

# Agenda



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Meeting: 2018 RTP Transportation Equity Work Group - Final Meeting  
Date: Thursday, January 11, 2018  
Time: 9:00 a.m. to 12:00 p.m.  
Place: Metro Regional Center, Room 401

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- 9:00 a.m. Welcome and Introductions
- 9:10 a.m. Partner Updates  
*Who have you talked to about this work? What feedback have you heard?*
- 9:25 a.m. 2018 RTP Transportation Equity Evaluation – Summary of Feedback, Follow Ups, and Next Steps  
*Discuss the feedback received throughout the work group and committee discussions of the 2018 RTP Transportation Equity Evaluation and next steps for the 2018 RTP refinements period.*
- 10:15 a.m. Break
- 10:25 a.m. 2018 RTP Transportation Policy Framework – Proposed Revisions & Performance Targets  
*Continue discussion of the 2018 RTP policy framework proposal based on work group feedback and also present proposal concepts to carry forward to the RTP performance target discussion in 2018.*
- 11:00 a.m. Displacement Research  
*Receive a presentation related to research and strategies to address involuntary displacement and discuss how these may be part of implementation strategies moving forward.*
- 11:30 a.m. 2018 RTP Process  
*Discuss the next steps for the 2018 RTP and opportunities to remain engaged in the development of the final draft 2018 RTP for public review in summer 2018.*
- 12:00 p.m. Adjourn

## Meeting Packet

- Agenda
- Memorandum – 2018 RTP Transportation Equity Analysis –
- Memorandum – 2018 RTP – Revised Proposed Policy Framework for Equity
- Memorandum – 2018 RTP Performance Targets Next Steps
- Attachment I – Summary of 2014 RTP Policy Framework
- Attachment II – 2014 RTP Goals and Objectives
- Meeting Summary – Transportation Equity Work Group – November 30, 2017
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# Memo

Date: Thursday, January 11, 2018  
To: Transportation Equity Work Group and Interested Parties  
From: Grace Cho, Associate Transportation Planner  
Subject: 2018 RTP Transportation Equity Evaluation – Summary of Feedback, Follow Ups and Next Steps

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## Introduction

As part of the 2018 RTP, a Transportation Equity Assessment is conducted to look at how well the region's planned long-range transportation investments will perform relative to equity goals and demonstrate compliance with regional responsibilities toward federal civil rights laws as they relate to transportation planning. The assessment takes a programmatic look at the region's long-term investment strategy, to determine whether: 1) progress is being made towards desired equity outcomes expressed by historically marginalized communities; 2) to determine whether the financially constrained long-range transportation investment strategy, in totality, is disproportionately impacting historically marginalized communities and if mitigation measures are necessary; and 3) continue to learn from the assessment to propose technical refinements for future transportation equity evaluations. The following memorandum outlines feedback and reactions to the initial results of the 2018 RTP transportation equity evaluation, findings and results of additional requested analysis, and next steps for the evaluation work within the 2018 RTP process.

### Transportation Equity Analysis Primer

The analysis purpose is to see whether the RTP investment scenarios advance accessibility, safety, and environmental outcomes for historically marginalized communities at a greater rate than the overall region.

## 2018 RTP Transportation Equity Evaluation Road Show – Summary of Feedback on Initial Findings

Since the November 2017 work group meeting, Metro staff presented the initial results and findings from the 2018 RTP transportation equity evaluation at various work group and technical committee meetings. From November 30<sup>th</sup>, Metro staff presented the results and initial findings at the following meetings:

- 2018 RTP workshop (December 4<sup>th</sup>)
- MTAC (December 6<sup>th</sup>)
- EMCTC TAC (December 13<sup>th</sup>)
- Regional Transit Strategy work group (December 14<sup>th</sup>) – transit-related results only
- TPAC (December 15<sup>th</sup>)

Metro staff asked similar questions to these committees as the work group in requesting input as to what the results seem to be saying. At the various committee meetings there was interesting discussion on the results and initial findings of the 2018 RTP transportation equity evaluation. Some common comment themes to emerge from the input and feedback were the following:

- To effectively communicate to elected officials, pick one of the equity communities lens (e.g. historically marginalized communities, focused, communities of color) to speak from in terms of the results.
  - There was discussion in calling out elderly as the main lens
  - There was discussion in calling out people of color as the main lens
- Provide background context about future population and employment growth and the investment scenarios to help ground the work. Also provide context as to what portion of the region is represented through the different equity community lenses. ) For example,

nearly two-thirds of the region's population lives within the areas identified as historically marginalized communities or nearly 27% of the region identifies as a person of color.)

- In recognition of the limitations with the evaluation in projecting future growth and locations of historically marginalized communities, focus on communicating the evaluation results for the first 10-years investment strategy.
  - Which may mean to help contextualize information to conduct a 2027 No-Build analysis run to better understand the isolated effect of the 10-year investment strategy on the system.
- Reconsider comparing the results to the region and look at how the different equity community lenses compare to “higher achieving” communities.
- Where appropriate for the different evaluation measures, provide both the percent change and the raw numbers for the results.
- For the Access to Jobs and Places evaluation measures, add in the automobile access to provide some form of context to the transit, bike, and walking results.
- The habitat results are interesting, but may make more sense to be provided in an appendix rather as a major part of the storyline for the 2018 RTP investment strategy.
- The investment in active transportation may be underreported because a number of roadway projects include active transportation elements.
- The investment in safety may also be underreported as many projects have secondary purposes to address safety.
- If resource and time is available, conduct sub-regional analysis of the evaluation measures to provide a better understanding of what is happening within different part of the region and to help inform if adjustments are necessary for the RTP investment strategy.
- Frame the results of the analysis in a way which explains how the investment strategies are closing the disparities gap experienced by historically marginalized communities, particularly communities of color.
  - Understanding the context for historic and current disparities as well communities having to overcome disparities provides an understanding how well the investment strategies are performing.
- Organize the results in talking about the successes first and then talk about where the region's investment strategy falls behind or is unable to make up ground.

In addition to these comments, a question emerged through the committees about what the jurisdictions should be expected to do with the information from the 2018 RTP transportation equity evaluation. As Metro does some follow up analysis work to better understand the results and findings some recommendations may be proposed to be discussed at the technical committees as well as at the March 2018 Regional Leadership Forum.

### **Follow on Evaluation and Actions As a Result of Feedback and Discussions**

As a result of the feedback and discussions on the 2018 RTP transportation equity evaluation in addition to looking at the 2018 RTP timeline, staff capacity and resources, the following modifications are being undertaken by Metro staff to better support the evaluation results and findings.

1. A 2027 No-Build scenario is being processed by the travel demand model in order to better understand the impact and results of the 2018 RTP 10-year investment strategy (2018 – 2027) from an equity perspective.
2. One equity community lens (e.g. historically marginalized communities, focused historically marginalized communities, communities of color) will be selected to communicate results,

findings, and determining disproportionate impact for the purposes of federal compliance purposes as well as communicating the results efficiently and effectively to elected officials.

- a. The technical appendix will continue to report on the evaluation results for the different equity community lenses.
3. The evaluation results will focus in and report on the 2018 RTP 10-year investment strategy to facilitate a desire to know the near-term benefits or burdens equity communities may see as a result in the identified locations.
4. Background context will be provided to better understand the proportion of different equity communities represented as well as future projected population and employment growth.
  - a. This is also being undertaken as context for the entire 2018 RTP and the system evaluation.
5. As appropriate, the 2018 RTP transportation equity evaluation will report the percent change and/or the raw numbers to effectively communicate the finding.
  - a. All details (percent change, raw numbers) will be provided as part of a technical appendix for the transportation equity evaluation.
6. Automobile access will be reported for the two accessibility evaluation measures: Access to Jobs and Access to Community Places.
7. Further investigation will be undertaken on the 2018 RTP project list during the refinement period to better understand the level of investment in safety and active transportation.

Several of these efforts will occur during the refinement period scheduled for winter through spring 2018 to help prepare for a final analytical run on the final draft 2018 RTP investment strategies. A final draft 2018 RTP report will reflect these changes and will be released for public comment in early summer 2018. For those modifications in which Metro staff have been able to complete between the November work group meeting and the final work group meeting, materials and information will be brought forward at the meeting in addition to segments being discussed in the following section.

### **Follow Up Analysis on the 2018 RTP Transportation Equity System Evaluation – Individual Measure Results**

Based on the seven additional analytical items to be undertaken, three of the 2018 RTP transportation equity evaluation measures were reassessed looking closely at the results of the 10-year investment strategy under the context of a No-Build scenario for 2027. The No-Build scenario helps to better understand and isolate the effect of the 10-year investment strategy. In previous system analysis for the RTP, a No-Build scenario is only developed for the out-year of the plan, which is 2040 for the 2018 RTP. Because of the equity implications as well as being able to speak to the performance of the investment strategy in the first 10-years, feedback received to look at a No-Build for 2027 was undertaken. Earlier results of the transportation equity evaluation looked against a base-year, which did not isolate the intermixed land use, population, and employment growth assumptions which had been making it difficult to determine what was happening in the 10-year investment strategy.

The three 2018 RTP transportation equity evaluation measures in which the 2027 No-Build scenario was applied to in order to understand the results better are:

1. Access to Jobs (by wage profile, particularly middle and low-wage)
2. Access to Community Places
3. Exposure to Non-Freeway Vehicle Miles Traveled (VMT)

Prior to discussing the results of the three transportation equity evaluation measures under the 2027 No-Build scenario, some key assumptions to note in the three evaluation measures are:

1. The equity community lens to communicate the results is the historically marginalized communities, with results specific to communities of color also drawn out to communicate.
2. The 2027 No-Build scenario assumes only those transportation projects with committed funding will be built out and no other transportation project will get built
3. The land use, population, and employment assumed for 2027 is based on the region's adopted land use forecast from 2016. This assumes an approximate additional 300,000 people (to a total of 1.9 million people), 140,000 households (to a total of 776,000 households), and 176,000 jobs (to a total of 1.07 million jobs).
4. The estimated total population of those areas identified as historically marginalized communities is 1,058,220 as of 2015. All numbers are from the U.S. Census Bureau, these reflect current population of these communities. and does not account for overall projected growth of these historically marginalized.

As a reminder, a key focus of the 2018 RTP transportation equity analysis is to look whether there are gains in advancing the accessibility, safety, and environmental outcomes and whether those gains are outpacing the region in historically marginalized communities. Data has shown there are disparities experienced by marginalized communities as it relates to the transportation system and gains alone or being on pace with the region may not be enough to make progress towards addressing the disparities gap. Therefore, the discussion of the results for the 2018 RTP transportation evaluation is in the context of performance in historically marginalized communities relative to the region. The desire is to see the 2018 RTP investment strategies advancing outcomes in these communities at a greater rate than as the region overall, even if the region and the historically marginalized communities are seeing positive results.

## Access to Community Places

### Evaluation Measure Summary

To look at how many existing community places (e.g. schools, libraries, grocery stores, pharmacies, medical facilities, general stores, etc.) can be reached within a certain travel time window for transit (30 minutes), bicycling (15 minutes), and walking (20 minutes) region wide and in historically marginalized communities (in aggregate) and understand if the 2018 RTP investment strategies are further increasing access to community places for historically marginalized communities.

As follow up to the discussions on the initial findings from the 2018 RTP transportation equity evaluation, the completion of the 2027 No-Build scenario better places in context how well the 2018 RTP 10-year investment strategy performs in Access to Community Places. The following narrative discusses the 2018 RTP 10-year investment strategy relative to the No-Build. In addition, for the Access to Community Places evaluation measure, a reminder that the community places identified are based on existing community places, not those forecasted to open for service in the future. As a result, the results of the evaluation measure may be underestimating the level of access. Nonetheless, the results of the equity evaluation are being framed relative to the region and therefore the results provide a sense of how well the investment strategy performs in historically marginalized communities.

### Preliminary Findings

- The 2018 RTP 10-year investment strategy tends to perform at lesser rate for historically marginalized communities compared to the region in increasing the number of community places which can be reached by automobile, transit, biking, and walking.
- Nonetheless, communities of color and where there is a greater density of racial diversity, poverty, and language isolation saw greater access to community places than the region specifically by transit, both in the rush hour and off-hours, and very slight increase by automobile during the off-hours.
  - Interestingly, a slight increase in access to community places relative to the region by bicycle is observed in areas with a greater density of racial diversity, poverty, and language isolation. The increase in bicycle access was usually specific to a certain community place, such as grocery stores.
- While not the focus of this portion of the reporting, a similar pattern in increased access relative to the region was observed in communities of color and where there is a greater density of racial diversity, poverty, and language isolation among the 2018 RTP financially constrained and strategic (2018-2040) investment strategies.
- The travel demand model may not be the strongest analytical tool for understanding accessibility for bicycling and walking for time-based travel sheds because investments may increase more active travel.

Table 4. Access to Community Places

	% change 2027 Constrained over 2027 No Build					
	AP	AOP	TP	TOP	B	W
<b>Region</b>	1.5%	0.7%	16.0%	22.0%	0.3%	0.5%
<b>Historically Marginalized Communities</b>	1.3%	0.7%	15.7%	20.7%	0.3%	0.2%

<b>Communities of Color</b>	1.2%	0.8%	17.3%	24.6%	0.4%	0.2%
<b>Focused Historically Marginalized Communities</b>	1.3%	0.8%	18.7%	24.8%	0.4%	0.3%

*AP = Automobile Peak Period; AOP =Automobile Off-Peak Period; T-P = Transit Peak Period; T-OP = Transit Off-Peak Period; B = Bicycle; W = Walking*  
**Green** = Performance greater than the region

Discussion, Key Observations, and Thoughts

*2018 RTP 10-Year Investment Strategy (2018-2027)*

In the 2018 RTP 10-year investment strategy, access to community places tends to increase based on the transportation investments. This means, that the number of places tend which can be reached by automobile and transit (during the rush hours and off-hours) increases overall for the region and within historically marginalized communities, communities of color, and in areas with a greater density of racial diversity, poverty, and language isolation. This is a positive outcome and can be attributed to the 10-year investment strategy because the evaluation did not project and spatially distribute the new community places (e.g. grocery stores, libraries, drug stores, medical services, etc.) as a result of population growth. Essentially, the access to community places was measured based on the existing locations of community places. The benefit in conducting the evaluation using existing community places helped to isolate the performance of the investment strategy in terms of access, but it is also not a full picture of the access because the future investment strategy were unable to recognize the likelihood of growth of these community places as a result of population growth and demand, especially in existing less developed areas expected to grow. There is an underlying assumption that access will be further realized with the anticipation of new community places opening for service.

While overall, the 2018 RTP 10-year investment strategy does provide an increase in access to community places in an absolute sense the purposes of the transportation equity analysis is to look at the performance in historically marginalized communities, focused historically marginalized communities, and communities of color relative to the region to assess a sense of “fairness” for historically marginalized communities.

Therefore, what is observed with the 10-year investment strategy is that while access to community places increases overall, historically marginalized communities tend to see less increased access compared to the overall region by cars and transit regardless of the time of day. The difference in access range from .2% - 1.3%, but the difference in percentage translates to an additional 15 – 20 places accessible by automobile or 66 – 72 places by transit, depending on the time of day. (Total places within 20 minute drive and 30 minutes for transit are between 1,500 – 2,000 by automobile and 300 – 400 by transit respectively.)

Communities of color and areas with a greater density of racial diversity, poverty, and language isolation generally saw increased access to community places with the 10-year investment strategy, specifically by transit regardless of the time of day and automobile during the off-hours. The increase outperformed the region by .1% - 2.8% to community places. The greater increase in access to community places in these communities compared to the overall increased experienced by the region is positive outcomes of the 10-year investment strategy. This may be a demonstration of local jurisdictions focusing investments in places with greater densities and rates of racial

diversity, poverty, and language isolation which are currently underserved by service and infrastructure investment.

Another element to consider is access to community places is how to interpret the results for walking and bicycling. Because the accessibility measure is time-based, improvements to the active transportation system which encourages further or longer travel to get to a separated or protected facility makes it appear there is under performance of the investment program because more time is spent in active travel. Recognizing this unique challenge of the travel demand model, increases or decreases in access to community places or jobs can be viewed in a positive manner and that the investment program is making some impact.

In general, the 2018 RTP 10-year investment strategy does underperform in access to community places relative to the region in different profile types of historically marginalized communities. There could be some very reasonable rationale to the underperformance relative to the region. But the access to community places results for the 10-year investment strategy may also be an indication a greater level of investment needed for the transportation system in the first 10-years within these communities.



## Access to Jobs

### Evaluation Measure Summary

To look at how many jobs, particularly low and middle-wage jobs can be reached within a certain travel time window for transit (45 minutes), bicycling (30 minutes), and walking (20 minutes) region wide and in historically marginalized communities (in aggregate) and understand if the 2018 RTP investment strategies are further increasing access to jobs for historically marginalized communities.

As follow up to the discussions on the initial findings from the 2018 RTP transportation equity evaluation, the completion of the 2027 No-Build scenario better places in context how well the 2018 RTP 10-year investment strategy performs in Access to Jobs, particularly low and middle-wage jobs. The following narrative discusses the 2018 RTP 10-year investment strategy relative to the No-Build. As a reminder, the results of the equity evaluation are being framed relative to the region and therefore the results provide a sense of how well the investment strategy performs in historically marginalized communities.

### Preliminary Findings

- The 2018 RTP 10-year investment strategy demonstrates an overall increase in access to jobs, particularly middle and low-wage jobs, in a reasonable commuting time by automobile, transit, bicycling, and walking.
  - In general, the number of jobs which can be reached within a reasonable commute increased by 18 (by walking) to 14,011 (by transit).
- While it is a positive sign that the 2018 RTP 10-year investment strategy increases access to jobs overall, the relative increase in access to jobs in historically marginalized communities, communities of color, and areas where there is a greater density of racial diversity, poverty, and language isolation, the rate of increase in jobs access within a reasonable commute is less than the region overall.
  - This is shown across all modes (walking, bicycling, transit, and driving).
  - This may mean there is a disproportionate impact
- While not the focus of this portion of the reporting, a similar pattern in decreased access to jobs relative to the region was observed in historically marginalized communities, communities of color, and where there is a greater density of racial diversity, poverty, and language isolation among the 2018 RTP financially constrained and strategic (2018-2040) investment strategies.
- The travel demand model may not be the strongest analytical tool for understanding accessibility for bicycling and walking for time-based travel sheds because investments may increase more active travel.

Job Access -- % of Jobs in Region						
	% change 2027 Constrained over 2027 No Build					
	AP	AOP	TP	TOP	B	W
<b>Region</b>	1.5%	0.7%	14.7%	19.0%	1.0%	0.4%
<b>Historically Marginalized Communities</b>	1.2%	0.6%	13.7%	16.8%	0.7%	0.2%
<b>Communities of Color</b>	1.0%	0.6%	13.2%	17.8%	0.5%	0.1%

<b>Focused Historically Marginalized Communities</b>	1.0%	0.6%	13.8%	17.6%	0.4%	0.1%
<b>Job Access -- % of Low-Wage Jobs in Region</b>						
	<b>% change 2027 Constrained over 2027 No Build</b>					
	<b>AP</b>	<b>AOP</b>	<b>TP</b>	<b>TOP</b>	<b>B</b>	<b>W</b>
<b>Region</b>	1.5%	0.7%	14.7%	19.0%	1.0%	0.4%
<b>Historically Marginalized Communities</b>	1.2%	0.6%	13.7%	16.7%	0.7%	0.2%
<b>Communities of Color</b>	1.0%	0.6%	13.2%	17.7%	0.5%	0.1%
<b>Focused Historically Marginalized Communities</b>	1.0%	0.6%	13.8%	17.6%	0.3%	0.1%
<b>Job Access -- % of Medium-Wage Jobs in Region</b>						
	<b>% change 2027 Constrained over 2027 No Build</b>					
	<b>AP</b>	<b>AOP</b>	<b>TP</b>	<b>TOP</b>	<b>B</b>	<b>W</b>
<b>Region</b>	1.5%	0.7%	14.7%	19.0%	1.0%	0.4%
<b>Historically Marginalized Communities</b>	1.2%	0.6%	13.7%	16.8%	0.7%	0.2%
<b>Communities of Color</b>	1.0%	0.6%	13.2%	17.9%	0.5%	0.1%
<b>Focused Historically Marginalized Communities</b>	1.0%	0.6%	13.8%	17.7%	0.4%	0.1%

*AP = Automobile Peak Period; AOP =Automobile Off-Peak Period; T-P = Transit Peak Period; T-OP = Transit Off-Peak Period; B = Bicycle; W = Walking*

#### *Discussion Key Observations and Thoughts*

In looking at the access to jobs, particularly low and middle-wage jobs, evaluation measure, the 2018 RTP 10-year investment strategy does increase access to jobs region-wide and in historically marginalized communities, communities of color, and in areas where there is a greater density of racial diversity, poverty, and language isolation. The increase in access to jobs is observed across all modes of transportation (e.g. walking, bicycling, transit and driving) regardless of time of day. The increase ranges from .4% - 19% increases (leading to 18 more jobs accessible by a 20 minute walk to another 14,000 jobs accessible within a 45 minute transit ride). In general, this is a positive sign that the 10-year investment strategy is increasing the overall access to jobs and that number of low and middle wage jobs accessible within a reasonable commute is also increasing.

