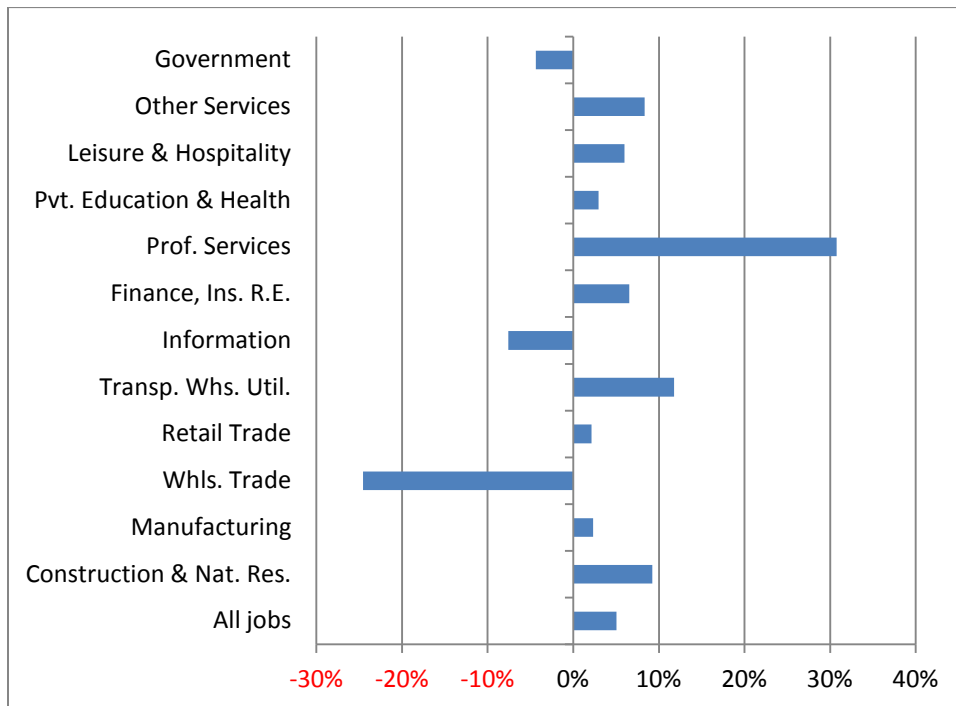


Figure 10: Washington County percent changes in jobs by sector, 2011 through 2013





Date: October 16, 2014  
To: MPAC  
From: Ted Reid, project manager for 2015 urban growth management decision  
Re: MTAC recommendations on components of the draft 2014 Urban Growth Report

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### **Background**

In July, Metro staff issued a draft of the 2014 Urban Growth Report. On December 4, 2014, the Metro Council will consider a resolution accepting the 2014 Urban Growth Report as a draft analysis of need for capacity in the urban growth boundary to accommodate growth to the year 2035 and for actions the Council may take to add housing and employment capacity by ordinance in 2015. The resolution is available in draft form in MPAC's October 8 meeting packet. On November 12, 2014, MPAC will be asked for a formal recommendation on whether the Council should adopt the resolution.

### **MTAC recommendations made to date**

As summarized in a previous memo to MPAC, on October 1, 2014, MTAC made the following unanimous recommendations on two core technical elements of the Urban Growth Report:

- The residential buildable land inventory has undergone an appropriate level of technical review and provides a reasonable basis for policy discussions. (3 abstentions, 0 nays)
- The seven-county population and employment range forecast in the draft UGR has undergone an appropriate level of technical review and provides a reasonable basis for policy discussions. (2 abstentions, 0 nays)

On October 15, 2014, MTAC made two additional unanimous recommendations related to the draft 2014 Urban Growth Report:

- The employment buildable land inventory, including the inventory of large industrial sites, has undergone an appropriate level of technical review and provides a reasonable basis for policy discussions. (3 abstentions, 0 nays)
- The assumptions (building types, square feet per employee, and floor-area ratios) used to translate the employment forecast into demand for acres have undergone an appropriate level of technical review and provide a reasonable basis for policy discussions. (2 abstentions, 0 nays)







DATE: October 24, 2014  
TO: MTAC members and alternates, and interested parties  
FROM: Kim Ellis, Principal Transportation Planner  
SUBJECT: Climate Smart Communities Scenarios Project: MTAC feedback on draft materials

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### REQUEST FOR INPUT

At the Nov. 5, 2014 meeting, MTAC will be asked to provide feedback on:

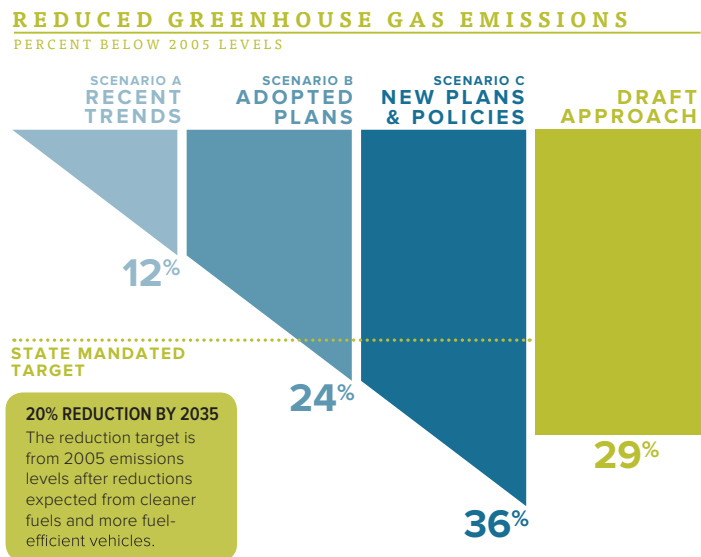
- **Ordinance No. 14-1346 and staff report**
- **Exhibit B - Draft Regional Framework Plan Amendments**
- **Exhibit D - Draft Performance Monitoring Approach**
- **Draft Exhibit E - Summary of Recommended Changes**

### BACKGROUND

The Climate Smart Communities Scenarios Project responds to a mandate from the 2009 Oregon Legislature to develop and implement a regional strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035.

After a four-year collaborative process informed by research, analysis, community engagement and discussion, a draft Climate Smart Strategy and implementation recommendations were released for public review from Sept. 15 to Oct. 30, 2014.

As unanimously recommended for study by the Metro Policy Advisory Committee (MPAC) and the Joint Policy Advisory Committee on Transportation (JPACT) on May 30, the draft strategy achieves a 29 percent per capita greenhouse gas emissions reduction and supports local and regional plans and visions that have already been adopted by communities and the region. The strategy, if implemented, will deliver significant public health, environmental and economic benefits to households and businesses in the region.



## **Update on 45-day public comment period and Metro Council and advisory committee discussions**

The draft Climate Smart Strategy and implementation recommendations were released for public review from Sept. 15 to Oct. 30, 2014. In addition, Metro launched an on-line survey at [makeagreatplace.org](http://makeagreatplace.org). The materials are posted on the project website at [oregonmetro.gov/draftapproach](http://oregonmetro.gov/draftapproach) and include:

- **Key Results** (an overview of the analysis of the draft approach, expected benefits and estimated costs)
- **Draft Climate Smart Strategy** (an overview of the draft approach)
- **Draft Implementation Recommendations** (policy, actions and monitoring recommendations organized in three parts)
  1. Draft Regional Framework Plan (RFP) Amendments
  2. Draft Toolbox of Possible Actions (2015-20)
  3. Draft Performance Monitoring Approach

On Oct. 7, the Metro Council discussed the toolbox and expressed overall support for the range of immediate and near-term actions identified for Metro and noted that advocating for increased funding to implement adopted local and regional plans and state actions needed to realize fleet and technology assumptions included in the draft strategy will be critical to success.

On Oct. 9, JPACT discussed the Draft RFP amendments and principles identified by TPAC for defining the draft short list of toolbox actions. On Oct. 9, a technical work group of TPAC and Metro Technical Advisory Committee (MTAC) members met to begin defining a short list of priority toolbox actions for the region to work on together in 2015 and 2016. On Oct. 15, the MTAC discussed the Draft RFP amendments and a draft short list of toolbox actions for MPAC and JPACT to discuss at their joint meeting on Nov. 7. On Oct. 22, MPAC discussed the Draft Metro Council Ordinance and RFP amendments. A summary of comments provided by the technical and policy advisory committees is provided for reference.

### **Draft Regional Framework Plan Amendments**

JPACT, MTAC and MPAC members provided the following comments on the draft RFP amendments:

#### Chapter 1 - Land Use

- Page 2, Objective 1.1.4 – revise to read “Incentivize and encourage elimination of unnecessary barriers to compact, mixed-use, pedestrian-friendly and transit-supportive development within Centers, Corridors, Station Communities and Main Streets.”
- Page 3, Objective 1.10.1(c)(iii) – revise to read, “Provides access to neighborhood and community parks, schools, trails and walkways, and other recreation and cultural areas and facilities.”

#### Chapter 2 - Transportation

- Simplify Chapter 2 amendments to mirror level of detail in existing Chapter 2 policies:
  - Page 8, Objective 11.1 - Delete last bullet given it overlaps with the goal statement

- Page 8, Objective 11.1 - Delete reference to “regional plans and functional plans adopted by the Metro Council for local governments” because this is already defined in Chapter 8 (Implementation) of the RFP.
- Page 9, Objective 11.2 – delete bullet with reference to the Oregon Modeling Steering Committee because this seems to be unnecessary detail
- Page 9, Objective 11.3 – add reference to Toolbox of Possible Actions in objective statement and delete sub-bullets listing examples of possible actions because the actions are voluntary and could appear to be defacto priorities or criteria for funding eligibility
- Page 9, Objective 11.3 – retain but shorten the list of example actions and revise the language to read, “Encourage local, state and federal governments and special districts to take actions recommended in the regional climate strategy to help meet adopted targets for reducing greenhouse gas emissions from light vehicle travel, including such as...”
- Page 9, Objective 11.3 – add reference to safe routes to schools programs to list of possible actions
- Page 8, Objective 11.1 - Add reference to alternative fuel vehicles and fueling stations as part of supporting Oregon’s transition to cleaner, low carbon fuels and more fuel efficient vehicle technologies
- Policy language should be more direct and aspirational about linkages between the policies that reduce greenhouse gas emissions and Metro funding, such as the Community Development Grant Program.

#### **Draft Short list of toolbox actions for 2015 and 2016**

Building on existing local, regional and statewide priorities, the *Toolbox of Possible Actions* is a comprehensive menu of more than 200 policy, program and funding actions that can be tailored to best support local, regional and state plans and visions. Local government partners and other stakeholders have raised questions around what priority actions the region should work on together starting in 2015 given the voluntary nature of the toolbox and the significant number of actions that could be taken. While many actions are already being implemented to varying degrees across the region and at the state level, the toolbox identifies new actions the state, Metro, local governments and special districts can take to help implement the draft approach. Immediate (2015-16) and near-term (2017-20) identified in the public review draft toolbox include:

- Advocating for **state legislative changes** related to the Oregon Clean Fuels program, brownfield redevelopment, local housing policies and programs and transportation funding;
- Adopting **policy and program changes** at the state, regional and local levels to align policies and investments with community visions, focus growth in designated areas, improve safety for all modes and all users of the transportation system, and incorporate greenhouse gas emissions reduction in planning and funding decisions;
- **Building a diverse transportation funding coalition** that includes elected officials and community and business leaders at local, regional and state levels working together to secure adequate transportation funding for all modes and all users of the transportation system;

- **Expanding funding available to low carbon travel options and programs**, including transit, intelligent transportation systems (ITS), travel information and incentives and Safe Routes to Schools (including high schools) and Safe Routes to Transit programs; and
- **Expanding technical assistance and best practices** provided to local governments and other business and community partners to support implementation of the strategy;
- Increasing the **public and private alternative fuel vehicle (AFV) fleet and charging/fueling infrastructure**; and
- Further developing **appropriate tools and methods to support greenhouse gas emissions reduction planning and monitoring**.

On Oct. 15, MTAC members provided the following comments on a draft short list of priority actions:

- Action 1 (state legislative changes)– revise action to narrow focus on state actions related to the fleet and technology assumptions included in the draft Climate Smart Strategy given the significant greenhouse gas emissions reduction expected (and taken credit for in the draft strategy).
  - Funding is already captured in Action 2.
  - Typically, the state legislative agenda priorities adopted by JPACT and the Metro Council focus on transportation funding.
  - The other topics are important but less central to reducing greenhouse gas emissions and should be left to Metro, individual local governments and others to determine whether they are priorities for their respective 2015 state legislative agendas.
- Action 2 (transportation funding) – revise action to reference “advocating for increased funding” as part of a coalition given that the Oregon Transportation Forum and the JPACT finance subcommittee are already working on securing adequate transportation funding. This is also a key action for implementation.
- Action 3 (local projects) –revise action to clarify the intent is to seek opportunities to implement local projects that integrate the most effective greenhouse gas emissions reduction strategies to show locally tailored approaches that go beyond what the region is currently doing; ensure community-based transit service improvements can be an element of a project.

An updated draft is attached and will be reviewed by TPAC on Oct. 31. The updated draft reflects input provided by MTAC and re-orders action 1 and 2 and further simplifies action 3.

#### **Options for demonstrating the region’s commitment to implement the Climate Smart Strategy**

Local government partners and other stakeholders have raised questions around how the region can best demonstrate to the Land Conservation and Development Commission a shared commitment to implement the draft approach and priority actions given that the toolbox reflects a menu of actions that can be locally tailored to best support local, regional and state plans and visions. Ideas raised to date have included:

- A signed **regional compact** that outlines, at a broad level, what the region agrees to work on together starting in 2015 and how to monitor progress;
- Adoption of the **Metro Council Ordinance** that outlines, at a broad level, what the region agrees to work on together starting in 2015 and how to monitor progress;

- Adoption of **local resolutions or other means** to signal a commitment to work together and implement priority actions; and
- Submittal of **letters of support** from responsible agencies, coordinating committees, city councils, county boards and other decision-making bodies indicating a shared commitment to implement their priority actions.

MTAC provided the following comments on demonstrating the region' commitment to implement the Climate Smart Strategy:

- Keep it simple, and rely on MPAC and JPACT's recommendation to the Metro Council on adoption of the strategy and implementation recommendations, the three priority actions for 2015 and 2016, and the Metro Council Ordinance as the primary vehicles for demonstrating commitment. This is consistent with how the region demonstrates its commitment to implement the Regional Transportation Plan, for example.
- Local governments and others could choose to provide Metro with letters of support or commitment that identify actions they are already taking or will seek opportunities to take in the near-term. The letters could then be submitted to the Land Conservation and Development Commission along with the final adoption action and decision record in 2015.

In addition to the comments provided by JPACT and MTAC members, more than 1,800 individuals have responded to the on-line survey or submitted comments on the draft materials. Staff is reviewing all of the comments received to date to identify potential refinements to the adoption package. A preliminary summary of comments received and potential refinements will be provided at the Nov. 5 meeting.

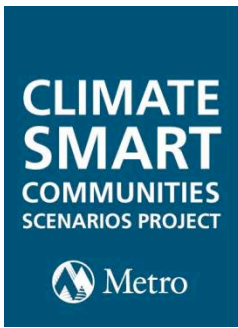
## **WHAT'S NEXT?**

The Metro Council will hold a public hearing on Oct. 30. On November 19 and 21, MTAC and TPAC will be asked to make a recommendation to MPAC and JPACT at their respective meetings. MPAC and JPACT will make final recommendations to the Metro Council on adoption of the draft Climate Smart Strategy and implementation recommendations on Dec. 10 and 11, respectively. The Metro Council will hold a second public hearing and consider the MPAC and JPACT recommendations on Dec. 18, 2014.

## Attachments

- 2014 Decision Milestones (*Oct. 10, 2014*)
- Ordinance No. 14-1346
  - Exhibit A – Draft Climate Smart Communities Strategy (*Sept. 15, 2014*)
  - Exhibit B - Draft Regional Framework Plan Amendments (*Sept. 15, 2014*)
  - Exhibit C – Draft Toolbox of Possible Actions (*Sept. 15, 2014*)
  - Exhibit D - Draft Performance Monitoring Approach (*Sept. 15, 2014*)
  - Exhibit E – Summary of Recommended Changes placeholder (*under development*)
  - Exhibit F – Findings of Fact and Conclusions of Law placeholder (*under development*)
- Staff report to Ordinance No. 14-1346 (*Oct. 20, 2014*)
  - Attachment 1 – TPAC/MTAC recommended inputs to reflect May 30 MPAC/JPACT Draft Approach (June 20, 2014)
  - Attachment 2 – Key Results (Sept. 12, 2014)
  - Attachment 3 – Public Engagement Report placeholder (*under development*)
- Draft Short List of Climate Smart Actions For 2015 and 2016 (*Oct. 23, 2014*)





## 2014 DECISION MILESTONES

1. Receive Council direction on Draft Approach	June 19, 2014
2. Release Draft Approach for 45 day public comment period	September 15, 2014
3. Seek Council adoption of recommended preferred approach	December 18, 2014

## EVENTS AND PRODUCTS TO ACTUALIZE DECISION MILESTONES

<b>Milestone 1</b>	<b>Council direction on draft approach to test</b>
Jan. - Feb.	Metro Council, MPAC and JPACT confirm process & policy areas to discuss in 2014 Conduct interviews with community and business leaders and elected officials
Feb. - March	MPAC and JPACT discuss background information on policy areas Launch public opinion research (telephone survey) and on line public comment tool Convene discussion groups to gather input on strategies to include in draft approach MTAC and TPAC help frame policy choices for MPAC and JPACT discussion
April 11	Joint MPAC/JPACT meeting to discuss policy choices
April	Public engagement report prepared for policy advisory committees and Metro Council MTAC and TPAC provide input on elements of draft approach and make recommendation to MPAC and JPACT
May 30	Joint MPAC/JPACT meeting to recommend draft approach to test
June 19	Council direction on draft approach to test
<b>Milestone 2</b>	<b>Release draft approach and implementation recommendations for 45-day public comment period</b>
June - Sept.	Staff evaluates draft preferred approach and develops implementation recommendations MTAC and TPAC provide input on draft approach evaluation results, estimated costs and implementation recommendations Brief local officials on draft approach and upcoming adoption process through quarterly updates and other means
Week of Aug. 25	Public notice published on upcoming public comment period
<b>Sept. 15, 2014</b>	<b>Release draft approach and implementation recommendations for 45-day public comment period</b>

Milestone 3	Seek Council adoption of recommended preferred approach
Sept. – Nov.	Brief local officials, TriMet, the Port of Portland and ODOT through county level coordinating committee meetings, quarterly updates, and other means
Sept. 10 and 11	MPAC and JPACT discussion on draft approach results, implementation recommendations and topics for future policy discussion
Sept. 17	MTAC update on update on public review materials and next steps for defining priority toolbox actions and options to demonstrate region’s commitment to implementation
Sept. 26	TPAC update on public review materials and begin discussion to prioritize toolbox actions and define options to demonstrate region’s commitment to implementation
Oct. 7	Council discussion on draft approach and implementation recommendations, including actions Metro can take to implement draft approach
Oct. 8	MPAC update on public review materials and next steps for short list of toolbox actions and demonstrating region’s commitment to implementation ( <i>as part of Councilor communications</i> )
Oct. 9	JPACT update on public review materials and next steps for short list of toolbox actions and demonstrating region’s commitment to implementation
	Climate Smart Communities technical work group discussion on short list of toolbox actions and demonstrating region’s commitment to implementation
Oct. 15	MTAC discussion on Regional Framework Plan amendments, performance monitoring, short list of toolbox actions and demonstrating region’s commitment to implementation
Oct. 22	MPAC discussion on Regional Framework Plan amendments and next steps for short list of toolbox actions and demonstrating region’s commitment to implementation
Oct. 30	Public hearing (also first reading and initial evidentiary hearing)
Oct. 31	TPAC discussion on public comments, Regional Framework Plan amendments, performance monitoring, short list of toolbox actions, demonstrating region’s commitment to implementation and draft legislation on adoption of preferred approach
Nov. 5	MTAC discussion on public comments, performance monitoring and draft legislation on adoption of preferred approach
Nov. 6	Council discussion on public comments and prep for 11/7 MPAC/JPACT meeting
Nov. 7	MPAC/JPACT joint meeting to discuss public comments and begin shaping recommendation to Council
Nov. 12	MPAC discussion on public comments, potential refinements & recommendation to Council
Nov. 13	JPACT discussion on public comments, potential refinements & recommendation to Council
Nov. 19	MTAC makes recommendation to MPAC on adoption of the preferred approach
Nov. 21	TPAC makes recommendation to JPACT on adoption of the preferred approach
Dec. 9	Council discussion of potential refinements being considered by MPAC & JPACT
Dec. 10	MPAC recommendation to the Metro Council on adoption of the preferred approach
Dec. 11	JPACT recommendation to the Metro Council on adoption of the preferred approach
<b>Dec. 18, 2014</b>	<b>Seek Metro Council adoption of recommended preferred approach (2<sup>nd</sup> hearing and action)</b>



BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING A ) ORDINANCE NO. 14-1346  
PREFERRED CLIMATE SMART )  
COMMUNITIES STRATEGY AND AMENDING ) Introduced by Chief Operating Officer  
THE REGIONAL FRAMEWORK PLAN TO ) Martha Bennett in concurrence with  
COMPLY WITH STATE LAW ) Council President Tom Hughes

WHEREAS, the State of Oregon’s 2007 greenhouse gas emissions reductions goals direct Oregon to stop increases in greenhouse gas emissions by 2010, reduce emissions to at least 10 percent below 1990 levels by 2020, and reduce emissions to at least 75 percent below 1990 levels by 2050; and

WHEREAS, Oregon Legislature passed House Bill 2001, also known as the Jobs and Transportation Act (“JTA”), in 2009; and

WHEREAS, Section 37 of the JTA requires Metro in the Portland metropolitan region to prepare and cooperatively select a preferred land use and transportation scenario for achieving greenhouse gas emission reductions from motor vehicles with a gross vehicle weight rating of 10,000 pounds or less (light vehicles); and

WHEREAS, the Metro Council, with the advice and support of the Metro Policy Advisory Committee (“MPAC”) and the Joint Policy Advisory Committee on Transportation (“JPACT”), adopted the 2035 Regional Transportation Plan (“RTP”) in 2010 and directed staff to conduct greenhouse gas scenario planning; and

WHEREAS, on December 16, 2010, the Metro Council, with the advice and support of MPAC, established six desired outcomes to reflect the region’s desire to develop vibrant, prosperous and sustainable communities with safe and reliable transportation choices that minimize greenhouse gas emissions and equitably distribute the benefits and costs of growth and change in the region; and

WHEREAS, in 2011, the Land Conservation and Development Commission (“LCDC”) adopted Oregon Administrative Rules (“OARs”) 660-044-0000 to -0060, which included per capita greenhouse gas emissions reduction targets for each of Oregon’s six metropolitan areas, including the Portland metropolitan region, to help meet statewide goals to reduce greenhouse gas emissions to 75 percent below 1990 levels by the year 2050; and

WHEREAS, the LCDC adopted target calls for the Portland metropolitan region to reduce per capita roadway greenhouse gas emissions from light duty vehicles by 20 percent below 2005 levels by 2035; and

WHEREAS, the target reduction is in addition to significantly greater reductions anticipated to occur from state and federal actions related to advancements in cleaner, low carbon fuels and more fuel-efficient vehicle technologies, including electric and alternative fuel vehicles; and

WHEREAS, in 2012, the LCDC amended OAR 660-044-0040 to direct Metro to evaluate a reference case that reflects implementation of existing adopted comprehensive and transportation plans and at least two alternative land use and transportation scenarios that accommodate planned growth while achieving a reduction in greenhouse gas emissions from light vehicles and guide Metro in the evaluation and selection of a preferred land use and transportation scenario by December 31, 2014; and

WHEREAS, the Portland metropolitan region conducted scenario planning through the Climate Smart Communities Scenarios Project to demonstrate leadership on addressing climate change, maximize achievement of all six of the region's desired outcomes, implement adopted local and regional plans and visions, including the 2040 Growth Concept, local comprehensive and transportation system plans and the regional transportation system plan, and respond to Section 37 of the JTA and OAR 660-044; and

WHEREAS, the Climate Smart Communities Scenarios Project was completed through a 3-phase collaborative effort designed to support communities in the Portland metropolitan region in realizing their aspirations for healthy and equitable communities and a strong economy, and reduce greenhouse gas emissions from light vehicles as required by the State; and

WHEREAS, Phase 1 of the Scenarios Project focused on understanding the region's land use and transportation choices by conducting a review of published research and testing 144 regional scenarios in 2011; and

WHEREAS, Phase 2 of the Scenarios Project, in 2012 and 2013, focused on shaping future choices for the region to advance implementation of community visions by conducting further analysis of the Phase 1 scenarios, confirming local land use visions, preparing eight community case studies and engaging community and business leaders, city and county officials and staff, county coordinating committees, responsible state agencies, a technical work group and Metro's technical and policy advisory committees to develop assumptions for three scenarios to test and a set of evaluation criteria to be used to measure and compare them; and

WHEREAS, Phase 2 of the Scenarios Project found that adopted local and regional plans, if implemented, can meet the state mandated target for reducing greenhouse gas emissions from light vehicles by 2035; and

WHEREAS, Phase 3 of the Scenarios Project, in 2014, considered the results of the Phase 2 evaluation, the region's six desired outcomes, feedback received from public officials, business and community leaders, interested members of the public and other identified audiences from January to April 2014 to shape a draft preferred approach; and

WHEREAS, on June 19, 2014, the Metro Council directed staff to evaluate the draft approach, a product of four years of research, analysis, community engagement and discussion, that was unanimously recommended by MPAC and JPACT for testing on May 30, 2014; and

WHEREAS, the recommended approach as set forth in the draft Climate Smart Communities Strategy reflects adopted local and regional land use plans and local and regional investment priorities adopted in the 2014 Regional Transportation Plan (RTP) on July 17, 2014; and

WHEREAS, the recommended approach, as set forth in the draft Climate Smart Communities Strategy, reflects assumptions used by the state when adopting the region's reduction target for state and federal actions related to advancements in cleaner, low carbon fuels and more fuel-efficient vehicle technologies, including electric and alternative fuel vehicles; and

WHEREAS, the recommended approach reflects the financially constrained 2014 RTP level of investment for streets, highways and active transportation, and higher levels of investment for (1) transit service and related capital improvements needed to support increased service levels, (2) transportation system management technologies, and (3) travel information and incentive programs; and

WHEREAS, while the recommended level of investment for transit service and related capital, transportation system management technologies and travel information and incentive programs is more than what is adopted in the financially constrained 2014 RTP, the estimated costs fall within the full 2014 RTP funding assumptions the region has agreed to work toward as part of meeting statewide planning goals; and

WHEREAS, analysis shows, if implemented, the recommended approach achieves a 29 percent reduction in per capita greenhouse gas emissions from light duty vehicles and provides significant community, public health, environmental and economic benefits to communities and the region; and

WHEREAS, the recommended approach reduces air pollution, improves safety, helps people live healthier lives, manages congestion, reduces freight truck travel costs due to delay, expands travel options, improves access to jobs and essential destinations, and makes the most of investments already made in the region's transportation system – all of which help save businesses and households money and support job creation and economic development; and

WHEREAS, on September 15, 2014, Metro staff launched an online survey and released the preferred land use and transportation scenario under OAR 660-044-0040 for review and comment through October 30, 2014, as set forth in the draft Climate Smart Communities Strategy, draft Regional Framework Plan Amendments, draft Toolbox of Possible Actions (2015-2020) and draft Performance Monitoring Approach; and

WHEREAS, the draft Climate Smart Communities Strategy reflects the approach unanimously recommended for study by MPAC and JPACT on May 30, 2014; and

WHEREAS, the Regional Framework Plan guides Metro land use and transportation planning and other activities and does not mandate local government adoption of any particular policy or action; and

WHEREAS, the draft Regional Framework Plan Amendments identify refinements to existing regional policies that integrate the key components of the Climate Smart Communities Strategy, including performance measures for tracking the region's progress on implementing the strategy; and

WHEREAS, the draft Toolbox of Possible Actions identifies possible near-term (within the next 5 years) actions that the Oregon Legislature, state agencies and commissions, Metro, local governments and special districts can take to begin implementation of the Climate Smart Communities Strategy; and

WHEREAS, while the toolbox does not mandate adoption of any particular policy or action, MPAC and JPACT agree updates to local comprehensive plans and development regulations, transit agency plans, port district plans and regional growth management and transportation plans present continuing opportunities to implement the Toolbox of Possible Actions in ways that can be locally tailored; and

WHEREAS, the draft Performance Monitoring Approach identifies measures and aspirational targets for tracking the region's progress on implementing the key components of the Climate Smart Communities Strategy adopted by the Metro Council that build on the existing land use and transportation performance monitoring Metro is already responsible for as a result of state and federal requirements; and

WHEREAS, the 2018 Regional Transportation Plan update will serve as a major vehicle for implementing the preferred scenario under OAR 660-044-0040; and

WHEREAS, Metro sought and received comments on the draft Climate Smart Strategy, draft Regional Framework Plan Amendments, draft Toolbox of Possible Actions (2015-2020) and draft Performance Monitoring Approach from MPAC, JPACT, its Metro Technical Advisory Committee (“MTAC”), its Transportation Policy Alternatives Committee (“TPAC”), state agencies and commissions, including the Oregon Department of Transportation, the Oregon Department of Environmental Quality, the Oregon Department of Land Conservation and Development, and the Land Conservation and Development Commission, local governments in the region, the Port of Portland, public, private and non-profit organizations and the public; and

WHEREAS, the Metro Council held public hearings on October 30 and December 18, 2014; and

WHEREAS, Metro identified amendments in response to comments received on the draft Climate Smart Strategy, draft Regional Framework Plan Amendments, draft Toolbox of Possible Actions (2015-2020) and draft Performance Monitoring Approach for consideration by MTAC, TPAC, MPAC and JPACT as set forth in the Summary of Recommended Changes; and

WHEREAS, MTAC, TPAC, MPAC and JPACT have considered the results of the evaluation, materials released for public review on September 15, 2014, subsequent public and stakeholder input received and amendments identified to address input received prior to recommending a preferred scenario for the Metro Council to adopt by December 31, 2014; and

WHEREAS, adoption of the Climate Smart Communities Strategy and supporting implementation recommendations presents an opportunity for the region to act together to demonstrate leadership on climate change and address challenges related to transportation funding and implementing adopted local and regional plans, including transit service plans; and

WHEREAS, MPAC and JPACT acknowledge that implementation of adopted local and regional plans, including transit service plans, as called for in the Climate Smart Communities Strategy and supporting implementation recommendations, will require new resources and active participation from a full range of partners over the long-term; and

WHEREAS, MPAC and JPACT have agreed to work together with the Metro Council and other public and private partners to begin implementation in 2015 and recommend three priority actions as a starting point; and

WHEREAS, MPAC, on December 10, 2014, and JPACT, on December 11, 2014, recommended Council adoption of the preferred scenario under OAR 660-044-0040, as reflected in the Climate Smart Communities Strategy and supporting implementation recommendations, to achieve state and regional climate goals and support many other state, regional and local goals, including expanded transportation choices, clean air, healthy and equitable communities, and a strong economy; now, therefore,

BE IT ORDAINED THAT:

1. The Climate Smart Communities Strategy, attached to this ordinance as Exhibit A, is hereby adopted as part of the preferred land use and transportation scenario under OAR 660-044-0040.
2. The amendments to the Regional Framework Plan, attached to this ordinance as Exhibit B, are hereby adopted as part of the preferred land use and transportation scenario under OAR 660-044-0040 to provide policy direction on efforts to reduce per capita greenhouse gas emissions from light duty vehicles and identify performance measures to evaluate and report on the region’s progress toward implementing key components of the Climate Smart Communities Strategy.

