

## Council work session agenda

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**Tuesday, November 5, 2019**

**2:00 PM**

**Metro Regional Center, Council Chamber**

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**2:00 Call to Order and Roll Call**

**2:05 Safety Briefing**

**Work Session Topics:**

2:10 Mobility Policy Update [18-5302](#)

Presenter(s): Margi Bradway, Metro  
Kim Ellis, Metro

Attachments: [Work Session Worksheet](#)  
[Draft Resolution](#)  
[Key Scoping Meetings](#)  
[Scoping Factsheet](#)  
[Stakeholder Interviews Report](#)  
[Draft Work Plan](#)  
[Draft Stakeholder and Public Engagement Plan](#)

2:40 Oregon Zoo Strategic Plan [18-5303](#)

Presenter(s): Don Moore, Metro  
Sarah Keane, Metro

Attachments: [Work Session Worksheet](#)  
[Draft Strategy Plan Overview Sheet](#)  
[Draft Strategy Plan Framework](#)

**3:10 Chief Operating Officer Communication**

**3:15 Councilor Communication**

**3:20 Adjourn**

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

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## **Mobility Policy Update**

*Work Session Topics*

Metro Council Work Session  
Tuesday, November 5, 2019  
Metro Regional Center, Council Chamber

## REGIONAL MOBILITY POLICY UPDATE WORK PLAN AND ENGAGEMENT PLAN

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Date: October 24, 2019

Department: Planning and Development

Meeting Date: November 5, 2019

Prepared by:

Kim Ellis, x1617,

[kim.ellis@oregonmetro.gov](mailto:kim.ellis@oregonmetro.gov)

Presenters: Margi Bradway, Deputy  
Director and Kim Ellis, Project Manager

Length: 30 minutes

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### ISSUE STATEMENT

Metro and the Oregon Department of Transportation (ODOT) are working together to update the policy on how the region defines and measures mobility in regional and local transportation system plans (TSPs) and during the local plan amendment process in the Portland area. The current 20-year old mobility policy is contained in the [Regional Transportation Plan](#) (RTP) and Policy 1F of the [Oregon Highway Plan](#) (OHP) and measures the ratio of motor vehicle volume to motor vehicle capacity during peak travel periods to identify transportation needs.

The 2018 RTP failed to meet state requirements for demonstrating consistency with the OHP Highway Mobility Policy (Policy 1F) under the current mobility targets for the region. As a result, ODOT agreed to work with Metro to update the mobility policy for the Portland metropolitan area in both the 2018 RTP and OHP Policy 1F.

The 2018 RTP is built around four key priorities of advancing equity, mitigating climate change, improving safety and managing congestion. The plan recognizes that our growing and changing region needs an updated mobility policy to better align how we measure the performance and adequacy of the transportation system for both people and goods to serve planned land uses. The comprehensive set of shared regional values, goals and related desired outcomes identified in the RTP and 2040 Growth Concept, as well as local and state goals will guide to this work. This work will be coordinated with planned updates to the Oregon Transportation Plan (OTP) and the OHP.

Since April, Metro and ODOT have worked closely together and with local, regional and state partners to scope the project, seeking feedback on the project objective and proposed approach. A schedule of key scoping meetings is provided in **Attachment 1**.

#### What is the Regional Mobility Policy?

The region's mobility policy is based on vehicle-based thresholds adopted in the Regional Transportation Plan (RTP) and Policy 1F of Oregon Highway Plan (OHP). These thresholds are referred to as the volume-to-capacity ratio (v/c ratio).

As the primary way of measuring congestion on roads and at intersections, the current policy measures the number of motor vehicles relative to the motor vehicle capacity of a given roadway during peak weekday travel times to identify transportation needs and determine adequacy of the transportation system to serve planned land uses.

Originally developed and used to guide the sizing and location of the Interstate System in the 1960s, over time the policy has been applied to all roads for these purposes:

- Planning for the future
- Regulating development
- Mitigating the impacts of development
- Managing and designing roads



## REGIONAL MOBILITY POLICY UPDATE WORK PLAN AND ENGAGEMENT PLAN

Comments and feedback have been received since mid-April through:

- a **Metro Council work session** (June 25);
- more than twenty **discussions with local and regional policy and technical advisory committees**, including county-level coordinating committees, **and local, regional and state agency staff** aimed at understanding the intersection of the mobility policy and land use and other transportation issues (April – October);
- one **forum with community leaders** (August);
- one **consultation meetings with Oregon Department of Land Conservation and Development** staff (September); and
- **interviews with more than sixty stakeholders** from across the greater Portland region representing state, regional and local government, transit, business, freight movement, commuter, public health, environmental, affordable housing and racial equity perspectives, among other stakeholders (July – October).