However, the purpose of the transportation equity evaluation is to see how the 2018 RTP investment strategies perform in historically marginalized communities relative to the region. While an increase number of jobs, particularly low and middle-wage, within a reasonable commute is a positive sign, consistently historically marginalized communities, communities of color, and areas with a greater density of racial diversity, poverty, and language isolation see a rate of increase which is lesser than the region overall. This is consistently seen across all modes regardless of time of day and regardless of wage profiled job. For example, in communities of color, access to middle-wage jobs within a reasonable transit commute during off-hours increased by 17.9%, but the region saw a 19% increase overall. This means that while the 2018 RTP 10-year investment strategy is bringing forward positive job access benefits, historically marginalized communities are not seeing the same gains. As a result, the 2018 RTP 10-year investment strategy may produce a possible disproportionate impact. The result may also be an indication further investment is needed in the transportation system sooner and in the future as a similar pattern is observed with the 2018 RTP financially constrained and strategic investment strategy.

In addition, similar to the access to community places measure, the results for bicycling or walking may not fully capture the effect of the 2018 RTP investment strategy as it relates to increased access to jobs within a reasonable commute time specifically for historically marginalized communities. This is partially due to the travel demand and behavioral model because of capital improvements made to the regional transportation system may increasing travel time for walking and bicycling. For example, when a new facility is added (e.g. a new protected bicycle lane or sidewalk) the attractiveness of the new facility will divert a number of trips. Specifically for bicycling, the new facilities which make it more comfortable to ride, because of protection or lower automobile vehicle volumes, generates travel behaviors where a person may travel a little bit farther or slightly out-of-direction and therefore travel longer. Since the access to jobs system evaluation measure looked at the number of jobs accessible within a certain time window (i.e. 30 minutes by bicycle), the results for this system measures for biking and walking does not fully capture or illustrate the positive gains or impacts in middle and/or low-wage accessibility unless there is a significant swing in the numbers.

While there are potential reasons for the slower rate of increase in access to jobs for historically marginalized communities, there are some technical considerations as part of the evaluation which may not fully account for the access to jobs within a reasonable commute. For example, some of the transit solutions slated for industrial job areas, like the Columbia corridor and in western Hillsboro, are community connector solutions, which are not currently represented in the travel demand model. These areas tend to be less populated, further on the outskirts away from residential and commercial land uses because of their industrial uses, which make certain options such as frequent transit service not as viable or safe bicycle facilities a bit more limited. Nonetheless, these industrial areas have a greater concentration of middle-wage jobs. Not being able to represent the community shuttles in the travel demand model does not fully capture the increased number of jobs accessible within a reasonable commute.

## Exposure to Vehicle Miles Traveled (VMT) and Crash Risk

### **Evaluation Measure Summary**

To look at the amount of non-freeway vehicle miles traveled (VMT) exposure region wide and in historically marginalized communities (in aggregate), and understand if the 2018 RTP investment strategies are further reducing vehicle miles traveled exposure, which is correlated to crashes, for historically marginalized communities.

Due to timing and capacity constraints, this evaluation measure has not been updated and completed at the time of the mailing. Material will be brought forward to the work group meeting on January 11<sup>th</sup>.

## **Discussion Questions**

1. In light of having some additional information to help provide a better understanding of how the 2018 RTP 10-year investment strategy performs and the evaluation showing some areas in which the RTP 10-year investment strategy underperforms:
  - a. What are some suggested refinements to recommend to the different 2018 RTP investment strategies (i.e. 10-year investment strategy, 2040 financially constrained, and 2040 strategic)? In particular, what refinements are suggested for the 10-year investment strategy?
  - b. What are some suggested mitigation measures and policies to recommend as part of the implementation of the 2018 RTP?
2. Are there additional questions about the different updates and refinements to be undertaken from January to March 2018 to the evaluation?
3. Are there additional considerations or messages to help communicate the results of the transportation equity evaluation?

## **Next Steps**

While certain elements of feedback has been incorporated into the 2018 RTP transportation equity evaluation to date, several follow up elements will aim to be completed during the refinement period taking place through winter and spring 2018. A revised set of findings from the evaluation results will be brought forward for discussion at the March 2018 Regional Leadership Forum. In between January through the March forum, Metro staff will work on assessment refinements and work with jurisdictions to gather more information on the project submissions.

Following the discussions at the March 2018 Regional Leadership Forum and further refinement and direction may result. Between late March and late April 2018, Metro staff will be working directly with the jurisdictions to refine the RTP project list and investment strategy scenarios.

Once these refinements have been incorporated, a second round and final run of the system performance evaluation will take place on the 2018 RTP investment strategy prior to putting together the public comment draft of the 2018 RTP, which is expected to be released in summer 2018.

A memorandum from Kim Ellis, RTP project manager, provides a more detailed outline on the next steps for the development of the 2018 RTP. The memorandum is attached.

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: Thursday, January 11, 2018  
To: 2018 RTP Transportation Equity Work Group and Interested Parties  
From: Grace Cho, Associate Transportation Planner  
Subject: 2018 Regional Transportation Plan – Revisions to the 2018 RTP Policy Framework to Advance Equity

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## **Purpose**

The purpose of this memorandum is to summarize proposed revisions to the RTP policy framework to address feedback from the work group in June and November 2017 meetings. In addition, this memorandum provides an outline as to the next steps for the 2018 RTP policy discussions.

## **Introduction**

The Portland metropolitan region's economic prosperity and quality of life depend on a transportation system that provides every person and business in the region with equitable access to safe, efficient, reliable, affordable and healthy travel options. Through the 2018 RTP update, the Metro Council is working with the Joint Policy Advisory Committee on Transportation (JPACT), the Metro Policy Advisory Committee (MPAC) and community and business leaders throughout the region to plan the transportation system of the future by updating the region's shared transportation vision and investment strategy for the next 25 years.

In late May 2017, the Metro Council directed staff to initiate the 2018 Regional Transportation Plan (RTP) call-for-projects. In opening the call-for-projects, the Metro Council directed staff to use development of the 2018 RTP to clearly and realistically communicate our transportation funding outlook and develop a pipeline of priority projects for the regional transportation system for Metro and other partners to work together to fund and build. The Council also directed the RTP project list and RTP modal and topical strategies be developed in a transparent way that advances adopted regional goals, supports regional coalition building efforts, and emphasizes equity, safety, and climate change.

As a result, the Transportation Equity work group meetings in June and November 2017 had focused discussions on how the 2014 RTP policies can better express and advance equity. The discussions included an overview of existing RTP policies as they relate to equity and the RTP performance targets related to the transportation equity evaluation measures. The proposed refinements are based on work group discussion and will be forwarded to the technical committees as part of discussions pertaining to the RTP policies, goals, and objectives.

## **2018 Regional Transportation Plan – Proposed Equity Definition**

At the November 2017 work group meeting, Metro staff presented proposed language for an updated equity definition, goal, and equity objectives. In addition, the November 2017 meeting materials provided an overview of consolidating and embedding different equity objectives among other RTP goals and objectives. Metro staff also illustrated how the different transportation equity evaluation measures align to existing and proposed new objectives. During the meeting, Metro staff asked the work group to weigh-in on specific questions pertaining to the proposed equity definition and then took general feedback on the proposed language for the equity goal and objectives.

A notable shift on the proposed language for the equity definition is to clarify the RTP definition of equity means racial equity. In proposing a racial equity definition for the 2018 RTP and to better support a focus on race across all the region's communities, Metro staff recommends refining the threshold for how communities of color were geographically identified for the purposes of future

### Proposed Revised Ensure Equity Goal for the 2018 RTP

#### *Advance Equity*

*An equitable interconnected multimodal transportation system is safe, accessible and affordable to use and reduces disparities experienced by people of color as the means of addressing the most challenging barriers and ultimately provide benefits to all users of the transportation the system.*

analytical work. The anticipated timeframe for redefining the thresholds will be applied to the next transportation equity evaluation, either for the 2023 RTP or the 2021-2024 MTIP.

Based on the discussions from the November 2017 work group meeting, Metro staff heard the following feedback:

- More of the work group members preferred the broader definition of equity which considered all disparities with the transportation system and did not focus solely on access, affordability, safety, and health;
- More of the work group members preferred the language construction of the broader definition, which explicitly called out people of color;
- Work group members agreed that the final part of the definition which said “and better outcomes for all,” appeared as an afterthought and the definition is stronger without the final statement;

As a result, refinements were made to the proposed equity definition. The proposed language for the 2018 RTP equity definition is as follows:

### **2018 Regional Transportation Plan – Proposed Revised Equity Goal**

With an established vision for the regional transportation system, the goals and objectives outlined as part of the adopted RTP express specific outcomes to work towards in order to achieve the vision. The RTP goals and objectives are intended to guide the region’s investments to achieve the overarching RTP vision.<sup>1</sup> In building the long-range investment strategy for the 2018 RTP, policymakers agreed to use the adopted 2014 RTP goals and objectives as a starting point for the 2018 RTP call-for-projects, the first step in building the 2018 RTP investment strategy, recognizing additional work is needed to more fully address transportation safety, equity, and climate change.<sup>2</sup>

Based on feedback and general discussion, only minor refinements to the proposed language for the equity goal were made. The equity goal is proposed as follows:

#### Proposed Refined Definition for the RTP

***Equity** – The responsibility of the plan to ensure one’s racial and/or ethnic identity cannot predict disparate outcomes experienced with the transportation system, particularly for people of color, and especially when it comes to access, safety, affordability, and health outcomes.*

Associated with the equity goal as part of the RTP are four equity-oriented objectives. In conducting a review and assessment of the existing RTP goals and objectives, in addition to feedback provided by the work group, a proposal to revise the equity objectives was presented in November. The

<sup>1</sup> See Attachment 1 “Summary of the 2014 RTP Policy Framework”. Within the summary, footnoted are specific comments provided by different members of MPAC, JPACT, and Metro Council in directing Metro staff to further focus on transportation safety, equity, and climate change. Relevant footnotes include: 3, 5, 6, and 7.

<sup>2</sup> See Attachment 2 “2014 RTP Goals and Objectives”.

proposal is included as Attachment 1. Only slight modifications to the proposed objectives have been made.

### **2018 Regional Transportation Plan – Performance Targets**

With the 2018 RTP entering its final year of development, to help facilitate discussions with stakeholders on RTP policies, including the 2018 RTP performance targets, Metro staff will introduce discussions jointly with the technical committees (TPAC-MTAC) beginning in January 2018. The joint MTAC-TPAC workshops are intended to be the forum for the discussions. Work group members are welcome to attend. Recognizing this transition, a joint memorandum provided by the 2018 RTP Performance work group lead and the Transportation Equity work group lead provide an outline of the next steps for the performance measures and targets discussion in 2018.

Nonetheless, through the work group meetings, members provided robust feedback on the RTP performance targets. Key themes Metro staff heard about the RTP performance targets overall were (in no particular order) include:

- Continue to be aspirational with the RTP performance targets;
- Be aggressive with the RTP performance targets in and for historically marginalized communities;
- Orient the RTP performance targets in a way which prioritizes eliminating the disparities gap experienced by communities of color with the transportation system;
  - Be intentional with how the performance target becomes oriented to prevent the possibility of manipulation to show better performance
- Have appropriate monitoring measures to better understand progress; and
- Recognize historically marginalized communities have pressing needs today and that the RTP performance targets will not advance equitable outcomes unless more aggressive actions are taken immediately.

In addition, there were a number of specific comments made towards individual RTP performance targets.

These themes will be communicated at the joint MTAC-TPAC workshops where the suite of the 2018 RTP performance targets will be discussed. Additionally, Metro staff will propose at the joint workshops revisions to the RTP performance targets which address the key outcomes of accessibility, affordability, safety, and health all be framed in a manner which would eliminate the disparate outcomes experienced by historically marginalized communities, particularly people of color. For Metro staff to reframe the RTP performance targets in this manner, this may mean the reporting of the progress of the 2018 RTP 10-year and financially constrained investment strategy may not be able to report progress towards the updated targets because it may require additional baseline work which will not be completed prior to the adoption of the 2018 RTP. Adjustments to the thresholds used to identify historically marginalized communities, particularly communities of color, will also be proposed at the joint workshops to better capture the direction to focus on race and better measure how the 10-year and long-range investment strategies are closing the disparities gap.

### **Discussion Questions**

1. Are there any other thoughts or feedback on the proposed RTP equity definition and equity goal which will be taken to the technical committees for discussion?



2. Are there any other key messages the work group desires for Metro staff to communicate to the technical committees when presenting the proposed equity definition, goal, and objectives?

**Next Steps**

Beginning in January 2018, Metro staff will introduce the revised RTP policy framework to MTAC and TPAC through the monthly joint workshops as part of a broader discussion of the 2018 RTP policy framework. Additionally, the performance target discussions will be brought forward in the same venue. The discussions had as part of the 2018 RTP transportation equity work group will be communicated to these discussions for the technical committees to deliberate and help propose how to bring the information forward for the elected officials. Following the discussions at TPAC, MTAC, MPAC, and JPACT, Metro staff will revise the RTP policy framework in time for a public comment period planned for June-August 2018. At that time, work group members, committee members, community and business leaders, and others interested in the development of the RTP are encouraged to provide additional feedback and input.

## Attachment 1 – Process to Identifying Proposed Equity Objectives Refinements

As a means to achieve the RTP goal, Ensure Equity, four identified objectives are currently a part of the RTP. These four objectives provide further direction on different areas transportation investments can aim to implement to achieve the equity goal. Additionally, throughout the RTP policy framework there are a number of RTP goals and objectives which have an association to the priority desired outcomes expressed by historically marginalized communities. The different RTP goals and objectives which are associated or directly related to equity are listed in Table X.

*Table 1. Equity Related RTP Goals and Objectives*

<b>Equity Related RTP Goals and Objectives</b>
Goal 1: Foster Vibrant Communities; Objective 1.3 Affordable Housing
Goal 2: Sustain Economic Competitiveness and Prosperity; Objective 2.5 Job Retention and Creation
Goal 3: Expand Transportation Choices; Objective 3.2 Vehicle Miles of Travel
Goal 3: Expand Transportation Choices; Objective 3.3 Equitable Access and Barrier Free Transportation
Goal 4: Emphasize Effective and Efficient Management of the Transportation System; Objective 4.4 Demand Management
Goal 5: Enhance Safety and Security; Objective 5.1. Operational and Public Safety
Goal 6: Promote Environmental Stewardship; Objective 6.1 Natural Environment
Goal 6: Promote Environmental Stewardship; Objective 6.2 Clean Air
Goal 7: Enhance Human Health; Objective 7.2 Active Living
Goal 7: Enhance Human Health; Objective 7.2 Pollution Impacts
Goal 8: Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.3 Regional and Community Transit Network and Access
Goal 8: Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.4 Active Transportation Network
Goal 9: Ensure Equity; Objective 9.1 Environmental Justice
Goal 9: Ensure Equity; Objective 9.2 Coordinated Human Services Transportation Needs
Goal 9: Ensure Equity; Objective 9.3 Housing Diversity
Goal 9: Ensure Equity; Objective 9.4 Transportation and Housing Costs
Goal 11: Deliver Accountability; Objective 11.1 Meaningful Input Opportunities

In a review of the RTP goals and objectives, Metro staff identified a number of redundancies across different goals and objectives. Additionally, as part of the review, Metro staff noted many of the objectives do not fit the definition of an objective (specific, measurable, achievable, realistic, and time-bound). Recognizing these issues, Metro staff is in the process of identifying updates to the RTP policy framework that will streamline the goals and objectives, as well as reshaping the objectives to make them specific, measurable, achievable, realistic, and time-bound. The purpose of the update is to have the objectives function as direction for transportation investments to make progress towards for achieving the goals set forth for the RTP.

To support the reshaping and revising of the RTP policy framework, as represented by the goals and objectives, several different exercises were undertaken to help shape the RTP policy framework proposal. These different exercises included the following:

- Gathered input through the transportation equity work group on the objectives specific to the RTP Ensure Equity goal;

- Conducted an internal screening to identify redundancies and propose collapsing of various RTP objectives; and
- Assessed the alignment of the transportation equity system evaluation measures to the RTP goals and objectives to ensure that analysis of the plan reflects and measures progress towards the objectives and the goals of the RTP.

The following sections illustrate a summary of the different exercises undertaken and the results to lead to the proposal.

#### Feedback from the Transportation Equity Work Group on Objectives for RTP Goal 9: Ensure Equity

At the June meeting, Metro staff held a discussion with the work group as to what resonated and what is missing from each of the Equity specific objectives. The purpose of the discussion was to help facilitate that objectives be shaped in way to achieve the equity goal. For each objective the main thematic comments were identified from the work group discussion specific to each objective and summarized below.

*Objective 9.1 Environmental Justice* – Ensure benefits and impacts of investments are equitably distributed by population demographics and geography.

Thematic feedback provided by the work group:

- Reorient this objective to be the “distribution” oriented objective
- Have it speak to the key themes of safety, access, affordability, and health
- But also include environmental benefits and address mitigating burdens

*Objective 9.2 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 Coordinated Transportation Plan.

Thematic feedback provided by the work group:

- Simplify to be more inclusive
- Reframe language to recognize racial disparities
- Cross over the language from other RTP goals and objectives which overlap

*Objective 9.3 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.

Thematic feedback provided by the work group:

- Link this objective to affordable housing and provide specific measurable language
- Jobs and housing balance
- Orient towards people and racial justice
- Potentially reframe/retitle objective to reflect “connection to opportunity”

*Objective 9.4 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.

Thematic feedback provided by the work group:

- Continue to reflect the housing and transportation relationship
- Broaden the objective to certain percent income spent on transportation rather than transportation and housing; meaning develop a specific target to transportation
- Reduce the combined expenditure percentage from 50% to 45% which is more recognized across the county

- Reflect jobs and housing balance; recognize the balance of closer in housing to jobs and commercial and lead to reduced transportation costs

Assessment of Transportation System Evaluation Measures and the RTP Policy Framework

One of several reasons for updating the RTP policy framework is to assess and align what is measured in the plan (i.e. the RTP system and equity evaluation) to the RTP goals and objectives to ensure what is being measured is informing whether or not the region is making progress towards achieving the RTP goals and objectives. As a result, Metro staff reviewed the five transportation equity system evaluation measures for the 2018 RTP. These include those two system evaluation measures which are being recommended to be developed by the 2023 RTP.

The assessment exercise looked to align the transportation equity system evaluation measures as closely as possible to the associated RTP goal and objective, recognizing some revisions and reshaping on both the RTP goal and objective and system evaluation measure may be needed.

*Table 2. 2018 RTP Transportation Equity System Evaluation Measures & RTP Policy Framework Links*

<b>Transportation Equity System Evaluation Measure</b>	<b>Associated RTP Goal and Objective</b>
Access to Jobs	<u>RTP Goal 2</u> : Sustain Economic Competitiveness and Prosperity; Objective 2.5 Job Retention and Creation
Access to Community Places	<u>RTP Goal 3</u> : Expand Transportation Choices; Objective 3.3 Equitable Access and Barrier Free Transportation
Access to Travel Options – System Connectivity and Completeness	<u>RTP Goal 3</u> : Expand Transportation Choices; Objective 3.3 Equitable Access and Barrier Free Transportation <u>RTP Goal 4</u> : Emphasize Effective and Efficient Management of the Transportation System: Objective 4.4 Demand Management <u>RTP Goal 8</u> : Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.4 Active Transportation Network <u>RTP Goal 9</u> : Ensure Equity; Objective 9.2 Coordinated Human Services Transportation Needs
Share of Safety Projects	<u>RTP Goal 5</u> : Enhance Safety and Security; Objective 5.1. Operational and Public Safety
Exposure to Non-Freeway Vehicle Miles Traveled/Crash Risk	<u>RTP Goal 3</u> : Expand Transportation Choices; Objective 3.2 Vehicle Miles of Travel <u>RTP Goal 5</u> : Enhance Safety and Security; Objective 5.1. Operational and Public Safety
Habitat Impact	<u>RTP Goal 6</u> : Promote Environmental Stewardship; Objective 6.1 Natural Environment
Affordability	<u>RTP Goal 4</u> : Emphasize Effective and Efficient Management of the Transportation System: Objective 4.4 Demand Management <u>RTP Goal 8</u> : Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.3 Regional and Community Transit Network and Access <u>RTP Goal 8</u> : Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.4 Active Transportation Network

	RTP Goal 9: Ensure Equity; Objective 9.4 Transportation and Housing Costs
Clean Air	RTP Goal 6: Promote Environmental Stewardship; Objective 6.2 Clean Air RTP Goal 7: Enhance Human Health; Objective 7.2 Pollution Impacts

Based on the assessment and alignment what has been observed is that each transportation equity system evaluation measure has one or more associated RTP goal(s) and objective(s). However, none of the RTP goal(s) and objective(s) associated with the system measures aligns perfectly with the system evaluation measure. There were also a handful of RTP goals and objectives which did not align to a specific transportation equity measure.