3. The amendments to Chapter 2 of the Regional Framework Plan, attached to this ordinance as Exhibit B, are also incorporated into Chapter 2 of the Regional Transportation Plan.
4. The Toolbox of Possible Actions (2015-2020), attached to this ordinance as Exhibit C, is hereby adopted as part of the preferred land use and transportation scenario under OAR 660-044-0040 and will be incorporated into the technical appendix for the Regional Transportation Plan as part of the next update.
5. The Performance Monitoring Approach, attached to this ordinance as Exhibit D, is hereby adopted as part of the preferred land use and transportation scenario under OAR 660-044-0040 and will be incorporated into the Regional Transportation Plan.
6. Metro's on-going regional performance monitoring program will evaluate and report on the region's progress over time toward implementing key components of the Climate Smart Communities Strategy through regularly-scheduled updates to the Regional Transportation Plan and Urban Growth Report, and in response to Oregon State Statutes ORS 197.301 and ORS 197.296.
7. The Summary of Recommended Changes, attached to this ordinance as Exhibit E, is hereby adopted to amend Exhibits A through D.
8. The Findings of Fact and Conclusions of Law in Exhibit F, attached and incorporated into this ordinance, explain how adoption of Exhibits A through E by the Council satisfies Metro's responsibility under state law to prepare and cooperatively select a preferred land use and transportation scenario that achieves the adopted LCDC target for greenhouse gas emission reductions from light vehicles in the Portland metropolitan region by 2035 pursuant to OAR 660-044.
9. Metro staff is directed to prepare a final report that consolidates Exhibits A, C and D, as amended by Exhibit E, and transmit the report and decision record, including this ordinance and exhibits to the ordinance, to the LCDC in the manner of periodic review.
10. The preferred scenario under OAR 660-044-0040, adopted by this ordinance and reflected in the Climate Smart Communities Strategy and supporting implementation recommendations, will be further implemented through the next scheduled update to the Regional Transportation Plan by December 31, 2018. Metro staff is directed to begin scoping the work plan for the next update to the Regional Transportation Plan, and identify a schedule and outline of policy decisions and resources needed.

ADOPTED by the Metro Council this 18th day of December, 2014.

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Tom Hughes, Council President

Approved as to Form:

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Alison Kean, Metro Attorney

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**CLIMATE  
SMART**  
COMMUNITIES  
SCENARIOS PROJECT

A full version of Exhibit A is available by [clicking here](#).

# Draft Climate Smart Strategy

Public Review Draft

September 15, 2014

**MAKING A  
GREAT  
PLACE**



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**CLIMATE  
SMART**  
COMMUNITIES  
SCENARIOS PROJECT

**1**

# Draft Regional Framework Plan Amendments

Public Review Draft

September 15, 2014

**MAKING A  
GREAT  
PLACE**



## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

Stay in touch with news, stories and things to do.

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

### **Metro Council President**

Tom Hughes

### **Metro Councilors**

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

### **Auditor**

Suzanne Flynn

**PART 1. DRAFT REGIONAL FRAMEWORK PLAN AMENDMENTS**

*This is one of three parts of the draft implementation recommendations being presented for public review and comment from Sept. 15 to Oct. 30, 2014*

This document includes proposed policy amendments that are limited to Chapter 1 (Land Use) and Chapter 2 (Transportation) of the Regional Framework Plan and reflect policy changes that will guide how Metro will implement the draft approach. The proposed amendments are detailed in the attached strikethrough/underscore versions of the chapters.

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**Chapter 1 (Land Use) Regional Framework Plan Amendments**

**Chapter 2 (Transportation) Regional Framework Plan Amendments**

**BACKGROUND**

The Climate Smart Communities Scenarios Project responds to a 2009 mandate from the Oregon Legislature for our region to develop a strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. Metro is the regional government and federally-designated metropolitan planning organization for the Portland metropolitan area, serving a population of 1.5 million people. In that role, Metro has been working together with community, business and elected leaders across our region to shape a draft Climate Smart Strategy that meets the state mandate while supporting economic prosperity, community livability and protection of our environment.

After a four-year collaborative process informed by research, analysis, community engagement and deliberation, a draft Climate Smart Strategy that meets the state target is being presented for your review and comment. The draft strategy relies on policies and investments that have already been identified as local priorities in communities across the region and in the region’s long-range transportation plan.

**HOW TO PROVIDE YOUR INPUT**

- Take an on-line survey at [www.makeagreatplace.org](http://www.makeagreatplace.org).
- Submit comments by mail to Metro Planning, 600 NE Grand Ave., Portland, OR 97232, by email to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov), or by phone at 503-797-1750 or TDD 503-797-1804 from Sept. 15 through Oct. 30, 2014.
- Testify at a Metro Council hearing on Oct. 30 at 600 NE Grand Ave., Portland, OR 97232 in the Council Chamber.

## WHAT'S NEXT?

The Metro Policy Advisory Committee and the Joint Policy Advisory Committee on Transportation are working to finalize their recommendation to the Metro Council on the draft approach and draft implementation recommendations.

**Sept. 15 to Oct. 30** Public comment period on draft approach and draft implementation recommendations

**Nov. 7** MPAC and JPACT meet to discuss public comments and shape recommendation to the Metro Council

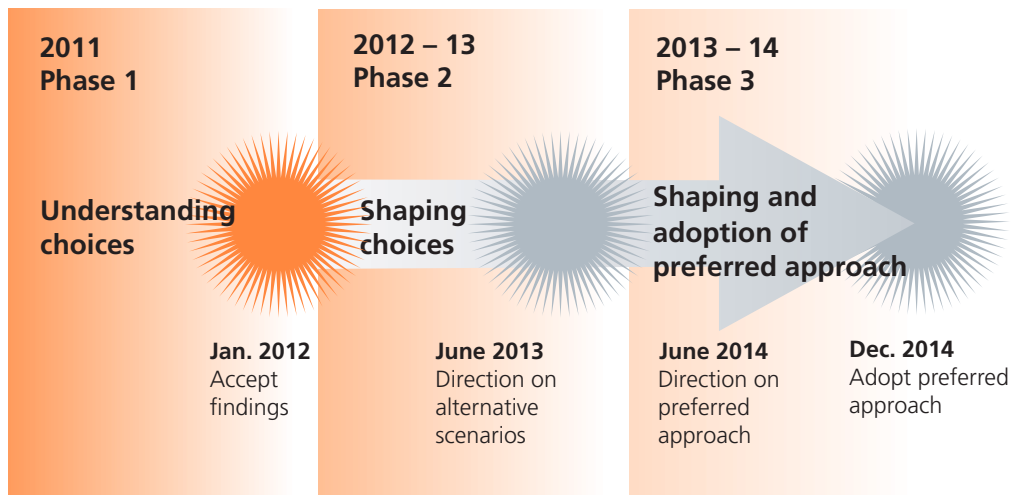
**December 10 and 11** MPAC and JPACT make recommendation to Metro Council

**December 18** Metro Council considers adoption of preferred approach

**January 2015** Metro submits adopted approach to Land Conservation and Development Commission for approval

**2015 and beyond** Ongoing implementation and monitoring

## Climate Smart Communities Scenarios Project timeline



## WHERE CAN I FIND MORE INFORMATION?

Public review materials and other publications and reports can be found at [oregonmetro.gov/climatescenarios](http://oregonmetro.gov/climatescenarios). For email updates, send a message to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov).

## EXCERPT FROM

### Regional Framework Plan Chapter 1 Land Use

#### Introduction

The Metro Charter requires that Metro address growth management and land use planning matters of metropolitan concern. This chapter contains the policies that guide Metro in such areas as development of centers, corridors, station communities, and main streets; housing choices; employment choices and opportunities; economic vitality; urban and rural reserves; management of the Urban Growth Boundary (UGB); urban design and local plan and policy coordination.

This chapter also addresses land use planning matters that the Metro Council, with the consultation and advice of the Metro Policy Advisory Committee (MPAC), determines will benefit from regional planning, such as affordable housing.

A livable region is an economically strong region. This chapter contains policies that supports a strong economic climate through encouraging the development of a diverse and sufficient supply of jobs, especially family wage jobs, in appropriate locations throughout the region.

#### Six Outcomes, Characteristics of a Successful Region

It is the policy of the Metro Council to exercise its powers to achieve the following six outcomes, characteristics of a successful region:

1. People live, work and play in vibrant communities where their everyday needs are easily accessible.
2. Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
3. People have safe and reliable transportation choices that enhance their quality of life.
4. The region is a leader in minimizing contributions to [global warming climate change](#).
5. Current and future generations enjoy clean air, clean water and healthy ecosystems.
6. The benefits and burdens of growth and change are distributed equitably.

(Added 12/16/10, Metro Ord. 10-1244B.)

#### Performance Measures and Performance Targets

It is also the policy of the Metro Council to use performance measures and performance targets to:

- a. Evaluate the effectiveness of proposed policies, strategies and actions to achieve the desired Outcomes;

- b. Inform the people of the region about progress toward achieving the Outcomes;
- c. Evaluate the effectiveness of adopted policies, strategies and actions and guide the consideration of revision or replacement of the policies, strategies and actions; and
- d. Publish a report on progress toward achieving the desired Outcomes on a periodic basis.

(Added 12/16/10, Metro Ord. 10-1244B.)

The Metro Code provisions, the Urban Growth Management Functional Plan, a background discussion and policy analysis for this chapter are included in the Appendices of this plan.

## **Policies**

The following section contains the policies for land use. These policies are implemented in several ways. The Metro Council implements the policies through its investments in planning, transportation and other services. The Council also implements the policies by adopting and occasionally revising Metro's functional plans for local governments. The functional plans themselves are implemented by the region's cities and counties through their comprehensive plans and land use regulations.

### **1.1 Compact Urban Form**

It is the policy of the Metro Council to:

- 1.1.1. Ensure and maintain a compact urban form within the UGB.
- 1.1.2. Adopt and implement a strategy of investments and incentives to use land within the UGB more efficiently and to create a compact urban form.
- 1.1.3. Facilitate infill and re-development, particularly within Centers, Corridors, Station Communities, Main Streets and Employment Areas, to use land and urban services efficiently, to support public transit, to promote successful, walkable communities and to create equitable and vibrant communities.
- 1.1.4. Encourage elimination of unnecessary barriers to compact, mixed-use, pedestrian-friendly and transit-supportive development within Centers, Corridors, Station Communities and Main Streets.
- 1.1.5. Promote the distinctiveness of the region's cities and the stability of its neighborhoods.
- 1.1.6. Enhance compact urban form by developing the Intertwine, an interconnected system of parks, greenspaces and trails readily accessible to people of the region.
- 1.1.7. Promote excellence in community design.

1.1.8 Promote a compact urban form as a key climate action strategy to reduce greenhouse gas emissions.

(RFP Policy 1.1 amended 12/16/10, Metro Ord. 10-1244B.)

## 1.10 Urban Design

It is the policy of the Metro Council to:

1.10.1 Support the identity and functioning of communities in the region through:

- a. Recognizing and protecting critical open space features in the region.
- b. Developing public policies that encourage diversity and excellence in the design and development of settlement patterns, landscapes and structures.
- c. Ensuring that incentives and regulations guiding the development and redevelopment of the urban area promote a settlement pattern that:
  - i) Links any public incentives to a commensurate public benefit received or expected and evidence of private needs.
  - ii) ~~Is pedestrian "friendly,"~~ Makes biking and walking safe and convenient, encourages transit use and reduces auto dependence and related greenhouse gas emissions.
  - iii) Provides access to neighborhood and community parks, trails and walkways, and other recreation and cultural areas and public facilities.
  - iv) Reinforces nodal, mixed-use, neighborhood-oriented design.
  - v) Includes concentrated, high-density, mixed-use urban centers developed in relation to the region's transit system.
  - vi) Is responsive to needs for privacy, community, sense of place and personal safety in an urban setting.
  - vii) Facilitates the development and preservation of affordable mixed-income neighborhoods.
  - viii) Avoids and minimizes conflicts between urbanization and the protection of regionally significant fish and wildlife habitat.

1.10.2 Encourage pedestrian-, bicycle- and transit-supportive building patterns in order to minimize the need for auto trips, reduce greenhouse gas emissions and to create a development pattern conducive to face-to-face community interaction.

(RFP Policy 1.10.1 (c)(viii) added 9/29/05, Metro Ord. 05-1077C, Exb. B, Amend. 4.)





**REGIONAL FRAMEWORK PLAN  
CHAPTER 2 TRANSPORTATION**

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## Chapter 2 Transportation

### Introduction

In 1992, the region's voters approved a charter for Metro that formally gave responsibility for regional land use planning to the agency, and requires adoption of a Regional Framework Plan that integrates land use, transportation and other regional planning mandates. The combined policies of this framework plan establish a new framework for planning in the region by linking land use and transportation plans. Fundamental to this plan is a transportation system that integrates goods and people movement with the surrounding land uses.

This chapter of the Regional Framework Plan presents the overall policy framework for the specific transportation goals, objectives and actions contained in the Regional Transportation Plan (RTP). It also sets a direction for future transportation planning and decision-making by the Metro Council and the implementing agencies, counties and cities.

The policies aim to implement the 2040 Growth Concept and:

- Protect the economic health and livability of the region.
- Improve the safety of the transportation system.
- Provide a transportation system that is efficient and cost-effective, investing our limited resources wisely.
- [Make the most of the investments the region has already made in our transportation system by expanding the use of technology to actively manage the transportation system, providing traveler information and incentives to expand the use of travel options.](#)
- [Make transit more convenient, frequent, accessible and affordable.](#)
- Provide access to more and better choices for travel in this region and serve special access needs for all people, including youth, elderly and disabled.
- Provide adequate levels of mobility for people and goods within the region.
- Protect air and water quality ~~and~~, promote energy conservation, [and reduce greenhouse gas emissions.](#)
- Provide transportation facilities that support a balance of jobs and housing.
- [Make walking and biking safe and convenient.](#)
- Limit dependence on any single mode of travel and increase the use of transit, bicycling, walking and carpooling and vanpooling.
- [Make streets and highways safe, reliable and connected; pProvide](#) for the movement of people and goods through an interconnected system of highway, air, marine and rail systems, including passenger and freight intermodal facilities and air and water terminals.
- Integrate land use, automobile, bicycle, pedestrian, freight and public transportation needs in regional and local street designs.
- ~~[Use transportation demand management and system management strategies.](#)~~
- ~~[Limit the impact of urban travel on rural land through use of green corridors.](#)~~

- [Manage parking to make efficient use of land and parking spaces.](#)
- [Demonstrate leadership on climate change.](#)

**Goal 1: Foster Vibrant Communities and Efficient Urban Form**

Land use and transportation decisions are linked to optimize public investments, [reduce greenhouse gas emissions](#) and support active transportation options and jobs, schools, shopping, services, recreational opportunities and housing proximity.

**Objective 1.1 Compact Urban Form and Design**

Use transportation investments to ~~reinforce-focus~~ growth in and [provide](#) multi-modal access to 2040 Target Areas and ensure that development in 2040 Target Areas is consistent with and supports the transportation investments.

**Objective 1.2 Parking Management**

Minimize the amount and promote the efficient use of land dedicated to vehicle parking.

**Objective 1.3 Affordable Housing**

Support the preservation and production of affordable housing in the region.

**Goal 2: Sustain Economic Competitiveness and Prosperity**

Multi-modal transportation infrastructure and services support the region's well-being and a diverse, innovative, sustainable and growing regional and state economy.

**Objective 2.1 Reliable and Efficient Travel and Market Area Access**

Provide for reliable and efficient multi-modal regional, interstate and intrastate travel and market area access through a seamless and well-connected system of throughways, arterial streets, freight services, transit services and bicycle and pedestrian facilities.

**Objective 2.2 Regional Passenger Connectivity**

Ensure reliable and efficient connections between passenger intermodal facilities and destinations in and beyond the region to improve non-auto access to and from the region and promote the region's function as a gateway for tourism.

**Objective 2.3 Metropolitan Mobility**

Maintain sufficient total person-trip and freight capacity among the various modes operating in the Regional Mobility Corridors to allow reasonable and reliable travel times through those corridors.

**Objective 2.4 Freight Reliability**

Maintain reasonable and reliable travel times and access through the region as well as between freight intermodal facilities and destinations within and beyond the region to promote the region's function as a gateway for commerce.

**Objective 2.5 Job Retention and Creation**

Attract new businesses and family-wage jobs and retain those that are already located in the region.

**Goal 3: Expand Transportation Choices**

Multi-modal transportation infrastructure and services provide all residents of the region with affordable and equitable options for accessing housing, jobs, services, shopping, educational, cultural and recreational opportunities, and facilitate competitive choices for goods movement for all businesses in the region.

**Objective 3.1 Travel Choices**

Achieve modal targets for increased walking, bicycling, use of transit and shared ride and reduced reliance on the automobile and drive alone trips.

**Objective 3.2 Vehicle Miles of Travel**

Reduce vehicle miles traveled per capita.

**Objective 3.3 Equitable Access and Barrier Free Transportation**

Provide affordable and equitable access to travel choices and serve the needs of all people and businesses, including people with low income, children, elders and people with disabilities, to connect with jobs, education, services, recreation, social and cultural activities.

**Objective 3.4 Shipping Choices**

Support multi-modal freight transportation system that includes air cargo, pipeline, trucking, rail, and marine services to facilitate competitive choices for goods movement for businesses in the region.

**Goal 4: Emphasize Effective and Efficient Management of the Transportation System**

Existing and future multi-modal transportation infrastructure and services are well-managed to optimize capacity, improve travel conditions [for all users](#) and address air quality [and greenhouse gas emissions reduction](#) goals.

**Objective 4.1 Traffic Management**

Apply technology solutions to actively manage the transportation system.

**Objective 4.2 Traveler Information**

Provide comprehensive real-time traveler information to people and businesses in the region.

**Objective 4.3 Incident Management**

Improve traffic incident detection and clearance times on the region's transit, arterial and throughways networks.

**Objective 4.4 Demand Management**

Implement services, incentives and supportive infrastructure to increase telecommuting, walking, biking, taking transit, and carpooling, and shift travel to off-peak periods.

**Objective 4.5 Value Pricing**

Consider a wide range of value pricing strategies and techniques as a management tool, including but not limited to parking management to encourage walking, biking and transit ridership and selectively promote short-term and long-term strategies as appropriate.

**Goal 5: Enhance Safety and Security**

Multi-modal transportation infrastructure and services are safe and secure for the public and goods movement.

Objective 5.1 Operational and Public Safety

Reduce fatal and severe injuries and crashes for all modes of travel.

Objective 5.2 Crime

Reduce vulnerability of the public, goods movement and critical transportation infrastructure to crime.

Objective 5.3 Terrorism, Natural Disasters and Hazardous Material Incidents

Reduce vulnerability of the public, goods movement and critical transportation infrastructure to acts of terrorism, natural disasters, [climate change](#), hazardous material spills or other hazardous incidents.

**Goal 6: Promote Environmental Stewardship**

Promote responsible stewardship of the region's natural, community, and cultural resources.

Objective 6.1 Natural Environment

Avoid or minimize undesirable impacts on fish and wildlife habitat conservation areas, wildlife corridors, significant flora and open spaces.

Objective 6.2 Clean Air

Reduce transportation-related vehicle emissions to improve air quality so that as growth occurs, the view of the Cascades and the Coast Range from within the region are maintained.

Objective 6.3 Water Quality and Quantity

Protect the region's water quality and natural stream flows.

Objective 6.4 Energy and Land Consumption

Reduce transportation-related energy and land consumption and the region's dependence on unstable energy sources.

Objective 6.5 Climate Change

Reduce transportation-related greenhouse gas emissions [and meet adopted targets for reducing greenhouse gas emissions from light vehicle travel](#).

**Goal 7: Enhance Human Health**

Multi-modal transportation infrastructure and services provide safe, comfortable and convenient options that support active living and physical activity, and minimize transportation-related pollution that negatively impacts human health.

Objective 7.1 Active Living

Provide safe, comfortable and convenient transportation options that support active living and physical activity to meet daily needs and access services.

Objective 7.2 Pollution Impacts

Minimize noise, impervious surface and other transportation-related pollution impacts on residents in the region to reduce negative health effects.

**Goal 8: Ensure Equity**

The benefits and adverse impacts of regional transportation planning, programs and investment decisions are equitably distributed among population demographics and geography, considering different parts of the region and census block groups with different incomes, races and ethnicities.

**Objective 8.1 Environmental Justice**

Ensure benefits and impacts of investments are equitably distributed by population demographics and geography.

**Objective 8.2 Coordinated Human Services Transportation Needs**

Ensure investments in the transportation system provide a full range of affordable options for people with low income, elders and people with disabilities consistent with the Tri-County Coordinated Human Services Transportation Plan (CHSTP).

**Objective 8.3 Housing Diversity**

Use transportation investments to achieve greater diversity of housing opportunities by linking investments to measures taken by the local governments to increase housing diversity.

**Objective 8.4 Transportation and Housing Costs**

Reduce the share of households in the region spending more than 50 percent of household income on housing and transportation combined.

**Goal 9: Ensure Fiscal Stewardship**

Regional transportation planning and investment decisions ensure the best return on public investments in infrastructure and programs and are guided by data and analyses.

**Objective 9.1 Asset Management**

Adequately update, repair and maintain transportation facilities and services to preserve their function, maintain their useful life and eliminate maintenance backlogs.

**Objective 9.2 Maximize Return on Public Investment**

Make transportation investment decisions that use public resources effectively and efficiently, using performance-based planning approach supported by data and analyses that include all transportation modes.

**Objective 9.3 Stable and Innovative Funding**

Stabilize existing transportation revenue while securing new and innovative long-term sources of funding adequate to build, operate and maintain the regional transportation system for all modes of travel at the federal, state, regional and local level.

**Goal 10: Deliver Accountability**

The region's government, business, institutional and community leaders work together in an open and transparent manner so the public has meaningful opportunities for input on transportation decisions and experiences an integrated, comprehensive system of transportation facilities and services that bridge governance, institutional and fiscal barriers.

**Objective 10.1 Meaningful Input Opportunities**

Provide meaningful input opportunities for interested and affected stakeholders, including people who have traditionally been underrepresented, resource agencies, business, institutional

and community stakeholders, and local, regional and state jurisdictions that own and operate the region's transportation system in plan development and review.

#### Objective 10.2 Coordination and Cooperation

Ensure representation in regional transportation decision-making is equitable from among all affected jurisdictions and stakeholders and improve coordination and cooperation among the public and private owners and operators of the region's transportation system so the system can function in a coordinated manner and better provide for state and regional transportation needs.

### **Goal 11: Demonstrate leadership on climate change**

It is the policy of the Metro Council to:

- 11.1 Adopt and implement a regional climate strategy to meet adopted targets for reducing greenhouse gas emissions from light vehicle travel while creating healthy and equitable communities and a strong economy. The strategy shall include:
- Implementing the 2040 Growth Concept through regional plans and functional plans adopted by the Metro Council for local governments;
  - Making the most of investments the region has already made in the transportation system by using technology to actively manage the transportation system and providing information and incentives to expand the use of travel options;
  - Expanding the use of low carbon transportation options across the region by:
    - investing in new transit connections and expanding and improving existing transit services to make transit convenient, frequent, accessible and affordable; and
    - making biking and walking safe and convenient by completing gaps in the region's network of sidewalks and bike paths that connect people to their jobs, schools and other destinations;
  - Investing strategically in streets and highways to make them safe, reliable and connected and to support the movement of people and goods;
  - Managing parking to make efficient use of land dedicated to parking and parking spaces;
  - Supporting and building upon Oregon's transition to cleaner, low carbon fuels and more fuel-efficient vehicles;
  - Securing adequate funding for transportation investments; and
  - Demonstrating leadership on climate change.
- 11.2 Take actions recommended in the regional climate strategy to help meet adopted targets for reducing greenhouse gas emissions from light vehicle travel, including:
- Implement the 2040 Growth Concept through regional plans and functional plans;



- Work with local, state and federal governments, community and business leaders and organizations, and special districts to implement the strategy;
- Build a diverse coalition that includes elected official and business and community leaders at local, regional and state levels to secure adequate funding for transportation investments in the region;
- Provide technical assistance, best practices and grant funding to local governments and other business and community partners to support implementation of the strategy; and
- Through the Oregon Modeling Steering Committee, collaborate on appropriate tools and methods to support greenhouse gas reduction planning and monitoring.
- Report on the potential light vehicle greenhouse gas emissions impacts of policy, program and investment decisions.

11.3 Encourage local, state and federal governments and special districts to take actions recommended in the regional climate strategy to help meet adopted targets for reducing greenhouse gas emissions from light vehicle travel, including:

- implement plans and zoning that focus higher density, mixed-use zoning and development near transit;
- implement capital improvements in frequent bus corridors (including dedicated bus lanes, stop/shelter improvements, and intersection priority treatments) to increase service performance;
- complete gaps in pedestrian and bicycle access to transit;
- build infrastructure and urban design elements that facilitate and support bicycling and walking (e.g., completing gaps, crosswalks and other crossing treatments, wayfinding signs, bicycle parking, bicycle sharing programs, lighting, separated facilities);
- link active transportation investments to providing transit and travel information and incentives;
- adopt “complete streets” policies and designs to support all users;
- invest in making new and existing streets “complete” and connected to support all users;
- integrate multi-modal designs in road improvement and maintenance projects to support all users;
- expand use of intelligent transportation systems (ITS), including active traffic management, incident management and travel information programs and coordinate with capital projects;
- partner with transit providers to expand deployment of transit signal priority along corridors with 15-minute or better transit service;
- partner with businesses and/or business associations and transportation management associations to implement demand management programs in

employment areas and centers served with active transportation options, 15-minute or better transit service, and parking management;

- expand local travel options program delivery through new coordinator positions and partnerships with business associations, transportation management associations, and other non-profit and community-based organizations;
- prepare community inventory of public parking spaces and usage;
- adopt shared and unbundled parking policies;
- provide preferential parking for electric vehicles, vehicles using alternative fuels and carpools;
- adopt policies and update development codes to support private adoption of alternative fuel vehicles (AFVs), such as streamlining permitting for fueling stations, planning for access to charging and compressed natural gas (CNG) stations, allowing charging and CNG stations in residences, work places and public places, providing preferential parking for AFVs, and encouraging new construction to include necessary infrastructure to support use of AFVs;
- prepare and periodically update a community-wide greenhouse gas emissions inventory;
- adopt greenhouse gas emissions reduction policies and performance targets; and
- develop and implement local climate action plans.

11.4 Monitor and measure the progress of local and regional efforts in meeting adopted targets for reducing greenhouse gas emissions from light vehicle travel, report the results to the region and state on a periodic basis, and guide the consideration of revision or replacement of the policies and actions, if performance so indicates, as part of updates to the Regional Transportation Plan.

**CLIMATE  
SMART**  
COMMUNITIES  
SCENARIOS PROJECT

**2**

# **Draft Toolbox of Possible Actions (2015-20)**

Public Review Draft

September 15, 2014

**MAKING A  
GREAT  
PLACE**



## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

Stay in touch with news, stories and things to do.

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

### **Metro Council President**

Tom Hughes

### **Metro Councilors**

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

### **Auditor**

Suzanne Flynn

## PART 2. DRAFT TOOLBOX OF POSSIBLE ACTIONS (2015-20)

*This is one of three parts of the draft implementation recommendations being presented for public review and comment from Sept. 15 to Oct. 30, 2014*

This document includes a draft toolbox of actions with meaningful implementation steps that can be taken in the next five years to reduce greenhouse gas emissions and minimize the region's contribution to climate change. Building on existing local, regional and statewide activities and priorities, the toolbox is a comprehensive menu of voluntary policy, program and funding actions that can be tailored to best support local, regional and state plans and visions.

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<b>Draft Toolbox of Possible Actions (2015-20)</b>	

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### BACKGROUND

The Climate Smart Communities Scenarios Project responds to a 2009 mandate from the Oregon Legislature for our region to develop a strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. Metro is the regional government and federally-designated metropolitan planning organization for the Portland metropolitan area, serving a population of 1.5 million people. In that role, Metro has been working together with community, business and elected leaders across our region to shape a draft Climate Smart Strategy that meets the state mandate while supporting economic prosperity, community livability and protection of our environment.

After a four-year collaborative process informed by research, analysis, community engagement and deliberation, a draft Climate Smart Strategy that meets the state target is being presented for your review and comment. The draft strategy relies on policies and investments that have already been identified as local priorities in communities across the region and in the region's long-range transportation plan.

### HOW TO PROVIDE YOUR INPUT

- Take an on-line survey at [www.makeagreatplace.org](http://www.makeagreatplace.org).
- Submit comments by mail to Metro Planning, 600 NE Grand Ave., Portland, OR 97232, by email to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov), or by phone at 503-797-1750 or TDD 503-797-1804 from Sept. 15 through Oct. 30, 2014.
- Testify at a Metro Council hearing on Oct. 30 at 600 NE Grand Ave., Portland, OR 97232 in the Council Chamber.

## WHAT'S NEXT?

The Metro Policy Advisory Committee and the Joint Policy Advisory Committee on Transportation are working to finalize their recommendation to the Metro Council on the draft approach and draft implementation recommendations.

**Sept. 15 to Oct. 30** Public comment period on draft approach and draft implementation recommendations

**Nov. 7** MPAC and JPACT meet to discuss public comments and shape recommendation to the Metro Council

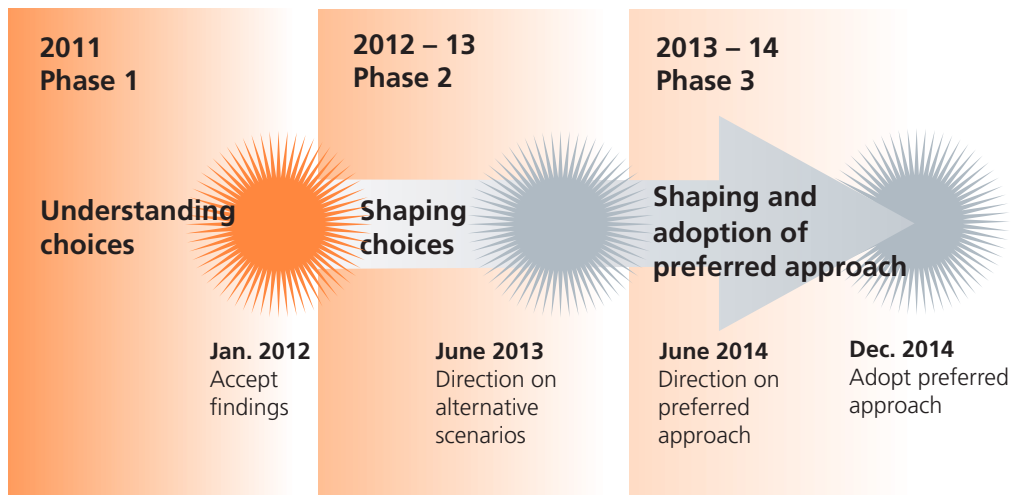
**December 10 and 11** MPAC and JPACT make recommendation to Metro Council

**December 18** Metro Council considers adoption of preferred approach

**January 2015** Metro submits adopted approach to Land Conservation and Development Commission for approval

**2015 and beyond** Ongoing implementation and monitoring

## Climate Smart Communities Scenarios Project timeline



## WHERE CAN I FIND MORE INFORMATION?

Public review materials and other publications and reports can be found at [oregonmetro.gov/climatescenarios](http://oregonmetro.gov/climatescenarios). For email updates, send a message to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov).