A [Scoping Summary factsheet](#) describing the process and key themes from stakeholder feedback and a [Stakeholder Interviews Report](#) are provided in **Attachments 2 and 3, respectively**. This information is posted on the project website at: [oregonmetro.gov/mobility](http://oregonmetro.gov/mobility).

Overall, there is broad support and enthusiasm for an updated policy that accounts for all modes of travel and a broader array of outcomes beyond the level of congestion. Stakeholders also broadly supported the draft project objectives and the need for an updated policy. In response to comments and feedback received, staff updated the draft project objectives and proposed approach presented to the Metro Council in June. The updates are reflected in the draft work plan and draft stakeholder and public engagement plan in **Attachments 4 and 5**, respectively, and will be considered by the Transportation Policy Alternatives Committee (TPAC) on November 1.

At this work session, staff will seek Metro Council support for the revised draft work plan and engagement plan under consideration by TPAC and the Joint Policy Advisory Committee on Transportation (JPACT). Staff will seek approval of the work plan and engagement plan by JPACT in November and the Metro Council in December.

### **ACTION REQUESTED**

Staff seeks Metro Council support for both the proposed work plan and the engagement plan and direction on the Metro Council approval process.

Anticipated next steps for finalizing the work plan and public engagement plan:

- **November 1** – TPAC makes recommendation to JPACT on approval of the work plan and engagement plan
- **November 21** – JPACT considers approval of the work plan and engagement plan
- **December 5 or 12** – Metro Council considers approval of the work plan and engagement plan ([Staff recommends Council approval by Resolution, as a Consent Agenda item](#))
- **December and January** – Metro and ODOT staff finalize an Intergovernmental Agreement (IGA) and Request for Proposals for consultant support (technical and communications)

## REGIONAL MOBILITY POLICY UPDATE WORK PLAN AND ENGAGEMENT PLAN

### IDENTIFIED POLICY OUTCOMES

As directed by the 2018 RTP, this project will update the 20-year old “interim” mobility policy that is used to define and measure mobility in regional and local transportation system plans (TSPs) and during the plan amendment process in the Portland area. The project will develop a holistic alternative mobility policy and associated measures, targets, and methods for the Portland region that focuses on system completeness for all modes and system and demand management activities to serve planned land uses. The project will advance the RTP policy goals for addressing equity, climate, safety and congestion as well as support other state, regional and local policy objectives, including implementation of the 2040 Growth Concept and the region’s Climate Smart Strategy.

In addition, this project will develop guidance to jurisdictions on how to balance multiple policy objectives and document adequacy, i.e. consistency with the RTP and OHP, in both transportation system plans (TSPs) and plan amendments, when there are multiple measures and targets in place. Finally, the project will recommend considerations for future local, regional and state actions outside the scope of this project to implement the new policy and to reconcile differences between the new TSP and plan amendment measures and targets and those used in development review and project design.

### POLICY QUESTION(S)

1. Does Council support the project work plan and the engagement plan as proposed?
2. Does Council support approving the project work plan and the engagement plan by Resolution as part of a Consent Agenda?

### POLICY OPTIONS FOR COUNCIL TO CONSIDER

The 2018 RTP failed to meet state requirements for demonstrating consistency with the OHP Highway Mobility Policy (Policy 1F) and, as a result, ODOT agreed to work with Metro to update the mobility policy for the Portland metropolitan area in both the 2018 RTP and OHP Policy 1F. Feedback received during the scoping engagement activities reflects broad support for updating the mobility policy and significantly informed revisions to fine-tune the project objectives and approach.

Policy options for Council to consider include:

- **Option 1: Council supports the project work plan and public engagement plan, as proposed.**
- **Option 2: Council provides additional direction to staff, if the approach does not reflect Council’s desired approach.**

### STAFF RECOMMENDATIONS

Staff recommends Council support of the project work plan and engagement plan and staff’s proposed approval process (e.g., approval of the work plan and the engagement plan by Resolution as part of a Consent Agenda).