*Table 3. Outlier Equity Related RTP Goals and Objectives without a Transportation Equity System Evaluation Measure*

<b>Outlier of Equity Related RTP Goals and Objectives without a System Evaluation Measure</b>
Goal 1: Foster Vibrant Communities; Objective 1.3 Affordable Housing
Goal 7: Enhance Human Health; Objective 7.2 Active Living
Goal 9: Ensure Equity; Objective 9.1 Environmental Justice
Goal 9: Ensure Equity; Objective 9.3 Housing Diversity
Goal 11: Deliver Accountability; Objective 11.1 Meaningful Input Opportunities

These objectives in the RTP are considered critical to the success of the region’s transportation system. Metro staff proposes that these RTP objectives without an associated transportation equity system evaluation measure continue to move forward as part of the plan’s policy framework. As a result, Metro staff consulted with key planning department staff working in these areas to gather a sense of what recommendations would be appropriate for the long-range transportation plan and the region’s investment strategy to help advance the objective outcomes.

Internal Screening of the RTP Policy Framework

In the Metro staff screening of the RTP goals and objectives, the purpose is to revise and reframe the goals and objectives to reduce redundancies, better reflect the intended outcomes stated by the goal, and provide greater clarity for the purposes of policy direction. Recognizing the main outcomes staff looks to achieve with the RTP goals and objectives revision, Table 4 summarizes Metro staff proposed actions and recommendations for the 2018 RTP policy framework for the equity-related goals and objectives.

*Table 4. Summary of Proposed Actions and Recommendations for the 2018 RTP Policy Framework*

<b>Original 2014 RTP Goal &amp; Objective</b>	<b>Proposed Action</b>
Goal 1: Foster Vibrant Communities; Objective 1.3 Affordable Housing	Combine with Goal 9, Objective 9.3: Housing Diversity; revise using input from work group and from Metro equitable housing and transit-oriented development program staff.

Goal 2: Sustain Economic Competitiveness and Prosperity; Objective 2.5 Job Retention and Creation	Revise objective to reflect equitable construction industry workforce aspirations and outcomes. Create new objective to reflect Access to Middle and/or Low-Wage Jobs system evaluation measure. Relocate Goal 9, Objective 9.4 Housing and Transportation Costs; revise objective according to work group input.
Goal 3: Expand Transportation Choices; Objective 3.2 Vehicle Miles of Travel	Modify and reference other aligned goals and objectives.
Goal 3: Expand Transportation Choices; Objective 3.3 Equitable Access and Barrier Free Transportation	Combined with Goal 9, Objective 9.2: Coordinated Human Services Transportation Needs;
Goal 4: Emphasize Effective and Efficient Management of the Transportation System: Objective 4.4 Demand Management	Revise to incorporate equity element.
Goal 5: Enhance Safety and Security; Objective 5.1. Operational and Public Safety	Revise and reframe to focus specifically on transportation safety and supporting Vision Zero framework recommended by the Safety work group and Metro staff.
Goal 6: Promote Environmental Stewardship; Objective 6.1 Natural Environment	Revise to support other related goals and objectives.
Goal 6: Promote Environmental Stewardship; Objective 6.2 Clean Air	Combine with Goal 7, Objective 7.2 Pollution Impacts; revise according to work group input and develop work program for implementation as part of the 2023 RTP
Goal 7: Enhance Human Health; Objective 7.2 Active Living	Revise to support other related goals and objectives.
Goal 7: Enhance Human Health; Objective 7.2 Pollution Impacts	See Goal 6, Objective 6.2 Clean Air
Goal 8: Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.3 Regional and Community Transit Network and Access	Incorporate Goal 8 into other RTP aligned goals and revise to advance the Climate Smart objectives (included as Goal 8) and other related RTP goals.
Goal 8: Demonstrate Leadership on Reducing Greenhouse Gas Emissions; Objective 8.4 Active Transportation Network	See Goal 8, Objective 8.3 Regional and Community Transit Network and Access
Goal 9: Ensure Equity; Objective 9.1 Environmental Justice	Revise objective to reflect work group input and align to on-going transportation equity assessment of transportation investment strategy
Goal 9: Ensure Equity; Objective 9.2 Coordinated Human Services Transportation Needs	See Goal 3, Objective 3.3 Equitable Access and Barrier Free Transportation
Goal 9: Ensure Equity; Objective 9.3 Housing Diversity	See Goal 1, Objective 1.3 Affordable Housing

Goal 9: Ensure Equity; Objective 9.4 Transportation and Housing Costs	See Goal 2; moved because it seemed better aligned to Goal 2; new objective created
Goal 11: Deliver Accountability; Objective 11.1 Meaningful Input Opportunities	Revise according to work group input (non-specific) and consultation with Metro communications staff.

## **Regional Transportation Plan Policy Framework – Proposed Revised Equity Goals and Objectives**

Metro proposes the following revised RTP goals and objectives based on the previously described review of the RTP policy framework, equity work group input, and the desire to better align the RTP goals and objectives to the outcomes reflected in transportation equity system evaluation measures. Metro staff requests feedback from the transportation equity work group on the proposed revisions that follow. The adopted 2014 RTP goals and objectives are provided for reference in Attachment 2.

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

*Objective 1.3 Affordable Housing and Transportation Coordination* – Coordinate the investment of affordable transportation options to support the preservation and production of affordable housing in the region by increasing the number, percentage and diversity of regulated affordable housing units within walking distance of frequent service transit and other affordable transportation options.

### Goal 2: Sustain Economic Competitiveness and Prosperity

*Objective 2.5 Construction Trade Job Creation and Retention* – Utilize the public investment of regional transportation projects to support family-wage construction job opportunities and growing a diverse construction workforce that better reflects the demographics of the community.

**NEW** *Objective 2.X Access to Jobs and Talent* – Increase the number, percentage, and types (i.e. wage, other) of jobs the region’s residents can reach by transit, walking, and bicycling with a focus on increasing job access for historically marginalized communities.

*Objective 2.X Transportation and Housing Costs* – Reduce the share of lower-income households in the region spending more than 45 percent of household income on housing and transportation combined and aim to maintain household transportation costs at 15% or less particularly for lower-income households of color and renters of color.

### Goal 3: Expand Transportation Choices

*Objective 3.3 Equitable Access and Barrier Free Transportation* – Increase affordable and equitable access to travel choices that serve the needs of all people and businesses, particularly for people of color, people in poverty, youth, older adults and people with disabilities, to connect with jobs, education, and community places.

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

*Objective 4.4 Demand Management* – TBD with input from Metro RTO staff and strategic plan.

### Goal 5: Increase Safety and Security

*Objective 5.1 Operational and Public Transportation Safety* – Eliminate fatal and serious injury crashes for all modes of travel.

Goal 6: Promote Environmental Stewardship

*Objective 6.1 Natural Environment and Cultural Resources* – Avoid or minimize undesirable impacts on fish and wildlife habitat conservation areas, wildlife corridors, significant flora, open spaces, protected water features, and cultural resources identified through planning process.

Goal 7: Enhance Public Health

*Objective 7.2 Pollution Impacts* – Reduce transportation-related vehicle emissions to improve air quality and to reduce negative health effects, particularly for historically marginalized communities who often experience greater exposure to air pollution.

Goal 9: Advance Equity

*Objective 9.1 Desired Outcomes to Advance Equity* – Make progress towards the desired outcomes historically marginalized communities, particularly those of color, have expressed for the regional transportation system by evaluating regional transportation plans, programs, and investments effect in making progress.

**NEW** *Objective 9.2: Reduce Racial Disparities* – Use transportation investments to reduce racial disparities in access – for both physical barriers and socioeconomic – to affordable travel options to jobs, education, services, recreation, and social and cultural activities.

Goal 11: Ensure Transparency and Accountability

*Objective 11.1 Meaningful Input Opportunities* – TBD with input from Metro communications staff input.



# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: Thursday, January 11, 2018  
To: Transportation Equity Work Group  
From: John Mermin, Performance Work Group Lead  
Grace Cho, Transportation Equity Work Group Lead  
Subject: 2018 RTP Performance Targets & MAP-21 Performance Monitoring, Target Setting and Reporting Next Steps

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## **Background**

At the September 2017 Transportation Equity work group meeting, Metro staff presented an overview of the existing RTP performance targets and presented staff analysis on potential refinements to the existing targets to better align the RTP performance targets to the newly developed transportation equity evaluation measures. The purpose of the exercise was to support longer-term performance evaluation and monitoring. At the September and November work group meetings, members provided robust feedback on the Metro staff proposal for the RTP performance targets.

Additionally, At the October 2017 Performance work group meeting, Metro staff presented various federal and state regulations relating to monitoring, target setting and reporting. At the November 8, 2017 work group meeting Staff presented recommendations for streamlining the region's response to federal and state requirements. This memo summarizes next steps for this work.

## **Next Steps**

Recognizing there are two closely aligned performance target setting efforts which need to be completed as part of the 2018 RTP (federally mandated prescribed performance targets and refinements to the RTP performance targets), Metro will utilize TPAC-MTAC joint workshops at that time to make recommendations regarding target setting, monitoring and reporting.

The feedback provided as part of the work group discussion in September 2017 in combination feedback provided at the November 2017 work group meeting are being combined as a summary to bring forward to the discussions pertaining to RTP performance targeting setting at the TPAC-MTAC joint workshops in order to communicate the input by the work group. In addition ODOT is in process of compiling and verifying the data to support target-setting by ODOT and Oregon's MPOs for the newly federally mandated performance targets. Data is expected to be available in Spring 2018.

The Transportation Equity work group members are highly encouraged to participate in these workshops. The work of the joint TPAC-MTAC workshops in 2018 represents a shift to a new phase of the 2018 RTP where data discussed with RTP workgroups will be further discussed and packaged into findings for regional elected leaders to consider as they approach adoption of the 2018 RTP.

Metro staff thanks the Transportation Equity workgroup members for their time and contributions to date and encourage members to stay engaged in helping communicate results to policymakers and the public in 2018.

# 2018 RTP UPDATE | 2018 Council and Regional Advisory Committees Briefings

(dates are subject to change)

Month	Who	When	What
January	TPAC/MTAC workshop	1/3	<ul style="list-style-type: none"> <li>• Draft RTX policy language development</li> <li>• Draft RTO Strategy discussion</li> <li>• Technical review draft of freight strategy</li> </ul>
	TPAC	1/5	<ul style="list-style-type: none"> <li>• 2018 RTP engagement activities and RLF #4</li> <li>• RTP Schedule and Findings Update</li> </ul>
	Comment opportunity	1/16 to 2/12	<ul style="list-style-type: none"> <li>• 30-day on-line public comment opportunity on draft RTP investment priorities</li> </ul>
	TEA work group	1/11	<ul style="list-style-type: none"> <li>• Updated draft Equity definition and policy framework</li> <li>• Equity analysis findings</li> <li>• Work group wrap-up</li> </ul>
	MTAC	1/17	<ul style="list-style-type: none"> <li>• Draft RTX policies</li> </ul>
	JPACT	1/18	<ul style="list-style-type: none"> <li>• Update on Technical Evaluation and Schedule for Finalizing the 2018 RTP</li> <li>• 2018 RTP Engagement and Regional Leadership Forum #4</li> </ul>
	Community leaders forum	1/19	<ul style="list-style-type: none"> <li>• RTP Evaluation Findings</li> <li>• Community response on draft RTP investment priorities</li> </ul>
	MPAC	1/24	<ul style="list-style-type: none"> <li>• Update on Technical Evaluation and Schedule for Finalizing the 2018 RTP</li> <li>• 2018 RTP Engagement and Regional Leadership Forum #4</li> </ul>
	February	TPAC	2/2
Metro Council		2/13	<ul style="list-style-type: none"> <li>• RTP Evaluation Findings discussion guide and update on RLF #4</li> <li>• Draft RTX policies</li> </ul>
MPAC		2/14	<ul style="list-style-type: none"> <li>• RTP Evaluation Findings discussion guide and update on RLF #4</li> </ul>
JPACT		2/15	<ul style="list-style-type: none"> <li>• RTP Evaluation Findings discussion guide and update on RLF #4</li> <li>• Draft RTX policies</li> </ul>
Metro Council		2/27	<ul style="list-style-type: none"> <li>• Draft Safety Strategy</li> </ul>
MTAC		2/21	<ul style="list-style-type: none"> <li>• Draft RTP Policy Chapter Changes</li> </ul>
MPAC		2/28	<ul style="list-style-type: none"> <li>• Draft RTX policies</li> </ul>
March	Regional Leadership Forum #4	3/2	<ul style="list-style-type: none"> <li>• Shaping the final RTP                             <ul style="list-style-type: none"> <li>○ System evaluation and equity analysis findings</li> <li>○ Public feedback on draft RTP investment priorities</li> <li>○ Community leaders' feedback on draft RTP investment priorities</li> </ul> </li> </ul>
	TPAC/MTAC workshop	3/7	<ul style="list-style-type: none"> <li>• Pilot project evaluation criteria refinement</li> <li>• Technical review draft of transit strategy</li> </ul>
	TPAC	3/9	<ul style="list-style-type: none"> <li>• RLF #4 Takeaways and 2018 RTP investment priorities</li> <li>• Draft RTP Implementation Chapter</li> </ul>
	Metro Council	3/13	<ul style="list-style-type: none"> <li>• Draft RTP Policy Chapter Changes</li> <li>• Pilot project evaluation findings</li> </ul>
	MPAC	3/14	<ul style="list-style-type: none"> <li>• Draft Safety Strategy</li> <li>• RLF #4 Takeaways and 2018 RTP investment priorities – <b>endorsement requested</b></li> </ul>
	JPACT	3/15	<ul style="list-style-type: none"> <li>• Draft Safety Strategy</li> <li>• RLF #4 Takeaways and 2018 RTP investment priorities – <b>endorsement requested</b></li> </ul>
	Metro Council	3/20	<ul style="list-style-type: none"> <li>• RLF #4 Takeaways and 2018 RTP investment priorities – <b>direction</b></li> </ul>

# 2018 RTP UPDATE | 2018 Council and Regional Advisory Committees Briefings

(dates are subject to change)

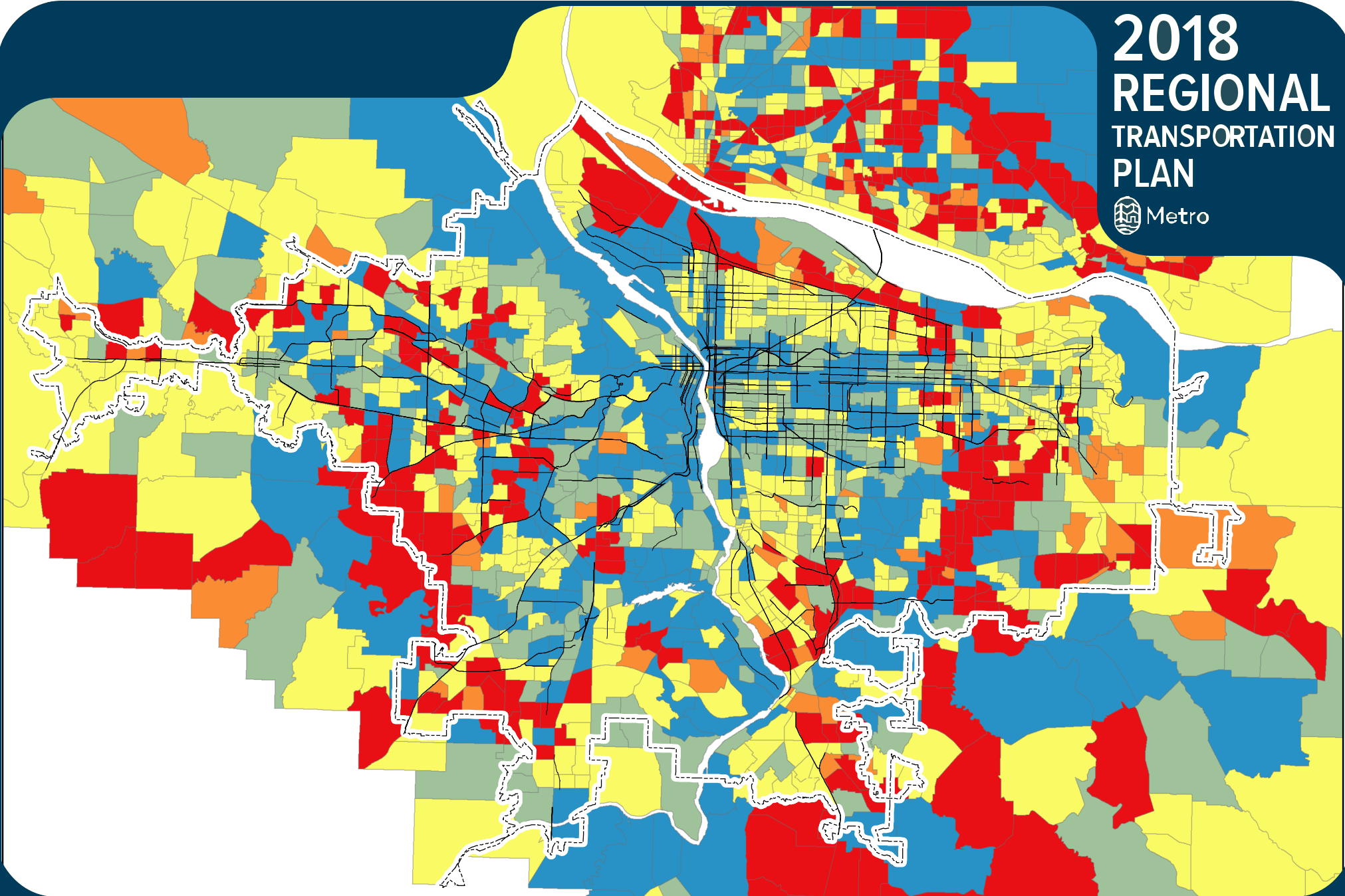
Month	Who	When	What
			<b>requested</b>
	MTAC	3/21	<ul style="list-style-type: none"> <li>Draft RTP Implementation Chapter</li> </ul>
April	TPAC/MTAC workshop	4/4	<ul style="list-style-type: none"> <li>Transportation Resiliency and Emergency Routes</li> <li>MAP-21 Performance Monitoring, Target Setting and Reporting</li> <li>Technical review draft RTP</li> </ul>
	TPAC	4/6	<ul style="list-style-type: none"> <li>Refining 2018 RTP project priorities (jurisdictional updates due by April 29)</li> <li>Draft Transit Strategy</li> <li>Technical review draft RTX Strategies and Policies</li> </ul>
	Metro Council	4/10	<ul style="list-style-type: none"> <li>Draft Transit Strategy</li> <li>Draft Freight Strategy</li> </ul>
	MTAC	4/18	<ul style="list-style-type: none"> <li>Draft Transit Strategy</li> <li>Technical review draft RTX Strategies and Policies</li> </ul>
	JPACT	4/19	<ul style="list-style-type: none"> <li>Draft Freight Strategy</li> </ul>
	MPAC	4/25	<ul style="list-style-type: none"> <li>Draft Freight Strategy</li> </ul>
May	Metro Council	5/1	<ul style="list-style-type: none"> <li>Draft RTP (focus on policies and implementation)</li> <li>Draft RTX Strategies and Policies</li> </ul>
	TPAC/MTAC workshop	5/2	<ul style="list-style-type: none"> <li>Designing Livable Streets</li> </ul>
	TPAC	5/4	<ul style="list-style-type: none"> <li>Draft RTP</li> </ul>
	MPAC	5/9	<ul style="list-style-type: none"> <li>Draft Transit Strategy</li> <li>Draft RTX Strategies and Policies</li> </ul>
	MTAC	5/16	<ul style="list-style-type: none"> <li>Draft RTP</li> </ul>
	JPACT	5/17	<ul style="list-style-type: none"> <li>Draft RTP (focus on policies and implementation)</li> <li>Draft Transit Strategy</li> <li>Draft RTX Strategies and Policies</li> </ul>
	MPAC	5/23	<ul style="list-style-type: none"> <li>Draft RTP (focus on policies and implementation)</li> </ul>
June	TPAC	6/1	<ul style="list-style-type: none"> <li>Draft RTP, if needed</li> <li>RTP Livable Streets and Design Classification Map Update</li> </ul>
	MTAC	6/20	<ul style="list-style-type: none"> <li>Draft RTP, if needed</li> <li>RTP Livable Streets and Design Classification Map Update</li> </ul>
	Metro Council	6/21	<ul style="list-style-type: none"> <li><b>Direction to staff</b> to release Draft 2018 RTP and draft strategies for freight, transit, and safety for public review</li> </ul>
	Comment period begins	6/29	<ul style="list-style-type: none"> <li>45-day public comment period on Draft 2018 RTP and draft strategies for freight, transit, and safety, including public hearings (June 29 to <b>Aug. 13 or 15</b>)</li> </ul>
July			<ul style="list-style-type: none"> <li>45-day public comment period continues, including public hearings and consultation with tribes and federal and state agencies</li> </ul>
August	TPAC	8/3	<ul style="list-style-type: none"> <li>Discuss public comments and frame policy issues for JPACT discussion</li> </ul>
	Comment opportunity ends	<b>8/13 or 8/15</b>	<ul style="list-style-type: none"> <li>45-day public comment period ends</li> </ul>
	MTAC	8/15	<ul style="list-style-type: none"> <li>Discuss public comments and frame policy issues for MPAC discussion</li> </ul>
September	TPAC	9/7	<ul style="list-style-type: none"> <li>Discuss public comments and policy issues identified for JPACT</li> </ul>