**PUBLIC REVIEW DRAFT**



**DRAFT TOOLBOX OF POSSIBLE ACTIONS (2015-2020)**

**BACKGROUND** | The Climate Smart Communities Scenarios Project responds to a state mandate to reduce greenhouse gas emissions from cars and small trucks by 2035. Working together, community, business and elected leaders are shaping a strategy that meets the goal while creating healthy and equitable communities and a strong economy. After considering prior public input and other information, on May 30, 2014, the Metro Policy Advisory Committee (MPAC) and the Joint Policy Advisory Committee on Transportation (JPACT) unanimously recommended a draft approach for testing that relies on policies and investments that have already been identified as local priorities in communities across the region. Analysis shows the region can meet the 2035 target if we make the investments needed to build the plans and visions that have already been adopted by communities and the region. The draft Climate Smart Strategy does more than just meet the target. It supports many other local, regional and state goals, including clean air and water, transportation choices, healthy and equitable communities, and a strong regional economy.

Building on existing local, regional and statewide activities and priorities, the project partners have developed a draft toolbox of actions with meaningful steps that can be taken in the next five years to reduce greenhouse gas emissions and minimize the region’s contribution to climate change. The policies and actions are the result of a four-year collaborative process informed by research, analysis, community engagement, and deliberation. They will be subject to public review from Sept. 15 to Oct. 30, 2014 before being considered by MPAC, JPACT, and the Metro Council in December 2014.

**HOW TO USE THE TOOLBOX** | The toolbox is a comprehensive menu of policy, program and funding actions that can be tailored to best support local, regional and state plans and visions. Local, state and regional partners are encouraged to review the toolbox and identify actions they have already taken and any new actions they are willing to consider or commit to as we move into 2015. Medium and longer-term actions will be identified during the next update to the Regional Transportation Plan (scheduled for 2016-18).

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? <small>(e.g., transit providers, Port districts, parks providers, etc.)</small>
<b>Implement the 2040 Growth Concept and local adopted land use and transportation plans</b>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Reauthorize Oregon Brownfield Redevelopment Fund</li> <li><input type="checkbox"/> Support brownfield redevelopment related legislative proposals</li> <li><input type="checkbox"/> Restore local control of housing policies and programs to ensure local communities have a full range of tools available to meet the housing needs of all residents to expand opportunities for households of modest means to live closer to work, services and transit</li> <li><input type="checkbox"/> Begin implementation of the Statewide Transportation Strategy Vision and short term implementation plan to support regional and community visions</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek opportunities to leverage local, regional, state and federal funding to achieve local visions and the region's desired outcomes</li> <li><input type="checkbox"/> Provide increased funding and incentives to local governments, developers and non profits to encourage brownfield redevelopment and transit oriented development to help keep urban areas compact</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Implement policies and investments that align with regional and community visions to focus growth in designated centers, corridors and employment areas</li> <li><input type="checkbox"/> Support restoring local control of housing policies and programs through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Support reauthorization of Oregon Brownfield Redevelopment Fund through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Facilitate regional brownfield coalition to develop legislative proposals and increase resources available in the region for brownfield redevelopment</li> <li><input type="checkbox"/> Maintain a compact urban growth boundary</li> <li><input type="checkbox"/> Review functional plans and amend as needed to implement Climate Smart Strategy</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek opportunities to leverage local, regional, state and federal funding to achieve local visions and the region's desired outcomes</li> <li><input type="checkbox"/> Expand on going technical assistance and grant funding to local governments, developers and others to incorporate travel information and incentives, transportation system management and operations strategies, parking management</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Implement policies and investments that align with community visions, focus growth in designated centers, corridors and employment areas</li> <li><input type="checkbox"/> Support restoring local control of housing policies and programs through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Support reauthorization of Oregon Brownfield Redevelopment Fund through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Participate in regional brownfield coalition to develop legislative proposals and increase resources available in the region for brownfield redevelopment</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Pursue opportunities to locate higher density residential development near activity centers such as parks and recreational facilities, commercial areas, employment centers, and transit</li> <li><input type="checkbox"/> Locate new schools, services, shopping, and other health promoting resources and community destinations in activity centers</li> <li><input type="checkbox"/> Seek opportunities to leverage local, regional, state and federal funding to achieve local visions and the region's desired outcomes</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Implement policies and investments that align with community visions, focus growth in designated centers, corridors and employment areas</li> <li><input type="checkbox"/> Support restoring local control of housing policies and programs through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Support reauthorization of Oregon Brownfield Redevelopment Fund through Legislative agenda, testimony, endorsement letters or similar means</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek opportunities to leverage local, regional, state and federal funding to achieve local visions and the region's desired outcomes</li> <li><input type="checkbox"/> Share brownfield redevelopment expertise with local governments and expand leadership role making brownfield sites development ready</li> </ul>

**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
		<p>approaches and transit oriented development in local plans and projects</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Convene regional brownfield coalition and strengthen regional brownfields program by providing increased funding and technical assistance to local governments to leverage the investment of private and non profit developers</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Develop brownfield redevelopment plans and leverage local funding to seek state and federal funding and create partnerships that leverage the investment of private and non profit developers</li> </ul>	
<p><b>Make transit more convenient, frequent, accessible and affordable</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Begin update to Oregon Public Transportation Plan</li> <li><input type="checkbox"/> Increase state funding for transit service</li> <li><input type="checkbox"/> Maintain existing intercity passenger rail service and develop proposals for improvement of speed, frequency and reliability</li> <li><input type="checkbox"/> Provide technical assistance and funding to help establish local transit service</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt Oregon Public Transportation Plan with funding strategy to implement</li> <li><input type="checkbox"/> Begin implementation of incremental improvements to intercity passenger rail service</li> <li><input type="checkbox"/> Make funding for access to transit a priority</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Build a diverse coalition that includes elected officials and community and business leaders at local, regional and state levels working together to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s)</li> <li><input type="checkbox"/> Seek transit funding from Oregon Legislature</li> <li><input type="checkbox"/> Consider local funding mechanism(s) for local and regional transit service</li> <li><input type="checkbox"/> Support state efforts to consider carbon pricing</li> <li><input type="checkbox"/> Fund reduced fare programs and service improvements for youth, older adults, people with disabilities and low income families</li> </ul> </li> <li><input type="checkbox"/> Consider local funding mechanism(s) for local and regional transit service</li> <li><input type="checkbox"/> Update Regional High Capacity Transit System Plan</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support reduced fares and service improvements for low income families and individuals, youth, older adults and people with disabilities through testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Make funding for access to transit a priority</li> <li><input type="checkbox"/> Research and develop best practices that support equitable growth and development near transit without displacement, including strategies that provide for the retention and creation of businesses and affordable housing near transit</li> <li><input type="checkbox"/> Update Regional Transportation Plan by 2018</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Participate in development of TriMet Service Enhancement Plans (SEPs): <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide more community to community transit connections</li> <li><input type="checkbox"/> Identify community based public and private shuttles that link to regional transit service</li> <li><input type="checkbox"/> Link service enhancements to areas with transit supportive development, communities of concern<sup>1</sup>, and other locations with high ridership potential</li> <li><input type="checkbox"/> Consider ridership demographics in service planning</li> </ul> </li> <li><input type="checkbox"/> Consider local funding mechanism(s) for local and regional transit service</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Make funding for access to transit a priority</li> <li><input type="checkbox"/> Complete gaps in pedestrian and bicycle access to transit</li> <li><input type="checkbox"/> Expand partnerships with transit agencies to implement capital improvements in frequent bus corridors (including dedicated bus lanes, stop/shelter improvements, and intersection priority treatments) to increase service performance</li> <li><input type="checkbox"/> Implement plans and zoning that focus higher density, mixed use zoning and development near transit</li> <li><input type="checkbox"/> Partner with transit providers and school districts to seek resources to support youth pass program and expand reduced fare program to low income families and individuals</li> <li><input type="checkbox"/> Support reduced fares and service improvements for low income families and individuals, youth, older adults and people with disabilities through testimony, endorsement letters or similar means</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Expand transit payment options (e.g., electronic fare cards) to increase affordability, convenience and flexibility</li> <li><input type="checkbox"/> Seek state funding sources for transit and alternative local funding mechanisms</li> <li><input type="checkbox"/> Complete development of TriMet Service Enhancement Plans (SEPs): <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide more community to community transit connections</li> <li><input type="checkbox"/> Identify community based public and private shuttles that link to regional transit service</li> <li><input type="checkbox"/> Link service enhancements to areas with transit supportive development, communities of concern, and other locations with potential high ridership potential</li> <li><input type="checkbox"/> Consider ridership demographics in service planning</li> </ul> </li> <li><input type="checkbox"/> Consider local funding mechanism(s) for local and regional transit service</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand partnerships with cities, counties and ODOT to implement capital improvements in frequent bus corridors (including dedicated bus lanes, stop/shelter improvements, and intersection priority treatments) to increase service performance</li> <li><input type="checkbox"/> Partner with local governments and school districts to seek resources to support youth pass program and expanding reduced fare program to low income families and individuals</li> <li><input type="checkbox"/> Expand transit service to serve communities of concern, transit supportive development and other potential high ridership locations, etc.</li> <li><input type="checkbox"/> Improve and increase the availability of transit</li> </ul>

<sup>1</sup> The 2014 Regional Transportation Plan defines communities of concern as people of color, people with limited English proficiency, people with low income, older adults, and young people.



**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
<p><b>Make biking and walking safe and convenient</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt Oregon Bicycle and Pedestrian Plan with funding strategy</li> <li><input type="checkbox"/> Adopt a Vision Zero strategy for eliminating traffic fatalities</li> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s) for active transportation projects</li> <li><input type="checkbox"/> Advocate for use of Connect Oregon funding for active transportation projects</li> <li><input type="checkbox"/> Review driver's education training materials and certification programs and make changes to increase awareness of bicycle and pedestrian safety</li> <li><input type="checkbox"/> Complete Region 1 Active Transportation Needs inventory</li> <li><input type="checkbox"/> Maintain commitment to funding Safe Routes to School programs statewide</li> <li><input type="checkbox"/> Fund Safe Routes to Transit programs</li> <li><input type="checkbox"/> Adopt a complete streets policy</li> <li><input type="checkbox"/> Partner with local governments to conduct site specific evaluations from priority locations identified in the DOT Pedestrian and Bicycle Safety Implementation Plan</li> <li><input type="checkbox"/> Improve bicycle and pedestrian crash data collection</li> <li><input type="checkbox"/> Support local and regional health impact assessments</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide technical assistance and expand grant funding to support development and adoption of complete streets policies and designs</li> <li><input type="checkbox"/> Expand existing funding for active transportation investments</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt a Vision Zero strategy for eliminating traffic fatalities</li> <li><input type="checkbox"/> Fund construction of active transportation projects as called for in air quality transportation control measures</li> <li><input type="checkbox"/> Advocate for use of Connect Oregon funding for active transportation projects</li> <li><input type="checkbox"/> Build a diverse coalition that includes elected officials and community and business leaders at local, regional and state levels working together to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Build local and state commitment to implement active transportation plan, and Safe Routes to Schools and Safe Routes to Transit programs</li> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s)</li> <li><input type="checkbox"/> Advocate to maintain eligibility in federal formula programs (i.e., NHPP, STP, CMAQ) and discretionary programs (New Starts, Small Starts, TIFIA, TIGER)</li> </ul> </li> <li><input type="checkbox"/> Seek opportunities to implement Regional Transportation Safety Plan recommendations in planning, project development and development review activities</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide technical assistance and planning grants to support development and adoption of complete streets policies</li> <li><input type="checkbox"/> Provide technical assistance and funding to support complete street designs in local planning and project development activities</li> <li><input type="checkbox"/> Review the regional transportation functional plan and make amendments needed to implement the regional active transportation Plan</li> <li><input type="checkbox"/> Update and fully implement the Regional Transportation Safety Plan</li> <li><input type="checkbox"/> Update best practices in street design and complete streets, including: <ul style="list-style-type: none"> <li><input type="checkbox"/> develop a complete streets checklist</li> <li><input type="checkbox"/> provide design guidance to minimize air pollution exposure for bicyclists and pedestrians</li> <li><input type="checkbox"/> use of green street designs that include tree</li> </ul> </li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt a Vision Zero strategy for eliminating traffic fatalities</li> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Advocate for use of Connect Oregon funding for active transportation projects</li> <li><input type="checkbox"/> Leverage local funding with development for active transportation projects</li> <li><input type="checkbox"/> Seek opportunities to coordinate local investments with investments being made by special districts, park providers and other transportation providers</li> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s)</li> <li><input type="checkbox"/> Seek opportunities to implement Regional Transportation Safety Plan recommendations in planning, project development and development review activities</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Develop and maintain a city/county wide active transportation network of sidewalks, on and off street bikeways, and trails to provide connections between neighborhoods, schools, civic center/facilities, recreational facilities, transit centers, bus stops, employment areas and major activity centers</li> <li><input type="checkbox"/> Build infrastructure and urban design elements that facilitate and support bicycling and walking (e.g., completing gaps, crosswalks and other crossing treatments, wayfinding signs, bicycle parking, bicycle sharing programs, lighting, separated facilities)</li> <li><input type="checkbox"/> Invest to quitably complete active transportation network gaps in centers and along streets that provide access to transit stops, schools and other community destinations</li> <li><input type="checkbox"/> Link active transportation investments to providing transit and travel information and incentives</li> <li><input type="checkbox"/> Partner with ODOT to conduct site specific evaluations from priority locations identified in the ODOT Pedestrian and Bicycle Safety Implementation Plan</li> <li><input type="checkbox"/> Expand Safe Routes to Schools programs to include high schools and safe routes to transit</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt a Vision Zero strategy for eliminating traffic fatalities</li> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Advocate for use of Connect Oregon funding for active transportation projects</li> <li><input type="checkbox"/> Complete Port of Portland 2014 Active Transportation Plan for Portland International Airport</li> <li><input type="checkbox"/> Prepare a TriMet Bicycle Plan</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Invest in rail that increase equitable access to transit, services and community destinations</li> </ul>

**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
<p><b>Make streets and highways safe, reliable and connected</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Maintain existing highway network to improve traffic flow</li> <li><input type="checkbox"/> Increase state gas tax (indexed to inflation and fuel efficiency)</li> <li><input type="checkbox"/> Update the Oregon Transportation Safety Action Plan</li> <li><input type="checkbox"/> Review driver’s education training materials and certification programs and make changes to increase awareness of safety or II system users</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Work with Metro and local governments to consider alternative performance measures</li> <li><input type="checkbox"/> Integrate multi-modal designs in road improvement and maintenance projects to support all users</li> <li><input type="checkbox"/> Pilot new pavement and hard surface materials proven to help reduce infrastructure related heat gain</li> <li><input type="checkbox"/> Use green street designs that include tree plantings to support carbon sequestration</li> </ul>	<p>plantings to support carbon sequestration</p> <ul style="list-style-type: none"> <li>o identify new pavement and hard surface materials proven to help reduce infrastructure related heat gain</li> </ul> <p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Build a diverse coalition that includes elected officials and community and business leaders at local, regional and state levels working together to: <ul style="list-style-type: none"> <li>o Ensure adequate funding of local maintenance and support city and county efforts to fund maintenance and preservation needs locally</li> <li>o Support state and federal efforts to increase gas tax (indexed to inflation and fuel efficiency)</li> <li>o Support state and federal efforts to implement mileage based road usage charge program</li> </ul> </li> <li><input type="checkbox"/> Seek opportunities to implement Regional Transportation Safety Plan recommendations in planning, project development and development review activities</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Work with ODOT and local governments to consider alternative performance measures</li> <li><input type="checkbox"/> Provide technical assistance and grant funding to support integrated transportation system management operations strategies in local plans, projects and project development activities</li> <li><input type="checkbox"/> Update and fully implement Regional Transportation Safety Plan</li> <li><input type="checkbox"/> Update best practices in street design and complete streets, including: <ul style="list-style-type: none"> <li>o Develop a complete streets checklist</li> <li>o Provide design guidance to minimize air pollution exposure for bicyclists and pedestrians</li> <li>o Use of green street designs that include tree plantings to support carbon sequestration</li> <li>o Identify new pavement and hard surface materials proven to help reduce infrastructure related heat gain</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt “complete streets” policies and designs to support all users</li> <li><input type="checkbox"/> Establish local funding pool to leverage state and federal funds</li> </ul> <p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Maintain existing street network to improve traffic flow</li> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Seek opportunities to implement Regional Transportation Safety Plan recommendations in planning, project development and development review activities</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Work with ODOT and Metro to consider alternative performance measures</li> <li><input type="checkbox"/> Support railroad grade separation projects in corridors to allow for longer trains and less delay/disruption to other users of the system</li> <li><input type="checkbox"/> Invest in making new and existing streets complete and connected to support all users</li> <li><input type="checkbox"/> Integrate multi-modal designs in road improvement and maintenance projects to support all users</li> <li><input type="checkbox"/> Pilot new pavement and hard surface materials proven to help reduce infrastructure related heat gain</li> <li><input type="checkbox"/> Use green street designs that include tree plantings to support carbon sequestration</li> </ul>	<p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Support railroad grade separation projects in corridors to allow for longer trains and less delay/disruption to other users of the system</li> </ul>

**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
<p><b>Use technology to actively manage the transportation system</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Integrate transportation system management and operations strategies into project development activities</li> <li><input type="checkbox"/> Expand deployment of intelligent transportation systems (ITS), including active traffic management, incident management and traveler information programs</li> <li><input type="checkbox"/> Partner with cities, counties and TriMet to expand deployment of transit signal priority along corridors with 15 minute or better transit service</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek Metro Council/JPACT commitment to invest more in transportation system management and operations (TSMO) projects using regional flexible funds</li> <li><input type="checkbox"/> Advocate for increased state commitment to invest more SMO projects using state funds</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Build capacity and strengthen interagency coordination</li> <li><input type="checkbox"/> Provide technical assistance and grant funding to integrate transportation system management operations strategies in local plans, project development, and development review activities</li> <li><input type="checkbox"/> Update Regional TSMO Strategic Plan by 2018</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Advocate for increased regional and state commitment to invest more SMO projects using regional and state funds</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand deployment of intelligent transportation systems (ITS), including active traffic management, incident management and travel information programs and coordinate with capital projects</li> <li><input type="checkbox"/> Partner with TriMet to expand deployment of transit signal priority along corridors with 15 minute or better transit service</li> </ul>	<p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Partner with cities, counties and ODOT to expand deployment of transit signal priority along corridors with 15 minute or better transit service</li> </ul>
<p><b>Provide information and incentives to expand the use of travel options</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Adopt Statewide Transportation Options Plan with funding strategy to implement</li> <li><input type="checkbox"/> Deploy statewide eco driving educational effort, including integration of eco driving information in driver's education training courses, region Driver's education manual and certification programs</li> <li><input type="checkbox"/> Review EcoRule to identify opportunities to improve effectiveness</li> <li><input type="checkbox"/> Increase state capacity and staffing to support on going EcoRule implementation and monitoring</li> <li><input type="checkbox"/> Deploy video conferencing, virtual meeting technologies and other communication technologies to reduce business travel needs</li> <li><input type="checkbox"/> Partner with TriMet, SMART and media partners to link the Air Quality Index to transportation system information outlets</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Promote and provide information, recognition, funding and incentives to encourage commuter programs and individualized marketing to provide employers, employees and residents information and incentives to use travel options</li> <li><input type="checkbox"/> Integrate transportation demand management practices into planning, project development, and development review activities</li> <li><input type="checkbox"/> Establish a state vanpool strategy that addresses urban and rural transportation needs</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek Metro Council/JPACT commitment to invest more regional flexible funds to expand direct services and funding provided to local partners (e.g., local governments, transportation management associations, and other non profit and community based organizations) to implement expanded education, recognition and outreach efforts in coordination with other capital investments</li> <li><input type="checkbox"/> Provide funding and partner with community based organizations to develop culturally relevant information materials</li> <li><input type="checkbox"/> Develop best practices on how to integrate transportation demand management in local planning, project development, and development review activities</li> <li><input type="checkbox"/> Integrate transportation demand management practices into planning, project development and development review activities</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand on going technical assistance and grant funding to local governments, transportation management associations, business associations and other non profit organizations to incorporate travel information and incentives in local planning and project development activities and at worksites</li> <li><input type="checkbox"/> Establish an on going individualized marketing program that targets deployment in conjunction with capital investments being made in the region</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Advocate for increased state and regional funding to expand direct services provided to local partners e.g., local governments, transportation management associations, and other non profit organizations) to support expanded education, recognition and outreach efforts in coordination with other capital investments</li> <li><input type="checkbox"/> Host citywide and community events like Bike to Work Day and Sunday Parkways</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Integrate transportation demand management practices into planning, project development, and development review activities</li> <li><input type="checkbox"/> Provide incentives for new development over a specific trip generation threshold to provide travel information and incentives to support achievement of EcoRule and mode share targets adopted in local and regional plans</li> <li><input type="checkbox"/> Partner with businesses and/or business associations and transportation management associations to implement demand management programs in employment areas and centers served with active transportation options, 15 minute or better transit service, and parking management</li> <li><input type="checkbox"/> Expand local travel options program delivery through new coordinator positions and partnerships with business associations, transportation management associations, and other non profit and community based</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand employer program capacity and staffing to support expanded education, recognition and outreach efforts</li> </ul>

**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
<p><b>Manage parking to make efficient use of parking spaces</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide technical assistance and grant funding to support development of parking management plans at the local and regional level</li> <li><input type="checkbox"/> Distribute “Parking Made Easy” handbook and provide technical assistance, planning grants, model code language, education and outreach</li> <li><input type="checkbox"/> Increase safe, secure and convenient bicycle parking</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide preferential parking for electric vehicles, vehicles using alternative fuels and carpools</li> <li><input type="checkbox"/> Prepare inventory of state owned public parking spaces and usage</li> <li><input type="checkbox"/> Provide monetary incentives such as parking cash out and employer buy back programs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Begin update to Regional Travel Options Strategic Plan in 2018</li> </ul> <p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Build a diverse coalition that includes elected officials and community and business leaders at local, regional and state levels working together to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss priced parking as a revenue source to help fund travel information and incentives programs, active transportation projects and transit service</li> </ul> </li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand on going technical assistance to local governments, developers and others to incorporate parking management approaches in local plans and projects</li> <li><input type="checkbox"/> Pilot projects to develop model parking management plans and model ordinances for different development types</li> <li><input type="checkbox"/> Research and update regional parking policies to more comprehensively reflect the range of parking approaches available for different development types and to incorporate goals beyond customer access, such as linking parking approaches to the level of transit service and active transportation options provided</li> <li><input type="checkbox"/> Amend Title 6 of Regional Transportation Functional Plan to update regional parking map and reflect updated regional parking policies</li> </ul>	<p>organizations</p> <p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Consider charging for parking in high usage areas served by 15 minute or better transit service and active transportation options</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare community inventory of public parking spaces and usage</li> <li><input type="checkbox"/> Adopt shared and unbundled parking policies</li> <li><input type="checkbox"/> Require or provide development incentives for developers to separate parking from commercial space and residential units in lease and sale agreements</li> <li><input type="checkbox"/> Provide preferential parking for electric vehicles, vehicles using alternative fuels and carpools</li> <li><input type="checkbox"/> Require or provide development incentives for large employers to offer employees parking cash out option where the employee can choose a parking benefit, a transit pass or the cash equivalent of the benefit</li> <li><input type="checkbox"/> Increase safe, secure and convenient bicycle parking</li> <li><input type="checkbox"/> Reduce requirements for off street parking and establish off street parking supply maximums, as appropriate, enacting and adjusting policies to minimize spillover impacts in adjacent areas</li> <li><input type="checkbox"/> Prepare parking management plans tailored to 2040 centers served by high capacity transit (existing and planned)</li> </ul>	<p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide preferential parking for electric vehicles, vehicles using alternative fuels and carpools</li> <li><input type="checkbox"/> Increase safe, secure and convenient bicycle parking</li> </ul>
<p><b>Secure adequate funding for transportation investments</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Preserve local options or raising revenue to ensure local communities have a full range of financing tools available to adequately fund current and future transportation needs</li> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s) for active transportation and transit</li> <li><input type="checkbox"/> Research and consider carbon pricing models to generate new funding for clean energy, transit and active transportation, alleviating regressive impacts on businesses and communities of concern</li> <li><input type="checkbox"/> Increase state gas tax (indexed to inflation and fuel efficiency)</li> <li><input type="checkbox"/> Implement mileage based road usage charge program as called for in Senate Bill 810</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Update research on regional infrastructure gaps and potential funding mechanisms to inform communication materials that support engagement activities and development of a funding strategy to meet current and future transportation needs</li> <li><input type="checkbox"/> Build a diverse coalition that includes elected officials and community and business leaders at local, regional and state levels working together to: <ul style="list-style-type: none"> <li><input type="checkbox"/> Advocate for local revenue raising options</li> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s) for transit and active transportation</li> <li><input type="checkbox"/> Seek transit and active transportation funding from Oregon Legislature</li> </ul> </li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Advocate for local revenue raising options</li> <li><input type="checkbox"/> Support state efforts to implement a mileage based road usage charge program</li> <li><input type="checkbox"/> Support state efforts to research and consider carbon pricing models</li> <li><input type="checkbox"/> Consider local funding mechanism(s) for local and regional transportation needs, including transit service and active transportation</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Work with local, regional and state partners, including elected officials and business and community leaders, to develop a funding strategy to meet current and future transportation needs</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support and/or participate in efforts to build transportation funding coalition</li> <li><input type="checkbox"/> Advocate for local revenue raising options</li> <li><input type="checkbox"/> Seek and advocate for new, dedicated funding mechanism(s) for active transportation and transit</li> <li><input type="checkbox"/> Support state efforts to research and consider carbon pricing models</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Work with local, regional and state partners, including elected officials and business and community leaders, to develop a funding strategy to meet current and future transportation needs</li> </ul>

**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
	<p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expand funding available for active transportation and transit investments</li> <li><input type="checkbox"/> Broaden implementation of the mileage based road usage charge</li> </ul>	<ul style="list-style-type: none"> <li>o Consider local funding mechanism(s) for local and regional transit service</li> <li>o Support state efforts to research and consider carbon pricing models</li> <li>o Build local and state commitment to implement active transportation plan, and Safe Routes to Schools (including high schools) and Safe Routes to Transit programs</li> <li>o Ensure adequate funding of local maintenance and safety needs and support city and county efforts to fund safety, maintenance and preservation needs locally</li> <li>o Support state and federal efforts to increase gas tax (indexed to inflation and fuel efficiency)</li> <li>o Support state and federal efforts to implement road usage charge program</li> <li>o Discuss priced parking as a revenue source for travel information and incentives programs, active transportation projects and transit service</li> </ul>		
<p><b>Support Oregon’s transition to cleaner, low carbon fuels, more fuel-efficient vehicles and pay-as-you-drive insurance</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Reauthorize Oregon Clean Fuels Program</li> <li><input type="checkbox"/> Implement Oregon zero emission vehicle Program and Multi State Zero Emission Vehicle Action Plan in collaboration with California and other states</li> <li><input type="checkbox"/> Lead by example by increasing the public alternative fuel vehicle (AFV) fleet</li> <li><input type="checkbox"/> Provide funding to Drive Oregon to advance electric mobility, and to other endeavors that advance alternative fuels</li> <li><input type="checkbox"/> Work with insurance companies to offer and encourage pay as you drive insurance</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide consumer and business incentives to purchase new AFVs</li> <li><input type="checkbox"/> Expand communication efforts about the cost savings of driving more fuel efficient vehicles</li> <li><input type="checkbox"/> Promote and provide information, funding and incentives to encourage the provision of electric vehicle charging and compressed natural gas (CNG) stations and infrastructure in residences, work places and public places</li> <li><input type="checkbox"/> Encourage private fleets to purchase, lease or rent AFVs</li> <li><input type="checkbox"/> Develop model code for electric and CNG vehicle</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support reauthorization of the Oregon Clean Fuels Program through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Support the Oregon Zero Emission Vehicle Program through Legislative agenda, testimony, endorsement letters or similar means</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lead by example by increasing public AFV fleet</li> <li><input type="checkbox"/> Support state efforts to build public acceptance of pay as you drive insurance</li> <li><input type="checkbox"/> Expand communication efforts about the cost savings of driving more fuel efficient vehicles</li> <li><input type="checkbox"/> Partner with state agencies to hold regional planning workshops to educate local governments on AFV opportunities</li> </ul> <p>Develop AFV readiness strategy for region in partnership with local governments, state agencies, electric and natural gas utilities, non profits and others</p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support reauthorization of the Oregon Clean Fuels Program through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Support the Oregon Zero Emission Vehicle Program through Legislative agenda, testimony, endorsement letters or similar means</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Lead by example by increasing public AFV fleet</li> <li><input type="checkbox"/> Expand communication efforts about the cost savings of driving more fuel efficient vehicles</li> <li><input type="checkbox"/> Pursue grant funding and partners to expand the growing network of electric vehicle fast charging stations and publicly accessible CNG stations</li> <li><input type="checkbox"/> Partner with local dealerships, Department of Energy (DOE) Clean Cities programs, non profit organizations, businesses and others to incorporate EV outreach and education events for consumers in conjunction with such events as Earth Day celebrations, National Plug In Day and the DOE/Drive Oregon Workplace Charging Challenge</li> <li><input type="checkbox"/> Adopt policies and update development codes to support private adoption of AFVs, such as streamlining permitting for alternative fueling stations, planning for access to charging and CNG</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Support reauthorization of the Oregon Clean Fuels Program through Legislative agenda, testimony, endorsement letters or similar means</li> <li><input type="checkbox"/> Support the Oregon Zero Emission Vehicle Program through Legislative agenda, testimony, endorsement letters or similar means</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide electric vehicle charging and CNG stations in public places (e.g., park and rides, parking garages)</li> <li><input type="checkbox"/> Provide preferential parking for AFVs</li> </ul>

**PUBLIC REVIEW DRAFT**

POLICY	TOOLBOX OF POSSIBLE ACTIONS (2015-2020)			
	WHAT CAN THE STATE DO?	WHAT CAN METRO DO?	WHAT CAN CITIES AND COUNTIES DO?	WHAT CAN SPECIAL DISTRICTS DO? (e.g., transit providers, Port districts, parks providers, etc.)
	<p>infrastructure and partnerships with businesses</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Remove barriers to electric and CNG vehicle charging and fueling station installations</li> <li><input type="checkbox"/> Promote AFV infrastructure planning and investment by public and private entities</li> <li><input type="checkbox"/> Provide clear and accurate signage to direct AFV users to charging and fueling stations and parking</li> <li><input type="checkbox"/> Expand communication efforts to promote AFV tourism activities</li> <li><input type="checkbox"/> Continue participation in the Pacific Coast Collaborative, Western Climate Initiative, and West Coast Green Highway Initiative and partner with members of Energize Oregon coalition</li> <li><input type="checkbox"/> Track and report progress toward adopted state goals related to greenhouse gas emissions reductions and AFV deployment</li> <li><input type="checkbox"/> Provide incentives and information to expand use of pay as you drive insurance and report on progress</li> </ul>		<p>stations, allowing charging and CNG stations in residences, work places and public places, and providing preferential parking for AFVs</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Update development codes and encourage new construction to include necessary infrastructure to support use of AFVs</li> </ul>	
<p><b>Demonstrate leadership on climate change</b></p>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Update the 2017-20 Statewide Transportation Improvement Program (STIP) allocation process to address the Statewide Transportation Strategy (STS) Vision and STS Short Term Implementation Plan actions</li> <li><input type="checkbox"/> Support local government and regional planning for climate change mitigation</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Amend the Oregon Transportation Plan to address the Statewide Transportation Strategy Vision</li> <li><input type="checkbox"/> Update statewide greenhouse gas emissions inventory and track progress toward adopted greenhouse gas emissions reduction goals</li> <li><input type="checkbox"/> Through the Oregon Modeling Steering Committee, collaborate on appropriate tools to support greenhouse gas reduction planning</li> <li><input type="checkbox"/> Report on the potential greenhouse gas emissions impacts of policy, program and investment decisions</li> </ul>	<p><b>Immediate (2015-16)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Seek Metro Council/JPACT commitment to address the Climate Smart Strategy in the policy update for the 2018-21 Metropolitan Transportation Improvement Program (MTIP) and the 2019-21 Regional Flexible Fund Allocation (RFFA) process</li> </ul> <p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Assess potential risks and identify strategies to address potential climate impacts to transportation infrastructure and operations as part of 2018 RTP update</li> <li><input type="checkbox"/> Update regional greenhouse gas emissions inventory and track progress toward adopted greenhouse gas emissions reduction target</li> <li><input type="checkbox"/> Through the Oregon Modeling Steering Committee, collaborate on appropriate tools and methods to support greenhouse gas reduction planning and monitoring</li> <li><input type="checkbox"/> Report on the potential greenhouse gas emissions impacts of policy, program and investment decisions</li> <li><input type="checkbox"/> Encourage development and implementation of local climate action plans</li> </ul>	<p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Sign U.S. Conference of Mayors Climate Protection Agreement</li> <li><input type="checkbox"/> Prepare and periodically update community wide greenhouse gas emissions inventory</li> <li><input type="checkbox"/> Report on the potential greenhouse gas emissions impacts of policy, program and investment decisions</li> <li><input type="checkbox"/> Adopt greenhouse gas emissions reduction policies and performance targets</li> <li><input type="checkbox"/> Develop and implement local climate action plans</li> </ul>	<p><b>Near-term (2017-20)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare and periodically update greenhouse gas emissions inventory of transportation operations</li> <li><input type="checkbox"/> Report on the potential greenhouse gas emissions impacts of policy, program and investment decisions</li> <li><input type="checkbox"/> Adopt greenhouse gas emissions reduction policies and performance targets</li> </ul>

**CLIMATE  
SMART**  
COMMUNITIES  
SCENARIOS PROJECT

**3**

# Draft Performance Monitoring Approach

Public Review Draft

September 15, 2014

**MAKING A  
GREAT  
PLACE**



## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

Stay in touch with news, stories and things to do.