## 2018 RTP UPDATE | 2018 Council and Regional Advisory Committees Briefings

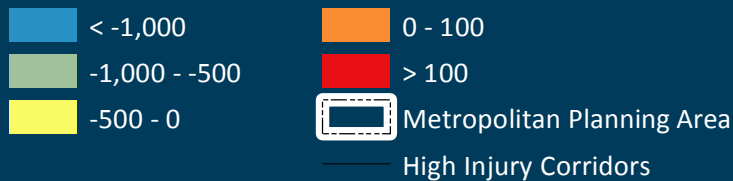
(dates are subject to change)

Month	Who	When	What
			discussion – <b>Recommendation to JPACT</b>
	MTAC	9/12	<ul style="list-style-type: none"> <li>Discuss public comments and policy issues identified for MPAC discussion – <b>Recommendation to MPAC</b></li> </ul>
	Metro Council	9/18	<ul style="list-style-type: none"> <li>Discuss public comments and policy issues identified for JPACT and MPAC discussion</li> </ul>
	JPACT	9/20	<ul style="list-style-type: none"> <li>Discuss TPAC recommendation</li> </ul>
	MPAC	9/26	<ul style="list-style-type: none"> <li>Discuss MTAC recommendation</li> </ul>
<b>October</b>	MPAC	10/10	<ul style="list-style-type: none"> <li><b>Recommendation to Council</b> on adoption of 2018 RTP and strategies for freight, transit, and safety</li> </ul>
	JPACT	10/18	<ul style="list-style-type: none"> <li><b>Recommendation to Council</b> on adoption of 2018 RTP and strategies for freight, transit, and safety</li> </ul>
<b>November</b>	Metro Council	11/6	<ul style="list-style-type: none"> <li>Discuss JPACT and MPAC recommendations and provide direction to staff on finalizing adoption package for Council consideration</li> </ul>
<b>December</b>	Metro Council	12/6	<ul style="list-style-type: none"> <li><b>Consider final action</b> on 2018 RTP (by Ordinance 18-XXXX) and strategies for freight, transit, and safety (by Resolution)</li> </ul>

# 2018 REGIONAL TRANSPORTATION PLAN

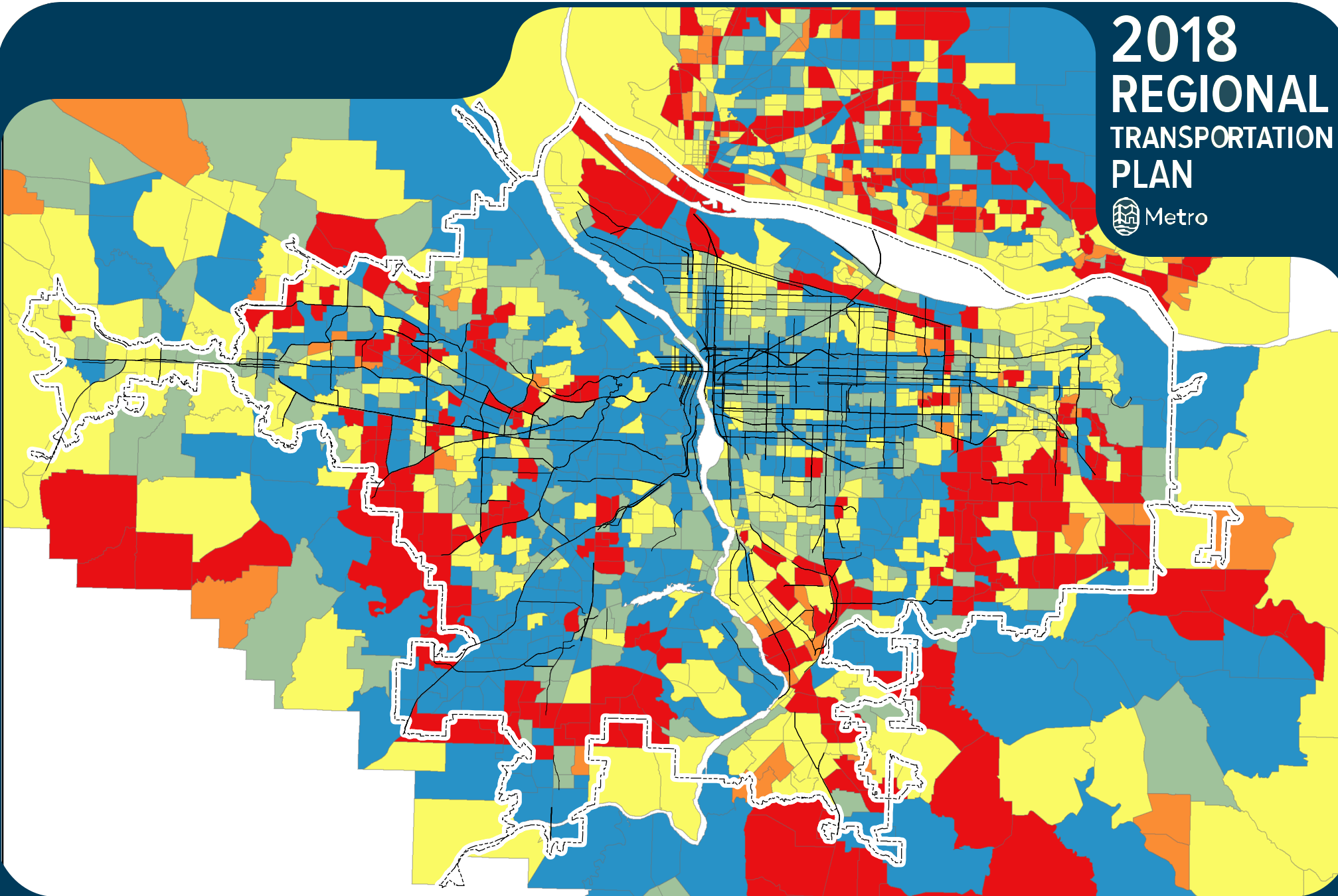


**Average Weekday Non-Freeway VMT  
Change: 2040 No Build to  
2040 Financially Constrained**

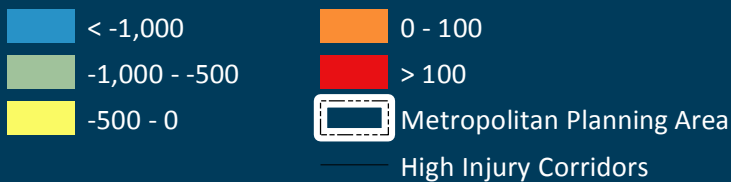


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# 2018 REGIONAL TRANSPORTATION PLAN

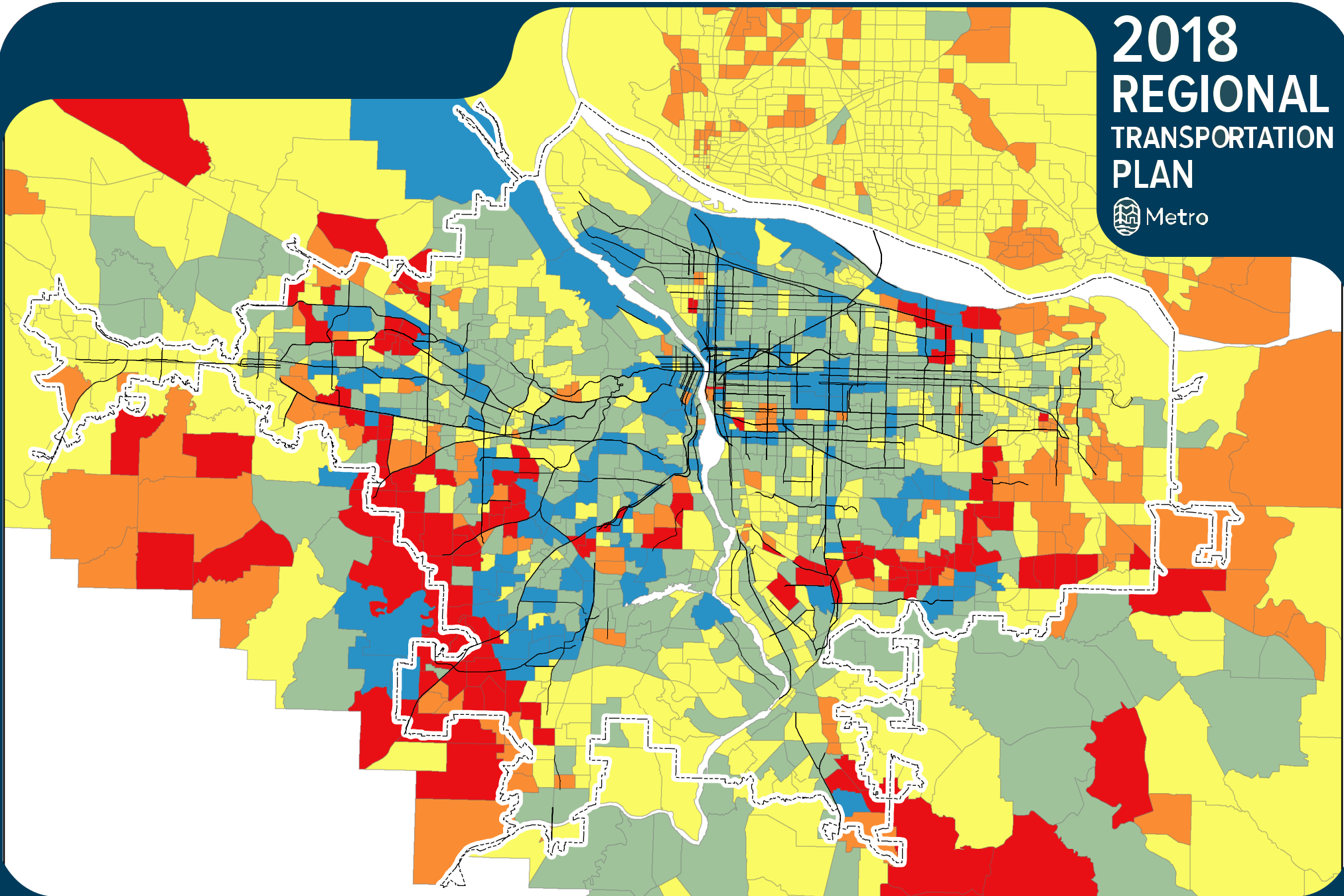


**Average Weekday Non-Freeway VMT**  
**Chance: 2040 No Build to 2040 Strategic**



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# 2018 REGIONAL TRANSPORTATION PLAN



**Average Weekday Non-Freeway VMT  
Change: 2027 No Build to  
2027 Financially Constrained**

< -500

-500 - -100

-100 - 0

0 - 100

> 100

Metropolitan Planning Area

High Injury Corridors

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## Exposure to Vehicle Miles Traveled (VMT) and Crash Risk

### Evaluation Measure Summary

To look at the amount of non-freeway vehicle miles traveled (VMT) exposure region wide and in historically marginalized communities (in aggregate), and understand if the 2018 RTP investment strategies are further reducing vehicle miles traveled exposure, which is correlated to crashes, for historically marginalized communities.

As follow up to the discussions on the initial findings from the 2018 RTP transportation equity evaluation, the completion of the 2027 No-Build scenario better places in context how well the 2018 RTP 10-year investment strategy performs in reducing Exposure to Non-Freeway Vehicle Miles Traveled (VMT) and subsequently crash risk. The following narrative discusses the 2018 RTP 10-year investment strategy relative to the No-Build. As a reminder, the results of the equity evaluation are being framed relative to the region and therefore the results provide a sense of how well the investment strategy performs in historically marginalized communities.

### Preliminary Findings

- The 2018 RTP 10-year investment strategy demonstrates an overall increase in VMT across all three 2018 RTP investment strategies, due to the nature of population growth and economic activity.
  - In general, this means exposure to non-freeway VMT will increase overtime.
- While overall VMT is increasing, the 2018 RTP 10-year investment strategy, once controlled for population and employment, sees a slight decrease in non-freeway VMT exposure in historically marginalized communities, communities of color, and areas where there is a greater density of racial diversity, poverty, and language isolation, compared to the region overall.
- While not the focus of this portion of the reporting, a similar pattern in decreased exposure to non-freeway VMT compared to the region is projected in historically marginalized communities, communities of color, and where there is a greater density of racial diversity, poverty, and language isolation among the 2018 RTP financially constrained and strategic (2018-2040) investment strategies.
  - This result demonstrates the multimodal profile of the 2018 RTP financially constrained and strategic investment strategies, with a greater investment level, is reducing non-freeway VMT exposure.

2018-2027 No Build Region wide VMT	2018-2027 Constrained RTP Region wide VMT	Difference in VMT	Percent Difference
		(RTP – Base Year)	
25,759,338	25,579,276	-180,062	-0.7%
2018-2027 No Build HMC VMT	2018-2027 Constrained RTP HMC VMT	Difference in VMT	Percent Difference
		(RTP – HMC Base Year)	
17,117,839	16,968,580	-149,259	-0.9%
2018-2027 No Build FHMC VMT	2018-2027 Constrained RTP FHMC VMT	Difference in VMT	Percent Difference



		(RTP – FHMC Base Year)	
10,041,224	9,965,249	-75,975	-0.8%
2018-2027 No Build POC VMT	2018-2027 Constrained RTP POC VMT	Difference in VMT	Percent Difference
		(RTP – POC Base Year)	
10,679,460	10,580,265	-99,195	-0.9%

*Discussion Key Observations and Thoughts*

In looking at exposure to non-freeway VMT evaluation measure, in general exposure to non-freeway VMT is expected to grow in the future due to population growth and economic activity. The increased number of people getting to-and-from jobs, shops, and other services indicates more traveling activity in whether by driving, transiting, bicycling, or walking. In general, compared to 2015, where the project miles of non-freeway VMT is just under 21.5 million, even without any further investment in the regional transportation system, non-freeway VMT is projected to grow to 25.7 million by 2027 and just under 30 million miles by 2040.

Nonetheless, with the mix of multimodal projects comprising the three 2018 RTP transportation investment strategies, what is projected to occur is a slight decrease in non-freeway VMT region wide and ultimately exposure to one of the key factors to crashes. The projected result demonstrates the investment strategies are having an effect in reducing the amount of non-freeway VMT exposure region wide. What is projected by 2027 with the 2018 RTP investment strategy is a .7% decrease in non-freeway VMT, which may seem small, but translates into a decrease of 180,000 miles. What is also a positive trajectory is that historically marginalized communities, communities of color, and areas with a greater density of racial and ethnic diversity, poverty, and language isolation see a greater decrease compared to the region of non-freeway VMT exposure. While the additional decreases in historically marginalized communities range in the .1-.2%, this translates to a decrease in 75,000 – 149,000 miles. So while VMT is expected to grow by 19.3% by 2027 due to economic activity and population growth, the 2018 RTP investment strategy is working to reduce non-freeway VMT region wide and the greater rate projected in historically marginalized communities show the investment strategies are working to reduce the exposure of non-freeway VMT to communities which are vulnerable and already greatly affected by traffic collisions.

In addition, while the specific the focus of this updated memorandum is to highlight how the 2018 RTP 10-year investment strategy performs in light of additional analytical work, what can now be further understood is that the long-range 2018 RTP investment strategies (i.e. the 2018-2040 RTP financially constrained and strategic) both further decrease non-freeway VMT exposure region wide and in historically marginalized communities. What the evaluation results indicate is that a greater level of multimodal investment further reduces non-freeway VMT exposure and subsequently one of the bigger factors correlated with crashes. It is also a positive sign the different historically marginalized community lenses saw decreases in non-freeway VMT exposure.

Lastly, while the projected results of the exposure to non-freeway VMT evaluation measure shows a positive trajectory of the investment strategies helping to reduce VMT, it should also be recognized that with the increasing VMT occurring overall because of population growth and economic activity, the region should continue to pursue different strategies which reduce VMT. Reducing VMT will facilitate the reduced exposure to factors which contribute to crashes, but also the multiple other outcomes connected to VMT, such as air pollution and greenhouse gas emissions.



# Meeting minutes

**Meeting:** 2018 RTP Transportation Equity Work Group Meeting #10  
**Date:** Thursday, November 30, 2017  
**Time:** 1:00 p.m. to 4:00 p.m.  
**Place:** Metro Regional Center, Room 501

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## Attendees

Aaron Golub  
Jay Higgins  
Steve Williams  
Cora Potter  
Talia Jacobsen  
Stephanie Caldera  
Kari Schlosshauer  
Brandon Haggerty  
Dan Rutzick  
Chris ..  
Jessica Berry  
Sarah Armitage  
Steve Nakana  
Zan Gibbs  
Dyami Valentine

## Affiliation

Portland State University  
City of Gresham  
Clackamas County  
Ride Connection  
ODOT Region 1  
Oregon Department of Environmental Quality  
Safe Routes to School National Partnership  
Multnomah County Public Health  
City of Hillsboro  
  
Multnomah County – Land Use and Transportation  
Oregon Department of Environmental Quality  
Port of Portland  
PBOT  
Washington County

## Staff Present

Grace Cho  
Cliff Higgins  
Jamie Snook  
Ted Leybold  
Lake McTighe

## Welcome and Introductions

Mr. Cliff Higgins and Ms. Grace Cho called the meeting to order. Staff and workgroup attendees introduced themselves. Ms. Cho then reviewed the meeting's agenda.

## Partner Updates

Mr. Higgins asked workgroup members to provide updates from their organizations.

Mr. Steve Nakana from the Port of Portland announced that the Port of Portland will be adopting an equity policy by early 2018 to help steer the agency in considering how several major upcoming capital investments by the Port may help to advance equity.

Ms. Cora Potter gave an update on HB2017 implementation. She explained issues pertaining to HB 2017 funding directed towards transit service. She mentioned there is legislative clarification being undertaken because TriMet's expressed intention for part of the use of its portion of the HB2017

operating revenue is to develop an adult low-income fare program. There is legislative interpretation of the transportation bill that in creating a low-income fare there is a benefit being borne to light rail, which is a strictly prohibited use of HB2017 funding for transit.

Ms. Stephanie Caldera from DEQ provided updates on the Volkswagen settlement agreement activities.

Ms. Talia Jacobson from ODOT said that ODOT is currently undertaking efforts to design a congestion pricing program for I-5 and I-205. She said most of the work will be done in the next six months.

### **2018 RTP Transportation Equity Analysis Draft Results**

Ms. Grace Cho presented the draft results from the 2018 RTP equity analysis and sought feedback from the workgroup. She briefly summarized the eight equity measures and three investment strategies evaluated in the 2018 RTP. She then went in detail in each performance measure and discussed the preliminary results and finding.

Before launching into the discussion of the individual performance measure, Ms. Cho provided some brief context about the 2018 RTP transportation equity analysis. She explained the initial results and findings are based on how well historically marginalized communities are performing relative to the region with the implemented investment strategy. She provided this distinction to explain that while certain overall patterns may be seen, for example an increased access to jobs within a reasonable commute, the desired trend is to see historically marginalized communities perform better than the region as a result of the investments. This is in recognition of disparities experienced by historically marginalized communities.

#### **Measure #8: Access to Community Places**

Ms. Cho discussed the broad sense of findings for the Access to Community Places. She said the initial results tend to show a pattern that in general historically marginalized communities tend to see an increase in access to community places in the 10-year investment strategy across different modes, but by 2040, the increase in access gets limited. She also noted some different limitations of the bicycle and pedestrian results coming from the travel demand model and the limitation of projecting the locations of future community places like grocery stores and libraries.