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

### **Metro Council President**

Tom Hughes

### **Metro Councilors**

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

### **Auditor**

Suzanne Flynn



**PART 3. DRAFT PERFORMANCE MONITORING APPROACH**

*This is one of three parts of the draft implementation recommendations being presented for public review and comment from Sept. 15 to Oct. 30, 2014.*

This document includes a draft approach to monitor and measure the progress of local and regional efforts with implementing the draft Climate Smart Strategy and meeting adopted targets for reducing greenhouse gas emissions from light vehicle travel as directed by OAR 660-044-0040(3)(e). The approach relies on observed data sources and existing regional performance monitoring processes to the extent possible, including future RTP updates, Urban Growth Report updates and reporting in response to Oregon State Statutes ORS 197.301 and ORS 197.296.

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**Draft Performance Monitoring Approach**

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**BACKGROUND**

The Climate Smart Communities Scenarios Project responds to a 2009 mandate from the Oregon Legislature for our region to develop a strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. Metro is the regional government and federally-designated metropolitan planning organization for the Portland metropolitan area, serving a population of 1.5 million people. In that role, Metro has been working together with community, business and elected leaders across the region to shape a draft Climate Smart Strategy that meets the state mandate while supporting economic prosperity, community livability and protection of our environment.

After a four-year collaborative process informed by research, analysis, community engagement and deliberation, a draft Climate Smart Strategy that meets the state target is being presented for your review and comment. The draft strategy relies on policies and investments that have already been identified as local priorities in communities across the region and in the region’s long-range transportation plan.

**HOW TO PROVIDE YOUR INPUT**

- Take an on-line survey at [www.makeagreatplace.org](http://www.makeagreatplace.org).
- Submit comments by mail to Metro Planning, 600 NE Grand Ave., Portland, OR 97232, by email to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov), or by phone at 503-797-1750 or TDD 503-797-1804 from Sept. 15 through Oct. 30, 2014.
- Testify at a Metro Council hearing on Oct. 30 at 600 NE Grand Ave., Portland, OR 97232 in the Council Chamber.

## WHAT'S NEXT?

The Metro Policy Advisory Committee and the Joint Policy Advisory Committee on Transportation are working to finalize their recommendation to the Metro Council on the draft approach and draft implementation recommendations.

**Sept. 15 to Oct. 30** Public comment period on draft approach and draft implementation recommendations

**Nov. 7** MPAC and JPACT meet to discuss public comments and shape recommendation to the Metro Council

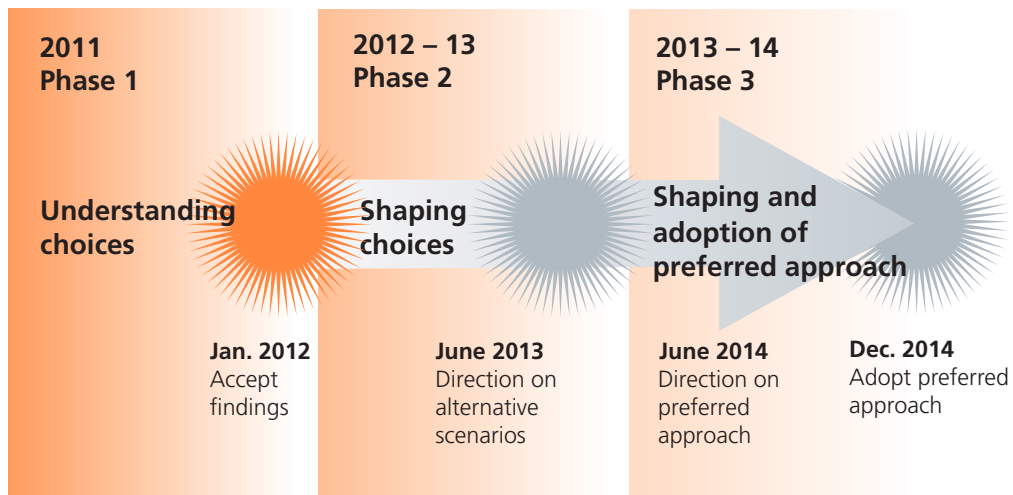
**December 10 and 11** MPAC and JPACT make recommendation to Metro Council

**December 18** Metro Council considers adoption of preferred approach

**January 2015** Metro submits adopted approach to Land Conservation and Development Commission for approval

**2015 and beyond** Ongoing implementation and monitoring

## Climate Smart Communities Scenarios Project timeline



## WHERE CAN I FIND MORE INFORMATION?

Public review materials and other publications and reports can be found at [oregonmetro.gov/climatescenarios](http://oregonmetro.gov/climatescenarios). For email updates, send a message to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov).

**PUBLIC REVIEW DRAFT**

September 15, 2014



**DRAFT CLIMATE SMART STRATEGY  
DRAFT PERFORMANCE MONITORING APPROACH**

**BACKGROUND |** The 2009 Oregon Legislature required the Portland metropolitan region to reduce per capita greenhouse gas emissions from cars and small trucks by 20 percent below 2005 levels by 2035. The region has identified an approach that meets the target while also substantially contributing to many other state, regional and local goals, including clean air and water, transportation choices, healthy and vibrant communities and a strong economy.

OAR 660-044 0040(3)(e) directs Metro to identify performance measures and targets to monitor and guide implementation of the preferred approach selected by the Metro Council. The purpose of performance measures and targets is to enable Metro and local governments to monitor and assess whether key elements or actions that make up the preferred approach are being implemented, and whether the preferred approach is achieving the expected outcomes.

**PERFORMANCE MONITORING AND REPORTING APPROACH |** Use observed data sources and rely on existing regional performance monitoring and reporting processes to the extent possible, including future RTP updates, Urban Growth Report updates and reporting in response to Oregon State Statutes ORS 197.301 and ORS 197.296. When observed data is not available, data from regional models may be reported.

POLICY	MEASURE	HOW WILL PROGRESS BE MEASURED?	
		2010 (unless otherwise noted)	2035 TARGET (unless otherwise noted)
<b>Implement the 2040 Growth Concept and local adopted land use and transportation plans</b>	a. New residential units built through infill and redevelopment in the urban growth boundary (UGB) <sup>1</sup> ( <i>existing</i> )	a. Data being finalized	a. Track; no target proposed
	b. New residential units built on vacant land in the UGB <sup>2</sup> ( <i>existing</i> )	b. Data being finalized	b. Track; no target proposed
	c. Acres of urban reserves added to the UGB <sup>3</sup> ( <i>existing</i> )	c. Data being finalized	c. Track; no target proposed
	d. Daily vehicle miles traveled per capita <sup>4</sup> ( <i>existing</i> )	d. 19	d. 17
<b>Make transit convenient, frequent, accessible and affordable</b>	a. Daily transit service revenue hours ( <i>new</i> )	a. 4,900	a. 9,400
	b. Share of households within ¼ mile frequent bus service and ½ mile of high capacity transit ( <i>existing</i> )	b. Data being finalized	b. Track; no target proposed

## PUBLIC REVIEW DRAFT

September 15, 2014

POLICY	MEASURE	HOW WILL PROGRESS BE MEASURED?	
		2010 (unless otherwise noted)	2035 TARGET (unless otherwise noted)
<b>Make biking and walking safe and convenient</b>	a. Share of daily trips made by biking and walking <sup>5</sup> ( <i>existing</i> )	a. Data being finalized	a. Data being finalized
	b. Daily miles of bicycle and pedestrian travel	b. A methodology for establishing a baseline for this measure and tracking progress will be developed in 2018 TP update	b. Track; no target proposed
	c. Bike and pedestrian fatal and severe injury crashes <sup>6</sup> ( <i>existing</i> )	c. 63 fatal or severe injury pedestrian crashes 35 fatal or severe injury bike crashes	c. 32 fatal or severe injury pedestrian crashes 17 fatal or severe injury bike crashes
	d. New miles of bikeways, sidewalks and trails <sup>7</sup> ( <i>existing</i> )	d. Data being finalized	d. Track; no target proposed
<b>Make streets and highways safe, reliable and connected</b>	a. Motor vehicle fatal and severe injury crashes <sup>8</sup> ( <i>existing</i> )	a. 398	a. 199
	b. Reliability measure ( <i>new</i> )	b. A methodology for establishing a baseline for this measure and tracking progress for will be developed in 2018 RTP update	
<b>Use technology to actively manage the transportation system</b>	a. Share of regional transportation system covered with transportation system management and operations (TSMO) strategies ( <i>new</i> )	A methodology for establishing a baseline for this measure and tracking progress will be developed in 2018 RTP update	
<b>Provide information and incentives to expand the use of travel options</b>	a. Share of households participating in individualized marketing programs ( <i>existing</i> )	a. 9%	a. 45%
	b. Share of the workforce participating in commuter programs ( <i>existing</i> )	b. 20%	b. 30%

## PUBLIC REVIEW DRAFT

September 15, 2014

POLICY	MEASURE	HOW WILL PROGRESS BE MEASURED?	
		2010 (unless otherwise noted)	2035 TARGET (unless otherwise noted)
<b>Manage parking to make efficient use of land and parking spaces</b>	a. Parking measure TBD in 2018 RTP update ( <i>new</i> )	A methodology for establishing a baseline for this measure and tracking progress will be developed in 2018 RTP update	
<b>Support Oregon's transition to cleaner, low carbon fuels, more fuel-efficient vehicles and pay-as-you-drive private vehicle insurance</b>	a. Share of registered light duty vehicles in Oregon that are electric vehicles (EV) or plug in hybrid electric vehicles (PHEV) <sup>9</sup> ( <i>new</i> ) b. Share of households using pay as you drive private vehicle insurance <sup>10</sup> ( <i>new</i> )	<u>EV/PHEV</u> a. 1%/0% (auto) 1%/0%(light truck) b. >1%	<u>EV/PHEV</u> a. 23%/8% (auto) 20%/2% (light truck) b. 40%
<b>Secure adequate funding for transportation investments</b>	a. Make progress in addressing local, regional and state transportation funding gap ( <i>new</i> )	A methodology for establishing a baseline for this measure and tracking progress will be developed in 2018 RTP update	
<b>Demonstrate leadership on climate change</b>	a. Region wide per capita roadway greenhouse gas emissions from light vehicles ( <i>new</i> )	e. 4.05 MTCO <sub>2</sub> e <sup>11</sup>	a. 1.2 MTCO <sub>2</sub> e <sup>12</sup>

**PUBLIC REVIEW DRAFT***September 15, 2014***TABLE NOTES**

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<sup>1</sup> Data is compiled and reported by Metro every two years in response to Oregon State Statutes ORS 197.301 and ORS 197.296. No targets have been adopted for these measures.

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.

<sup>4</sup> Data is from the ODOT Oregon Highway Performance Monitoring System (HPMS) and was the official state submittal to the Federal Highway Administration for tracking nationally. The 2014 Regional Transportation Plan (RTP) target calls for reducing daily vehicle miles traveled per person by 10 percent compared to 2010.

<sup>5</sup> The 2014 Regional Transportation Plan calls for tripling the share of daily trips made by biking and walking compared to 2010.

<sup>6</sup> Data is for the period 2007-2011 and comes from the ODOT Oregon Highway Performance Monitoring System (HPMS). The data was reported in the 2014 RTP adopted by the Metro Council on July 17, 2014. The 2014 RTP target calls for reducing fatal and severe injury crashes by 50 percent compared to the 2007-2011 period.

<sup>7</sup> The 2014 RTP financially constrained system includes completing 663 miles of bikeways, sidewalks and trails; progress toward completion of the system of investments will be tracked.

<sup>8</sup> See note 6.

<sup>9</sup> The Oregon Department of Motor Vehicles will track this data through vehicle registration records.

<sup>10</sup> A data source for this information has not been identified.

<sup>11</sup> Data is a model estimate for the year 2005, using the Metropolitan GreenSTEP model.

<sup>12</sup> The target reflects the state mandated 20 percent reduction per person in roadway greenhouse gas emissions, after accounting for state assumptions for advancements in cleaner, low carbon fuels and more fuel-efficient vehicles. A transition to the Motor Vehicle Emission Simulator (MOVES) model for tracking progress will be made as part of the 2018 Regional Transportation Plan update. The MOVES model is the federally-sanctioned model for demonstrating compliance with federal and state air quality requirements.

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# Summary of recommended changes

To be finalized following the  
Oct. 30 close of comment  
period

XX, XX, 2014

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Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

### **Auditor**

Suzanne Flynn



**CLIMATE  
SMART  
COMMUNITIES**  
SCENARIOS PROJECT

# Findings of Fact and Conclusions of Law

Under development

XX, XX, 2014

**MAKING A  
GREAT  
PLACE**



## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

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Suzanne Flynn

## STAFF REPORT

### IN CONSIDERATION OF ORDINANCE NO. 14-1346, FOR THE PURPOSE OF ADOPTING A PREFERRED CLIMATE SMART COMMUNITIES STRATEGY AND AMENDING THE REGIONAL FRAMEWORK PLAN TO COMPLY WITH STATE LAW

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Date: October 20, 2014

Prepared by: Kim Ellis, Principal Transportation Planner  
Planning and Development Department, 503-797-1617

## BACKGROUND

The Climate Smart Communities Scenarios Project responds to a 2009 mandate from the Oregon Legislature for Metro to develop and implement a strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. Metro is the regional government serving a population of 1.5 million people in the Portland metropolitan region. In that role, Metro has been working together with regional technical and policy advisory committees and community, business and elected leaders across the region to shape the Climate Smart Communities Strategy and supporting implementation recommendations in this ordinance. Adoption of this ordinance satisfies the 2009 legislative mandate and subsequent requirements adopted by the Land Conservation and Development Commission (LCDC) in 2011 and 2012 under Oregon Administrative Rule 660-044.

This ordinance forwards recommendations from the Metro Policy Advisory Committee (MPAC) and the Joint Policy Advisory Committee on Transportation (JPACT) to the Metro Council on adopting a preferred land use and transportation scenario under OAR 660-044-0040. The Climate Smart Communities Strategy contained in the ordinance achieves a 29 percent reduction in per capita greenhouse gas emissions from light duty vehicles and provides significant community, public health, environmental and economic benefits to communities and the region. The strategy builds on and supports adopted local and regional plans and visions for healthy and equitable communities and a strong economy.

Metro Council action through Ordinance No. 14-1346 adopts a preferred land use and transportation scenario under OAR-044-0040 and directs staff to develop and submit a final report with the decision record to LCDC in the manner of periodic review. The ordinance also directs staff to begin scoping the work plan for the next update to the Regional Transportation Plan, which will serve as a major vehicle for implementing the preferred scenario under OAR 660-044-0040.

## LEGISLATIVE BACKGROUND

Since 2006, Oregon has initiated a number of actions to respond to mounting scientific evidence that shows the earth's climate is changing, indicating a long-term commitment to significantly reduce GHG emissions in Oregon.

In 2007 the Oregon Legislature established statewide greenhouse gas emissions reduction goals. The goals apply to all emission sectors – energy production, buildings, solid waste and transportation – and direct Oregon to:

- stop increases in GHG emissions by 2010
- reduce GHG emissions to 10 percent below 1990 levels by 2020
- reduce GHG emissions to at least 75 percent below 1990 levels by 2050.

In 2009, the Oregon Legislature passed House Bill 2001, the Jobs and Transportation Act (JTA). Section 37 of the Act requires Metro to develop two or more alternative land use and transportation scenarios designed to accommodate population and job growth anticipated by 2035 and reduce GHG emissions from light vehicles. Section 37 of the Act requires Metro to adopt a preferred scenario after public review and consultation with local governments in the Portland metropolitan region and calls for local governments to implement the adopted scenario.

In 2010, the Metro Council adopted the 2035 Regional Transportation Plan (RTP) and directed staff to conduct greenhouse gas scenario planning consistent with the JTA. In the same year, the Council also adopted six desired outcomes for the region to reflect a shared vision to develop vibrant, prosperous and sustainable communities with safe and reliable transportation choices that minimize greenhouse gas emissions and equitably distribute the benefits and costs of development.

To guide Metro's scenario planning work, the LCDC adopted the Metropolitan Greenhouse Gas Reduction Targets Rule (Oregon Administrative Rule 660-044) in May 2011. As required by section 37 of the JTA, OAR 660-044-0020 identifies GHG emissions reduction targets for 2035 for each of Oregon's six metropolitan areas. The targets identify the percentage reduction in per capita GHG emissions from light vehicle travel that is needed to help Oregon meet its GHG emissions reduction goals for 2050.

The LCDC target-setting process assumed anticipated changes to the vehicle fleet mix, improved fuel economy, and the use of improved vehicle technologies and low carbon fuels that would reduce 2005 emissions levels from 4.05 to 1.5 MT CO<sub>2</sub>e per capita by 2035. The adopted target for the Portland metropolitan area calls for a 20 percent per capita reduction in GHG emissions from light vehicle travel by 2035. This target reduction is in addition to the emissions reductions anticipated from changes to the fleet and technology sectors as identified in the Agencies' Technical Report. Therefore, to meet the target, per capita roadway GHG emissions must be reduced by an additional 20 percent below the 1.5 MT CO<sub>2</sub>e per capita by 2035 to 1.2 MT CO<sub>2</sub>e per capita. The adopted target for the region is the equivalent of 1.2 MT CO<sub>2</sub>e per capita by 2035.

In 2012, the LCDC amended OAR 660-044-0040 to further direct Metro to evaluate a reference case that reflects implementation of existing adopted comprehensive and transportation plans and at least two alternative land use and transportation scenarios that accommodate planned growth while achieving a reduction in greenhouse gas emissions from light vehicles. The amendments also directed Metro on the evaluation and selection of a preferred land use and transportation scenario by December 31, 2014.

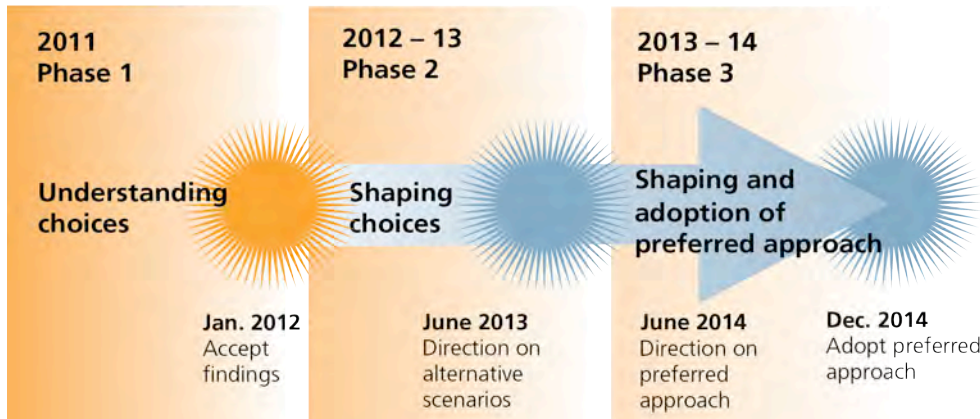
## **CLIMATE SMART COMMUNITIES SCENARIOS PROJECT**

Since 1995, Metro and its partners have collaborated to help communities realize their local aspirations while moving the region toward its goals for making a great place: vibrant communities, economic prosperity, transportation choices, equity, clean air and water, and leadership on climate change. Local and regional efforts to implement the 2040 Growth Concept provided a solid foundation for the GHG scenario planning work required of the region.

The Portland metropolitan region conducted scenario planning in three phases through the Climate Smart Communities Scenarios Project (Scenarios Project). The project was designed to implement the 2010 Council actions, demonstrate leadership on climate change, maximize achievement of all six of the region's desired outcomes, support adopted local and regional plans and satisfy requirements in Section 37 of the JTA and OAR 660-044.

**Figure 1** shows the project timeline.

**Figure 1. Climate Smart Communities Project Timeline**



Working together with city, county, state, business and community leaders, Metro researched how land use and transportation policies and investments can be leveraged to create healthy and equitable communities and a strong economy and meet state adopted targets for reducing greenhouse gas emissions. The adopted land use plans and zoning of cities and counties across the region served as the foundation for the scenarios tested throughout the project, with a goal of creating a diverse yet shared vision of how to make this region a great place for all communities today and for generations to come – and meet state greenhouse gas emissions targets.

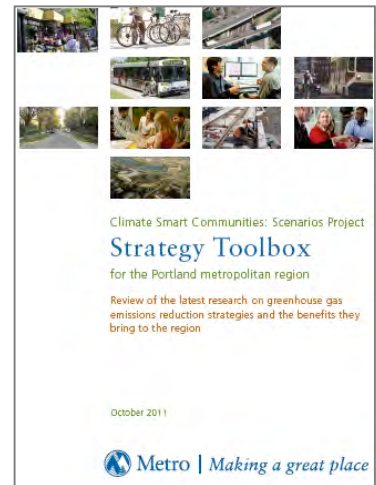
Metro led this process in consultation and coordination with federal, state and local governments, and engagement of other stakeholders with an interest in or who are affected by this planning effort. Metro facilitated this consultation and coordination through four advisory committee bodies—the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC), the Transportation Policy Alternatives Committee (TPAC) and the Metro Technical Advisory Committee (MTAC).

The project relied on this existing regional decision-making structure for development, review and adoption of the plan. MPAC, JPACT and the Metro Council made recommendations at key decision points based on input from TPAC, MTAC and the public participation process. A technical work group of members from MTAC and TPAC was formed to assist Metro staff with the development of work products, provide technical advice and assist with engaging local government officials and senior staff throughout the process.

**PHASE 1: UNDERSTANDING OUR LAND USE AND TRANSPORTATION CHOICES (JAN. 2011 TO JAN. 2012)**

**Phase 1 began in 2011 and concluded in early 2012.** This phase focused on understanding the region’s choices and produced the *Strategy Toolbox*, a comprehensive review of the latest research on greenhouse gas reduction strategies and their potential effectiveness and benefits. Staff also engaged public officials, community and business leaders, community groups and government staff through two regional summits, 31 stakeholder interviews, and public opinion research.

In addition, Metro evaluated a wide range of options for reducing greenhouse gas emissions by testing 144 different combinations of land use and transportation strategies to learn what it would take to meet



**Strategy Toolbox**  
Staff completed a comprehensive review of the latest research on greenhouse gas reduction strategies and their potential effectiveness and benefits.

the region's reduction target by 2035. Strategies we organized into six policy areas:

- Community design
- Pricing
- Marketing and incentives
- Roads
- Fleet
- Technology

Each of these policies areas included individual strategies that national research has shown to affect greenhouse gas emissions. Metro staff used a regionally tailored version of the Oregon Department of Transportation (ODOT) Greenhouse Gas State Transportation Emissions Planning (GreenSTEP) model to conduct the scenario analysis – the same model used by state agencies to set the region's greenhouse gas emissions reduction target and ODOT develop the Statewide Transportation Strategy for reducing greenhouse gas emissions. GreenSTEP accounts for the synergies between the policy areas and other variables, including vehicle miles traveled, fuel consumption, fleet mix, vehicle technology, amount of transit service and road expansion provided and the location of forecasted future growth.

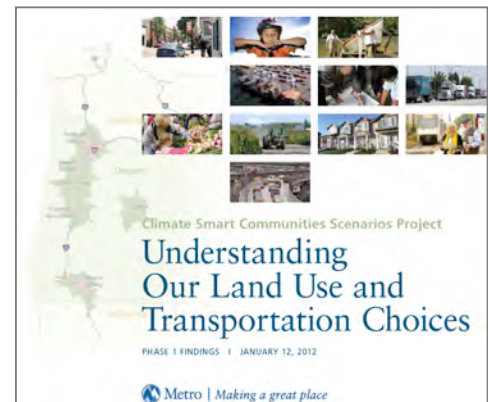
The initial scenario analysis found more than 90 of the 144 scenarios tested met or exceeded the target. The findings are summarized in *Understanding Our Land Use and Transportation Choices: Phase 1 Findings* (January 2012).

The Phase 1 findings indicated that current adopted plans and policies – if realized – along with state assumptions related to advancements in cleaner, low carbon fuels and more fuel-efficient vehicle technologies, including electric and other alternative fuel vehicles, provide a strong foundation for meeting the state target. Although current plans move the region in the right direction, current funding is not sufficient to implement adopted local and regional plans. As a result, the region concluded that a key to meeting the target would be the various governmental agencies working together to develop public and private partnerships to invest in communities in ways that support adopted local and regional plans and reduce greenhouse gas emissions.

## **PHASE 2: SHAPING OUR LAND USE AND TRANSPORTATION CHOICES (JAN. 2012 – OCT. 2013)**

**Phase 2 began in January 2012 and concluded in October 2013.**

This phase focused on shaping and evaluating future choices for supporting community visions and meeting the state GHG emissions reduction target. Staff conducted a sensitivity analysis of the policy areas tested during Phase 1 to better understand the GHG emissions reduction potential of individual strategies within each policy area.<sup>1</sup> The policies tested included pay-as-you-drive insurance, use of technology to actively manage the transportation system, expanded transit service, user-based



### **Understanding Our Land Use and Transportation Choices**

Phase 1 concluded adopted plans provide a strong foundation for reducing greenhouse gas emissions and that a key to meeting state target would be developing public and private partnerships to invest in communities in ways that support local community and economic development goals.

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<sup>1</sup> Memo to TPAC and interested parties on Climate Smart Communities: Phase 1 Metropolitan GreenSTEP scenarios sensitivity analysis (June 21, 2012).

pricing of transportation, transportation demand management programs, increased bicycle travel, carsharing and advancements in clean fuels and vehicle technologies.

Assuming adopted community plans and national fuel economy standards, the most effective individual policies for reducing greenhouse gas emissions were found to be:

- Fleet and technology advancements
- Transit service expansion
- User-based pricing of transportation (e.g., fuel price, pay-as-you-drive insurance, parking fees, mileage-based road use fee, and carbon fee)

The information derived from the sensitivity analysis was used to develop a five-star rating system for communicating the relative climate benefit of different policies. The potential reductions found for each individual policy area, and the star rating assigned, represent the potential effect of individual policy areas in isolation and do not capture greenhouse gas emissions reductions that may occur from synergies between multiple policies if implemented together.

It should be noted that the potential reductions achieved from increased walking and biking are likely underestimated due to known limitations with GreenSTEP.<sup>2</sup> It is also important to note that while some strategies did not individually achieve significant greenhouse gas emissions reductions, such as increasing walking or bicycle mode share or participation in marketing and incentives programs, they remain important elements to complement more effective strategies such as transit service expansion and building walkable downtowns and main streets as called for in adopted community plans and visions.

Metro also undertook an extensive consultation process by sharing the Phase 1 findings with cities, counties, county-level coordinating committees, regional advisory committees and state commissions. Staff also regularly convened a local government staff technical working group throughout 2012. The work group continued to provide technical advice to Metro staff, and assistance with engaging local government officials and senior staff.

In addition, Metro convened workshops with community leaders working to advance public health, social equity, environmental justice and environmental protection in the region. A series of discussion groups were held in partnership with developers and business associations across the region. More than 100 community and business leaders participated in the workshops and discussion groups from summer 2012 to winter 2013.

Eight case studies were produced to spotlight local government success stories related to strategies implemented to achieve their local community visions that also help to reduce greenhouse gas emissions. A video of local elected



More than 100 community and business leaders participated in the workshops and discussion groups that informed development of three scenarios to test and the criteria that would be used to evaluate and compare them.

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<sup>2</sup> Metro staff used a regionally tailored version of ODOT's Greenhouse Gas State Transportation Emissions Planning (GreenSTEP) model to conduct the analysis. ODOT is currently working on enhancements to GreenSTEP to better account for pedestrian travel and address other limitations identified through the Climate Smart Communities Scenarios Project and development of the Statewide Transportation Strategy.

officials and other community and business leaders was produced as another tool for sharing information about the project and the range of strategies being considered.

Through these efforts, the Metro Council and regional advisory committees concluded that the region's 2040 Growth Concept and the locally adopted land use and transportation plans that implement the growth concept should be the starting point for further scenario development and analysis.

**Figure 2** summarizes the three approaches evaluated in summer 2013. Each scenario was distinguished by an assumption of progressively higher levels of investment in adopted local and regional plans.

**Figure 2. Three approaches that were evaluated in 2013**

<b>Scenario</b> <b>A</b>	<b>RECENT TRENDS</b> This scenario shows the results of implementing adopted plans to the extent possible with existing revenue.
<b>Scenario</b> <b>B</b>	<b>ADOPTED PLANS</b> This scenario shows the results of successfully implementing adopted land use and transportation plans and achieving the current RTP, which relies on increased revenue.
<b>Scenario</b> <b>C</b>	<b>NEW PLANS &amp; POLICIES</b> This scenario shows the results of pursuing new policies, more investment and new revenue sources to more fully achieve adopted and emerging plans.

A set of criteria were developed through the Phase 2 engagement process that would be used to evaluate and compare the scenarios considering costs and benefits across public health, environmental, economic and social equity outcomes. As unanimously recommended by MPAC and JPACT, Council approved a resolution on June 6, 2013 directing staff to move forward into the analysis and report back with the results in Fall 2013.

### **PHASE 3: DEVELOPMENT AND SELECTION OF A PREFERRED LAND USE AND TRANSPORTATION SCENARIO (OCT. 2013 – DEC. 2014)**

**Phase 3, the final phase of the process, began in October 2013 with release of the Phase 2 analysis results.** The results demonstrated that implementation of the 2040 Growth Concept and locally-adopted zoning, land use and transportation plans and policies make the state-mandated greenhouse gas emissions reduction target achievable – if the region is able to make the investments and take the actions needed to implement those plans. Scenario A fell short of the state mandated target, achieving a 12 percent reduction in per capita greenhouse gas emissions. Scenario B achieved a 24 percent reduction and Scenario C achieved a 36 percent reduction.

The analysis also demonstrated there are potentially significant long-term benefits that can be realized by implementing adopted plans (Scenario B) and new policies and plans (Scenario C), including cleaner air, improved public health and safety, reduced congestion and delay and travel cost savings that come from driving more fuel efficient vehicles and traveling shorter distances.



Part of the analysis was conducted by the Oregon Health Authority through the Community Climate Choices Health Impact Assessment (HIA). The HIA built on a rapid HIA completed on a representative set of scenarios from Phase 1 and represents groundbreaking work to provide the region’s decision-makers with information about how the three scenarios may affect the health of people in the region before a final decision is made. The HIA found significant public health benefits from investments that increase physical activity, reduce air pollution and improve traffic safety.<sup>3</sup>

The Phase 2 analysis demonstrated that if the region continues investing in transportation at current levels (as reflected in Scenario A) the region will fall short of the state greenhouse gas emissions reduction target and other outcomes the region is working together to achieve – healthy and equitable communities, clean air and water, transportation choices, and a strong economy.

Release of the Phase 2 findings in October 2013 initiated Phase 3 and a regional discussion aimed at identifying which policies, investments and actions should be included in a preferred approach.

### SHAPING THE PREFERRED APPROACH IN 2014

In February 2014, MPAC and JPACT approved moving forward to shape and recommend a preferred approach for the Metro Council to adopt by the end of 2014. As recommended by both policy committees, development of the key components of the preferred approach began with the adopted 2040 Growth Concept, the 2014 Regional Transportation Plan (RTP) and the adopted plans of the region’s cities and counties including local zoning, capital improvement, comprehensive and transportation system plans. During this time, the RTP was in the process of being updated to reflect changes to local, regional and state investment priorities, which were different from what was studied in Scenario B and Scenario C during Phase 2.

From January to April 2014, Metro facilitated a Community Choices discussion to explore policy priorities and possible trade-offs. The activities built upon earlier public engagement to solicit feedback from public officials, business and community leaders, interested members of the public and other identified audiences. Interviews, discussion groups, and statistically valid public opinion research were used to gather input that was presented at a joint meeting of MPAC and JPACT on April 11, 2014. In addition, more detailed information about the policy areas under consideration was provided in a discussion guide, including estimated costs, potential benefits and impacts, and a comparison of the relative climate benefits and cost of six policy areas.<sup>4</sup>

<sup>3</sup> The Community Choices Health Impact Assessment is available to download at [www.healthoregon.org/hia](http://www.healthoregon.org/hia).

<sup>4</sup> *Shaping the Preferred Approach: A Policymakers Discussion Guide* is available to download from the project website at [www.oregonmetro.gov/climatescenarios](http://www.oregonmetro.gov/climatescenarios)



### Community Choices Health Impact Assessment

The Community Climate Choices HIA was conducted to provide health information and evidence based recommendations to inform the selection of a final scenario.



### Discussion guide for policymakers

The guide summarized the results of the Phase 2 analysis and public input received through the Community Choices engagement activities.

The six policy areas discussed at the joint meeting are:

- Make transit convenient, frequent, accessible and affordable
- Use technology to actively manage the transportation system
- Provide information and incentives to expand the use of travel options
- Make biking and walking safe and convenient
- Make streets and highways safe, reliable and connected
- Manage parking to make efficient use of land and parking spaces

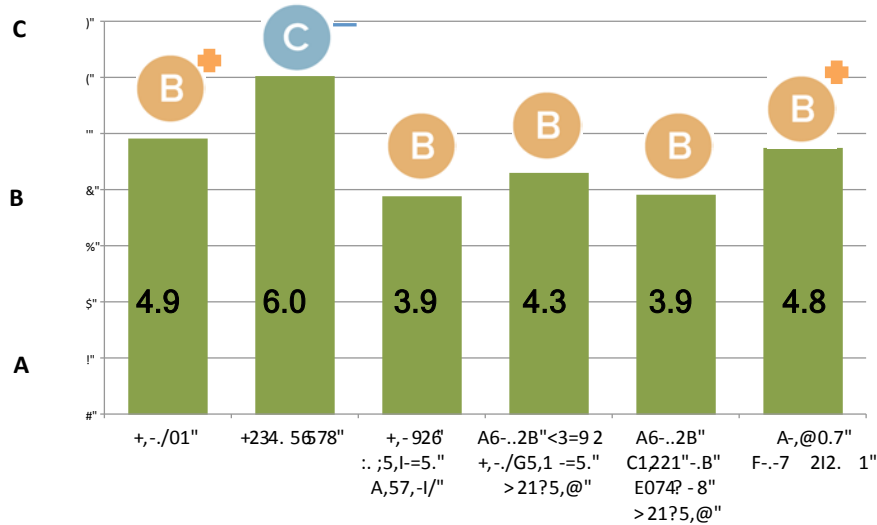
After receiving additional information about the policy options and previous engagement activities, MPAC and JPACT discussed the six policy areas contained within the Scenarios A, B and C. The April 11 meeting concluded with a straw poll conducted of members to identify the desired levels of investment to assume in the region’s draft approach using a scale of 1 to 7, with 1 representing the level of investment in Scenario A and 7 representing the level of investment in Scenario C. **Figure 3** summarizes the results of the straw poll.

**Figure 3. April 11 MPAC/JPACT Straw Poll Results**

## April 11 JPACT/MPAC Straw poll results

Preferences for Scenarios A, B, C and in-Between Scenarios

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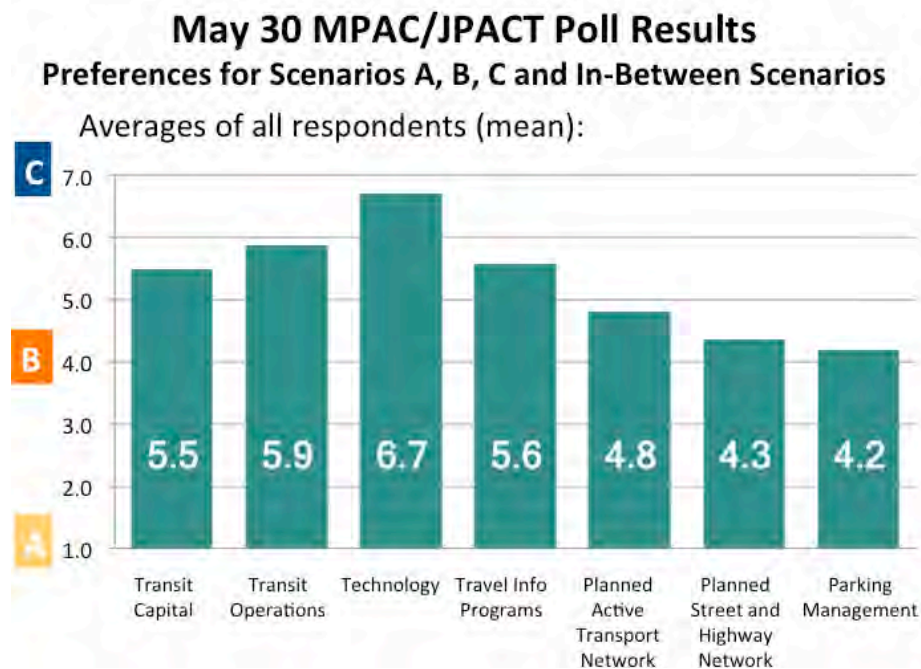


Between April 11 and May 30, the Metro Council and staff engaged local governments and other stakeholders on the straw poll results, primarily through the county-level coordinating committees and regional technical and policy advisory committees. On May 12, a MTAC/TPAC workshop was held to begin shaping a recommendation to JPACT and MPAC on a draft approach, factoring cost, the region’s six desired outcomes, the April 11 straw poll results, and other input received from the public and county-level coordinating committees. MTAC and TPAC further refined their recommendation to JPACT and MPAC on May 21 and May 23, respectively. The refinements included more directly connecting their recommendations on the draft approach to the 2014 RTP in anticipation of the plan’s adoption on July 17, 2014.

On May 30, a joint meeting of the MPAC and JPACT was held to review additional cost information, public input, the April 11 straw poll results and recommendations from MTAC and TPAC on a draft approach for testing. After discussion of each recommendation, the committees took a poll to confirm the levels of investment to assume in the region’s draft approach – using a scale of 1 to 7, with 1 representing the level of investment in Scenario A and 7 representing the level of investment in Scenario C.

At the end of the meeting, both policy committees unanimously recommended forwarding the results of the May 30 poll to the Metro Council as the draft approach recommended for staff to study during the summer, 2014. The poll results are summarized in **Figure 4**.

**Figure 4. May 30 MPAC/JPACT poll results on levels of investment recommended in the draft approach for testing**



On June 19, 2014, the Metro Council directed staff to evaluate the draft approach as recommended by MPAC and JPACT on May 30, 2014. The draft approach recommended for study includes the following assumptions:

- **Growth** - adopted local and regional land use plans, including the 2040 Growth Concept, as assumed in the 2035 growth distribution adopted by the Metro Council in 2012<sup>5</sup>
- **State and federal actions related to advancements in fuels and vehicle fleet and technologies** - assumptions used by the state when adopting the region’s reduction target to account for

<sup>5</sup> The 2035 growth distribution reflects locally adopted comprehensive plans and zoning as of 2010 and assumes an estimated 12,000 acres of urban growth boundary expansion by 2035. Metro’s assumption about UGB expansion is not intended as a land use decision authorizing an amendment through this ordinance. Instead, the assumption about UGB expansion is included for purposes of analysis to assure that UGB expansion – if subsequently adopted by Metro and approved by LCDC – would be consistent with regional efforts to reduce greenhouse gas emissions. Review of any UGB expansion will occur through the UGB Amendment process provided for by ORS 197.626(a) and OAR Chapter 660, Division 24.

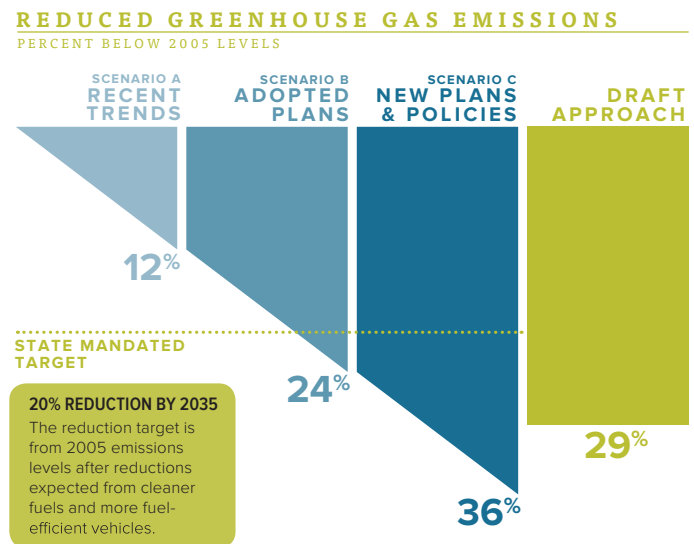
anticipated state and federal actions related to advancements in cleaner, low carbon fuels and more fuel-efficient vehicle technologies, including electric and alternative fuel vehicles<sup>6</sup>

- **Transportation investments** - local and regional investment priorities adopted in the 2014 Regional Transportation Plan (RTP) on July 17, 2014 to address current and future transportation needs in the region, including:
  - the financially constrained 2014 RTP level of investment for streets, highways and active transportation
  - the financially constrained 2014 RTP assumptions for parking management, which link varying levels of parking management to the availability of high capacity transit, frequent bus service and active transportation in 2040 centers
  - the full 2014 RTP level of investment for transit service and related capital improvements needed to support increased service levels to be able to more fully implement community and regional transit service identified in transit service plans
  - the full 2014 RTP level of investment for transportation system management and operations technologies to actively manage the transportation system and reduce delay
  - a higher level of investment than assumed in the full 2014 RTP for travel information and incentive programs to increase carpooling, bicycling, walking and use of transit.

Metro staff worked with the project’s technical work group over the summer to develop modeling assumptions to reflect the draft approach. **Attachment 1** provides a summary of the key planning assumptions studied in the draft approach.

Staff completed the evaluation in August, 2014. Analysis shows the draft approach, if implemented, achieves a 29 percent per capita reduction in greenhouse gas emissions as shown in **Figure 5**. But the draft approach does more than just meet the target. It will deliver significant environmental and economic benefits to communities and the region, including:

- Less air pollution and run-off of vehicle fluids means fewer environmental costs. This helps save money that can be spent on other priorities.
- Spending less time in traffic and reduced delay on the system saves businesses money, supports job creation, and promotes the efficient movement of goods and a strong regional economy.
- Households save money by driving more fuel-efficient vehicles fewer miles and walking, biking and using transit more.
- Reducing the share of household expenditures



**Figure 5. Estimated greenhouse gas emissions reduction from implementation of the draft approach**

<sup>6</sup> The assumptions were developed based on the best available information and current estimates about improvements in vehicle technologies and fuels and will be reviewed by LCDC in 2015.

for vehicle travel helps household budgets and allows people to spend money on other priorities; this is particularly important for households of modest means.

In addition, the Oregon Health Authority completed a third health impact assessment to evaluate the health impacts of the draft approach. The assessment found that the investments in land use and transportation under consideration in the draft approach not only protect health by reducing the risks of climate change, they will also deliver significant public health benefits to communities and the region, including:

- Reduced air pollution and increased physical activity can help reduce illness and save lives.
- Reducing the number of miles driven results in fewer traffic fatalities and severe injuries.

The HIA also monetized expected public health benefits to help demonstrate the economic benefits that can result from improved public health outcomes. Analysis found that by 2035 the region could save \$100 – \$125 million per year in healthcare costs related to illness from implementing the draft approach.

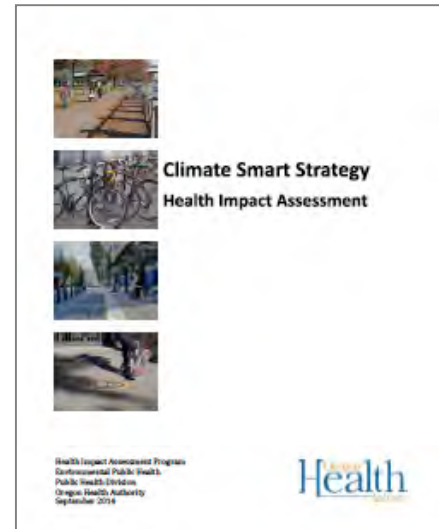
Staff also prepared cost estimates to implement the draft approach. At \$24 billion over 25 years, the overall cost of the draft approach is less than the full 2014 RTP (\$29 billion), but about \$5 billion more than the financially constrained 2014 RTP (\$19 billion). The financially constrained 2014 RTP refers to the priority investments that can be funded with existing and anticipated revenues identified by federal, state and local governments. The full 2014 RTP refers to all of the investments that have been identified to meet current and future regional transportation needs in the region. It assumes additional funding beyond existing and anticipated revenues.

While the recommended level of investment for transit service and related capital, transportation system management technologies and travel information and incentive programs is more than what is adopted in the financially constrained 2014 RTP, the estimated costs fall within the full 2014 RTP funding assumptions the region has agreed to work toward as part of meeting statewide planning goals. The cost to implement the draft approach is estimated to be \$945 million per year, plus an estimated \$480 million per year needed to maintain and operate the region’s road system. While this is about \$630 million more than we currently spend as a region, analysis shows multiple benefits and a significant return on investment. In the long run, the draft approach can help people live healthier lives and save households and businesses money providing a significant return on investment.

**Attachment 2** to the staff report summarizes the results of the analysis.

## **CLIMATE SMART COMMUNITIES STRATEGY**

After a four-year collaborative process informed by research, analysis, community engagement and discussion, community, business and elected leaders have shaped a draft Climate Smart Communities Strategy that meets the state mandate and supports the plans and visions that have already been adopted by communities and the region.



### **Climate Smart Strategy Health Impact Assessment**

The Climate Smart Strategy HIA was conducted to provide health information and evidence based recommendations on the draft approach.

On September 15, 2014, Metro staff launched an online survey and released the results of the analysis and the preferred land use and transportation scenario under OAR 660-044-0040 for review and comment through October 30, 2014:

- **Draft Climate Smart Strategy** (*an overview of the draft approach as unanimously recommended for study by MPAC and JPACT on May 30, 2014*)
- **Draft Implementation Recommendations** (*recommended policy, possible actions and monitoring approach organized in three parts*)
  1. **Draft Regional Framework Plan Amendments** identify refinements to existing regional policies to integrate the key components of the Climate Smart Communities Strategy, including performance measures for tracking the region's progress on implementing the strategy.
  2. **Draft Toolbox of Possible Actions (2015-20)** identifies possible near-term (within the next 5 years) actions that the Oregon Legislature, state agencies and commissions, Metro, cities and counties and special districts can take to begin implementation of the Climate Smart Communities Strategy. The toolbox is a comprehensive menu of more than 200 policy, program and funding actions that can be tailored to best support local, regional and state plans and visions that, if implemented, will reduce greenhouse gas emissions in ways that support community and economic development goals.

The toolbox does not mandate adoption of any particular policy or action. It builds on the research, analysis, community engagement and discussion completed during the past four years and was developed with the recognition that some tools and actions may work in some locations but not in others. It emphasizes the need for many diverse partners to work together to begin implementation of the Climate Smart Communities Strategy and that each partner retains flexibility and discretion in pursuing the strategies most appropriate to local needs and conditions. Updates to local comprehensive plans and development regulations, transit agency plans, port district plans and regional growth management and transportation plans present continuing opportunities to implement the *Toolbox of Possible Actions* in ways that can be locally tailored.

3. **Draft Performance Monitoring Approach** identifies measures and aspirational targets that reflect what was assumed in the strategy to evaluate and report on the region's progress toward implementing key components of the Climate Smart Communities Strategy through scheduled updates to the RTP and Urban Growth Report, and in response to Oregon State Statutes ORS 197.301 and ORS 197.296. The monitoring approach builds on the existing land use and transportation performance monitoring Metro is already responsible for as a result of state and federal requirements.

Metro sought and received comments on the draft Climate Smart Strategy, draft Regional Framework Plan Amendments, draft Toolbox of Possible Actions (2015-2020) and draft Performance Monitoring Approach from MPAC, JPACT, MTAC, TPAC, state agencies and commissions, including the Oregon Department of Transportation, the Oregon Department of Environmental Quality, the Oregon Department of Land Conservation and Development, and the Land Conservation and Development Commission, local governments in the region, the Port of Portland; public, private and non-profit organizations; and the public. The Metro Council held public hearings on October 30 and December 18, 2014.

A report documenting comments received through October 30, 2014 is provided in **Attachment 3**.

## **WORKING TOGETHER TO DEVELOP SOLUTIONS FOR OUR COMMUNITIES AND THE REGION**

Adoption of the preferred scenario under OAR 660-044-0040 – the Climate Smart Communities Strategy and supporting implementation recommendations – presents an opportunity for MPAC, JPACT and the Metro Council and others to work together to demonstrate leadership on climate change and address challenges related to transportation funding and implementing adopted local and regional plans, including transit service plans.

The preferred scenario adopted by this ordinance sets the foundation for how the region moves forward to integrate reducing greenhouse gas emissions with ongoing local and regional efforts to create healthy, equitable communities and a strong economy. The ordinance recommends local regional and state implementation actions and allows for local flexibility to support the differences among the region’s cities and counties. The ordinance also acknowledges that implementation of adopted local and regional plans, including transit service plans, as called for in the Climate Smart Communities Strategy and supporting implementation recommendations, will require new resources and active participation from a full range of partners over the long-term. MPAC and JPACT have agreed to work together with the Metro Council and other public and private partners to begin implementation in 2015 and recommend three priority actions as a starting point.

The preferred scenario will initially be implemented through amendments to Metro’s Regional Framework Plan in December 2014 and the three priority actions. Implementation through Metro’s Regional Transportation Plan, functional plans, local comprehensive plans, land use regulations and transportation system plans will occur through future actions as defined by administrative rules adopted by LCDC.<sup>7</sup>

### **ANALYSIS/INFORMATION**

1. **Known Opposition** None known. MPAC and JPACT unanimously recommended the Climate Smart Communities Strategy (attached to this ordinance as Exhibit A) for study on May 30, 2014.
2. **Legal Antecedents** Several state and regional laws and actions relate to this action.

#### **Metro Council actions**

- Resolution No. 08-3931 (For the Purpose of Adopting a Definition of Sustainability to Direct Metro's Internal Operations, Planning Efforts, and Role as a Regional Convener), adopted on April 3, 2008.
- Ordinance No. 10-1241B (For the Purpose of Amending the 2004 Regional Transportation Plan to Comply with State Law; To Add the Regional Transportation Systems Management and Operations Action Plan, the Regional Freight Plan and the High Capacity Transit System Plan; To Amend the Regional Transportation Functional Plan and Add it to the Metro Code; To Amend the Regional Framework Plan; And to Amend the Urban Growth Management Functional Plan), adopted on June 10, 2010.
- Ordinance No. 10-1244B (For the Purpose of Making the Greatest Place and Providing Capacity for Housing and Employment to the Year 2030; Amending the Regional Framework Plan and the Metro Code; and Declaring an Emergency), adopted on December 16, 2010.
- Resolution No. 12-4324 (For the Purpose of Accepting the Climate Smart Communities Scenarios Project Phase 1 findings and Strategy Toolbox for the Portland Metropolitan Region to Acknowledge the Work Completed to Date and Initiate Phase 2 of the Climate Smart Communities Scenarios Project), adopted on January 26, 2012.

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<sup>7</sup> OAR 660-044-0040 and OAR 660-044-0045.

- Ordinance No. 12-1292A (For the Purpose of Adopting the Distribution of the Population and Employment Growth to Year 2035 to Traffic Analysis Zones in the Region Consistent With the Forecast Adopted By Ordinance No. 11-1264B in Fulfillment of Metro's Population Coordination Responsibility Under ORS 195.036), adopted on November 29, 2012.
- Resolution No. 13-4338 (For the Purpose of Directing Staff to Move Forward With the Phase 2 of the Climate Smart Communities Scenarios Project Evaluation), adopted on June 6, 2013.
- Resolution No. 14-4539 (For the Purpose of Directing Staff to Test a Draft Approach and Complete Phase 3 of the Climate Smart Communities Scenarios Project), adopted June 19, 2014.
- Ordinance No. 14-1340 (For the Purpose of Amending the 2035 Regional Transportation Plan to Comply With Federal and State Law; and to Amend the Regional Framework Plan), adopted July 17, 2014.

### **State of Oregon actions**

- Oregon House Bill 3543, the Climate Change Integration Act, passed by the Oregon Legislature in 2007, codifies state greenhouse gas reduction goals and establishes the Oregon Global Warming Commission and the Oregon Climate Research Institute in the Oregon University System.
- Oregon House Bill 2001, the Jobs and Transportation Act, passed by the Oregon Legislature in 2009, directs Metro to conduct greenhouse gas emissions reduction scenario planning and LCDC to adopt reduction targets for each of Oregon's metropolitan planning organizations.
- Oregon House Bill 2186, passed by the Oregon Legislature in 2009, directs work to be conducted by the Metropolitan Planning Organization Greenhouse Gas Emissions Task Force.
- Oregon Senate Bill 1059, passed by the Oregon Legislature in 2009, directs planning activities to reduce greenhouse gas emissions in the transportation sector and identifies ODOT as the lead agency for implementing its requirements. This work is being conducted through the Oregon Sustainable Transportation Initiative.
- OAR 660-044, the Metropolitan Greenhouse Gas Reduction Targets Rule, adopted by the Land Conservation and Development Commission (LCDC) in May 2011, and amended in November 2012.

### **3. Anticipated Effects**

- Staff will transmit a final report and the decision record, including this ordinance, exhibits to the ordinance, the staff report to the ordinance and attachments to the staff report, to the Land Conservation and Development Commission in the manner of periodic review by January 31, 2015.
- The preferred scenario under OAR 660-044-0040, adopted by this ordinance and reflected in the Climate Smart Communities Strategy and supporting implementation recommendations, will be further implemented through the next scheduled update to the Regional Transportation Plan by December 31, 2018. Staff will begin scoping the work plan for the next update to the Regional Transportation Plan, and identify by September 30, 2015, a schedule and outline of policy decisions and resources needed.

### **4. Budget Impacts** This phase of the project is funded in the current budget through Metro and ODOT funds. Implementation of the Climate Smart Communities Strategy will be determined through future budget actions.

### **RECOMMENDED ACTION**

Staff recommends approval of Ordinance 14-1346.





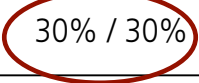

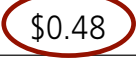




**TPAC/MTAC Recommended GreenSTEP Inputs to Reflect May 30 MPAC and JPACT Draft Approach**

 = Phase 3 draft approach model input

**Phase 2: 2010 base year and alternative scenario inputs**

The inputs are for research purposes only and do not represent current or future policy decisions of the Metro Council.

		2010	2035		
<b>Strategy</b>		<b>Base Year</b> Reflects existing conditions	<b>Scenario A</b> Recent trends	<b>Scenario B</b> Adopted plans	<b>Scenario C</b> New plans and policies
<b>Community design</b>	Households in mixed use areas (percent)	26%	36%		37%
	Urban growth boundary expansion (acres)	2010 UGB	28,000 acres		12,000 acres
	Drive alone trips under 10 miles that shift to bike (percent)	9%	10%	15%	 20%
	Transit service (daily revenue hours)	4,900	5,600	6,200 <small>(RTP Financially Constrained)</small>	 11,200 <small>(RTP State + more transit)</small>
	Work/non-work trips in areas with parking management (percent)	13% / 8%	13% / 8%		50% / 50%
<b>Pricing</b>	Pay-as-you-drive insurance (percent of households participating)	0%	20%		100%
	Gas tax (cost per gallon 2005\$)	\$0.42		\$0.73	\$0.18
	Road user fee (cost per mile)	\$0	\$0		\$0.03
	Carbon emissions fee (cost per ton)	\$0	\$0		\$50

Note: Gas tax assumption to be held in constant 2005\$ to be consistent with Oregon's revenue forecast scenario recommended for metropolitan transportation plans (Feb. 2011) and Statewide Transportation Strategy analysis.

 = Phase 3 draft approach model input

The inputs are for research purposes only and do not represent current or future policy decisions of the Metro Council.

**Strategy**

		2010	2035		
		Base Year Reflects existing conditions	Scenario A Recent trends	Scenario B Adopted plans	Scenario C New plans and policies
Marketing and incentives	Households participating in eco-driving (percent)	0%	0%	30% <b>45%</b>	60%
	Households participating in individualized marketing programs (percent)	9%	30%	30% <b>45%</b>	60%
	Workers participating in employer-based commuter programs (percent)	20%	20%	20% <b>30%</b>	40%
	Carsharing in high density areas (participation rate)	One carshare per 5000 vehicles	Twice the number of carshare vehicles available	<b>Same as Scenario A</b>	Four times the number of carshare vehicles available
	Carsharing in medium density areas (participation rate)	One carshare per 5000 vehicles	Same as today	<b>Twice the number of carshare vehicles</b>	Same as Scenario B
Roads	Freeway and arterial expansion (lane miles added)	N/A	<del>12/31</del> 9 miles	<del>15/336</del> 81 miles (RTP Financially Constrained)	<del>46/409</del> 105 miles (RTP State)
	Delay reduced by traffic management strategies (percent)	10%	10%	20%	<b>35%</b>
Fleet	Fleet mix (percent)	auto: 57% light truck: 43%	auto: 71% light truck: 29%		
	Fleet turnover rate	10 years	8 years		
Technology	Fuel economy (miles per gallon)	auto: 29.2 mpg light truck: 20.9 mpg	auto: 68.5 mpg light truck: 47.7 mpg		
	Carbon intensity of fuels	90 g CO <sub>2</sub> e/megajoule	72 g CO <sub>2</sub> e/megajoule		
	Plug-in hybrid electric/all electric vehicles (percent)	auto: 0% / 1% light truck: 0% / 1%	auto: 8% / 26% light truck: 2% / 26%		

Note: [1] Freeway and arterial lane miles added were incorrectly reported and have been updated to reflect what was tested in Phase 2. The difference between the 2010 RTP FC and 2014 RTP FC lane miles is largely due to the addition of the Sunrise Corridor Project and ODOT auxiliary lane projects.



# CLIMATE SMART COMMUNITIES SCENARIOS PROJECT



## KEY RESULTS

The Climate Smart Communities Scenarios Project responds to a state mandate to reduce greenhouse gas emissions from cars and small trucks by 2035. Working together, community, business and elected leaders are shaping a strategy that meets the goal while creating healthy and equitable communities and a strong economy. On May 30, 2014, Metro's policy advisory committees unanimously recommended a draft approach for testing that relies on policies and investments that have already been identified as priorities in communities across the region. **The results are in and the news is good.**

### WHAT DID WE LEARN?

**We can meet the 2035 target if we make the investments needed to build the plans and visions that have already been adopted by communities and the region.**

However, we will fall short if we continue investing at current levels.

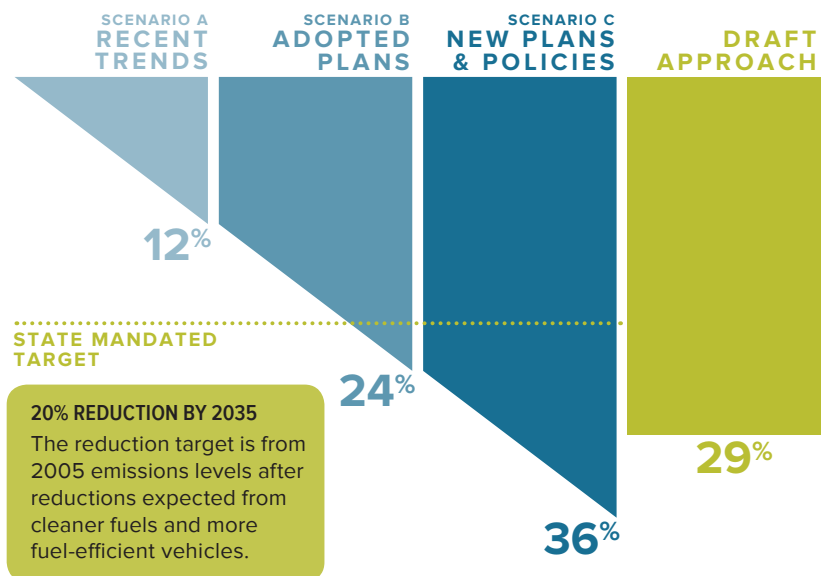
The region has identified a draft approach that does more than just meet the target. It supports many other local, regional and state goals, including clean air and water, transportation choices, healthy and equitable communities, and a strong regional economy.