#### **Measure#7: Access to Middle- and Low-Wage Jobs**

Similarly to the Access to Community Places, in general getting to middle and low-wage jobs is also getting a little easier because the region is projected to gain a lot more jobs and invested a lot in transit service, but traffic will be an issue at rush hour by 2040 because of growth. She mentioned in general the first 10-year investment strategy performs better for historically marginalized communities by mode.

Workgroup members sought clarity on the particular parameters of model, and why there was a big change in walk/bike access. Ms. Cho responded to the issue explaining how for biking and walking, improvements in the system may result in people traveling out of direction or for slightly longer to get to a better bicycling and walking facility.

Mr. Aaron Golub asked what the percent's are compared against. Ms. Cho responded that the 2040 strategic investment strategy is compared against the 2040 no-build, and the others are compared against the 2015 base year.

#### Measure #6: Access to Travel Options – Connectivity and Completeness

Ms. Cho discussed for the access to travel options performance measure, the measure is focused on looking at the active transportation network completeness and connectivity. In general what is seen across the investment strategy is that more of the active transportation network is getting completed and at a greater rate in historically marginalized communities. However, even under the strategic investment strategy, the region is falling short of building out the planned regional active transportation network. At the time of the work group meeting, only a part of the connectivity analysis was completed, but a similar pattern of bicycle connectivity is being shown as well. Finally, Ms. Cho noted while the investment strategies are directing funding in historically marginalized communities to complete the planned active transportation network, more of the active transportation investment is slated for the outer years of the 2018 RTP (2028-2040). Ultimately, the region is making progress towards building the regional active transportation system for people who walk and bicycle, and furthering that in historically marginalized communities, but more active transportation investments is slated out further.

Mr. Dyami Valentine raised an issue with the active transportation investment table. He said that active transportation investments come from multiple sources and that many roadway projects have active transportation elements.

Mr. Dan Rutzick asked if we can expect all the investments made under 2040 financially constrained investment scenario to get completed. Ms. Cho said the results show the comprehensive impact of these investments.

#### Measure #5: Non-Freeway Vehicle Miles Traveled Exposure

Ms. Cho noted the next two transportation equity evaluation measures pertain to transportation safety. In the measure which looked at exposure to non-freeway vehicle miles traveled (VMT), Ms. Cho explained that regardless of the investment strategy the region will see a greater amount of VMT overall because of population and employment growth. In general there is a greater increase in VMT in certain historically marginalized communities (i.e. focused historically marginalized communities and communities of color) than the region with the 10-year investment strategy, but VMT exposure will decrease in historically marginalized communities by 2040 with a full suite of investment. Ms. Cho noted that a 2027 NB modeled scenario would help clarify the results.

#### Measure #4: Share of Safety Projects

Ms. Cho walked through the results of the share of safety projects performance measures. What is seen is that investment in safety is being focused in vulnerable communities and addressing safety issues on high injury corridors in these communities. Ms. Cho noted there is not a disproportionate impact when it comes to safety dollars. Ms. Cho also explained that the analysis only took into account 53 projects identified “safety” because these projects had a primary purpose to reduce crashes or reduce crashes that result in fatalities or serious injuries. She mentioned there are a number of projects which identify a secondary purpose to reduce crashes and that the analysis may not be fully accounting for safety investment.

Mr. Dan Rutzick asked the workgroup if the results of the safety model resonate with others. Others talked about how safety projects are front-loaded as opposed to being in the out years.

Ms. Lake McTighe said that they anticipate more safety projects than the 53 in the RTP list, and raised a higher level question about whether any project on a high-injury corridor is a safety project. Mr. Steve

Williams said that all of the Clackamas County projects submitted had a primary or secondary “safety” classification.

#### Measure #17: Habitat

Ms. Cho walked through the final transportation equity evaluation measure for the 2018 RTP. She noted with habitat impact that more roadway investments overlap with habitat in marginalized communities at a higher rate than the overall region, which means the region will need to keep an eye on these projects as they progress from planning into design and implementation to ensure there is not a disproportionate impact.

Follow the presentation of the 2018 RTP transportation equity evaluation preliminary results, Ms. Cho provided a brief summary of what staff felt was learned after the transportation equity evaluation. These were the following

- No disproportionate impact in share of safety projects in HMCs.
- Potential disproportionate impact to high value habitat in HMCs.
  - Need further monitoring.
- Population and job growth means more congestion, which will impact accessibility by transit for HMCs.
- Increase VMT will pose safety-related risk.
- More of the active transportation network is getting completed.
  - But investment is conservative in the first 10 years.

The technical aspects learned were:

- No build for the 2027 constrained necessary to understand jobs and VMT results.
- Accessibility by bicycling and walking need further refinement.
- Evaluation is limited by the data received.
- Simplification is key.

Following the summary, Ms. Cho asked the work group to mull over several questions. She had the work groups break into small groups to walk through the discussion. Prior to breaking into small groups, work group members asked the following technical questions.

Mr. Steve Williams asked what it means that people of historically marginalized communities have faced historical marginalization. Mr. Cliff Higgins and Ms. Cho said that a specific gap analysis wasn't performed for this analysis, but that national and anecdotal evidence confirms the disparities gap. Several work group members said that there is plenty of data and information for the Portland area about historical marginalization of communities of color. Steve wants to know specifically about whether transportation investments in Clackamas County have historically contributed to this issue. Metro staff said that this will be addressed.

Mr. Jay Higgins sought clarification about the information in table #8.

Mr. Brandon Haggerty was unclear about the units in table #4. Grace clarified that it speaks the number of places accessible, compared to the base year.

Ms. Talia Jacobsen asked what kinds of projects got categorized as “roadway investments”. Ms. Cho said it was whatever each jurisdiction submitted.

Mr. Aaron Golub expressed doubts about simplifying the results. He said that these tables are problematic for public officials. He also wanted to see raw numbers for the accessibility evaluation measures. Ms. Cho noted a sheet with the raw numbers was prepared for the small group discussions.

Ms. Sarah Armitage asked about the exposure to VMT and how it relates to exposure to air pollution. Ms. Cho said that is something that Metro hasn’t been able to evaluate at a smaller scale, but desires to work with DEQ on finding a way to conduct this assessment.

### **Break into small groups for discussion**

Ms. Cho then asked workgroup members to break up into small groups to discuss the following questions:

- Thoughts/reactions to 2018 RTP TE Evaluation results?
  - Do the results seem to ring true to your experiences? Are there concerns not reflected in the results?
- What messages and takeaways should staff communicate?
- When results are at pace or slightly greater than the region, is there a disproportionate impact (is it good enough)?

Around 3:00, Cliff asked each group to summarize their discussions.

The first group, facilitated by Ms. McTighe, discussed the access to jobs evaluation measure and needing more information about what a weighted average for accessibility means. They also wanted to see a map to show where the accessibility improvements were being made.

The second group, facilitated by Mr. Dan Rutzick, said that seeing the whole numbers, as opposed to percentages, is important to understanding the results. The second group also commented a chart to present the info in a different way would also be good.

The third group, led by Mr. Brandon Haggerty, commented that the results are challenging to discuss as the desire is to understand whether this work helps close the disparities gap.

### **Question 2**

The third group said they feel the power of the numbers, but it also important to tell the story and the experiences of each county and how they fit in the context of the results. Also, go with one historically marginalized community’s lens, with a preference for focused historically marginalized communities in particular.

The first group wanted to see how the benefits to HMCs also benefit the region at large. It would also be helpful to understand existing conditions/gaps to put in perspective how those disparities gaps get closed. Mr. Aaron Golub expressed doubt that a detailed look into the numbers could be addressed in a one hour presentation. He suggests not presenting the numbers in such a scenario. Mr. Steve Williams offered the idea to show only the numbers with the biggest difference.

### **Question 3**

Mr. Aaron Golub reiterated that seeing the spatial data corresponding to the numbers is necessary. Data currently describes the region as a single entity, whereas the issues related to access are more nuanced and depend on geography.

### **2018 RTP Transportation Policy Framework – Proposed Revisions**

Ms. Cho refreshed the group on the RTP Policy Framework. First, she described what shaped the framework, which included feedback from the transportation equity work group at the June and September work group discussions, and direction from the Metro Council.

The revisions included:

1. Refine and revise RTP equity definition.
  - a. Place an additional focus on race.
2. Refine and revise the RTP equity goal.
  - a. Focus towards the desired outcomes expressed by HMC.
  - b. Focus on disparate outcomes.
3. Consolidate RTP objectives and move to appropriate goals.
4. Refine and revise RTP objectives.
  - a. Align to TE evaluation measures.
  - b. Incorporate work group feedback.
  - c. Focus on race.

#### **Proposed Equity Definition**

Ms. Cho presented two options for a new definition for equity, each with a focus on race specifically. Following, she presented a revised equity goal.

In a more long-winded explanation, Ms. Cho walked through the proposed equity objectives. She explained the changes made to the equity objectives, which include moving and combining duplicate objectives, aligning objectives to transportation equity performance measures, and revising the objectives per the direction of the work group.

Ms. Cho asked the work group to break up into small groups and discuss the following three questions:

1. Broader or specific equity definition?
2. Thoughts or reactions to 2018 RTP policy framework proposal?
3. Refinements to make RTP goals and objectives smart?
  - a. Suggestions to help focus on people of color?

Work group members split up into small groups again and discussed the questions, and then came back to the large group to share their discussions.

#### **Question 1**

Group two suggested keeping a broader definition for equity. A specific definition may unintentionally exclude certain groups from being included in equity conversations and policy. They also suggested adding “improving outcomes for all groups” to definition that moves forward.

Group three suggested removing “outcomes for all groups are improved” from the first definition as it appears to water down the definition.

Due to time constraints, work group members were asked to send additional comments to Ms. Cho, but in general, there was broad support for the overall direction of the proposed refinements.

### **Next Steps**

Ms. Cho noted she will be presenting the equity results at an RTP workshop, MTAC and TPAC meetings in December. In January, the last work group meeting will take place, which will include continued discussions of the RTP goals, objectives and performance targets, follow ups from the 2018 RTP transportation equity evaluation, and a discussion of the 2018 RTP process and next steps. She thanked everyone for attending and all the hard work.

### **Adjourn**

There being no further business, meeting was adjourned at 4:00 p.m. by Cliff Higgins.





# Strategies for Preventing Displacement: *Portland Metropolitan Region*

DRAFT

Prepared by: André Lightsey-Walker  
Fall/Winter 2018

**Introduction**

Like other regions across the country, the Portland metropolitan region has become aware of the equity issues that arise with rapid development. As the region's population grows, the demand for housing continues to increase. Population increases paired with the cultural shift that has restored value of inner-city living has resulted in array of changes; involuntary displacement existing as one of the most impactful. This memorandum is aimed at compiling, analyzing, and recommending contemporary strategies and/or best practices that help address displacement as well as mitigate the negative impacts to communities that have already been displaced. Before highlighting the strategies and best practices, it is necessary to explore the causes of displacement in the region, the relationship between displacement, housing, and transportation, and various indicators of displacement. This document is a starting point for strategizing ways to support growth in region without displacing the communities already living here.

## Background

Displacement | Direct vs. Indirect

There are variations of displacement, which is rooted in the concept of place. Place is defined as a portion of space available or designated for or being used by someone. The Latin prefix *Dis* translates to "apart." Linguistically, to be displaced means becoming separated from a space in which a person has some relation to. In urban planning, displacement represents the process by which some community uprooted into leaving an area due to causes outside of their control.

There are two primary forms of displacement:

- **Direct-Displacement** is the process of removing individuals from their current homes. Historically, direct displacement was typically the result of the urban renewal process and property acquisition for public purposes. This process usually involved government agencies.
- **Indirect-Displacement** is the process by which *outside* forces, primarily market-based inspire an increase in property values leading to populations being priced out of their homes. Because there is no single agent responsible for indirect-displacement the strategies for preventing it are much more complex.

Contemporary planning practices have, for the most part shifted away from processes that result in direct-displacement or direct-displacement is utilized in a very specific manner prescribed by strict government rules. As a result, the strategies discussed will focus and be focused on indirect-displacement.

## Displacement in Portland Metropolitan region

There are many factors which contribute to displacement. Displacement is also complicated and complex to fully attribute root causes, but one simple, and yet significant factor in the Portland region is the growing population and improving regional economy.

But what is not often recognized as a factor to the region's displacement issues is the history of communities. With many communities, the Portland region made an effort – often including

written policy – to concentrate certain groups into specific areas in the region. In turn, this caused these communities to build strong ties with these places making the effects of displacement today multi-generational.

### **Transportation Investment and displacement**

- How the planning of investment can accelerate the gentrification and displacement processes.

Compared to other regions throughout the country, the Portland metropolitan region's greatly values transportation options. While this is certainly something to be proud it also provides an additional layer of difficulty when discussing displacement. The addition of transportation infrastructure because of increasing access, often leads to increased property value and consequently the risk of displacement. As a region, it is critical to recognize the increased risk of causing displacement and remain diligent toward the goal of improving transportation options while also preserving community.

### **Strategies for preventing displacement**

A review of literature related to contemporary best practices to prevent and mitigate displacement highlight many effective strategies. This section highlights three categories of strategies and best practices. These categories include:

- Community Cohesion
- Affordable Housing
- Economic Development

Following the description of each and a brief discussion about benefits and potential drawbacks to implementation is followed by examples of successful implementation.

## **Community Cohesion Strategies**

The Community Cohesion Strategies (CCSs) are strategies aimed at preventing displacement through grassroots movements. The majority of the strategies listed under this category are focused on empowering the people directly burdened by gentrification and displacement.

### **Community Education Movements**

This strategy is based on the proven effectiveness of information access. Community education efforts are focused on facilitating routes that allow vulnerable populations to access information that can help prevent potential displacement. Typically this information is focused on renter rights, displacement risk factors, and local resources.

Community education has the ability to stop displacement by arming at risk citizens with resources necessary to alleviate their risk factors.

## **Benefits**

- Residents better understand the changes occurring and their causes.
- Residents are able to influence the development of their community as they work proactively to discourage displacement.
- With knowledge of various resources residents with information access them at a higher frequency likely helping them remain in the community.

## **Barriers**

- Information accessibility – the issue that this strategy aims to resolve can also be its weak point. Reaching all individuals in need of the information provided is often a difficult task.
- Adequate funding is necessary to properly disseminate the information.
- The speed of information change could prove problematic if leaders fail to stay up to date on latest methods and resources.

## **Partners**

Community education efforts could be initiated by leaders at any level – neighborhood, local, state, or federal. In most cases education efforts begin within the affected community.

## **Successful Example(s)**

### **San Francisco Anti Displacement Coalition (SFADC)**

San Francisco, California | <http://sfadc.org/>

SFADC is a group of tenant organizations and allies who have organized against the rapid increase of evictions and rents across the San Francisco area. They provide a slew of information sharing services. They host a website, twitter page and frequently host community campaigns ranging from marches to bus ads. Their points of focus are offered below:

- We believe that all tenants have a right to safe, secure and affordable places to live. We support strong public policies that protect these rights.
- We believe that real estate speculation destabilizes neighborhoods, communities and economies. We support regulation and controls on such speculation.
- We believe that the future of San Francisco as a culturally diverse, vibrant and creative city depends on its capacity to protect tenants from displacement and neighborhoods from losing their character and their social and economic diversity.
- We are committed to building a democratic, inclusive, and nonviolent movement for social change to advance these values and policies.

### **Shaw Education for Action (SEA)**

Shaw, Washington D.C. | <http://www.onedconline.org/history>

SEA is a committed group of Shaw neighborhood residents who organize for social change and economic justice to the residents most vulnerable to the negative impacts of gentrification and displacement. The primary function of SEA is to educate, create awareness and induce action among residents in relation to gentrification issues.

### **Neighborhood Associations**

A neighborhood association is a group of residents who advocate for or organize activities within a neighborhood. Distinct from home owner associations, neighborhood associations often include renters, home owners and local business owners.

Establishment of a neighborhood association within an area at risk for displacement creates a sense of community and organization that can lead to organized effort against displacement.

### **Benefits**

- Communities that are organized prior to gentrification typically stand a better chance of maintaining control of resources and are typically more active in forming the vision for the future of their community.
- Neighborhood associations often offer an increase sense of community that is often missing in a knowledge, technology, and digital society. Neighborhood associations allow connections to be made that would otherwise never happen and provide a unique space for collaboration, information sharing, and opportunity.

### **Barriers**

- Neighborhood Associations primary form of communication is typically a meeting – meeting times and locations have the potential to exclude individuals whose input would be valuable. This issue becomes more prevalent as the level of economic burden increases as gentrification progresses.
- Members of Neighborhood Associations in diverse areas often offer a wide range of subjects of concern which can make finding an area of focus difficult for an association.

### **Partners**

Community members with a wide network often take the lead in organizing neighborhood associations. Some key partners are various neighborhood organizations including Community Development Corporations. In Oregon, many of the neighborhood associations have a relationship with the city they operate within.

## **Successful Example(s)**

### **Amazon Neighborhood Association (ANA)**

Eugene, Oregon | <https://www.amazonneighbors.com/>

The ANA strives to improve the Amazon neighborhood in a number of ways. In the City of Eugene, neighborhood associations located near the University of Oregon campus are

especially active. Organized efforts have resulted in neighborhood specific code language affecting ADU development, bedroom counts, and even allowed number of water fixtures.

The ANA primary objectives are:

- Communicating and advocating for the neighborhood's position on issues such as land use, transportation, public safety and social service
- Sponsoring improvement projects and social events
- Providing a forum to identify, discuss and resolve neighborhood issues
- Promoting communication between neighborhoods and the city
- Educating neighbors on issues, public process, and city services

### **Community Benefits Agreements (CBA)\***

CBAs are contracts signed by community groups and developers that require the developers to provide specific amenities or mitigations to the local community or neighborhood.

CBAs have the ability to delay and mitigate displacement by facilitating the distribution of benefits associated with gentrification. When established effectively CBAs have the power to essentially lift up the entire community while implementing a positive change for the greater region.

#### **Benefits**

- Ensures that area development benefits existing communities
- Forces developers to be held accountable
- Gives communities influence over development

#### **Barriers**

- CBAs offer no way to ensure that they are truly representative of the community needs and desires; community groups can be left out of the decision making process.
- CBAs have the potential to be extremely long documents
- Requires input from multiple parties which can substantially slow the process

#### **Partners**

Due to the fact that CBAs are relatively comprehensive documents many groups are involved in the establishment. Typically they are collaboration between Community Development Corporations, various community groups, such as neighborhood associations, churches, or worker unions. The city and developers are also critical partners in the successful implementation and accountability of a CBA.

### **Successful Example(s)**

#### **Staples Center CBA**

Los Angeles, California | <http://www.forworkingfamilies.org/resources/staples-cba>

In 2001, through collaborative efforts from labor and community-based organizations, the Figueroa Corridor Coalition for Economic justice negotiated and established a comprehensive CBA for the Los Angeles Sports and Entertainment District Development. It was a large multipurpose project that included a hotel, 7,000-seat theater, convention center, expansion, housing complex, and plazas for entertainment, restaurants, and businesses.

- The Staples CBA was a tremendous achievement in several respects. It includes an unprecedented array of community benefits, including:
  - a developer-funded assessment of community park & recreation needs, and a \$1 million commitment toward meeting those needs
  - a goal that 70% of the jobs created in the project will pay the City's living wage, and consultation with the coalition on selection of tenants;
  - a first source hiring program targeting job opportunities to low-income individuals and those displaced by the project;
  - increased affordable housing requirements in the housing component of the project, and a commitment of seed money for other affordable housing projects;
  - developer funding for a residential parking program for surrounding neighborhoods; and
  - standards for responsible contracting and leasing decisions by the developer.

The Staples CBA set precedence for how successful CBAs can be. There is potential to establish CBAs in communities facing risk of displacement by working with developers to ensure that the negative impacts of gentrification are equitably distributed or removed altogether.

## **Affordable Housing Strategies**

These are strategies aimed at increasing the stock of affordable housing units or subsidizing the cost of housing for individuals at risk of displacement.

### **Land Acquisition/Banking**

Land banking is the practice of aggregating parcels of land for future sale or development. In regards to anti-displacement efforts the land is purchased by nonprofit organizations or government agencies to maintain a supply of land designated for affordable housing units. Acquiring land or properties can be one of the biggest challenges for affordable housing developers, especially nonprofits. By acquiring land prior to price increases organizations can provide locations for affordable housing developments and remain mostly outside the private market for land purchasing.

### **Benefits**

- Provides stock of land that can be used for affordable housing development
- Creates land stock relatively immune to market forces

- Land can be donated to organizations that will manage affordable housing

### **Barriers**

- In cities that are in critical need of affordable housing development land that isn't currently being used as affordable housing is not resolving the issue at hand.
- Land is expensive to acquire

### **Partners**

Typically land acquisition efforts are lead by nonprofit organizations and/or local government agencies.