### WHAT KEY POLICIES ARE INCLUDED IN THE DRAFT APPROACH?

- Implement adopted plans
- Make transit convenient, frequent, accessible and affordable
- Make biking and walking safe and convenient
- Make streets and highways safe, reliable and connected
- Use technology to actively manage the transportation system
- Provide information and incentives to expand the use of travel options
- Manage parking to make efficient use of land and parking spaces

### Reduced greenhouse gas emissions

PERCENT BELOW 2005 LEVELS



After a four-year collaborative process informed by research, analysis, community engagement and deliberation, the region has identified a draft approach that achieves a 29 percent reduction in per capita greenhouse gas emissions and supports the plans and visions that have already been adopted by communities and the region.

## WHAT ARE THE PUBLIC HEALTH AND ECONOMIC BENEFITS?

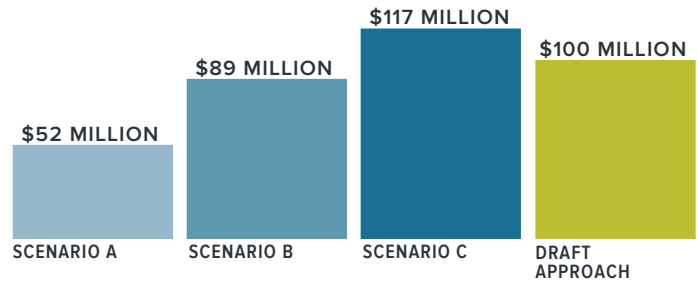
By 2035, the draft approach can help people live healthier lives and save businesses and households money through benefits like:

- Reduced air pollution and increased physical activity can help **reduce illness and save lives**.
- Reducing the number of miles driven results in **fewer traffic fatalities and severe injuries**.
- Less air pollution and run-off of vehicle fluids means **fewer environmental costs**. This helps save money that can be spent on other priorities.
- Spending less time in traffic and reduced delay on the system **saves businesses money, supports job creation**, and promotes the efficient movement of goods and a strong regional economy.
- **Households save money** by driving more fuel-efficient vehicles fewer miles and walking, biking and using transit more.
- Reducing the share of household expenditures for vehicle travel **helps household budgets** and allows people to spend money on other priorities; this is particularly important for households of modest means.



### Our economy benefits from improved public health

ANNUAL HEALTHCARE COST SAVINGS FROM REDUCED ILLNESS (MILLIONS, 2010\$)

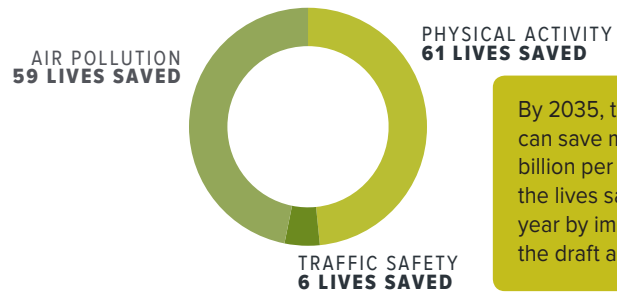


In 2010, our region spent \$5-6 billion on healthcare costs related to illness alone. By 2035, the region can save \$100 million per year from implementing the draft approach.



### More physical activity and less air pollution provide most health benefits

LIVES SAVED EACH YEAR BY 2035

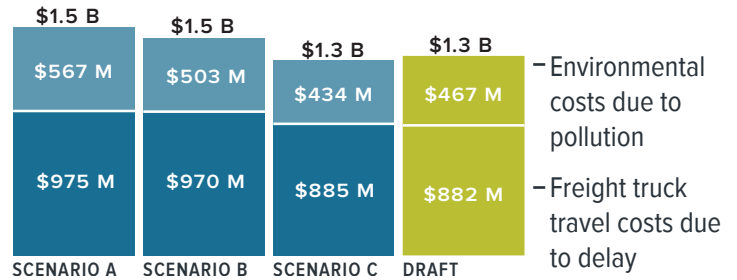


By 2035, the region can save more than \$1 billion per year from the lives saved each year by implementing the draft approach.



### Our economy benefits from reduced emissions and delay

ANNUAL ENVIRONMENTAL AND FREIGHT TRUCK TRAVEL COSTS IN 2035 (MILLIONS, 2005\$)

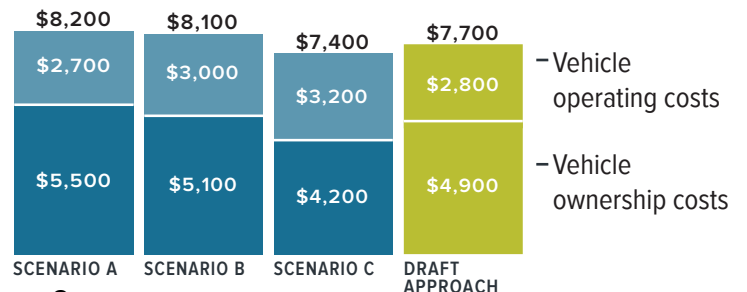


Cumulative savings calculated on an annual basis. The region can expect to save \$2.5 billion by 2035, compared to A, by implementing the draft approach.



### Overall vehicle-related travel costs decrease due to lower ownership costs

AVERAGE ANNUAL HOUSEHOLD VEHICLE OWNERSHIP & OPERATING COSTS IN 2005\$





### WHAT IS THE RETURN ON INVESTMENT?

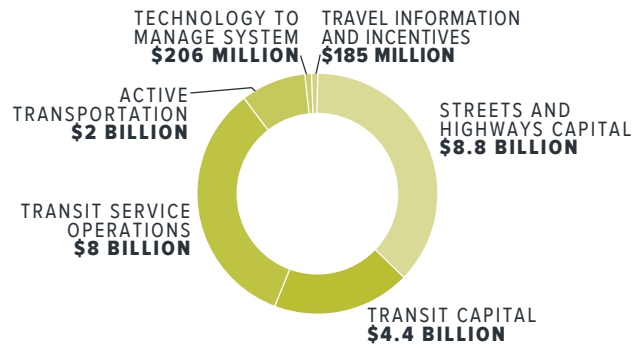
**Local and regional plans and visions are supported.** The draft approach reflects local and regional investment priorities adopted in the 2014 Regional Transportation Plan (RTP) to address current and future transportation needs in the region. At \$24 billion over 25 years, the overall cost of the draft approach is less than the full 2014 RTP (\$29 billion), but about \$5 billion more than the financially constrained 2014 RTP (\$19 billion).\*

### More transportation options are available.

As shown in the chart to the right, investment levels assumed in the draft approach are similar to those in the adopted financially constrained RTP, with the exception of increased investment in transit capital and operations region-wide. Analysis shows the high potential of these investments to reduce greenhouse gas emissions while improving access to jobs and services and supporting other community goals.

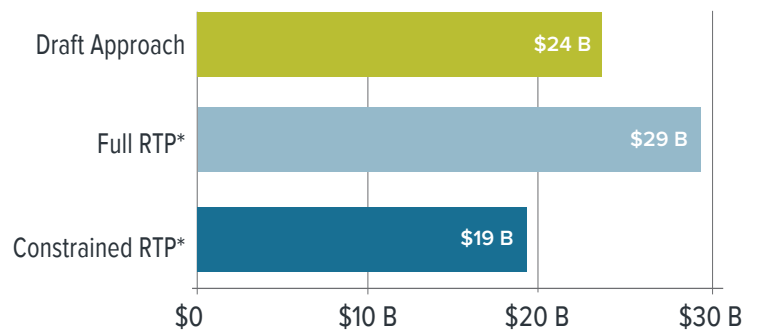
**Households and businesses experience multiple benefits.** The cost to implement the draft approach is estimated to be \$945 million per year, plus an estimated \$480 million per year needed to maintain and operate our road system. While this is about \$630 million more than we currently spend as a region, analysis shows multiple benefits and a significant return on investment. In the long run, the draft approach can help people live healthier lives and save households and businesses money.

### \$ How much would we need to invest by 2035?

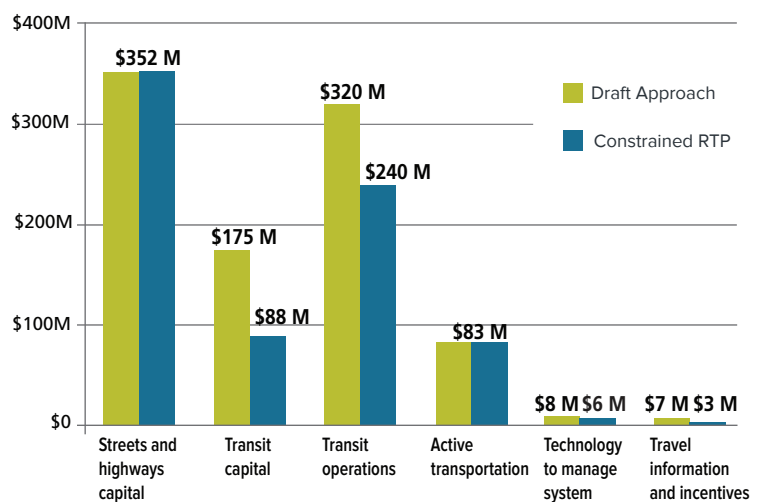


Investment costs are in 2014\$. The total cost does not include road-related operations, maintenance and preservation (OMP) costs. Preliminary estimates for local and state road-related OMP needs are \$12 billion through 2035.

### \$ Estimated costs of draft approach and 2014 RTP (billions, 2014\$)



### \$ Annual cost of implementation through 2035 (millions, 2014\$)



\* The financially constrained 2014 RTP refers to the priority investments that can be funded with existing and anticipated new revenues identified by federal, state and local governments. The full 2014 RTP refers to all of the investments that have been identified to meet current and future regional transportation needs in the region. It assumes additional funding beyond currently anticipated revenues.

### WHAT'S NEXT?

The Metro Policy Advisory Committee and the Joint Policy Advisory Committee on Transportation are working to finalize their recommendation to the Metro Council on the draft approach and draft implementation recommendations.

**September 2014** Staff reports results of the analysis and draft implementation recommendations to the Metro Council and regional advisory committees

**Sept. 15 to Oct. 30** Public comment period on draft approach and draft implementation recommendations

**Nov. 7** MPAC and JPACT meet to discuss public comments and shape recommendation to the Metro Council

**December 2014** MPAC and JPACT make recommendation to Metro Council

**December 2014** Metro Council considers adoption of preferred approach

**January 2015** Metro submits adopted approach to Land Conservation and Development Commission for approval

**2015 and beyond** Ongoing implementation and monitoring



### HOW DO WE MOVE FORWARD?

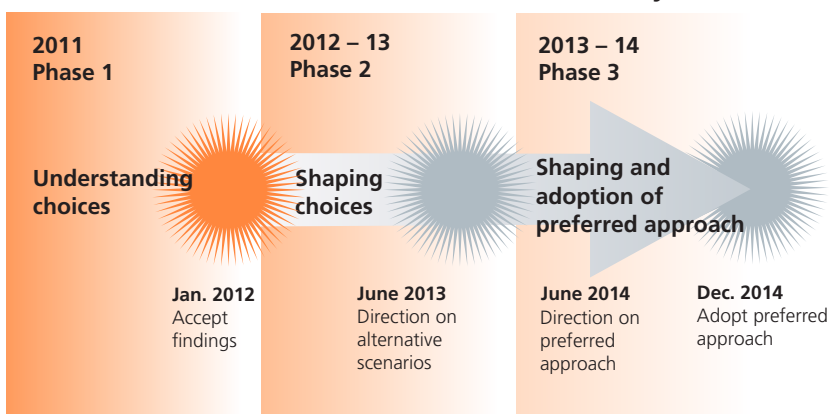
**We're stronger together.** Local, regional, state and federal partnerships and legislative support are needed to secure adequate funding for transportation investments and address other barriers to implementation.

Building on existing local, regional and statewide activities and priorities, the project partners have developed a draft toolbox of actions with meaningful steps that can be taken in the next five years. This is a menu of actions that can be locally tailored to best support local, regional and state plans and visions. Reaching the state target can best be achieved by engaging community and business leaders as part of ongoing local and regional planning and implementation efforts.

### WHAT CAN LOCAL, REGIONAL AND STATE PARTNERS DO?

**Everyone has a role.** Local, regional and state partners are encouraged to review the draft toolbox to identify actions they have already taken and prioritize any new actions they are willing to consider or commit to as we move into 2015.

### Climate Smart Communities Scenarios Project timeline



### WHERE CAN I FIND MORE INFORMATION?

The draft toolbox and other publications and reports can be found at [oregonmetro.gov/climatescenarios](http://oregonmetro.gov/climatescenarios).

For email updates, send a message to [climatescenarios@oregonmetro.gov](mailto:climatescenarios@oregonmetro.gov).



**CLIMATE  
SMART  
COMMUNITIES**  
SCENARIOS PROJECT

# Public Engagement Report

To be finalized following the  
Oct. 30 close of comment  
period

xx, 2014

**MAKING A  
GREAT  
PLACE**



## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

Stay in touch with news, stories and things to do.

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

### **Metro Council President**

Tom Hughes

### **Metro Councilors**

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

### **Auditor**

Suzanne Flynn





OCTOBER 23, 2014

Revised Straw Proposal for TPAC Discussion

## A SHORT LIST OF CLIMATE SMART ACTIONS FOR 2015 AND 2016

### BACKGROUND

The Climate Smart Communities project responds to a 2009 legislative mandate to develop and implement a regional strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. After a four-year collaborative effort, community leaders have shaped a Climate Smart strategy that meets the state mandate while supporting local city and county plans that have already been adopted in the region. When implemented, the strategy will also deliver significant public health, environmental and economic benefits to households and businesses in the region.

### WORKING TOGETHER TO DEVELOP SOLUTIONS FOR OUR COMMUNITIES AND THE REGION

Building on existing activities and priorities in our region, the project partners have developed a *Toolbox of Possible Actions* that recommends immediate steps that can be taken individually by local, regional and state governments to implement the Climate Smart strategy. The toolbox does not mandate adoption of any particular policy or action, and instead was developed with the recognition that existing city and county plans for creating great communities are the foundation for reaching the state target and some tools and actions may work better in some locations than others. The toolbox emphasizes the need for diverse partners to work together in pursuing those strategies most appropriate to local needs and conditions.

The toolbox includes some regional actions that require local and regional officials to work together. Seeing the opportunity to act quickly, the Metro Policy Advisory Committee (MPAC) and the Joint Policy Advisory Committee on Transportation (JPACT) have identified three toolbox actions that are key for the region to work together on now:

### CLIMATE SMART ACTIONS FOR 2015 AND 2016

<b>Action 1</b>	<b>Advocate for increased federal, state, regional and local transportation funding for all transportation modes as part of a diverse coalition, with a top priority of maintaining and preserving existing infrastructure.</b> <i>This action will advance efforts to implement adopted local city and county plans, transit service plans, and the 2014 Regional Transportation Plan.</i>
<b>Action 2</b>	<b>Advocate for federal and state governments to implement actions and legislative changes to advance Oregon’s transition to cleaner, low carbon fuels, and more fuel-efficient vehicle technologies.</b> <i>This action will accelerate the fuel and vehicle technology trends assumed in the state target.</i>
<b>Action 3</b>	<b>Seek opportunities to advance existing local projects that best combine the most effective greenhouse gas emissions reduction strategies.</b> <i>This action will implement adopted city and county plans and identify locally tailored approaches that integrate transit and active transportation investments with the use of technology, parking and transportation demand management strategies.</i>

### PARTNERSHIPS TO IMPLEMENT EARLY ACTIONS CAN DRIVE POSITIVE CHANGE

Adoption of the Climate Smart Communities Strategy presents an opportunity for the region to work together to demonstrate leadership on climate change while addressing the need to step up funding to implement our adopted local and regional plans. Working together on these early actions presents an opportunity to lay a foundation for addressing our larger shared challenges through a collaborative approach. The actions recommended are achievable, but require political will and collaboration among regional partners to succeed.

This collaborative effort will require full participation from not only MPAC, JPACT, and the Metro Council, but also the region's cities and counties, transit agencies, port districts, parks providers, businesses, non-profits as well as state agencies, commissions and the Oregon Legislature. Coordinated work plans for addressing these priority actions will be developed by MPAC and JPACT and the Metro Council in 2015.



 Metro | Memo

Date: October 31, 2014  
To: MTAC  
From: Gerry Uba, Community Planning and Development Grants project manager  
cc: John Williams, Deputy Planning and Development Director  
Subject: Revision of Administrative Rules for Implementation of Construction Excise Tax and Community Planning and Development Grants

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At your October 15 meeting staff provided you with a detailed background of the Community Planning and Development Grants funded by Construction Excise Tax and a copy of the Administrative Rules for implementation of the tax and grants. Staff also informed you that Metro Council approved the Chief Operating Officer's recommendation that MTAC undertake the review and discussion of the proposed revisions in the Administrative Rules and send its recommendations to the Chief Operating Officer, who will then send hers and MTAC's recommendations to the Metro Council. Almost all of the revisions in the Administrative Rules are based on the recommendations of the Chief Operating Officer and the Spring 2014 Advisory Group accepted by the Metro Council.

At your November 5, 2014 meeting, staff proposes the following process for discussion of this agenda item:

- A. Presentation of recommendations of the Chief Operating Officer and Spring 2014 Advisory Group to Metro Council, followed with questions and answers
- B. ECONorthwest presentation of the logical framework for addressing improvements to the CPDG program followed with questions and answers
- C. MTAC review and discussion of the proposed revisions in the Administrative Rules

Attachments

- Chief Operating Officer's memo to the Metro Council on recommendations on Construction Excise Tax extension and Community Planning and Development Grants program improvements
- ECONorthwest memo on Draft Logic Model for Metro Community Planning and Development Grants
- Revised Administrative Rules for CET and CPDG
- Eli Spevak's letter to Metro COO dated March 26, 2014 regarding "Code Updates to Meet Metro's Future Housing Needs"





Date: April 18, 2014  
To: Council President Hughes and Metro Council  
From: Martha Bennett, Chief Operating Officer  
Subject: Recommendation on Construction Excise Tax (CET) extension and Community Planning and Development Grant Program

---

I am pleased to present my recommendations for extending Metro's construction excise tax and modifying the community planning and development. The construction excise tax funds a valuable grant program for the region and its communities, and I recommend you adopt Ordinance 14-1328, which extends the tax for six more years. Additionally, I recommend the Council direct me to implement the attached recommendations to improve the quality of grant applications and increase the likelihood of achieving the purpose of the grant program.

In January 2014, I appointed a 22-member Stakeholder Advisory Group representing varied interests in the private and public sectors to review the grant program and advise me on whether the tax should be extended and on refinements to the program. This group had productive discussions, and I appreciate their time and effort.

My recommendations are based on their work. I endorse the Advisory Group's recommendations which they will share with you at the April 29, 2014 Council work session

Highlights of the recommendations from the Stakeholder Advisory Group include:

- Extension of Metro's construction excise tax from September 30, 2014 to December 31, 2020;
- Modification of the Community Planning and Development Grant program to ensure Metro supports grants that assist communities in three areas: Meeting the requirements of Title 11 for concept planning, strategic planning projects designed to help areas develop or redevelop; and catalytic planning efforts that remove barriers currently preventing development or redevelopment in the short term;
- Refinement of criteria currently in the Administrative Rules next fall; and

The proposed refinement of the community planning and development program will encourage stronger grant applications for getting more areas in the region ready for development and redevelopment. My recommendations as well as those of the Advisory Group were informed by a performance assessment of the community planning and development grants program by an independent contractor (ECONorthwest), which you will also hear about on April 29.

In addition to the Advisory Group's recommendation (attached), I also recommend that Council increase Metro's administrative reimbursement from two-and-a-half- percent (2.5%) to five percent (5%). Since creation of the construction excise tax in 2006, local governments collecting the tax have retained five percent (5%) of the paid receipts as administrative fee. Metro has retained 2.5%), which goes into the general fund for administration of the. In reviewing the program since 2006, I have learned that the direct costs for administering this grant program have

greatly exceeded this amount. Increasing the reimbursement will not cover all of Metro's direct costs, but it will reduce the impact of this program on other general fund services.. .

Please let me or the project manager, Gerry Uba, know if you have any questions.

Attachment to COO Recommendations

**RECOMMENDATIONS OF THE METRO STAKEHOLDER ADVISORY GROUP  
FOR POTENTIAL CONSTRUCTION EXCISE TAX EXTENSION  
AND COMMUNITY PLANNING AND DEVELOPMENT GRANTS PROGRAM REVIEW  
SUBMITTED TO METRO CHIEF OPERATING OFFICER  
FINAL -- April 18, 2014**

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**1. Decision on Construction Excise Tax (CET) expiration:**

The Stakeholder Advisory Group recommends the Metro Council extend the CET at the current tax rate from September 30, 2014 to December 31, 2020 for the purpose of funding the Community Planning and Development Grant Program.

**2. Modifications to the Community Planning and Development Grant (CPDG) Program**

**A. Purpose of the grant funds**

The Advisory Group recommends keeping the purpose of the program as stated in Ordinance No. 09-1220:

*“.....the purpose of funding grants for planning areas inside the UGB, future expansion areas, and urban reserves, with an emphasis on planning projects that advance the 2040 Regional Framework Plan and result in on-the-ground development.....*

*“...and Metro is willing to assist local governments to fund their planning .....”*

**B. Distribution of tax revenue**

The Advisory Group recommends Metro undertake at least two grant cycles to distribute fund collected from the CET extension to 2020. The Advisory Group also recommends setting some percentage of projected revenue for mandated concept planning and comprehensive planning for urban reserves and new urban areas required in Metro’s Urban Growth Management Functional Plan Title 11<sup>1</sup>. The approximate percentage is shown in the chart below. If the amount of qualified grant requests for urban reserves and new urban areas fall below the approximate percentage for this distribution area, the remainder of funds will be allocated to grant requests for planning in other areas. Similarly, if the qualified grant requests exceed the approximate percentage, Metro will consider increasing the allocation to this category for the upcoming grant cycle. The Advisory Group also recommends Metro conduct an assessment prior to each grant cycle to determine which jurisdictions want to undertake

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<sup>1</sup> Title 11 of Metro’s Urban Growth Management Functional Plan requires concept planning for areas in urban reserves before consideration of urban growth boundary expansion into these areas, or comprehensive planning of areas added to the UGB.

concept planning and/or comprehensive planning for urban reserve areas and new urban areas.

The remaining revenue should be used for various types of planning within the existing Urban Growth Boundary. The approximate percentage is shown in the chart below.

The following chart identifies types of planning that should be eligible for funding, and a sample of goals and desired outcomes to be achieved within the stated timeline.

Focus of Planning	Planning Goals	Timeline ( for building permits issued)	Outcome	Approximate Target of Projected Grant Funds
Mandated concept plan <u>and</u> comprehensive plan	<ul style="list-style-type: none"> <li>• Meet Title 11 requirement</li> <li>• Vision for planning area</li> <li>• Strong local match / support</li> </ul>	10 years or more	<ul style="list-style-type: none"> <li>• Concept Plan</li> <li>• Comprehensive plan</li> <li>• Likely addition to UGB with 10 yrs</li> <li>• Annexation</li> <li>• Identify additional planning needed</li> </ul>	25% - 30%
Strategic plan for development and redevelopment investments	<ul style="list-style-type: none"> <li>• Urban renewal planning</li> <li>• Pre-corridor planning projects</li> <li>• Infrastructure and financial feasibility planning</li> <li>• Projected growth areas planning</li> </ul>	5 to 10 years	<ul style="list-style-type: none"> <li>• Adopted redevelopment plan and implementation schedule</li> <li>• Adopted Funding strategy and implementation schedule</li> </ul>	70% to 75%
Catalytic action plan	<ul style="list-style-type: none"> <li>• Barriers to development removed</li> <li>• Market evaluation/reality</li> </ul>	Less than 5 years	<ul style="list-style-type: none"> <li>• Incentives created</li> <li>• Code creation, updating and maintenance</li> <li>• Recruit developer</li> <li>• Development agreements</li> <li>• Use of tools for improvement of development process</li> </ul>	



C. Understanding local and regional needs

The Advisory Group recommends Metro improve its understanding of the demand for grant support through a survey of local governments, or through solicitation of grants letters of intent, and adjust its distribution of resources accordingly.

3. **Guidelines for refining criteria to be included in the Administrative Rules for evaluating grant applications**

The Advisory Group recommends Metro work with stakeholders to refine existing evaluation criteria for the Administrative Rules, if the construction excise tax is extended. The refinement will encourage grant applicants to propose strong projects which demonstrate understanding of the market context and clearly stated outcomes. The Advisory Group recognizes proposed projects in urban reserve areas must address mandated Title 11 requirements, and recommends the stakeholders refine other criteria for evaluating projects in these areas.

The Advisory Group also recommends stakeholders assist to prioritize or weight the criteria to be used in future grant cycles, if the construction excise tax is extended. Following are recommended new criteria and a proposed approach for refinement of existing criteria.

- A. *The likelihood of implementation*: This criterion will evaluate the “will” to implement projects funded by the grant program. The Advisory Group discussed several dimensions that should be considered: support from governing body, public support and institutional support. The Advisory Group recommends that Metro require:
- i. Grant applications demonstrate that the appropriate governing body has approved the proposed project and grant application
  - ii. A certain percentage of match funds from the applicant
  - iii. A description of how the project will build or expand public support so that completed plans are likely to be implemented
  - iv. Where applicable, how voter-approved annexation and transit improvements will be addressed so that the outcome of proposed planning projects can be realized.
- B. *Equity criteria*: In Cycles 2 and 3 grant allocations, there were two equity-related criteria: – a prerequisite “social equity” criterion stated in the six Desired Outcomes adopted by the region to guide future planning (“...the benefits and burdens of growth and change are distributed equitably”), and a stand alone “revenue redistribution” criterion titled “equity” (“discuss whether and how the proposed planning grant will further the equitable distribution of funds, based on collections of revenues, past funding, and planning resource needs.”)

The Advisory Group recommends the stakeholders discuss and recommend to Metro how the prerequisite “social equity” criterion can be used to address concerns of historically disadvantaged-communities. The Advisory Group also recommends the stakeholders use the findings and recommendations of the Metro Equity Strategy Advisory Committee to refine this prerequisite criterion.

The Advisory Group recommends replacement of the stand alone “revenue redistribution” criterion with “growth absorption” criteria. The stakeholders should consider how this criterion should be used to ensure jurisdictions can absorb employment and population growth forecast by Metro for each jurisdiction, and recognize the needs of high growth areas.

- C. *Capacity of applicant criteria*: Applicants should describe the qualifications of staff and proposed consulting teams to carry out the planning projects.
- D. *Best practices criteria*: Grantees should be required to share lessons learned from the planning effort.

#### 4. Program outcomes

- A. Outcome and performance measures

The Advisory Group recommends Metro develop clear outcome goals for each grant area and a specific performance measure for each outcome.

- B. Future evaluations

The Advisory Group recommends Metro periodically evaluate the Community Planning and Development Grants program using adopted performance measures.

DATE: October 28, 2014

ECO Project 21920: 3

TO: Metro (attn: Gerry Uba)

FROM: ECONorthwest

SUBJECT: A DRAFT LOGIC MODEL FOR METRO COMMUNITY PLANNING AND DEVELOPMENT GRANTS

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In response to input from many community and stakeholder conversations, the Community Planning and Development Grant (CPDG) program's goals and criteria for application selection have evolved over time. Resulting definitional ambiguities have complicated attempts to describe the program's impact, as stated in the CPDG program evaluation report. To begin to address this challenge, Metro has asked ECONorthwest (ECO) to assist as Metro pursues recommendations to "develop a draft logic model that visually displays the links between goals, project activities, and ultimate outcomes." In this context, ECO was asked to develop a draft logic model for the CPDG program, and propose for consideration several ways the draft logic model can be used for program evaluation. The draft logic model will be finalized through the advisory group for the CPDG program. The advisory group will consider ECO recommendations and finalize the draft logic model, propose an evaluation approach for the program and grantees, and identify selection criteria for the upcoming cycle of grants.

Logic models and the evaluation activities they support are very rare in the urban and regional planning field, and Metro's consideration of one is unique. As such, there are few existing examples, and Metro and its partners have an opportunity to be innovators.

This memorandum accompanies ECO's draft logic model for the CPDG program. It provides a brief overview of the logic model before describing a series of recommendations regarding how the draft logic model could support the CPDG program. The memo is intended to support a broader process with Metro's advisors. As part of next steps, MTAC will develop recommendations about the program and forward to Metro's COO, who will send them and recommendations from the advisory group to Metro Council. Metro Council will finalize the administrative rules, which will contain criteria for selecting proposals. The administrative rules govern the implementation of the construction excise tax that funds CPDG. Once Metro Council approves the administrative rules, Metro will start soliciting applications for the next cycle of grants.

Below is a summary of ECO's recommendations on how Metro can use the draft logic model, which can be found in Appendix A. Details are contained in the body of the memorandum:

1. Clearly frame the goal of the CPDG program as *the reduction of barriers to local development*, in concept plan areas as well as in centers and corridors.
2. Measure program impact. *Short-term impact* (3-5 years) for grantees can be measured as the successful identification and removal of the core development barriers that were identified through their CPDG application and some of those identified through the funded planning

activity. More detail on this below. This is a realistic expectation of what individual CPDG-funded activities can accomplish.

3. As part of a shift to outcome-focused evaluation, work with grantees to identify specific outcomes (in terms of successfully removing development barriers) that an evaluation approach would measure in the short- and medium-term. This will engage the grantee in the evaluation process and respects the uniqueness of local conditions, while still enabling evaluation to occur.
4. Measure long-term impact (5 – 15 years) for the entire CPDG program by development activity in areas receiving grants relative to areas that did not receive grants, using existing GIS data on development.
5. ECO has proposed selection criteria that align with the draft logic model, as an input to conversations that will revise and finalize the criteria for future grant application cycles. Proposed new criteria are “Track Record of Relevant Planning Activities,” “The Project Would Not Have Happened Otherwise,” “Identified Outcomes for the Evaluation Process,” “Addresses Development Barriers,” and “Social Equity.” Criteria to retain from other recommendations and previous cycles are “Likelihood of Implementation,” “Best Practices,” “Location,” and “Regionally Significant.”

## Background

Metro’s CPDG program supports planning projects that enable communities to develop and thrive. Funding for the grants comes from a regional excise tax on construction permits. The grants are awarded to local governments to pay for planning activities in targeted areas that will support development of housing and jobs. Metro has awarded three cycles of grants, with differing goals and selection criteria for each.

Metro contracted ECONorthwest to evaluate the CPDG program. ECONorthwest has pointed out in the CPDG Program Evaluation Report that these differing goals and criteria created definitional ambiguities that must be addressed. One of the recommendations of ECONorthwest is that Metro should “develop a draft logic model that visually displays the links between goals, project activities, and ultimate outcomes.” This project is implementing that recommendation.

## Overview of the draft logic model

The draft logic model is a visual summary of what the program is specifically intended to accomplish in the short, medium, and long term. Its purpose is to clearly communicate the program’s intent by identifying the target population, defining “success” for the program, focusing program activities, setting reasonable expectations for what the program can accomplish, and creating a framework for measuring outcomes. The draft logic model, found in Appendix A, contains several parts:

- The **Goal** (“success” for the CPDG program) is *removal of barriers to development*
- **Application Evaluation Criteria** clarify the planning projects that the program is targeting

- **Activities** describe how the program will accomplish its goal
- **Outcomes** are the concrete events or changes that should result from the activities
- **Impact** is what the program hopes to achieve through its outcomes
- **Conditions** within and not within Metro’s influence helps set reasonable expectations

In the context of the CPDG Program, this draft logic model can help support short- and medium-term evaluation of grantees and long-term evaluation of the program itself.

## Details regarding recommendations

### Recommendation 1: Reframe the goal around reducing barriers to development

The goals of the first three cycles of grant awards were framed around on-the-ground development. The specific wording varied between cycles, but the expectation was that the CPDG-funded planning activities would lead to development activity.

For future cycles, ECO recommends framing the fundamental goal of the program as the removal of barriers to development. There are many barriers to development that local planning activities alone cannot address, including macroeconomic conditions, local political dynamics, and factors impacting land values, such as crime rates and natural amenities. Many of these can change while a planning activity is taking place. It is not realistic to expect that a planning activity alone will cause development to occur.

However, planning activities *can* directly address barriers currently preventing or discouraging development. For example, planning can rally community support and lower the chances of opposition. Planning can also identify and update specific policies that are not aligned with the market. Addressing these barriers should be considered success for the grantees. This sets realistic expectations about what CPDG-funded activities can and should accomplish, at the same time that it increases the likelihood that new development that aligns with community and Metro goals will occur in grant areas.

### Recommendation 2: Measure short-term program impact based on program activities

While planning can’t cause development, it can address certain development barriers. Successful planning should have immediate short-term outcomes, though these will depend on the type of planning activity. The CPDG program funds a variety of planning activities, which the draft logic model categorizes into the following:

- **Vision:** planning that gathers community input to propose a vision of the community’s future. Short-term outcomes include securing community support and identifying follow-up issues.
- **Policy:** planning that sets regulatory conditions for development, including zoning, codes, incentives, and internal procedures and processes. Short-term outcomes include updating regulations and identification of additional community issues.
- **Strategy:** activities that specify how the next steps for certain kinds of development could take place. Short-term outcomes involve formal commitments and agreements,

certain policy programs or incentive schemes, and occasionally infrastructure improvements.

Communities generally engage in all these activities as they progress to development readiness. Vision activities will identify additional policy issues to be tackled next, and many policy-focused planning activities set the stage for strategy.

Projects within these categories are aimed at addressing different development barriers, and the first criteria for success should be whether the initial planning activity had immediate outcomes. Was the concept plan adopted? Was the zoning changed? Were formal agreements made? ECO recommends that a grantee be measured according to these short-term outcomes, not whether development occurred, which is subject to many different factors beyond the grantee's control. These short-term outcomes operationalize a goal of reducing development barriers.

### **Recommendation 3: Shift toward outcome-focused evaluation methods and work with grantees to develop identify short- and medium-term outcomes**

Not every project has the same intended outcome, but accountability for achieving outcomes is important in grant-funded activities. This method recognizes that one size doesn't fit all, but still creates a mechanism to ensure that local and regional objectives are met.

Metro should work with grantees to develop evaluation criteria specific to the CPDG-funded project, and the grantees should propose some outcomes to which they should be held accountable in a 3 – 5 year time frame. Each community, working with a certain population, infrastructure conditions, political atmosphere, and policy legacy faces a unique set of development barriers. A top-down evaluation approach with a single set of outcomes for all grantees obscures local nuance. Moreover, many planning activities themselves are diagnostic and uncover additional development barriers facing the community. The grantees are best positioned to know their community.

As part of the application, the grantee proposes the planning activity that they think addresses a development barrier, and short-term success would involve the successful completion and adoption of the resulting vision, policy, or strategy.

In addition, the grantee can work with Metro to identify several outcome measures specific to their project. The core question for success in the medium term is whether the planning activity was relevant in future decision-making. Each activity should identify a series of next steps or recommend possible actions. Did recommendations from the concept plan get implemented? Was the policy utilized, even as the basis for strategy? Did the strategy lead to additional investments, partnerships, or policy updates?

Grantees can propose the outcomes specific to their project. This will provide incentives for the grantee to identify realistic next steps in becoming development-ready and allow for a bottom-up evaluation process flexible enough to accommodate all planning activities. This

recommendation ensures that grantees have a say in their evaluation process and a stake in the outcomes. Appendix B contains an example of how this approach, based on the draft logic model, could have been structured for the Barbur Concept Plan.

**Recommendation 4: Metro should measure long-term development impacts across all grantee areas.**

A key purpose of the draft logic model is to support an evaluation of CPDG program as a whole. This recommendation helps capture the transition from the short-term outcome of removing development barriers to the longer-term goal of development on the ground. The goal of the program is to fund planning activities that address development barriers. The anticipated long-term impact is that the reduction of these barriers will increase development relative to the 2040 goal. Metro can measure the extent that its portfolio of investments has influenced development by comparing development activity within all funded areas to activity outside those areas.<sup>1</sup>

Evaluation can happen at two levels. First, it is possible to measure just the amount, value, and type of development occurring in grant areas compared to other areas. Second, Metro could conduct a more complex approach that estimates alignment with the 2040 Vision by looking at key indicators related to the initial “regionally significant” goals in previous cycles. Metro will have its own measures to evaluate development relative to the 2040 plan that are not specific to the CDGP, though ECO has proposed several measures for consideration if existing measures do not exist. ECO believes Metro, as author of the 2040 Vision, is best positioned to identify these measures.

<b>Desired Outcomes Relative to 2040 Vision</b> (from Regionally Significant criteria in previous cycles)	<b>Possible Measure</b> (within the project area)
People live and work in vibrant communities where they can choose to walk for pleasure and to meet their daily needs	Walk score for development (residential and commercial) within the project areas or adaptation of a 20-min analysis
Current and future residents benefit from the region’s sustained economic	Square footage of commercial development

<sup>1</sup> Two methodological challenges in long-term evaluation merit discussion. First, it will be impossible to attribute causation to the CDGP. There simply are not enough statistical controls or a sufficient sample size to isolate particular planning activities as causal variables. Nonetheless, analysis can suggest correlations and identify areas in which development activity indicates success. Even for estimating correlations, spillover effects from other activities make it difficult to draw boundaries for measuring impact. Neighborhood walkability will be influenced by developments outside the project areas. Transportation choices will depend on nearby transit infrastructure and system connectivity. As such, any data gathered should be interpreted with caution.

competitiveness and prosperity	
People have safe and reliable transportation choices that enhance their quality of life	Number of housing units within .25 miles of a continuous bike lane and frequent transit service  Mode split for residents within project area
The region is a leader in minimizing contributions to global warming	52% of GHG emissions in the Portland Metro come from transportation and energy use. <sup>2</sup> Mode split for people within the area, density, and energy use in buildings would be indicators plausibly influenced by local planning and policy
Current and future generations enjoy clean air, clean water, and healthy ecosystems	We recommend against measuring this for the CPDG program. These are difficult to measure at a local level, directly tied to development, and linked to a program focused on removing development barriers
The benefits and burdens of growth and change are distributed equitably	We recommend against any single measure. These outcomes will depend on development type, which will vary significantly from jurisdiction to jurisdiction.

Given availability of geocoded data, this kind of evaluation is possible (if time-consuming) today. Identifying outlier communities (with high or low amounts of development activity) could yield insights about how these planning activities influence development and what factors might mitigate that relationship. While methodological challenges will prevent causal attribution, new spatial regression techniques can estimate correlations.

### Recommendation 5: Suggested selection criteria

The draft logic model can also support the selection committee as it identifies projects, and ECO recommends several criteria for consideration. The committee can use the draft logic model to consider which planning activities are appropriate to the community. ECO recommends retaining many selection criteria used in Cycle 3 and adding the following:

- **Track Record of Relevant Planning:** if the applicant has received CPDG funding before, demonstration that the applicant took or is taking the recommended next steps it identified in the previous planning project.
- **Would Not Have Happened Otherwise:** justification that the activity needs the grant funding to occur. A possible proxy is that grants do not support positions with existing stable funding sources.

<sup>2</sup> "A snapshot of the greenhouse gas inventory for the Portland metropolitan region." Oregon Metro, Spring 2010.



- **Identified Outcomes:** Proposed short-term outcomes that will reflect progress toward development-readiness. These should include outcomes directly related to the planning activity, such as successful adoption of the plan, and provisions for identifying follow-up activities in the 3 – 5 year timeframe.
- **Social Equity:** Metro can require an explanation of how the project relates to social equity in its selection criteria. In addition, the planning activities themselves further Metro’s goal of Meaningful Engagement and Empowered Communities, as identified by the Regional Equity Strategy Advisory Committee. One measure the committee has identified is “investment in community outreach,” and Metro can consider requiring that a certain percentage of the budget is devoted to public outreach and participation.
- **Existing Development Barriers:** clear articulation of how activities remove existing development barriers and why the proposed planning activity is needed in the community

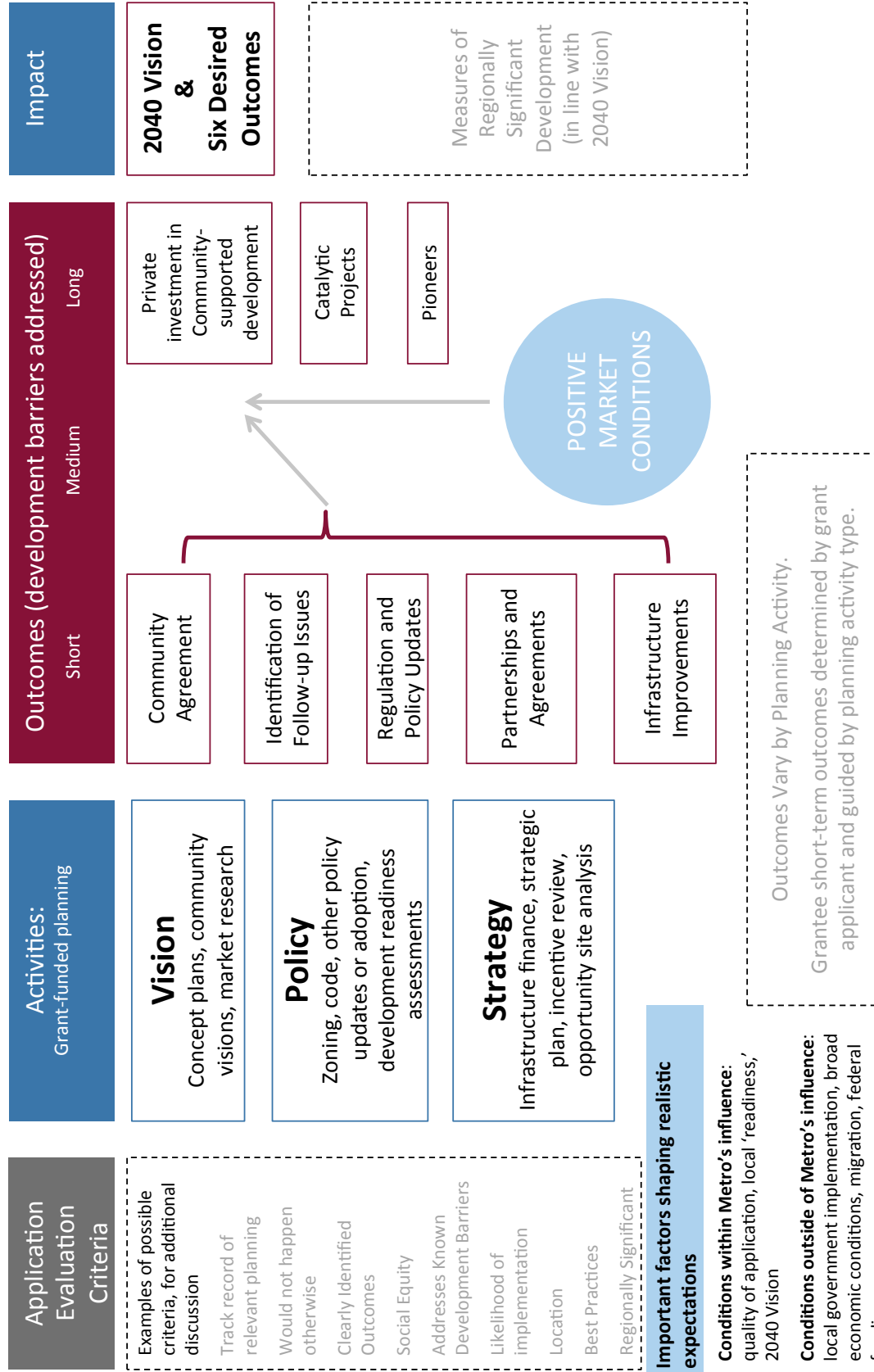
Core criteria to retain from Cycle 3 and the Metro Stakeholder Advisory Group recommendations (April 18, 2014):

- **Likelihood of Implementation:** this criteria will evaluate the ‘will’ to implement the project. ECO supports the advisory group’s recommendations that Metro require:
  - Demonstration that the governing body has approved
  - A portion of matched funds
  - A strategy for building or expanding public support,
  - Where applicable, how voter-approved annexation and transit improvements will be addressed so that the outcome of proposed planning projects can be realized
- **Location:** facilitation of development or redevelopment in centers, corridors/main streets, station areas, and/or employment and industrial areas
- **Best Practices:** provision of innovative tools that can be easily replicated in other locations in the region
- **Regionally Significant:** clear articulation of how planning activity will further the 2040 Vision.

It is important to identify the right projects to achieve the short-term outcomes of removing development barriers. It is also important to work with program stakeholders to identify criteria that will generate buy-in from program participants. Selection criteria that discourage applicants can be counter-productive to the program’s goals. The recommendations above can support the conversations about the selection criteria.

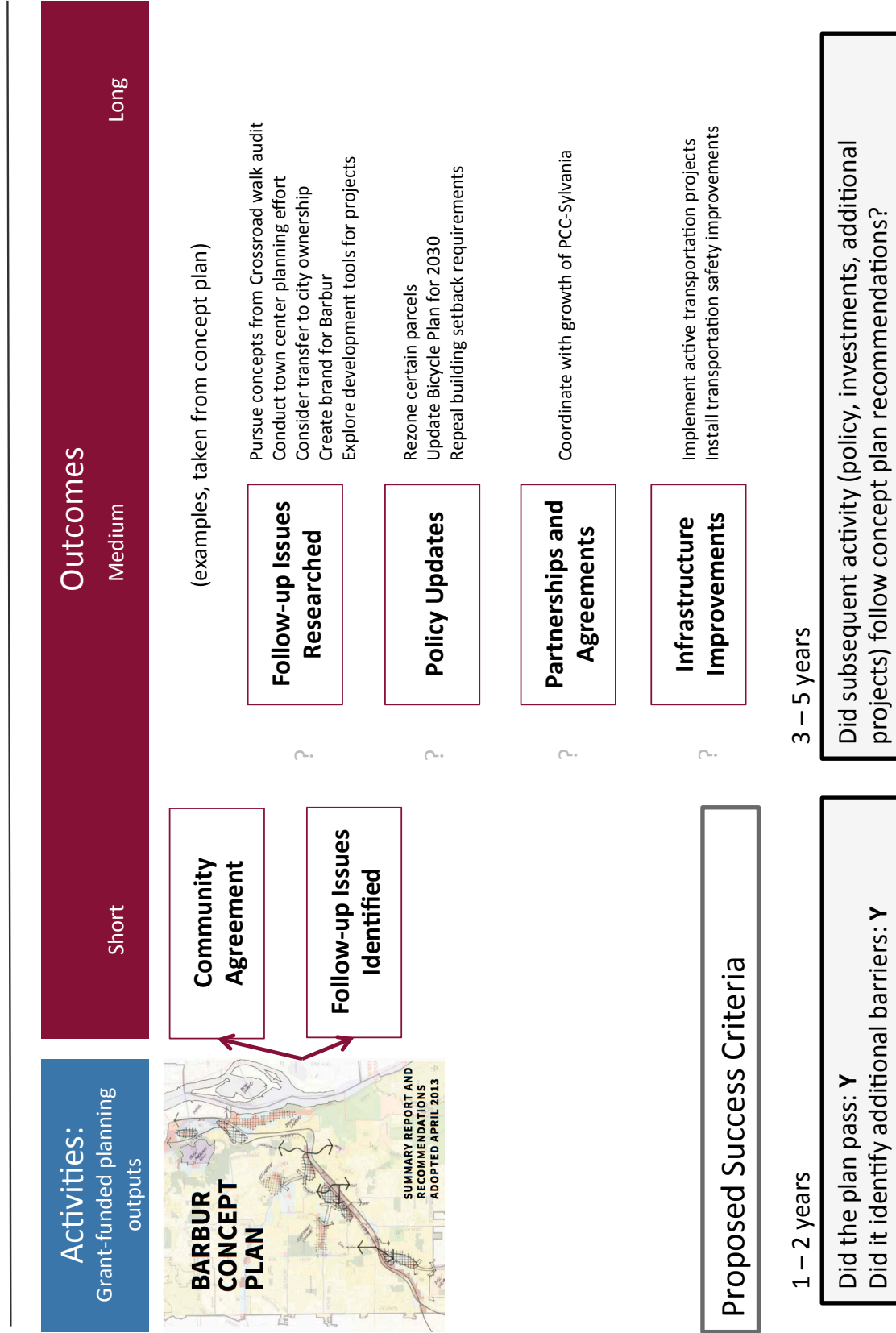
**Appendix A: Draft Logic Model**

**Community Planning and Development Grant Program** DRAFT  
**GOAL: To address barriers to development**



**Appendix B: Example**

**Barbur Concept Plan**





**ADMINISTRATIVE RULES: METRO CODE CHAPTER 7.04**  
**[Revised ~~December~~ 2012<sup>4</sup>]**  
**FOR MTAC REVIEW AND DISCUSSION – NOVEMBER 2014**

Effective July 1, 2006, and extended through ~~September 30, 2014~~ December 31, 2020, Metro has established as Metro Code Chapter 7.04 a Construction Excise Tax (“CET”) to fund Community Planning and Development Grants (“CPDG”). These Administrative Rules establish the procedures for administering this tax as mandated in Metro Code Section 7.04.050 and Metro Code Section 7.04.060. For ease of reference a copy of Metro Code Chapter 7.04 is attached to these administrative rules.

**Comment [U1]:** Metro Council action

**I. Metro Administrative Matters.**

- A. Definitions. These administrative rules incorporate the definitions as set forth in Metro Code Section 7.04.030 of Chapter 7.04, Construction Excise Tax, and Chapter 3.07, the Urban Growth Management Functional Plan.
- B. Designated Representatives (Metro Code Section 7.04.060). The Metro Chief Operating Officer (“COO”) is responsible for the administration and enforcement of the Metro Code Chapter 7.04 and these administrative rules.
  - 1. The COO may delegate his authority in administration and enforcement of the Code chapter and these administrative rules as he determines and as set forth herein.
  - 2. The COO shall appoint a Hearings Officer(s), which appointment shall be confirmed by the Metro Council. The Hearings Officer(s) shall have the authority to order refunds or rebates of the Construction Excise Tax or waive penalties as a result of the hearings process. Upon appointing a Hearings Officer, the Chief Operating Officer shall delegate authority to the Hearings Officer to administer oaths, certify to all official acts, to subpoena and require attendance of witnesses at hearings to determine compliance with this chapter, rules and regulations, to require production of relevant documents at public hearings, to swear witnesses, to take testimony of any Person by deposition, and perform all other acts necessary to adjudicate appeals of Construction Excise Tax matters.
- C. Internal Flow of Funds. Funds will be accounted for in a Construction Excise Tax account that will be created by the effective date of Metro Code Chapter 7.04.
- D. Rate Stabilization Reserves. Metro Code Chapter 7.04.200 states that the Council will, each year, as part of the Budget process, create reserves from revenues generated by the CET. These reserves are to even out collections thereby stabilizing the funds needed to support the applicable programs despite industry building activity fluctuation. These reserves can only be drawn on to support the specific budgeted activities as discussed in Section I.E. of these administrative rules. Due to their restricted nature, these reserves shall be reported as designations of fund balance in Metro’s General Fund.
- E. Dedication of Revenues. Revenues derived from the imposition of this tax, netted after deduction of authorized local jurisdiction costs of collection and administration will be solely dedicated to grant funding of the regional and local planning that is required to make land ready for development after inclusion in the Urban Growth Boundary.
- F. Rule Amendment. The Chief Operating Officer retains the authority to amend these administrative rules as necessary for the administration of the Construction Excise Tax, after consultation with Metro Council.

**Comment [U2]:** Metro Council direction

**II. Construction Excise Tax Administration.**

A. Imposition of Tax (Metro Code Section 7.04.070).

1. The CET is imposed on every Person who engages in Construction within the Metro jurisdiction, unless an Exemption applies as set forth herein.
2. The tax shall be due and payable at the time of the issuance of any building permit, or installation permit in the case of a manufactured dwelling, by any building authority, unless an Exemption applies as set forth herein.
3. The CET shall be calculated and assessed as of the application date for the building permit. Persons obtaining building permits based on applications that were submitted prior to July 1, 2006 shall not be required to pay the CET, unless the building permit issuer normally imposes fees based on the date the building permit is issued.
4. If no permit is issued, then the CET is due at the time the first activity occurs that would require issuance of a building permit under the State of Oregon Building Code.

B. Calculation of Tax (Metro Code Section 7.04.080). The CET is calculated by multiplying the Value of New Construction by the tax rate of 0.12%

(0.0012 x Value of New Construction)

- a. In the case of a Manufactured Dwelling for which no Exemption is applicable, and for which there is no building code determination of valuation of the Manufactured Dwelling, the applicant's good faith estimate of the Value of New Construction for the Manufactured Dwelling shall be used.

C. Exemptions (Metro Code Section 7.04.040).

1. Eligibility for Exemption. No obligation to pay the CET is imposed upon any Person who establishes, as set forth below, that one or more of the following Exemptions apply:
  - a. The Value of New Construction is less than or equal to One Hundred Thousand Dollars (\$100,000); or
  - b. The Person who would be liable for the tax is a corporation exempt from federal income taxation pursuant to 42 U.S.C. 501(c)(3), or a limited partnership the sole general partner of which is a corporation exempt from federal income taxation pursuant to 42 U.S.C. 501(c)(3), the Construction is used for residential purposes AND the property is restricted to being occupied by Persons with incomes less than fifty percent (50%) of the median income for a period of 30 years or longer; or
  - c. The Person who would be liable for the tax is exempt from federal income taxation pursuant to 42 U.S.C. 501(c)(3) AND the Construction is dedicated for use for the purpose of providing charitable services to Persons with income less than fifty

percent (50%) of the median income.

2. Procedures for Establishing and Obtaining an Exemption: Exemption Certificates:

- a. For exemption (a) above, the exemption will be established at the building permit counter where the Value of New Construction as determined in the building permit is less than or equal to One Hundred Thousand Dollars (\$100,000).
- b. For exemptions (b) and (c) above, prior to applying for a building permit a Person claiming an exemption may apply to Metro for a Metro CET Exemption Certificate, by presenting the appropriate documentation for the exemption as set forth herein, and upon receiving a Metro CET Exemption Certificate the Person may present the certificate to the building permit issuer to receive an exemption from paying the CET; or
- c. For exemptions (b) and (c) above, instead of going to Metro to obtain a Metro CET Exemption Certificate, a Person claiming an exemption from the CET when applying for a building permit may submit to the building permit issuer Metro's CET Exemption Certificate application form. Upon receiving a Person's Metro CET Exemption Certificate application, the building permit issuer shall preliminarily authorize the exemption and shall not collect the CET. The building permit issuer shall forward the Person's Metro CET Exemption Certificate application to Metro along with the quarterly CET report. It shall be Metro's responsibility to determine the validity of the exemption and to institute collection procedures to obtain payment of the CET, as well as any other remedy Metro may have under law, if the Person was not entitled to the exemption;
- d. To receive a Metro CET Exemption Certificate from Metro, or to substantiate to Metro the validity of an exemption received from a local building permit issuer, an applicant must provide the following:
  - i. IRS tax status determination letter evidencing that the Person seeking the building permit is exempt from federal income taxation pursuant to 42 U.S.C. 501(c)(3); and
  - ii. In the case of residential property, proof that the property is to be restricted to low income persons, as defined, for at least 30 years. Proof can be in the form of loan covenants; rental agreements or grant restrictions; a certification from the entity's corporate officer attesting that the exemption is applicable; or any other information that may allow the exemption determination to be made; and
  - iii. In the case of a qualified tax-exempt entity providing services to Persons with incomes less than 50 percent of the median income, the applicant must provide information that will allow such tax exempt status to be verified, and proof that the property will be restricted to such uses. Proof can be in the form of loan covenants; rental agreements or grant restrictions; certification from the entity's corporate officer attesting that the exemption is applicable; or any other information that may allow the exemption determination to be made; and

- iv. In the case of a limited partnership with a tax-exempt sole general partner corporation, verification from the partnership's attorney of that status is required; and
  - v. Authorization to audit the records to verify the legal status and compliance with Metro qualifications of all entities claiming exempt status.
- e. Partial Applicability of Exemption. If an exemption is applicable to only part of the Construction, then only that portion shall be exempt from the CET, and CET shall be payable for the remainder of the Construction that is not eligible for an exemption, on a pro-rata basis. It shall be the responsibility of the Person seeking the partial exemption to fill out a Metro CET Exemption Certificate application for the partial exemption, declaring on that application the proportion of the Construction qualifies for the exemption. Upon receiving a Person's Metro CET Exemption Certificate application claiming a partial exemption, the building permit issuer shall preliminarily authorize the partial exemption and shall only collect the pro-rata CET as declared by the applicant. The building permit issuer shall forward the Person's Metro CET Exemption Certificate application to Metro along with the quarterly CET report. It shall be Metro's responsibility to determine the validity of the partial exemption and to institute collection procedures to obtain payment of the remainder of the CET, as well as any other remedy Metro may have under law, if the Person was not entitled to the partial exemption.

D. Ceiling (Metro Code Section 7.04.045).

1. If the CET imposed would be greater than \$12,000.00 (Twelve Thousand Dollars) as measured by the Value of New Construction that would generate that amount of tax, then the CET imposed for that Construction is capped at a Ceiling of \$12,000.00 (Twelve Thousand Dollars).
2. The Ceiling applies on a single structure basis, and not necessarily on a single building permit basis. For example:
  - a. If a single building permit is issued where the Value of New Construction is greater than or equal to Ten Million Dollars (\$10,000,000), then the CET for that building permit is capped at Twelve Thousand Dollars (\$12,000.00).
  - b. If Construction in a single structure will require multiple building permits during the pendency of the CET program, and the total CET that would be imposed for those building permits would add up to more than Twelve Thousand Dollars (\$12,000.00), then the total CET for those building permits within the same structure during the pendency of the CET program is capped at Twelve Thousand Dollars (\$12,000.00). Once a total of \$12,000.00 has been paid in CET for a particular structure, then no additional CET will be collected for that structure during the pendency of the CET program.



E. Rebates (Metro Code Section 7.04.120). If a CET has been collected and a CET Exemption or the CET Ceiling was applicable, a rebate for the CET may be obtained from Metro.

1. Procedures for obtaining rebate are:

- a. Within thirty (30) days of paying the CET, the Person who believes that the CET was not applicable due to a CET exemption or CET Ceiling, shall apply for a rebate in writing to Metro and provide verification that the exemption eligibility provisions of Metro Code Section 7.04.040, or that the CET Ceiling provisions of Metro Code Section 7.04.045, have been met. Failure to seek a rebate within the thirty (30) day time limit will terminate a Person's right to seek a rebate.
- b. Applicant shall provide proof that the CET was paid, in the form of a paid receipt from the building permit issuer showing the tax was paid. All supporting documentation for the exemption or ceiling shall be submitted at the time of the rebate claim. The rebate will only be made to the name that is listed on the receipt unless the applicant has a written assignment of rebate.
- c. A rebate or a letter of denial shall be issued by Metro within thirty (30) days of receipt of a written request for rebate provided that the request includes all required information. The rebate will be calculated based upon the paid receipt, less the five percent (5%) administrative fee already retained by the building permit issuer and the ~~two and a half five~~ percent (2.5%) Metro administration fee.

Comment [U3]: Metro Council

F. Refunds (Metro Code Section 7.04.150). If a CET has been collected and the Construction was not commenced and the building permit was cancelled, a refund for the CET may be obtained from Metro.

1. Eligibility is determined by the absence of Construction and cancellation of the building permit.

2. Procedures for obtaining refund:

- a. Apply in writing to Metro within thirty (30) days of permit cancellation.
- b. Provide copy of canceled permit.
- c. Provide proof of payment of the tax in the form of the paid receipt.
- d. A refund or a letter of denial shall be issued by Metro within thirty (30) days of receipt of the written request for refund provided that the request includes all required information. The refund will be calculated based upon the paid receipt, less the five percent (5%) administrative fee already retained by the building permit issuer and the ~~two and a half five~~ percent (2.5%) Metro administration fee.
- e. Failure to seek a rebate within the thirty (30) day time limit will terminate a Person's right to receive a refund.

Comment [U4]: Metro Council

G. Appeals. The Hearings Officer shall conduct hearings related to enforcement or appeals of the CET. The appeal to the Hearings Officer must be:

1. In writing;
2. Made within ten (10) calendar days of denial of a refund, rebate, or exemption request. Notice of denial to the party denied, is deemed to have occurred three days after the mailing of the certified denial letter from Metro;
3. Tax must be paid prior to appeal;
4. Directed to the Office of Metro Attorney, who will contact the Hearings Officer to schedule a hearing upon receipt of a written appeal. The Hearings Officer will at that time provide further information as to what documentation to bring to the hearing.

H. Review. Review of any action of the Chief Operating Officer or Hearings Officer, taken pursuant to the Construction Excise Tax Ordinance, or the rules and regulations adopted by the Chief Operating Officer, shall be taken solely and exclusively by writ of review in the manner set forth in ORS 34.010 through 34.100, provided, however, that any aggrieved Person may demand such relief by writ of review.

I. CET Sunset (Metro Code Section 7.04.230).

1. The CET shall not be imposed on and no person shall be liable to pay any tax for any Construction activity that is commenced pursuant to a building permit issued on or after ~~September 30, 2014~~ December 31, 2020.
2. Local governments collecting CETs shall remit the CETs to Metro on a quarterly or monthly basis, based on the jurisdiction's CET Collection IGAs with Metro. Each quarter, within thirty days of receiving CET remittances from all collecting local jurisdictions, Metro will issue a written statement of the total CET that Metro has received that quarter and cumulatively.
3. CET remittance to Metro shall be net of the local government's administrative expenses in collecting the CET, up to five percent (5%) of the CET collected by the local government as set forth in the Metro CET Collection IGA. This net amount of CET remitted to Metro shall be the basis for Metro's calculations of CET cumulative totals ~~and for the calculation of when the \$6.3 million CET has been reached.~~
4. The CET shall cease to be imposed by local governments on ~~September 30, 2014~~ December 31, 2020, and shall be remitted by the local governments to Metro as soon thereafter as possible.

### III. CET Collection Procedures.

A. Local Government CET Collection and Remittance Via Intergovernmental Agreements (Metro Code Section 7.04.110). For those local governments collecting the CET pursuant to Intergovernmental Agreements with Metro, the following procedures shall apply:

1. CET Report; Information Required. Each quarter (unless a local government prefers to report monthly), along with its CET remittance to Metro, the local government shall prepare and submit to the Metro Chief Operating Officer a report of the CETs and building permits

issued for the previous quarter's construction activities. The report shall include: the number of building permits issued that quarter; the aggregate value of construction; the number of building permits for which CET exemptions were given; the aggregate value of construction for the exempted construction; the aggregate amount of CET paid; and the amount of CET administrative fee retained by the local government pursuant to this CET Collection IGA.