### **Successful Example(s)**

#### **Oregon Housing Acquisition Fund (OHAF) | <http://www.preserveoregonhousing.org/>**

The OHAF provides short-term financing for the acquisition of affordable multifamily housing projects with expiring federal rental subsidies approaching their expiration. The loans are available to for- and non-profit entities. The loans range in amount from \$500,000 to \$5,000,000. The income distributions are as follows:

1. 51% or more of the units are to be rented to households earning 80% or less of median income as defined by HUD; or
2. 40% or more of the units are to be rented to households earning 60% or less of median income as defined by HUD; or
3. 20% or more of the units are to be rented to households earning 50% or less of median income as defined by HUD.

#### **Down Payment Assistance Programs**

Down Payment Assistance programs combat displacement by transitioning renters into owners. As a property owner individuals aren't susceptible to being pushed out by increasing rents. Also, by subsidizing the upfront cost of home purchasing, down payment assistance programs allow lower income individuals to purchase a home and build wealth.

### **Benefits**

- Helps offset burden of housing prices
- Assistance programs typically require homeownership education courses
- Helps to build wealth in communities

### **Barriers**

- Depending on the stage of gentrification the amounts offered by assistance programs may not cover the cost of a down payment in the area.



- The cost of homeownership is multi-faceted and a down payment doesn't cover all of a homeowners financial needs
- Expensive land can make building homes in at risk for displacement areas very expensive

### **Partners**

Down payments assistance programs are usually established by nonprofit organizations. In some cases these programs are ran in conjunction with government agencies to help with funding and distribution.

### **Successful Example(s)**

#### **Individual Development Accounts (IDAs) | <https://oregonidainitiative.org/>**

“The Oregon Individual Development Account Initiative invests in the personal and financial growth of individuals to build strong communities throughout Oregon. The Initiative was created in 1999 by the Oregon State Legislature to bring state agencies, private non-profit and tribal partners, and private contributors together to create opportunity in Oregon. Today, the Initiative is composed of the State of Oregon, under the leadership of Oregon Housing and Community Services Department and the Oregon Department of Revenue, and a host of private partners and contributors working together to help Oregonians achieve their dreams. The Initiative is managed by Neighborhood Partnerships.

Participants enroll through one of the many partners located in all corners of the state, set a goal and begin saving. Once the participant's goal is reached and all parts of the savings plan are completed, every dollar saved by a participant is matched by the Initiative, typically three dollars for every one dollar saved. Initiative participants may benefit from matched funds to help them purchase a home, fulfill an educational goal, develop and launch a small business, restore a home to habitable condition, or purchase equipment to support employment.”

#### **Habitat for Humanity | <http://habitatportlandmetro.org/>**

Habitat works with qualified, low-income families to help them realize the dream of owning their own home. We believe that building equity is a long-term solution to the problem of generational poverty. Habitat for Humanity is one of the only organizations offering homeownership opportunities to hardworking families making as little as \$25,865 (for a family of four). We do this through a hand-up, not hand-out model in which homeowners help to build and then buy their home from Habitat.

### **Inclusionary Zoning**

Inclusionary zoning (IZ) is an affordable housing tool that links the production of affordable housing to the production of market-rate housing. IZ policies either require or incentivize the creating of affordable units in new housing developments. Typically these incentives take the form of increased density allowances, fast-track permitting, or subsidies on things like system development charges.

In regards to displacement IZ works to mitigate more than it prevents. By creating a portion of units to be classified as affordable IZ provides the potential for previously displaced families to return to their original neighborhood and also creates economic diversity within the neighborhood.

The exact language in IZ policy varies from city to city but the objective remains the same. Currently it is a very common practice urban areas experiencing new development.

### **Benefits**

- Promotes neighborhood economic and racial diversity
- Prompts Market-Driven, Fiscally Responsible Solutions
- Protects against disinvestment

### **Barriers**

- Affordability is limited term (Typically around 20 years)

### **Partners**

Inclusionary zoning policy is enforced and headed by local jurisdictions, typically through city zoning code.

### **Successful Example(s)**

**San Francisco Inclusionary Housing Program** | <http://sfmohcd.org/inclusionary-housing-program>

Guided by [San Francisco Planning Code Section 415](#), the Inclusionary Housing Program aims to make housing more affordable to low or middle income residents in new buildings. When a housing developer proposes a housing project with 10 or more units, they must either:

- Reserve a percentage of units in the new building to be rented or sold at a below market rate.
- Reserve a percentage of units in another building they build to be rented or sold at a below market rate.
- Pay a fee.
- In some cases, dedicate land that will become affordable housing.

### **Owner-Occupied Rehabilitation Programs**

These programs are oriented around offering low-income or at risk homeowner's funds to update or maintain their homes. Depending on the issuer funds can be either loans or grants. Any many cases when loans are offered they are at competitive interest or in some cases completely forgiven if the owner continues to reside at the location for certain period of time.

In addition to funding for rehabilitation funding is also offered for home improvement including roof upgrades, foundation fixes or water and electric systems.

For individuals on a fixed income in a gentrifying area the benefits have the potential to help alleviate some of the stresses associated with increased property taxes and preserve home value.

### **Partners**

Restoration projects could be led by the owners themselves, neighborhood associations or community organization. Depending on the scale of restoration the amount of outside funding can vary substantially.

### **Successful Example(s)**

#### **Cumberland County Housing Rehabilitation Program | <https://cchra.com/>**

The Cumberland County HOME Consortium Owner Occupied Housing Rehab Program helps low-moderate income Cumberland County residents fix up their homes. For general rehab, a maximum amount of \$15,000 per home/unit is available. In addition to general rehab, HUD requires that all federally assisted rehabilitation include the identification and treatment of lead paint hazards. An additional amount up to \$10,000 per home/unit may be given for lead hazard reduction.

Eligible Applicants include individuals and families who occupy, as their principal residence, a one to four unit building located in Cumberland County and meet program underwriting standards which include the HUD income guidelines.

### **Benefits**

- Alleviates immediate burden of housing repairs
- Restores value to properties
- Improves home efficiency
- Decreases likelihood of displacement from homeownership-related financial causes

### **Drawbacks**

- Need may be greater than budget allows
- Exclusive to home owners

### **Equity Protection Programs**

The term programs that protect home equity can vary substantially but these programs are aimed at preserving the value of the home.

One of the indicators for displacement risk is backed property taxes or mortgage delinquencies. In many cases, home owners in displacement prone neighborhoods actually lack clear legal title to their homes.

### **Benefits**

- Alleviates one of the biggest risk factors for displacement
- Establishes legal ownership of property which generates potential for generational wealth

### **Barriers**

- Affordable payment plans aren't always enough to maintain ownership

### **Partners**

Typically the leads on equity protection programs would be legal organizations willing to provide services. They could be contracted by a government agency or nonprofit. In the Hill district example the local credit union were also key players in the process.

## **Successful Example(s)**

### **Hill District | Pittsburgh, PA**

Homeowners in this district were given free "equity protection" services to help them obtain and protect ownership of their homes. If they had tax delinquencies they received help negotiating affordable payment plans with lien holders, and those who lacked legal ownership received free legal help to obtain clear legal title to their homes.

### **Affordable Housing Preference Policy**

This strategy is aimed at providing affordable housing preference to people who were subjected to displacement and high levels of urban renewal. From a displacement perspective this exists as one of the few opportunities that allows for negatively affected communities to return to the areas they were originally displaced from.

### **Benefits**

- It allows for families with historic ties to the area to return
- Provides access to transit incomparable to most places in Portland
- Increase diversity in the area
- Integrating housing and health

### **Barriers**

- Apartments are not equivalent to single family dwellings
- Rentals do not generate wealth for occupants

### **Partners**

A project of this scale needs to be headed by a local government agency.

## Successful Example(s)

### **North/Northeast Neighborhood Housing Strategy** | <https://www.portlandoregon.gov/phb/>

“Recognizing that past City actions have marginalized and displaced many longtime residents of North and Northeast Portland, the Portland Housing Bureau (PHB) developed the Affordable Housing Preference Policy as a tool to prioritize impacted households for PHB housing opportunities in affected areas. The Preference Policy aims to address the ongoing impact of this legacy by giving priority to households with generational ties to N/NE Portland”

The PHB in conjunction with Cascadia Behavioral Health is developing a 52-unit apartment building with 31 units reserved for households that apply through the N/NE preference policy.

### **Condominium Conversion** | <https://goo.gl/DqKmCh>

Condominium Conversion Ordinances allow for the conversion of rental units to ownership units. While providing more affordable homeownership opportunities for some households, without additional regulations condominium conversions displace existing tenants and reduce a jurisdiction's rental housing stock without increasing housing supply. Jurisdictions can guide condominium conversions through zoning codes, minimizing the potential for displacement of current tenants and the potential decrease in the overall rental housing stock. If the jurisdiction is capable of maintaining the appropriate balance between rentals and owned units condominium conversion has the potential to

#### **Benefits**

- Provides opportunity to transition from renter to property owner
- Provides a sense of community
- Less expensive than purchasing a house

#### **Drawbacks**

- Additional annual costs associated with owning a condo
- Harder to buy and sell than a detached home
- Restrictive with HOAs and CC&Rs

#### **Partners**

The ordinance to convert affordable housing rentals into condominiums would have to be issued by a government agency. The process for condominium conversion could be streamlined if the units were private rather than public housing units.

## Successful Example(s)

### **New York, New York** | <https://ag.ny.gov/>

Under a change made by the New York state attorney general's office landlords are allowed to sell their market-rate rentals — or up to 80 percent of an individual building — in exchange for preserving or expanding the number of low-income apartments they own. Market-rate renters

would be the first to be offered the option to buy their units, officials said, and those who choose not to buy would be protected by existing rules from being forced out.

## Economic Development Strategies

Economic development strategies are targeted at improving the wellbeing of communities at risk for displacement by supporting economic growth. The strategies selected aim to stabilize incomes in at risk communities as well as offer subsidies to everyday expenses that allow some income to be allotted to remaining a resident.

### **Accessory Dwellings Units (ADUs)**

Accessory dwelling are secondary units on the same grounds or physically attached to a primary single family dwelling. The most common forms are:

- An apartment over the garage
- A *tiny* house in the backyard
- A basement apartment

ADUs have the potential to prevent displacement in multiple ways. They offer a way for high risk property owners to acquire additional income and they also offer the potential to offer less than market rate housing which could allow for high displacement risk individuals to have long term residence in the area.

### **Benefits**

- ADUs provide income for homeowners
- Increases neighborhood density without significant building impacts
- Preserves neighborhood design integrity
- Usually aligns with City infill goals

### **Barriers**

- Typically expensive to initially create
- Not all cities allow them
- Potential to strain relationships with neighbors

### **Partners**

In order to successfully establish an ADU their needs to be city code that allows it, therefore local jurisdictions play a role in their creation. Government agencies also have the potential to establish incentivize the development of ADUs.

### **Successful Example(s)**

**System Development Fee Waiver | Portland, Oregon**

Portland, Oregon's city council unanimously passed a resolution that extended the current waiver of System Development Charges (SDCs) the city's ADU fee waiver is a tangible move to incentivize much-needed infill development. The ability to waive fees associated with development proves that if organized correctly cities could subsidize the cost for ADU development for individuals at risk for displacement.

### **Target Area Job Opportunities**

Target Area Job Opportunities are a system by which an organization in a position to hire offers preferential selection based on geographic location. Typically, individuals are also required to currently make below a certain income threshold.

When successfully implemented a target area hiring can provide stable positions to individuals with displacement risks. In many cases economic instability plays a major role in displacement and programs aimed at stabilizing incomes in displacement risk communities can prevent it.

### **Benefits**

- Provides job opportunities targeted to people in specific areas
- Ability to alleviate economically depressed communities

### **Barriers**

- Doesn't necessarily qualify individuals for the jobs
- No program to supplement required education

### **Partners**

A similar program could be organized by any organization in a position to hire. Similar results could be achieved by simply distributing more hiring notifications in a certain area.

### **Successful Example**

**Metro First Opportunity Target Areas** | <https://www.oregonmetro.gov/how-metro-works/jobs/first-opportunity-target-area-jobs>

Currently Metro offers a Target Area Job Opportunity program called First Opportunity Target Areas (FOTA). The FOTA program was created in 1989 to provide economically disadvantaged residents within an area near the Oregon Convention Center first opportunity to apply for employment at the OCC. Later, Metro expanded the program to include Metro's Portland Expo and Portland's venues. In 2016, the boundary and income requirements were expanded to make the program available to more residents. The FOTA program was created in 1989 to provide economically disadvantaged residents within an area near the Oregon Convention Center first opportunity to apply for employment at the OCC. Later, Metro expanded the program to include Metro's Portland Expo and Portland's venues. In 2016, the boundary and income requirements were expanded to make the program available to more residents.

### **Expand access to capital for local business**

In other gentrifying regions around the country, rising commercial lease rates and changing demographics have made it difficult for existing businesses to remain financially stable and competitive. Often this results in commercial displacement.

Programs that expand access to capital for local businesses or individuals interested in starting local businesses can mitigate pressures of displacement

#### **Benefits**

- Allows local businesses to remain competitive in expanding markets
- Potential to offset increased leasing costs
- Directly impacts local economy

#### **Barriers**

- Usually funding opportunities are limited and competitive
- Without interest regulations businesses could end up worse off than before

#### **Partners**

Efforts to expand capital access would likely involve loans or grants. Typically the organizations in a position to offer either of these are banks, government agencies, or larger businesses.

#### **Successful Example(s)**

**LendingTrees' Small Business Grant** | <https://www.lendingtree.com/business/grant/>

LendingTree is just one of many organizations that offer grants to small and local businesses. They offer a \$50,000 grant for 1 business per year that meets their criteria. While the grant application is competitive, there exist many other potential funding opportunities. A \$50,000 grant could make the difference needed for a local business to survive gentrification.

### **Reduced Fare Programs**

A reduced fare program refers to programs providing particular passengers with a discounted fare option for travel on a public transport system. In the United States, public transportation systems that receive federal funding are required to offer, at minimum, half fares to the elderly and handicapped persons during off peak travel. Some transportation systems also extend reduced fare options to youth, students, military personnel, and low-income passengers.

According to the Victoria Transport Policy there is a direct relation between transportation and economic productivity. The ability to alleviate the cost burden of transportation can have major impacts for people at risk for displacement.

#### **Benefits**

- Allows more people to benefit for transit systems
- Saves money and expands access to city
- Increases access to jobs



## **Barriers**

- Income thresholds may not cover everyone who needs fare reduction to effectively use system

## **Partners**

There are multiple ways to get to reduced fares. Typically the effort would be led by the transit organization but employers and education institutions have the ability to subsidize fares as well.

## **Successful Example(s)**

**SunTran** | [http://www.suntran.com/fares\\_red\\_lowinc.php](http://www.suntran.com/fares_red_lowinc.php)

Based out of Tucson, Arizona, Pima County residents who meet low-income guidelines based on the U.S. Department of Labor's Lower Living Standard Income Level, may be eligible for the reduced fare once an application and required documentation are submitted to the Special Services office. Once approved, individuals will receive the new SunGO ID & Card. Children ages 6-17 must be registered by an adult in the household and must be present at the time the ID is issued.

**Trimet, Metro Region** | <https://trimet.org/lowincome/>

Over the last few years, Trimet has been working toward a reduced-fare program for people with limited incomes. A task force of advocates, community members and elected officials gave us the following recommendation earlier this year:

Adults at or below 200 percent of the federal poverty level would be eligible for half-price fare.

If this were implemented today, adults making up to \$24,120 a year could take a ride for \$1.25 and buy a day pass for \$2.50 — the same price as Honored Citizen and Youth fares.

Participants would use a reduced fare Hop card similar to an Honored Citizen or Youth card.

## **Affordable Childcare**

This strategy is aimed at increasing the potential for increased capital gain for working families. The cost of childcare has the potential to be one of the most significant economic burdens for low-income individuals. Nationally, the average childcare center cost a family (or single parent) \$800 per month - across a year, this would total \$40,000 dollars.

Child rearing requires significant time and investment by parents, in addition to earning wages to be self-sufficient. A collaborative effort to mitigate the financial impacts of child rearing would allow for individuals at risk of displacement to focus their energy on stabilizing their income.

## **Benefits**

- Having childcare allows for families to focus on working
- Childcare programs are usually focused on early childhood development - early education can have impacts on the educational and concurrently economic attainment of future generations
- Allows income to be distributed toward other anti-displacement categories

## **Barriers**

- Income maximums could be exclusionary
- Childcare providers should be compensated which means cost must be handled by some other entity
- Transportation challenges depending on location of care center

## **Partners**

Affordable childcare has the ability to be established on any scale. Depending on the scale of the establishment government regulations may apply, but affordable childcare could be as simple as communities organizing to provide childcare for each other.

## **Successful Examples**

### **Head Start Programs** | <https://www.acf.hhs.gov/ohs>

The goal of Head Start is to bring about a greater degree of social competence in children, regardless of race, economic circumstances, language and geographic location by providing a comprehensive child development experience within the context of his/her family and community. Social competence embraces the child's intellectual, affective and physical development at home, in school, and in the neighborhood. Developmentally appropriate educational skills are those which are necessary for the later acquisition of skills and learning commonly recognized as reading, writing, mathematics, language, science, problem-solving and the development of positive attitudes toward learning.

The Head Start education classrooms are comprised of three and four year old students. They are staffed by classroom teachers including a certified teacher, and a full-time and a part-time assistant. Classroom support staff includes bilingual assistants, speech and early intervention specialists, family service staff, mental health consultants, and a registered nurse.

### **Incentivize Formal Education**

Formal education is education that takes place in the classroom setting and is administered by trained teachers in a systematic and intentional fashion within a school, or university. Efforts to incentivize or make formal education more attainable will prepare a generation for higher wage jobs which will likely lead to higher rates of home ownership.

There is a direct correlation between education level and annual income - frequently, populations at risk for displacement have lower incomes and education levels. By taking steps

to incentivize formal education regions have the ability to create a job force prepared for new industries and directly address a major displacement risk factor, access to income.

### **Benefits**

- Creates a route toward generational wealth
- Qualifies at risk communities for higher wage jobs
- Allows access to higher quality jobs

### **Barriers**

- Formal education takes time
- Institutions of higher education often aren't socially welcoming to non-traditional students
- Additional costs beyond tuition

### **Partners**

To do this on an appropriate scale this would need to be headed by state government and potentially federal government.

### **Successful Example(s)**

#### **Tennessee Promise | <http://tnpromise.gov/>**

The first class of Tennessee Promise students entered college in the fall of 2015. After four semesters -- through the spring 2017 semester -- 56.2 percent of the first class of Promise students either are still enrolled, have earned a college credential, or transferred to a four-year university, figures show. That compares to 38.9 percent of their peers (first-time freshmen at community colleges that fall who were also recent high school graduates but did not take part in the Promise program) -- a 17.3 percentage point difference.

Tennessee Promise, the nation's first statewide program for tuition-free community and technical college, provides students up to five semesters of tuition-free attendance at a community college or college of applied technology.

These results through four semesters indicate the program has accelerated college enrollment encouraged more full-time enrollment (an important indicator of student success), and accelerated award rates (degrees or other program certifications), according to Deaton.

This proves that there is a direct relationship between college enrollment and cost of attendance. If a region is serious about preventing displacement of citizens, then it should be equally dedicated to putting at risk individuals in positions to thrive. Education may be the number one route toward achieving this.

### **Conclusion**

The strategies and best practices listed in this memorandum are not comprehensive. Those discussed offer a starting point to shed light on all the different aspects that go into effectively

tackling the issue of displacement. There is no silver bullet to end displacement, but united effort on all fronts focused on making a difference has the ability to empower and stabilize communities to continue further advocacy. This memorandum should be used as a tool to further the conversation, and action against displacement.

**Attachment A**

<b>Strategy Name</b>	<b>Category</b>	<b>Owner (O) or Renter (R)</b>	<b>Lead</b>
Accessory Dwellings	ED, AH	O,R	Local GA
Affordable Housing Preference Policy	AH	O,R	Local GA
Community Benefits Agreement	CC	O,R	Community
Community Education	CC	O,R	Community / CDC
Down Payment Assistance	AH	O,R	CDC / Financial Institutions
Expand Access to Capital	ED	O,R	Financial Institutions/Local, State, Federal GA
Incentivize Formal Education	ED	O,R	Education Institutions / Local, State, Federal GA
Inclusionary Zoning	AH	O,R	Local GA
Land Acquisition	AH	O,R	Local, State, Federal GA / CDC
Neighborhood Associations	CC	O,R	Community
Owner-Occupied Rehab	AH	O	CDC / Financial Institutions
Provide Affordable Childcare	ED, CC	O,R	Community / Local, State, Federal GA
Reduced Fare Programs	ED	O,R	Transportation Agency
Target Area Job Opportunities	ED	O,R	Businesses

GA – Government Agency

CDC – Community Development Corporation

ED – Economic Development Strategy

AH – Affordable Housing Strategy

DRAFT

## Discussion Questions – 2018 RTP Transportation Equity Evaluation – Updated Results

1. In light of having some additional information to help provide a better understand of how the 2018 RTP 10-year investment strategy performs and the evaluation showing some areas in which the RTP 10-year strategy underperforms in historically marginalized communities:
  - What are suggested refinements to recommend to the 2018 RTP 10-year investment strategy (i.e. the project list)?
  - What are suggested mitigation measures and policies to recommend as part of the implementation of the 2018 RTP?
  