2. CET Remittance to Metro. Local governments collecting CET via IGAs with Metro shall remit the collected CET to Metro. Remittance shall be quarterly, unless a jurisdiction prefers to remit the CET monthly, by the 30<sup>th</sup> of the month following the quarter (or month) ending. Quarters end on September 30, December 31, March 31 and June 30 of each year. CET remittance and the CET Report shall be sent to Metro, attn Construction Excise Tax Accounting Specialist, 600 NE Grand, Portland, Oregon 97232.
3. Remuneration to Local Government for Collecting CET. As consideration for collecting the CET, each local government collecting the CET shall retain no more than five percent (5%) of the tax collected by that local government. This payment is intended to be a reimbursement of costs incurred. Prior to submitting the CET to Metro, the local government shall deduct the remuneration agreed upon directly from the collected tax, and the amounts deducted and retained shall be identified on the report submitted to Metro.
4. Metro Administrative Fee. To partially reimburse Metro for its costs in implementing and administering the CET program, Metro will retain ~~two and a half~~ five percent (2.5%) of the net CET funds remitted by local governments to Metro.
5. Audit and Control Features. Each local government shall allow the Chief Operating Officer, or any person authorized in writing by the Chief Operating Officer, to examine the books, papers, building permits, and accounting records relating to any collection and payment of the tax, during normal business hours, and may investigate the accuracy of reporting to ascertain and determine the amount of CET required to be paid.
6. Failure to Pay. Upon a Person's refusal to or failure to pay the CET when due, the local government administering that Person's building permit shall notify Metro in writing within five (5) business days of such failure, with information adequate for Metro to begin collection procedures against that Person, including the Person's name, address, phone numbers, Value of New Construction, Construction Project, and building permit number. Upon a Person's refusal or failure to pay the CET, it shall be Metro's responsibility to institute collection procedures to obtain payment of the CET as well as any other remedy Metro may have under law.

B. Metro Collection Procedures in Event of Non-payment. The CET is due and payable upon issuance of a building permit. It is unlawful for any Person to whom the CET is applicable to fail to pay all or any portion of the CET. If the tax is not paid when due, Metro will send a letter notifying the non-payer of his obligation to pay the CET along with the following information:

1. Penalty. In addition to any other fine or penalty provided by Chapter 7.04 of the Metro Code, penalty for non- payment will be added to the original tax outstanding. That penalty is equal to fifty dollars (\$50.00) or the amount of the tax owed, whichever is greater.
2. Misdemeanor. In addition to any other civil enforcement, non- payment of the CET is a misdemeanor and shall be punishable, upon conviction, by a fine of not more than five hundred dollars (\$500.00). This fine shall be charged to any officer, director, partner or

Comment [U5]: Metro Council

other Person having direction or control over any Person not paying the tax as due.

3. Enforcement by Civil Action. If the tax is not paid, Metro will proceed with collection procedures allowable by law to collect the unpaid tax, penalties assessed and fines due, including attorney fees.

#### IV. Revenue Distribution (Metro Code Section 7.04.220).

- A. Grant Cycles. CET funds collected pursuant to the ~~2009~~14 extension of the CET shall be allocated in ~~two~~ three new application assessment cycles (Cycle ~~42,~~ and Cycle 35 and Cycle 6).

1. ~~The Cycle 1~~ The Cycle 1 fund distribution took place in March 2006, which allocated up to \$6.3 million in grants. Grant requests in this cycle were made for planning only in new areas that were brought into the Urban Growth Boundary (UGB) between 2002 and 2005.

Comment [U6]: Proposed by Staff

~~2.~~ The Cycle 2 grant allocation through the Community Planning and Development Grant program (CPDG) took place in ~~FY June 2010-2009-2010~~, which allocated up to \$3.57 million in CET Grants revenue. Grant Rrequests in this cycle ~~may be were~~ made for planning in all areas that are in the Urban Growth Boundary (UGB) as of December 2009.

Comment [U7]: Proposed by staff

~~3.~~ The Cycle 3 grant allocation ~~shall take~~ took place in ~~FY 2012–August 2013~~, which allocated \$4.2 million in grants. Grant requests in this cycle were made, and shall allocate the remainder of the expected CET collections for this cycle. Grant Requests in this cycle may be made for planning in all areas that are in the UGB as of December 2009, plus areas added to the UGB since 2009 and Urban Reserves. This cycle earmarked fifty percent (50%) of projected CET revenues for planning in areas added to the UGB since 2009 and Urban Reserves, and required that if the amount of qualified Grant Requests for New Urban Areas and Urban Reserves does not equal or exceed the earmarked amounts, the remainder of funds may be allocated to Grant Requests for planning in other areas.

Comment [U8]: Proposed by staff

~~3.~~ The Cycle 3 grant allocation shall earmark fifty percent (50%) of projected CET revenues for planning in areas added to the UGB since 2009 and Urban Reserves. If the amount of qualified Grant Requests for New Urban Areas and Urban Reserves does not equal or exceed the earmarked amounts, the remainder of funds shall be allocated to Grant Requests for planning in other areas.

4. The Cycle 4 grant allocation shall take place in 2015-2016 for planning in all areas that are in the UGB and Urban Reserves. This grant allocation shall earmark seventy percent to seventy five percent (70% to 75%) of projected revenue for planning within the existing UGB, and earmark twenty five percent to thirty percent (25% to 30%) of projected revenue for concept planning and comprehensive planning for urban reserves and new urban areas, and require that if the amount of qualified Grant Requests for New Urban Areas and Urban Reserves does not equal or exceed the earmarked amounts, the remainder of funds may be allocated to Grant Requests for planning in other areas.

Comment [U9]: Proposed by Advisory Group and accepted by Metro Council

5. The Cycle 5 grant allocation shall take place in 2017-2018 for planning in all areas that are in the UGB and Urban Reserves. This grant allocation shall earmark seventy percent to seventy five percent (70% to 75%) of projected revenue for planning within the existing UGB, and earmark twenty five percent to thirty percent (25% to 30%) of projected revenue for concept planning and comprehensive planning for urban reserves and new urban areas, and require that if the amount of qualified Grant Requests for New Urban Areas and Urban Reserves does not equal or exceed the earmarked amounts, the remainder of funds may be allocated to Grant Requests for planning in other areas.

Comment [U10]: ditto

6. The Cycle 6 grant allocation shall take place in 2019-2020 for planning in all areas that are in the UGB and Urban Reserves. This grant allocation shall earmark seventy percent to seventy five percent (70% to 75%) of projected revenue for planning within the existing UGB, and earmark twenty five percent to thirty percent (25% to 30%) of projected revenue for concept planning and comprehensive planning for urban reserves and new urban areas, and require that if the amount of qualified Grant Requests for New Urban Areas and Urban Reserves does not equal or exceed the earmarked amounts, the remainder of funds may be allocated to Grant Requests for planning in other areas.

Comment [U11]: ditto

47. These cycles may be delayed or amounts reduced if the actual CET receipts remitted by the local governments are not as high as projected, or if CET revenue projections are modified due to market conditions, or if required by Metro’s spending cap limitations.

58. Metro may conduct additional allocation cycles if the Metro Chief Operating Officer finds that CET receipts are projected to exceed the grant amounts awarded in Cycle 24 and Cycle 35 and Cycle 6?

B. CET CPDG Grant Screening Committee (“Committee”).

1. Role. A CET Grant CPDG Screening Committee (“the Committee”) shall be created, which Committee shall review Grant Requests submitted by local governments. The Committee shall advise and recommend to the Metro Chief Operating Officer (“COO”) the ranking and recommended grant amounts, and whether to grant full, partial, or no awards, in accordance with the CET Grant Evaluation Criteria set forth below. The COO shall review the Committee’s recommendations and shall forward her/his own grant recommendations, along with the recommendations of the CET Grant CPDG Screening Committee, to the Metro Council. The Metro Council shall make final grant decisions in a public hearing. A new Grant CPDG Screening Committee shall be established for Cycle 34, Cycle 5 and Cycle 6 grants, but may include members from the Cycle 2 previous Committees.

2. CET CPDG Grant Screening Committee Members. The Committee, including the Committee Chair, will be selected by the Metro COO. In appointing Committee members, the Metro COO shall make every effort so that no one jurisdiction or geographic location is disproportionately represented on the Committee. The Committee will be composed of nine six individuals representing a variety of expertise from public and private interests as set forth below, plus one non-voting Metro Councilor to serve as a Metro Council liaison. A committee member may have more than one expertise. The nine six-member Committee shall include:

Comment [U12]: Proposed by Metro COO

Comment [U13]: ditto

- One member with expertise in economic development or urban redevelopment;
- One member with expertise in local government and urban planning;
- At least one member with expertise in real estate and finance;
- One member with expertise in infrastructure finance relating to development or redevelopment;
- One member with expertise in local government;
- One member with expertise in urban renewal and redevelopment;
- One member with expertise in business and commerce;
- One member from a Neighborhood Association or Community Planning Commission with an understanding of community livability issues; and

Comment [U14]: Proposed by staff

- One member with expertise in environmental sustainability relating to development or redevelopment.

C. Grant CPDG Screening Committee Review of Grant Requests.

1. Metro staff shall forward ~~the letters of intent and~~ Grant Requests to the members of the ~~Grant~~ Screening Committee, and will provide staff assistance to the Committee.
2. The ~~CET Grant~~ Screening Committee shall then review the Grant Requests and evaluate them based on the ~~CET Grant CPDG Requests~~ Evaluation Criteria set forth below. The Screening Committee shall use the criteria as guidelines for evaluating applications. The Committee may consult with the proponent of the Grant Request or any others in reviewing the request.
3. After analyzing the Grant Requests, the Committee shall forward to the Metro COO the Committee’s recommended ranking and grant amounts for each of the Grant Requests.
4. The Metro COO shall review the Committee’s recommendations and shall forward her/his own grant recommendations, based on the ~~CET Grant CPDG Requests~~ Evaluation Criteria set forth above, along with the recommendations of the ~~CET Grant~~ Screening Committee, to the Metro Council. The Metro Council shall decide, in a public hearing, whether or not to approve funding of any grants, and the amount of each grant.

Comment [U15]: Proposed by staff

D. Metro Council Grant Approval. The Metro Chief Operating Officer (“Metro COO”) shall review the Committee’s recommendations and shall forward her/his own grant recommendations, along with the recommendations of the ~~CET Grant~~ Screening Committee, to the Metro Council. The Metro Council shall make final grant decisions in a public hearing.

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E. Procedures for Distribution.

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1. **Step One: Pre-Grant-Letter of Intent.** Prior to making a ~~written~~ request to Metro for ~~CET CPDG grant~~ funds, each Grant Applicant that anticipates requesting ~~CET grant CPDG~~ funds in Cycle ~~42, Cycle 5~~ and Cycle ~~36~~ shall submit ~~a written and~~ electronic Letter of Intent to the Metro Chief Operating Officer.

a. Grant Applicant. ~~CET Grant CPDG~~ applicants shall be cities or counties within the Metro boundary. Other local governments, as defined in ORS 174.116, may apply for a ~~CET Grant CPDG~~ only in partnership with a city or county within the Metro boundary.

~~b. Letter of Intent Submission Date. For Grant Requests in Cycle 2, Letters of Intent shall be submitted to Metro within three (3) months of the effective date of the extension to the CET program, i.e., by December 9th, 2009, unless a different date is mutually agreed upon by Metro and the local government. For Grant Requests in Cycle 3, Letters of Intent shall be submitted to Metro by within three (3) months of the update to this administrative rule.~~

Comment [U16]: Proposed by staff

~~e.b. Letter of Intent Content. The Letter of Intent shall set forth the local government’s proposed planning project, the requested grant amount, how the project will address the ~~CET Grant CPDG Request~~ Evaluation Criteria, and proposed milestones for grant payments. Metro staff and the grant applications Screening Committee shall review the Letter of Intent and ~~work with the proposer, if necessary, to revise the proposal if additional information is needed for the Grant Request. Metro staff will send comments to the local governments.~~~~

Comment [U17]: Proposed by staff

2. **Step Two: Grant Request.** After submitting the Letter of Intent, and after working with Metro staff and ~~Grant~~ Screening Committee if necessary, to revise the proposal, Grant Applicants

seeking distribution of CET expected revenues shall submit a written and electronic Grant Request to the Metro Chief Operating Officer.

Comment [U18]: Proposed by staff

A. Grant Request Evaluation Criteria for Proposed Projects within the current UGB. For proposed projects within the UGB, the Grant Request shall specifically address how the proposed grant achieves, does not achieve, or is not relevant to, the following criteria (“CET Grant Evaluation Criteria”), drawn from the Urban Growth Management Functional Plan and the Regional Transportation Functional Plan.

Comment [U19]: Proposed by staff

- 1) Expected Development Outcomes: Explain how the proposed planning and development grant will increase ability to achieve on-the-ground development/redevelopment outcomes. Address:
  - a) Identification of opportunity site/s within the boundary of the proposed project area with catalyst potential that focus on jobs growth and/or housing. Explain the characteristics of the site/s and how the proposed project will lead to a catalytic investment strategy with private and public sector support.
  - b) The expected probability that due to this planning and development grant, development permits will be issued within two years;
  - c) The expected probability that due to this planning and development grant, development permits will be issued within five years;
  - d) The level of community readiness and local commitment to the predicted development outcomes; considerations include:
    1. Development sites of adequate scale to generate critical mass of activity;
    2. Existing and proposed transportation infrastructure to support future development;
    3. Existing urban form provides strong redevelopment opportunities;
    4. Sound relationship to adjacent residential and employment areas;
    5. Compelling vision and long-term prospects;
  - e) Describe the roles and responsibilities of the applicant and county or city, and relevant service providers for accomplishing the goals of the proposed project.
- 2) Regionally Significant: Clearly identify how the proposed planning grant will benefit the region in achieving established regional development goals and outcomes, including sustainability practices, expressed in the 2040 Growth Concept and the six Desired Outcomes adopted by the region to guide future planning, which include:
  - a. People live and work in vibrant communities where they can choose to walk for pleasure and to meet their everyday needs;
  - b. Current and future residents benefit from the region’s sustained economic competitiveness and prosperity;
  - c. People have safe and reliable transportation choices that enhance their quality of life;
  - d. The region is a leader in minimizing contributions to climate change;

e. Current and future generations enjoy clean air, clean water and healthy ecosystems;

f. The benefits and burdens of growth and change are distributed equitably<sup>1</sup>.

**Comment [U20]:** Spring 2014 Advisory Group recommended that MTAC use the findings and recommendations of the Metro Equity Strategy Advisory Committee to refine this criteria, and grant applicants should discuss how the project will address concerns of historically disadvantaged communities.  
**\*See FOOTNOTE**

3) Location: Discuss whether and how the proposed planning grant facilitates development or redevelopment of:

- a. Centers;
- b. Corridors/Main Streets;
- c. Station Centers; and/or
- d. Employment & Industrial Areas
- e. Areas where concept planning has been completed but where additional planning and implementation work is needed in order to make these areas development ready.

4) Best Practices Model. Consideration will also be given to applications that can be easily replicated in other locations and demonstrate best practices. Discuss also how lessons learned from the planning project will be shared with other communities in the region.

**Comment [U21]:** Advisory Group recommendation

5) Leverage: Discuss whether and how the proposed planning grant will leverage outcomes across jurisdictions and service providers, or create opportunities for additional private/public investment. Investments can take the form of public or private in-kind or cash contributions to the overall planning activity.

6) Matching Fund/Potential: A ten percent (10%) local match is required either as direct financial contribution or in-kind contribution. Discuss whether any portion of the total project cost will be incurred by the applicant and/or its partners. Explain specific portions of the work scope the match money would fund.

**Comment [U22]:** Proposed by staff

7) ~~Equity: Discuss whether and how the proposed planning grant will further the equitable distribution of funds, based on collections of revenues, past funding, and planning resource needs.~~

Growth Absorption: Discuss how this project will address the accommodation of expected population and employment growth in this region and the needs of high growth areas.

**Comment [U23]:** Advisory Group recommendation

8) Public Involvement: Discuss whether and how the public, including neighbors to the project, businesses, property owners and other key stakeholders, and disadvantaged communities including low income and minority populations, will be ~~involved formed~~ on the progress of the project and how their input will be used to strengthen the project outcome and increase likelihood to be implemented.

**Comment [U24]:** Advisory Group recommendation

<sup>1</sup> In this context, this is intended to refer to social equity. Applicants should explain how their projects will address inequities in the distribution of resources and opportunities by proposing projects with outcomes that will contribute to strong economy, quality jobs, living wages, stable and affordable housing, safe and reliable transportation, healthy environment, and resources that enhance quality of life.



- 9) Governing Body: Describe the role of the governing body in relation to:
- a. Approval of the grant application and adoption and implementation of final product
  - b. When and where applicable, how public voting requirements for annexation and transit improvements will be addressed so that the outcome of proposed planning projects can be realized.

**Comment [U25]:** Advisory Group recommendations

- 10) Capacity of applicant: Describe the skill set needed and the qualifications of the staff or proposed consulting teams to carry out the planning project.

**Comment [U26]:** Advisory Group recommendation

**B. Grant Request Evaluation Criteria for Proposed Projects within areas added to the UGB since 2009 and Urban Reserves.**

The grant request for proposed projects in both areas added to the UGB since 2009 and Urban Reserves shall specifically address how the proposed grant achieves, does not achieve, or is not relevant to the following criteria, drawn from the Urban Growth Management Functional Plan (UGMFP) and the Regional Transportation Functional Plan. While the UGMFP's Title 11 (Planning for New Urban Areas) calls for completion of a concept plan prior to Council decision to add the area to the UGB, Metro Council award of grants for concept planning in urban reserves should not be interpreted as a commitment by the Council to add the rest of the area to the UGB in the next cycle. Applications should note whether the planning project includes an Urban Reserve area currently being appealed in the Court of Appeals or other venues. The Screening Committee shall emphasize using available funds to spur development.

**Comment [U27]:** Proposed by staff

- 1) Addresses Title 11 requirements for concept plan or comprehensive plan. Clearly describe how the proposed planning grant will address the requirements for either a concept plan or comprehensive plan or both as described in Title 11.
  - a. If not proposing to complete a full plan, describe how the portion proposed will result in an action that secures financial and governance commitment for the next steps in the planning process.
  - b. If not proposing a planning grant for the full Urban Reserve area, describe how the proposal would address the intent for complete communities as described in the urban reserve legislative intent, urban and rural reserve intergovernmental agreements between Metro and counties, and Title 11.
- 2) Addresses how the proposed projects will meet local needs and also contribute solutions to regional needs.  
Describe how the proposal will meet a variety of community needs, including land uses such as mixed use development and/or large lot industrial sites which are anticipated to continue to be regional needs.
- 3) Demonstrates jurisdictional and service provider commitments necessary for a successful planning and adoption process.  
Applications should reflect commitment by county, city and relevant service providers to participate in the planning effort and describe how governance issues will be resolved through the planning process. Describe the roles and responsibilities of the county, city and relevant service providers for accomplishing the commitments.

4) Address readiness of land for development in areas added to the UGB since 2009. For applications in areas added to the UGB since 2009, demonstrate that market conditions would be ready to support development and efficient use of land or define the steps that the project would undertake to influence market conditions.

5) Best Practices Model. Consideration will also be given to applications that can be easily replicated in other locations and demonstrate best practices. Discuss also how lessons learned from the planning project will be shared with other communities in the region.

**Comment [U28]:** Advisory Group recommendation.

6) Leverage: Discuss whether and how the proposed planning grant will leverage outcomes across jurisdictions and service providers, or create opportunities for additional private/public investment. Investments can take the form of public or private in-kind or cash contributions to the overall planning activity.

7) Matching Fund/Potential: A ten percent (10%) local match is required either as direct financial contribution or in-kind contribution. Discuss whether any portion of the total project cost will be incurred by the applicant and/or its partners. Explain specific portions of the work scope the match money would fund.

**Comment [U29]:** Proposed by staff

~~8) Equity: Discuss whether and how the proposed planning grant will further the equitable distribution of funds, based on collections of revenues, past funding, and planning resource needs.~~  
Growth Absorption: Explain how this project will address the accommodation of expected population and employment growth in this region and the needs of high growth areas.

**Comment [U30]:** Advisory Group

9) Social Equity: Applicants should explain how their projects will address inequities in the distribution of resources and opportunities by proposing projects with outcomes that will contribute to strong economy, quality jobs, living wages, stable and affordable housing, safe and reliable transportation, healthy environment, and resources that enhance quality of life.

**Comment [U31]:** Same as the footnote in page 12

~~9)10) Public Involvement: Discuss whether and how the public, including neighbors to the project, businesses, property owners and other key stakeholders, and disadvantaged communities including low income and minority populations, will be involved~~formed on in the progress of the project and how their input will be used to strengthen the project outcome ~~and~~ increase its likelihood of being implemented.

**Comment [U32]:** Advisory Group recommendation

10) Governing Body: Describe the role of the governing body in relation to:

**Comment [U33]:** Advisory Group recommendation

a. Approval of the grant application and adoption and implementation of final product

b. When and where applicable, how public voting requirements for annexation and transit improvements will be addressed so that the outcome of proposed planning projects can be realized.

12) Capacity of applicant: Describe the skill set needed and the qualifications of the staff or proposed consulting teams to carry out the planning project.

**Comment [U34]:** Advisory Group recommendation

C. Proposed Scope of Work, Milestones and Budget. The Grant Request shall include a proposed scope of work and budget, setting forth the expected completion dates and costs for achieving the ~~Urban Growth Management Functional Plan~~ milestones proposed in the Grant Request. Milestones and grant payment allocations should follow the following general guidelines:

- 1) Execution of the ~~CET Grant CPDG~~ IGA
- 2) Grant Applicant staff's draft or proposed plan, report, code change, zoning change, redevelopment plan, Urban Growth Diagram, Concept Plan, urban services delivery plan, or other plan or agreement consistent with the ~~CET Grant CPDG~~;
- 3) Grant Applicant staff's final recommended plan, report, code change, redevelopment plan, zoning change, Comprehensive Plan or Comprehensive Plan amendment, development agreement, urban services delivery plan, or other plan or agreement consistent with the ~~CET Grant CPDG award~~, addressing compliance with the Urban Growth Management Functional Plan, the applicable conditions of the ~~CET Grant CPDG award~~, and applicable state laws and regulations; and
- 4) Grant Applicant's adoption of final plan, report, code change, redevelopment plan, zoning change, Comprehensive Plan or Comprehensive Plan amendment, urban services delivery plan, or other plan or agreement consistent with the ~~CET Grant CPDG award~~, consistent with the Functional Plan, the applicable conditions of the ~~CET Grant CPDG award~~, and applicable state law.

~~e. Grant Screening Committee Review of Grant Request.~~

~~The Screening Committee shall recognize the intent of the grants to lead to on the ground development and prioritize projects with broad public and private sector support. The Grant Screening Committee shall review and advise the COO as to the Committee's grant recommendations as set forth in Section IV.C above.~~

**Comment [U35]:** Unnecessary duplication of Section IV.C above – Page 10

3. **Step Three: Grant Intergovernmental Agreement (“Grant IGA”).** ~~Upon the award of a grant, the Metro Chief Operating Officer shall issue a Grant Letter for the grant amount determined by the Metro Council. Metro and the Grant Applicant shall enter into a Grant Intergovernmental Agreement (“Grant IGA”) or, at the Grant Applicant's request, the Metro Chief Operating Officer shall issue a Grant Letter, for the grant amount determined by the Metro Council. The governing body of the Grant applicant jurisdiction shall authorize the negotiation of the IGA. The IGA or Grant Letter shall set forth an agreed-upon scope of work and budget, expected milestone completion dates, and Grant payment dates and payment amount for each milestone. The scope of work in the grant application shall be the basis for Metro and grantee to negotiate the IGA. The COO shall retain the right to terminate a CET Grant CPDG award if the milestones set forth in the Grant IGA are not met within the timeframes set forth in the Grant IGA.~~

**Comment [U36]:** Proposed by staff.

- a) ~~Deadline for Signing IGA: Within six months of grant award by Metro Council, Metro and grantees shall negotiate the IGA for the projects receiving grant funds. Grantees that are unable to negotiate the IGA .....~~

**Comment [U37]:** Proposed by staff.

- b) ~~a. Grant Payments: The grant payment amount shall be stated in the IGA. Grant payments shall be made upon the completion of those milestones set forth in the Grant Agreements IGA, as determined by Metro in accordance with the requirements of the Metro Code and the Grant Agreement IGA. In general, a portion of the Grant funds shall be~~

**Comment [U38]:** Proposed by staff

distributed upon execution of a Grant Agreement IGA with Metro, with the remainder of the Grant being paid out as progress payments upon completion of the milestones ~~set forth above and~~ in the Grant Agreement IGA. Grantees shall submit progress reports to Metro documenting the milestone and the completed deliverables for grant payment.

c) b- Eligible Expenses.

1. The following expenses shall be considered Eligible Expenses for CET Grant CPDG consideration for eligible direct costs, which will have priority for funding over indirect costs:
  - i. Materials directly related to project;
  - ii. Consultants' work on project;
  - iii. Grant Applicant staff support directly related to project; and
  - iv. Overhead directly attributable to project;
2. Grant requests to reimburse local governments for planning work already completed shall not be considered.
3. If the total Grant Requests from participating Grant Applicants exceed the total CET actual revenues, Metro shall first consider awarding funds for eligible direct costs, which will have priority for funding over indirect costs.

d) Budgeted Matching Fund: Prior to Metro's distribution of funds under an IGA, grantees shall send letters to Metro confirming that their jurisdiction has budgeted matching funds as outlined in the IGA.

**Comment [U39]:** Proposed by staff. Previously some local governments sent such letters voluntarily.

e) Metro staff liaison: Grantees shall work closely with the Metro staff liaison, and consider including them in the appropriate advisory committee for the project.

**Comment [U40]:** Already established and ongoing.

4. **Application Handbook:** Before soliciting applications for the planning and development grants, Metro shall publish a handbook with details on how to submit applications, prepare a project budget linked to expected outcomes and milestones, and deadlines for applicants to submit letters of intent and full applications.

March 26, 2014

Martha Bennett, Chief Operating Officer  
Metro  
600 NE Grand Ave.  
Portland, OR 97232-2736

**Re: Code Updates to Meet Metro's Future Housing Needs**

Ms. Bennett,

As building professionals, local organizations and Metro residents, we request that Metro craft planning grant eligibility guidelines such that Portland and/or other local governments in the region could use these funds (if the excise tax is extended) to update their codes in support of enhanced housing choices in residential zones.

It's time to address the mismatch between the types of homes encouraged by our codes and the needs of real people and households who live in our region. Demographic shifts have yielded smaller households, and an increasing number of local residents don't need and can't afford the typically sized home. Furthermore, by expanding the palette of housing choices, Metro can meet its goals to reduce carbon emissions and provide affordable housing into the future. Such changes would support in-fill residential development types that meet multiple objectives, including:

- Discreet, neighborhood-friendly development that makes efficient use of existing housing stock and infrastructure to serve a broader variety of household configurations
- Preservation of the character of established residential neighborhoods
- Financial viability for smaller homes and shared housing models that are more affordable and energy-efficient, match demographic trends, and yield smaller per-person carbon footprints
- Encourage "empty nesters" in larger homes to remain in their neighborhoods and age in place
- Bring back historic forms of affordable housing that meet standard life safety requirements, while increasing access to housing for the most vulnerable members of our community
- Accommodate projected population growth within the Urban Growth Boundary (UGB)

The following are specific code changes proposed for Portland, which could also be utilized by other municipalities in the region. Each idea is accompanied by the reason for the change and possible approaches for implementation:

**1. Encourage accessory dwelling units (ADUs)**

Support ADUs as affordable, flexible, and discreet examples of in-fill housing that match well with emerging demographic trends.

- For ADUs under a certain size and height, waive the requirement that ADUs match the exterior design of the primary dwelling and/or provide a community design standard alternative for ADUs of any size.
- Allow one ADU per house in planned developments.
- Drop the requirement that the combined occupancy of an ADU + primary dwelling can't exceed that of a single household (as defined by the zoning code).

- Consider allowing both an internal and detached ADU on a single lot, subject to total square foot limits (as done in Vancouver, BC).<sup>12</sup>

## **2. Permit existing homes to be divided internally**

Allow internal divisions of existing homes into 2 or more units so existing housing stock can be adapted to changing market demand. This would also reduce market pressure to demolish well-built older homes.

- Permit internal conversions of houses to plexes in single dwelling zones so long as the house retains its single dwelling appearance and other restrictions are met.
- Revisit Portland WWII-era codes when such conversions were allowed, many in close-in neighborhoods.

## **3. Allow small house ‘cottage cluster’ development**

Increase the number of lots created in a new subdivision without increasing the total allowable residential square footage. This would provide a financially feasible way for developers to build right-sized homes for smaller households.

- Allow slightly higher densities (ie. bonus lots) in subdivisions or planned developments in exchange for house size and bulk limits. This would supplement common green and common court provisions of the existing code.

## **4. Eliminate household size definitions**

Remove archaic (and often discriminatory<sup>3</sup>) household size definitions and occupancy limits from the zoning code. Rely instead on existing noise, nuisance and building code regulations to address life safety and community impact concerns associated with larger households.

- Either drop household size limits altogether or define a household as “one person or group of persons who through marriage, blood relationship or other circumstances normally live together.”<sup>4</sup>

## **5. Allow micro-kitchens**

Acknowledge the diversity of household configurations by allowing a primary kitchen plus micro-kitchen(s) under a certain size within a dwelling unit.

- Maintain the existing 1-kitchen limit for a single dwelling, but redefine “kitchens” to be cooking facilities with over 16 square feet of floor area that, regardless of size, must comply with Section “29.30.160 Kitchen Facilities” of the Maintenance code.

## **6. Scale System Development Charges (SDCs) for new homes based on size**

Correct the current situation in which a builder pays the same SDCs for a 1,000sf home as for a 5,000sf home.

- Scale residential SDCs based on home size
- See p. 35 of the [2007 Metro report](#) for other US jurisdictions with scaled SDCs.

## **7. Adopt new rules for movable, temporary, and/or extremely low-income housing**

Create safe, sanitary and legal housing options for homeless and/or extremely low-income residents that meet all life safety requirements of the maintenance and landlord/tenant codes (ie.

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<sup>1</sup> Both a ‘[secondary suite](#)’ and ‘[laneway house](#)’ are permitted on a residential lot in Vancouver, BC

<sup>2</sup> [Laneway Houses Continue to Surge in Popularity in Vancouver, BC](#) (Vancouver Sun, 12/29/13)

<sup>3</sup> [The Roommate Gap: Your City’s Occupancy Limit](#) (Alan Durning, Sightline Institute, 1/2/13)

<sup>4</sup> [Victoria, BC definition of “family”](#)

egress, smoke detectors, ventilation, hand/guard rails...), but not necessarily the full standards for new construction under today's building code.

- Establish minimum standards for design, siting, and residential occupancy of moveable structures, including tiny homes on wheels
- Open the door for limited experimentation with low-cost housing models that meet basic life safety standards to house homeless and/or extremely low income residents

For demographic, affordability, land use, and environmental reasons, the time is right to update our codes to expand housing choices in residential zones. We look forward to working with Metro on this effort.

Sincerely,



Eli Spevak

Orange Splot LLC with:

Ben Schonberger, Housing Land Advocates  
John Miller, Oregon ON  
Sunnyside Neighborhood Association  
Peter Brown and Ryan Shanahan, Earth Advantage  
Nicholas Hartrich, Cascadia Green Building Council  
Sam Hagerman, founder, Hammer and Hand  
Rob Justus, Home First Development  
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Cc: Metro President Tom Hughes;  
Commissioners Shirley Craddick, Carlotta Collette, Craig Dirksen, Kathryn Harrington,  
Sam Chase and Bob Stacey;  
Steve Wheeler, interim director of Planning and Development