2. Are there additional considerations, messages, and takeaways to help communicate the results of the transportation equity evaluation?

Name (optional – for any follow up)

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*Getting there*



*equitably*



# Transportation Equity Work Group Meeting 11 – 2018 RTP Transportation Equity Evaluation & Policy Framework Follow Up & Next Steps

January 11, 2018

# Agenda Review



- ❑ Welcome
- ❑ Introductions & Partner Updates
- ❑ 2018 RTP Transportation Equity Evaluation Results – Summary, Follow Ups & Discussion
- ❑ 2018 RTP Policy Framework Proposal – Summary & Follow Ups
- ❑ Displacement Research – Strategies & Best Practices
- ❑ Next Steps and Q&A

*This information is for research and discussion purposes only and does not reflect current or future policy decisions of the Metro Council, MPAC or JPACT. The information is subject to change pending final modeling and analysis in 2018.*



# Introductions & Partner Updates



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# Tell us...



- Name and organization or community represented
- Who have you talked to and what feedback have you received?
- Interesting transportation equity related activity to note?



Metro

# 2018 RTP Transportation Equity Evaluation – Updates and Follow Up

- Urban growth boundary
- County boundary

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# Communicating the Transportation Equity Evaluation



## 2018 RTP Transportation Equity System Evaluation Road Show

- Transportation Equity Work Group (Nov. 2017)
- RTP Workshop (Dec. 2017)
- MTAC (Dec. 2017)
- EMCTC TAC (Dec. 2017)
- TPAC (Dec. 2017)

# Feedback Heard



## Summary:

- Focus in & communicate on first 10-years of the RTP
- Pick one community lens to communicate results
- Provide 2027 & 2040 population/employment context
- Organize results by successes first, then falling behind
- Frame results around disparities gap
- Certain results more appropriate for appendix
- **AND SO MUCH MORE!**

# And the Metro Staff Response



## Summary: Now

- Conduct a 2027 No-Build model run
- Focus and report out results of 10-year strategy
- Pick one community lens to communicate results
- Provide background population/employment context
- Moving certain results more appropriate for appendix
- Safety and AT investment work through

## Summary: Heading Towards

- Frame results around disparities gap

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# Transportation Equity Evaluation – Updated Results and Initial Findings



Transportation equity system evaluation measures:

- **Access to Jobs (by wage profile) - # 7**
- **Access to Community Places - # 8**
- Completeness and Connectivity of the Active Transportation Network - # 6
- Share of Transportation Safety Projects and Investments - # 4
- **Exposure to Non-Freeway Vehicle Miles Traveled (VMT) - # 5**
- High Value Habitat Impacts - # 17
  
- Housing + Transportation Expenditure and Cost Burden - # 3
- Clean Air - # 16

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# 2018 RTP Investment Strategies



## Three RTP Investment Strategies:

- **2027 Constrained (2018-2027)**
  - **\$6.2 billion**
- **2040 Constrained (2018-2040)**
  - **\$14.7 billion**
- **2040 Strategic (2018-2040)**
  - **\$21.3 billion**



# Measure # 8

## Access to Community Places



Measure 8

Refresher: How many community places (e.g. grocery stores, libraries, pharmacies, hardware store, medical services, schools, etc.) can be reached within the following travel time windows? How does this look for the region & HMC, FHMC, and Communities of Color? How does the investment strategy effect this?

- Auto – 20 minutes
- Transit – 30 minutes
- Bicycling – 15 minutes
- Walking 20 minutes

# Getting to places will be easier for certain communities



Measure 8

Source: Metro Travel Demand Model

	<b>% change 2027 Constrained over 2027 No Build</b>					
	<b>AP</b>	<b>AOP</b>	<b>TP</b>	<b>TOP</b>	<b>B</b>	<b>W</b>
<b>Region</b>	1.5%	0.7%	16.0%	22.0%	0.3%	0.5%
<b>HMC</b>	1.3%	0.7%	15.7%	20.7%	0.3%	0.2%
<b>COC</b>	1.2%	0.8%	17.3%	24.6%	0.4%	0.2%
<b>FHMC</b>	1.3%	0.8%	18.7%	24.8%	0.4%	0.3%

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# Measure # 7

## Access to Middle and Low-Wage Jobs



Measure 7

Refresher: How many middle and low-wage jobs can be reached within the following travel time windows? How does this look for the region & HMC, FHMC, and Communities of Color? How does the investment strategy effect this?

- Auto – 30 minutes
- Transit – 45 minutes
- Bicycling – 30 minutes
- Walking 20 minutes

# More jobs will be accessible by 2027 and 2040



Metro

Measure 7

...but historically marginalized communities do not see the same gains as the region.

Source: Metro Travel Demand Model

Job Access -- % of Jobs in Region						
	AP	AOP	TP	TOP	B	W
<b>Region</b>	1.5%	0.7%	14.7%	19.0%	1.0%	0.4%
<b>HMC</b>	1.2%	0.6%	13.7%	16.8%	0.7%	0.2%
<b>COC</b>	1.0%	0.6%	13.2%	17.8%	0.5%	0.1%
<b>FHMC</b>	1.0%	0.6%	13.8%	17.6%	0.4%	0.1%
Job Access -- % of Low-Wage Jobs in Region						
	AP	AOP	TP	TOP	B	W
<b>Region</b>	1.5%	0.7%	14.7%	19.0%	1.0%	0.4%
<b>HMC</b>	1.2%	0.6%	13.7%	16.7%	0.7%	0.2%
<b>COC</b>	1.0%	0.6%	13.2%	17.7%	0.5%	0.1%
<b>FHMC</b>	1.0%	0.6%	13.8%	17.6%	0.3%	0.1%
Job Access -- % of Medium-Wage Jobs in Region						
	AP	AOP	TP	TOP	B	W
<b>Region</b>	1.5%	0.7%	14.7%	19.0%	1.0%	0.4%
<b>HMC</b>	1.2%	0.6%	13.7%	16.8%	0.7%	0.2%
<b>COC</b>	1.0%	0.6%	13.2%	17.9%	0.5%	0.1%
<b>FHMC</b>	1.0%	0.6%	13.8%	17.7%	0.4%	0.1%

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# Overall, access for shorter non-work related trips fair better than longer work-related trips for HMC



Metro

Measure 7

## 2018 RTP 10 –Year Strategy:

- Some communities will see increased access to services and places, but not all
  - Generally, biggest gains by transit
- Across the board, marginalized communities do not see the same gains in middle or low-wage job access as the region
  - But in general access to jobs will increase for everyone

# Measure # 5

## Non-Freeway Vehicle Miles Traveled (VMT) Exposure



Metro

Measure 5

Refresher: How much VMT is the region being exposed to? How does this look for the region & HMC, FHMC, and Communities of Color? How does the investment strategy effect this?

# Investments will help manage growing VMT in communities



Metro

Measure 5

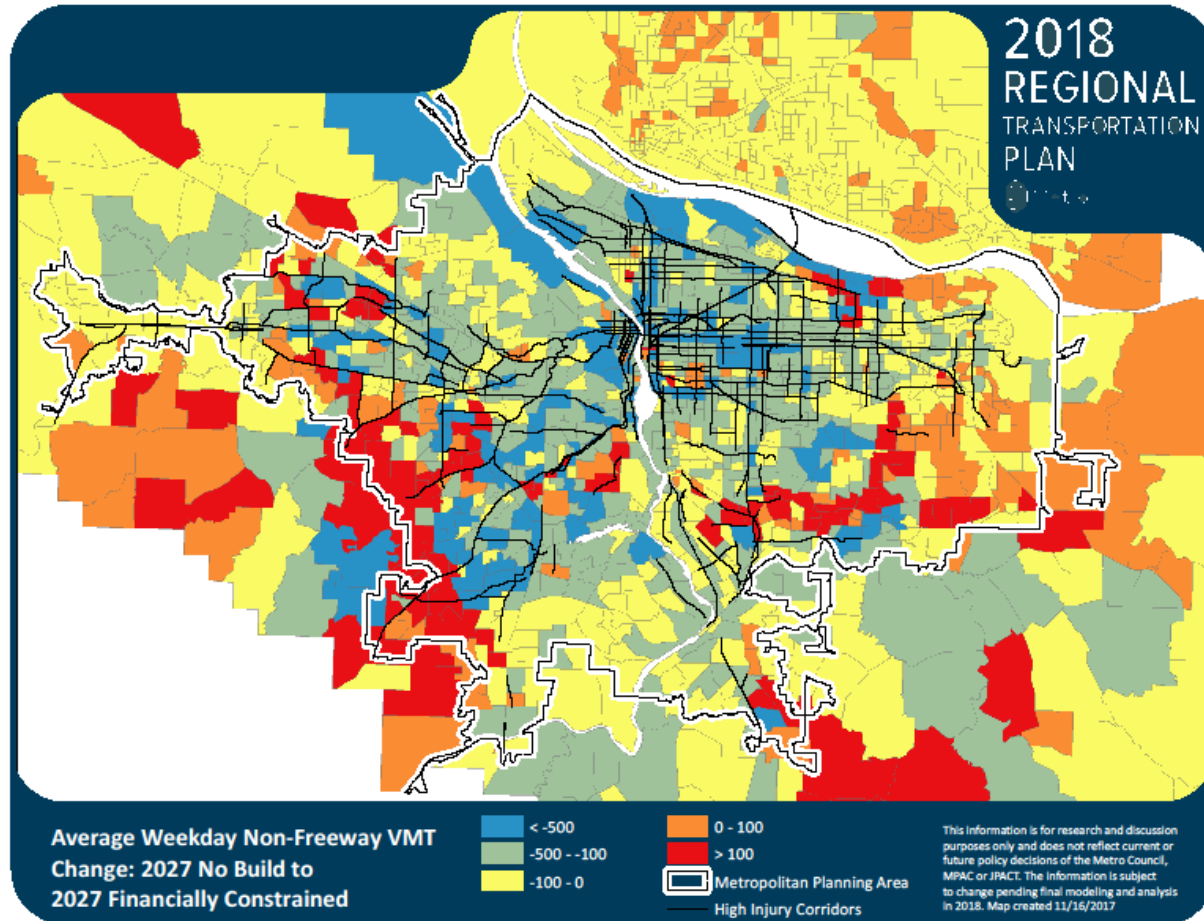
<b>2027 No Build Region VMT</b>	<b>2018 RTP 10-Year Region VMT</b>	<b>Difference in VMT</b>	<b>Percent Difference</b>
		<b>(RTP – NB)</b>	
25,759,338	25,579,276	-180,062	-0.7%
<b>2027 No Build HMC VMT</b>	<b>2018 RTP 10-Year HMC VMT</b>	<b>Difference in VMT</b>	<b>Percent Difference</b>
		<b>(RTP – HMC NB)</b>	
17,117,839	16,968,580	-149,259	-0.9%
<b>2027 No Build FHMC VMT</b>	<b>2018 RTP 10-Year FHMC VMT</b>	<b>Difference in VMT</b>	<b>Percent Difference</b>
		<b>(RTP – FHMC NB)</b>	
10,041,224	9,965,249	-75,975	-0.8%
<b>2027 No Build COC VMT</b>	<b>2018 RTP 10-Year COC VMT</b>	<b>Difference in VMT</b>	<b>Percent Difference</b>
		<b>(RTP – COC NB)</b>	
10,679,460	10,580,265	-99,195	-0.9%

Source: Metro Travel Demand Model

# And greater investment will only further manage VMT in communities



Measure 5



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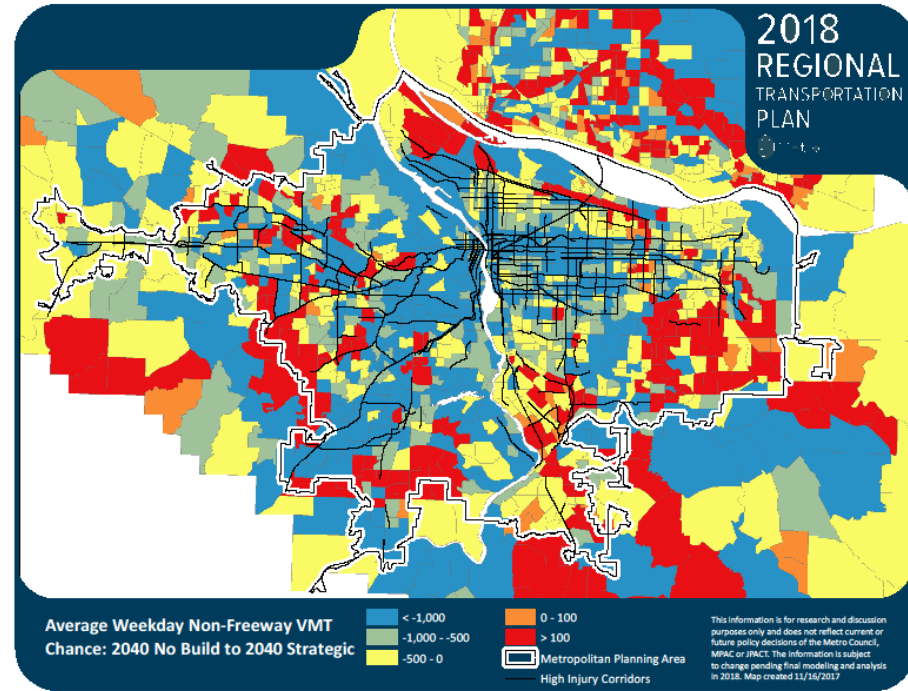
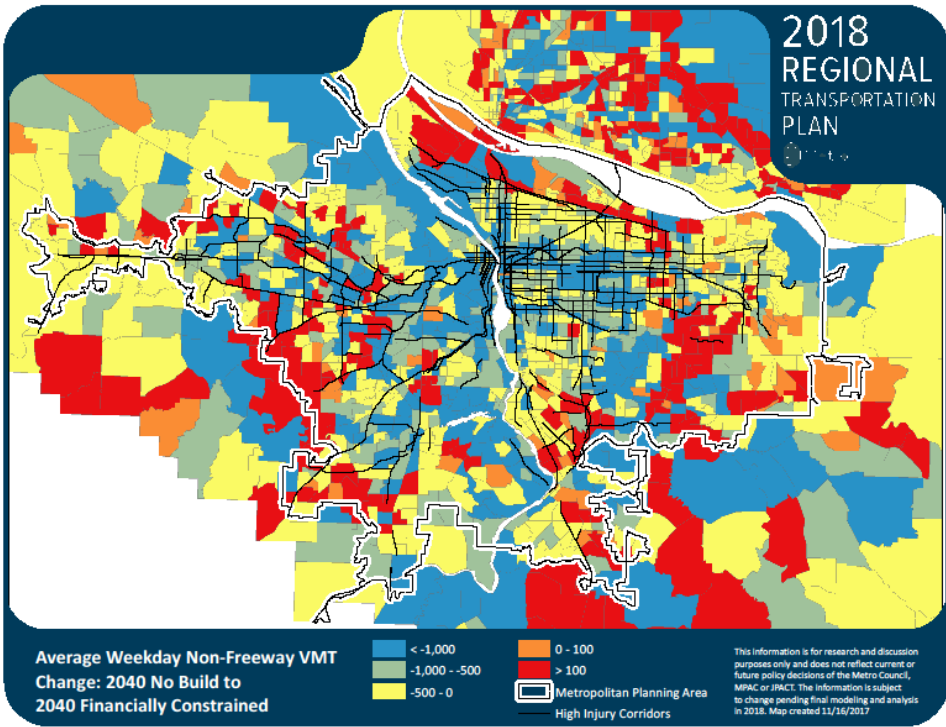
*Source: Metro Travel Demand Model*



# And greater investment will only further manage VMT in communities



Measure 5



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# What do we know after the transportation equity evaluation



From last time...

- No disproportionate impact in share of safety projects in HMCs
- Potential disproportionate impact to high value habitat in HMCs
- need further monitoring
- More active transportation network is getting completed
- But investment is conservative in the first 10-years

# What do we know after the transportation equity evaluation



- Overall accessibility to jobs and community places will get better
  - but mainly in areas with denser HMC population and primarily by transit for accessing community places
  - with jobs access, HMCs will not see the same rate of benefit as the overall region
- HMCs will see a reduction of non-freeway VMT exposure
  - But increased VMT will continue to pose safety risk

# Discussion Questions

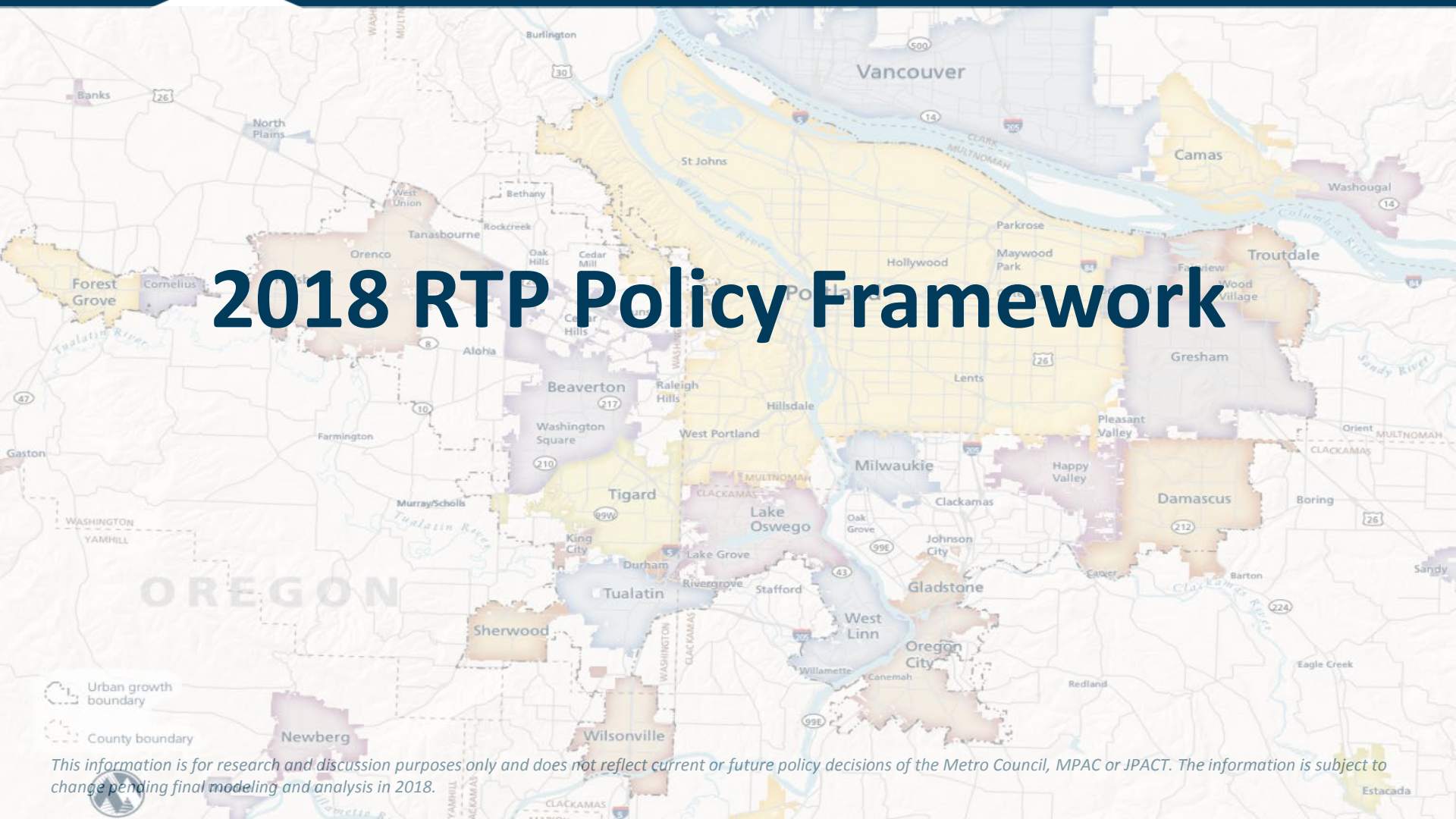


1. In light of results, what are suggested refinements for the 2018 RTP 10-year investment strategies?
2. What are suggested mitigation measures to recommend as part of the 2018 RTP implementation?
3. What messages and takeaways should staff communicate at the Regional Leadership Forum?
4. Additional questions?



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# 2018 RTP Policy Framework



- Urban growth boundary
- County boundary

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# Shaping the 2018 RTP Policy Framework



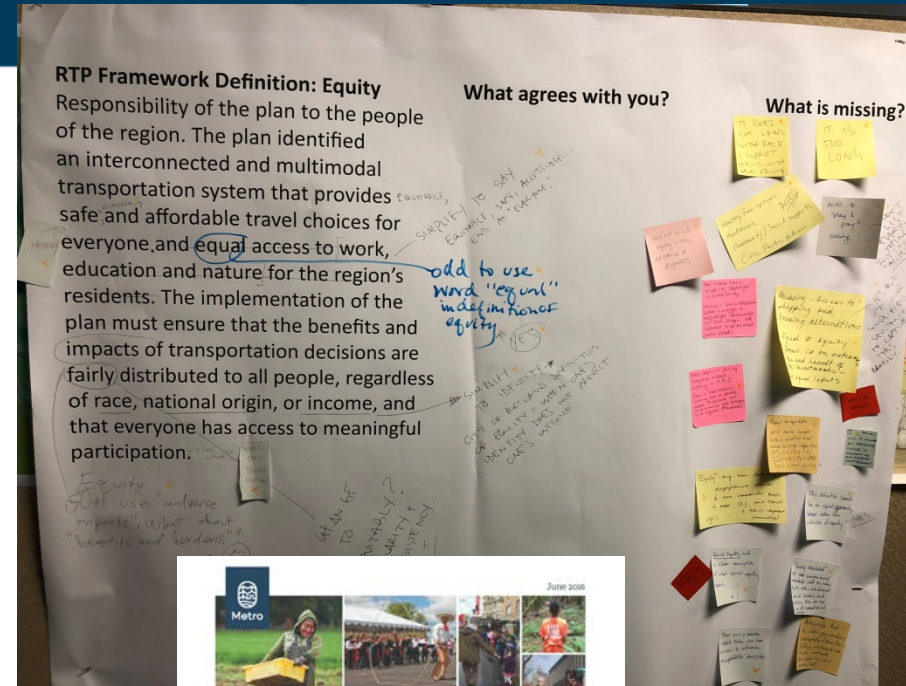
## Transportation Equity Work Group Feedback

- June – equity definition, goal, objectives
- September – RTP performance targets

## Metro Council

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

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Strategic plan to advance racial equity, diversity and inclusion

*Information is subject to*

# Feedback Heard



## In Summary:

- Broader definition considering all disparities preferred
- Language construction of broader definition
- Drop the final part phrase in the definition
- Focus on disparate outcomes with the equity goal

# Proposed Equity Definition



## Refined Definition

*The responsibility of the plan to ensure one's racial and/or ethnic identity cannot predict disparate outcomes experienced with the transportation system, particularly for people of color, and especially when it comes to access, safety, affordability, and health outcomes.*



# Proposed Equity Goal



## *Advance Equity*

*An equitable interconnected multimodal transportation system is safe, accessible and affordable to use and reduces disparities experienced by people of color as the means of addressing the most challenging barriers and ultimately provide benefits to all users of the transportation the system.*

# Proposed Equity Policy Framework – Next Steps



## Joint TPAC and MTAC Workshops & TPAC and MTAC Meetings

- Equity objectives – February 2018
- Performance Targets – April 2018  
(tentative)

# Reactions?



1. Thoughts or reactions to 2018 RTP policy framework proposal?
2. Questions on next steps?



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# Displacement Research



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# In the waaaay back machine...



Metro

Prioritization

Accessibility

Health  
Disparities

Meaningful  
Engagement

Racial  
Equity

Transportation  
Safety

Affordability

Involuntary  
Displacement

Enforcement



Metro

# Next Steps

- Urban growth boundary
- County boundary

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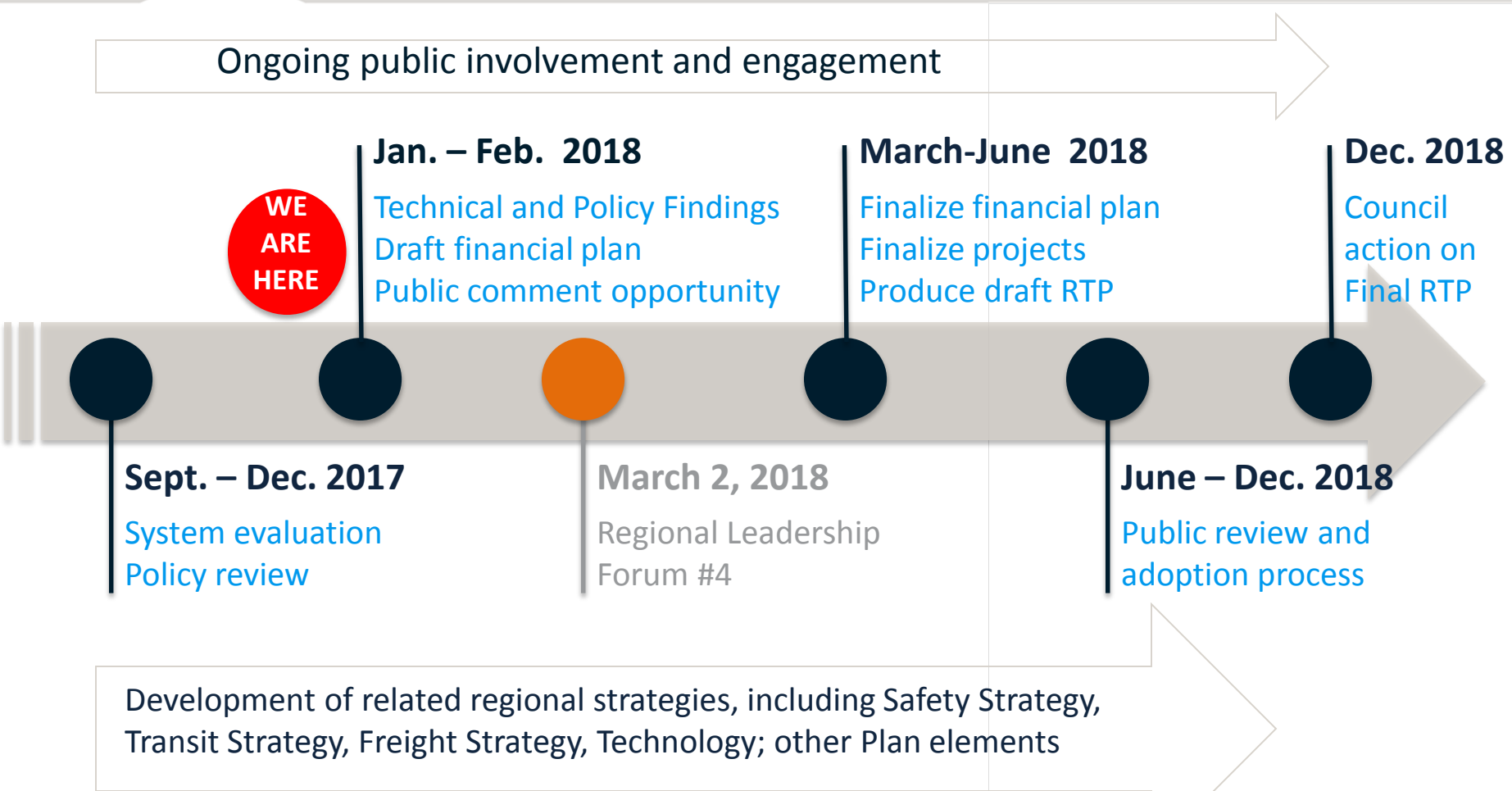


# 2018 RTP development

## Key elements going forward



Ongoing public involvement and engagement



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# 2018 RTP Process



## Key Dates in 2018! (See handout)

- RTP Policy Chapter Changes - February/March
- RLF #4 Takeaways and Investment Priorities – March\*
- Draft Safety, Transit, Freight Plans – April
- Public Comment on Draft 2018 RTP – June – July/August
- 2018 RTP Adoption by Metro Council – December 6<sup>th</sup>\*

\*Indicates action by JPACT, MPAC, and Metro Council



# Questions and Answers



1. Are there any additional questions, comments, or clarifications around the materials discussed today?



For all your hard work...



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**oregonmetro.gov**





# Strategies for Preventing Displacement

- 
- Objectives
  - Organization
  - Results
  - Strategies
  - Community Cohesion
  - Affordable Housing
  - Economic Development
  - Conclusion

---

# Objective

I was tasked with compiling, analyzing, and recommending contemporary strategies and best practices that help address displacement and mitigate the negative impacts of communities that have already been displaced.

*There are a lot of strategies out there...*



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# Organization

I noticed organizational trends throughout my literature review which led me to organize my strategies in the three following categories:

- Community Cohesion Strategies
- Affordable Housing Strategies
- Economic Development Strategies





# Results

Based on my research I selected fourteen (14) strategies to include in my initial memorandum.

Three (3) strategies had Community Cohesion as their focus. Five (5) had Affordable Housing as their focus and six (6) focused on Economic Development.


Categories were not mutually exclusive - as such, I identified two (2) strategies with relatively equal focus in multiple categories.

Strategy Name	Category	Owner (O) or Renter (R)	Lead
Accessory Dwellings	ED, AH	O,R	Local GA
Affordable Housing Preference Policy	AH	O,R	Local GA
Community Benefits Agreement	CC	O,R	Community
Community Education	CC	O,R	Community / CDC
Down Payment Assistance	AH	O,R	CDC / Financial Institutions
Expand Access to Capital	ED	O,R	Financial Institutions/Local, State, Federal GA
Incentivize Formal Education	ED	O,R	Education Institutions / Local, State, Federal GA
Inclusionary Zoning	AH	O,R	Local GA
Land Acquisition	AH	O,R	Local, State, Federal GA / CDC
Neighborhood Associations	CC	O,R	Community
Owner-Occupied Rehab	AH	O	CDC / Financial Institutions
Provide Affordable Childcare	ED, CC	O,R	Community / Local, State, Federal GA
Reduced Fare Programs	ED	O,R	Transportation Agency
Target Area Job Opportunities	ED	O,R	Businesses



# Community Cohesion Strategies





“We cannot seek achievement for ourselves and forget about progress and prosperity for our community... Our ambitions must be broad enough to include the aspirations and needs of others, for their sakes and for our own.”

-César Chávez

The Community Cohesion Strategies (CCS), are strategies aimed at preventing displacement through grassroot movements. The majority of the strategies listed under this category are focused on empowering the people directly burdened by gentrification and displacement.

- **Community Education Movements**
- **Neighborhood Associations**
- **Community Benefit Agreements**

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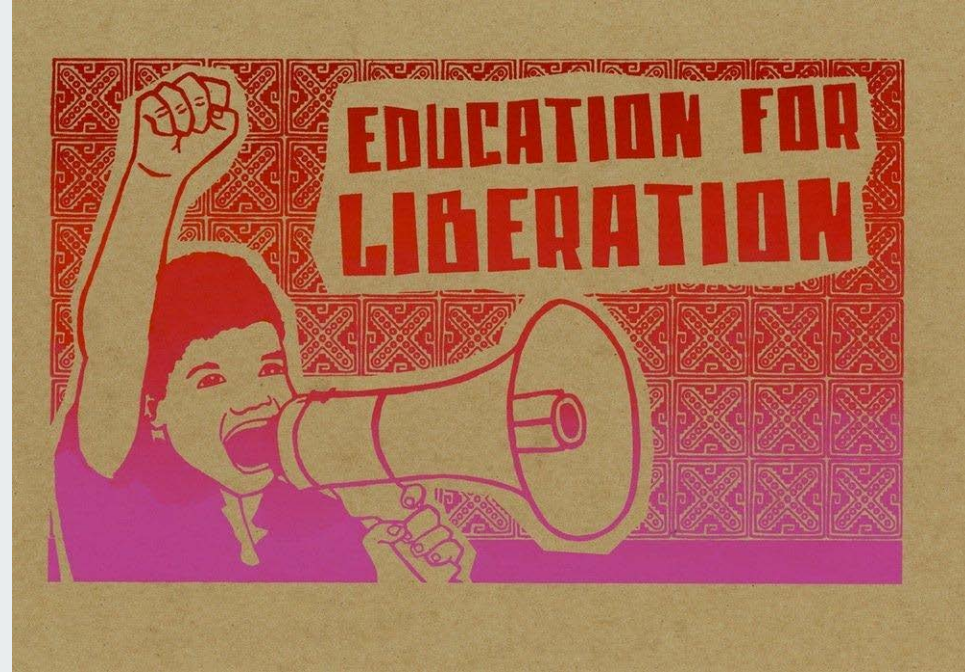
# Community Education Movements

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# Community Education Movements

Community education efforts are focused on **establishing routes that allow vulnerable populations to access information** that can help prevent displacement.

Typically this information is focused on renter rights, displacement risk factors, and local resources.





## Benefits of Community Education Movements

- Residents will **better understand the changes** occurring in their communities and **possess the ability to track their causes**.
- Residents will be able to **influence the development of their community** as they work proactively to discourage displacement.
- **With knowledge of various resources** residents with information will **access them at a higher frequency** likely helping them remain in the community.

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# Barriers for Community Education Movements

- Information accessibility – the issue that this strategy aims to resolve can also be its weak point. **Reaching all individuals in need** of the information provided is often a difficult task.
- **Adequate funding** is necessary to properly collect, organize, and disseminate the information.
- The **speed of information change** could prove problematic if leaders fail to stay up to date on latest methods and resources.



---

# San Francisco Anti-Displacement Coalition



## YOUR RIGHTS DON'T CHANGE JUST BECAUSE YOUR LANDLORD DOES!

Talk to a tenant counselor before you sign anything!

Visit [SFADC.org](http://SFADC.org) for a list of tenant rights groups in the city.

## UN RÉCORD POR ESCRITO AYUDA AL INQUILINIX PROTEGER SUS DERECHOS.

Documenta y guarda solicitudes de reparaciones y cualquier contrato con el dueño de tu vivienda



Pagar en efectivo es riesgoso, por eso es esencial obtener un recibo.

Para ver una lista de organizaciones que ayuden a inquilinos en San Francisco, visita [SFADC.org/spanish](http://SFADC.org/spanish).

## STAND UP FOR YOUR RIGHTS!

IT IS ILLEGAL FOR YOUR LANDLORD TO RETALIATE AGAINST YOU...

- When fighting an illegal rent increase
- For requesting needed repairs
- For asserting your rights

*You are protected regardless of your immigration status*

A written record helps tenants protect their rights!

Visit [SFADC.org](http://SFADC.org) for a list of tenant rights groups in the city.

# San Francisco Anti-Displacement Coalition (SFADC)

SFADC is a group of tenant organizations and allies who have organized against the rapid increase of evictions and rent prices across the San Francisco area.

They provide a wide range of information sharing services. They maintain a **website**, **twitter page** and frequently host community campaigns ranging from marches to bus ads.





# Affordable Housing Strategies





“Housing is absolutely essential to human flourishing. Without stable shelter, it all falls apart.”

Affordable housing strategies are aimed at increasing the stock and subsidizing or reducing the cost of housing units across the region.

- Land Acquisition
  - **Down Payment Assistance**
  - Inclusionary Zoning
  - Owner Occupied Rehab/ Modernization
  - Equity Protection Programs
  - Affordable Housing Preference Policies
  - Condominium Conversion
- Matthew Desmond  
(Author of *Evicted*)

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# Down Payment Assistance Programs

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# Down Payment Assistance Programs

- Down Payment Assistance programs are geared toward transitioning **renters into owners**.
- As a property owners individuals aren't susceptible to eviction and have the ability to start **generating wealth**.
- Also, by subsidizing the upfront cost of home purchasing down payment assistance programs allow **lower income individuals purchase homes**.





# Habitat for Humanity



# Habitat for Humanity

Habitat works with qualified, low-income families to help them purchase and build their own home.

Homeowners must invest 300 hours of “sweat equity” into the building of their home. The homes are then sold at no profit, with an **affordable mortgage**. Each homeowner’s **monthly mortgage payments go into a revolving fund** that is used to build more local Habitat homes.

Their movement is rooted in the idea that **building equity is a long-term solution to the problem of generational poverty**.

*They are one of the only organizations offering homeownership opportunities to families making as little as \$25,865. Compare this to the fact that market priced homes in the Portland area require, on average an annual household income of \$80,000.*

# Economic Development Strategies







“As we are pursuing economic growth and economic development, we have to make sure it happens with and by and for everyone. That everyone gets opportunity.”

-Betsy Hodges

Economic development strategies are targeted at improving the wellbeing of communities at risk for displacement by supporting economic growth and stability.

The strategies selected aim to **stabilize incomes** in at risk communities as well as **offer subsidies to living expenses** that allow more income to be directed towards remaining a resident.

- **Accessory Dwelling Units**
- **Target Area Job Opportunities**
- **Access to Capital for Local Businesses**
- **Reduced Fare Programs**
- **Affordable Childcare**

---

# Accessory Dwelling Units\*



# Accessory Dwelling Units

Accessory dwelling are secondary units on the same grounds or physically attached to a primary single family dwelling. The most common forms are:

- An apartment over the garage
- A *tiny* house in the backyard
- A basement apartment

ADUs have the potential to prevent displacement in multiple ways. They offer a way for high risk property owners to **acquire additional income** and they also offer the potential to offer **less than market rate housing** which could allow for high displacement risk individuals to have long term residence in the area.





# Benefits of Accessory Dwelling Units

- ADUs provide income for homeowners
- Increase home equity
- Increases neighborhood density without significant building impacts
- Preserves neighborhood design integrity
- Usually aligns with City infill goals
- Have the ability to provide affordable housing in a high displacement risk area



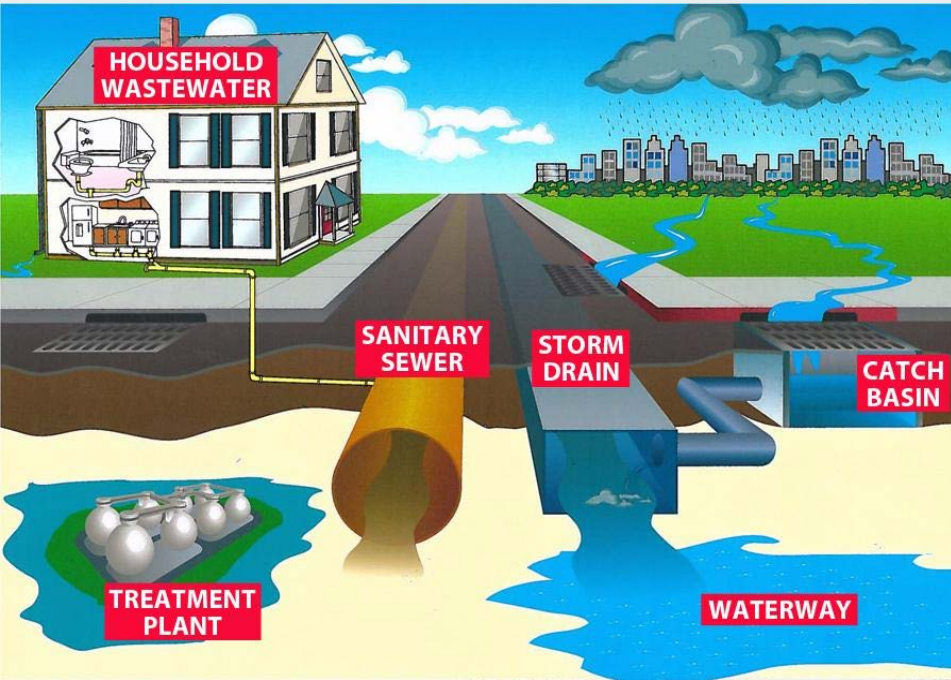
# Barriers for Accessory Dwelling Units

- Typically expensive to build
- Not allowed in all cities
- Potential to strain relationships with neighbors
- Increased responsibility as homeowner
- Size limitations
- Not all lots are large enough to allow
- Can be complex without contracting outside resources



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# SDC Waiver



# System Development Charge Waiver

Portland, Oregon's city council unanimously passed a resolution that extended the current waiver of System Development Charges (SDCs) the city's ADU fee waiver is a tangible move to incentivize much-needed infill development.

The ability to waive fees associated with development proves that if organized correctly cities could make ADU development a viable anti-displacement tool for homeowners in high displacement areas.

*Across the state of Oregon, average SDCs for a new home averaged \$7,028.*

# Conclusion





As community members and  
professionals in positions of  
power - **we have a  
responsibility to serve  
residents of our region**

---

Displacement is a complex  
issue with **many factors**  
contributing to its prevalence



Despite the many factors, there  
are also **a wide range of tools**  
available to help prevent it



This project was aimed at  
offering a starting place for the  
discussion of displacement  
prevention





Questions?