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

When the mobility policy update was defined and adopted unanimously in Chapter 8 of the 2018 RTP, JPACT and the Metro Council recognized this work must holistically advance the RTP policy goals for addressing equity, climate, safety, and congestion as well as support other state, regional and local policy objectives, including implementation of the 2040 Growth Concept and the region's Climate Smart Strategy. This understanding and direction provided by the Metro Council in June is reflected in the project work plan and engagement plan.

### **Legal Antecedents**

- **Ordinance No. 18-1421** (For the Purpose of Amending the 2014 Regional Transportation Plan to Comply with Federal and State Law and Amending the Regional Framework Plan), adopted December 6, 2018.
- **Resolution No. 19-4979** (For the Purpose of Adopting the Fiscal Year 2019-20 Unified Planning Work Program), adopted May 16, 2019.

### **Anticipated Effects**

This project will develop amendments to the mobility policy contained in the 2018 RTP and the OHP for the Portland metropolitan region for consideration by JPACT, the Metro Council and the Oregon Transportation Commission in 2021.

### **Financial Implications**

This project is accounted for in the 2019-20 budget approved by the Metro Council on June 20, 2019 and the 2019-2020 Unified Planning Work Program (UPWP) approved by the Metro Council on May 16, 2019. The project will rely on a combination of Metro's federal transportation planning grants and other resources to be determined by ODOT, pending finalizing the IGA between Metro and ODOT.

## **ATTACHMENTS**

- Is legislation required for Council action? **Yes**
- If yes, is draft legislation attached? **Yes**
- What other materials are you presenting today?
  1. Key Scoping Meetings (10/23/19)
  2. Scoping Factsheet (10/23/19)
  3. Stakeholder Interviews Report (10/23/19)
  4. Draft Work Plan (10/23/19, TPAC Review Draft)
  5. Draft Stakeholder and Public Engagement Plan (10/23/19, TPAC Review Draft)

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE	)	RESOLUTION NO. 19-XXXX
WORK PLAN AND STAKEHOLDER	)	
ENGAGEMENT PLAN FOR UPDATING THE	)	Introduced by Acting Chief Operating Officer
REGIONAL TRANSPORTATION PLAN (RTP)	)	Andrew Scott in concurrence with Council
MOBILITY POLICY	)	President Lynn Peterson

WHEREAS, Metro is the regional government responsible for regional land use and transportation planning under state law and the federally-designated metropolitan planning organization (MPO) for the Portland metropolitan area; and

WHEREAS, the Regional Transportation Plan (RTP) is the federally recognized transportation policy for the Portland metropolitan region; and

WHEREAS, the RTP is a central tool for implementing the Region 2040 Growth Concept and the region's Climate Smart Strategy, and constitutes a policy component of the Regional Framework Plan; and

WHEREAS, mobility into and through the Portland region affects both residents across the region and users across the state, from freight and economic perspectives, as well as access to health care, universities, entertainment and other destinations of regional and statewide importance; and

WHEREAS, the 2018 RTP identified the need for this planning effort because the plan failed to meet state requirements for demonstrating consistency with the Oregon Highway Plan (OHP) Highway Mobility Policy (Policy 1F) for state-owned facilities; and

WHEREAS, the Oregon Department of Transportation (ODOT) agreed to partner with Metro to update the 20-year old "interim" mobility policy that is used to define and measure mobility in regional and local transportation system plans (TSPs) and during the plan amendment process in the Portland area; and

WHEREAS, when the regional mobility policy update was defined and adopted unanimously in Chapter 8 of the 2018 RTP, the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council recognized this work must holistically advance the RTP policy goals for addressing equity, climate, safety and congestion as well as support other state, regional and local policy objectives; and

WHEREAS, the update to Regional Mobility Policy is expected to recommend amendments to the RTP as part of its next scheduled update (due in 2023) and to Policy 1F (Highway Mobility Policy) of the OHP for state-owned facilities in the Portland metropolitan region; and

WHEREAS, the Metro Council and JPACT are authorities for approval of proposed amendments to the RTP and will be consulted at key milestones in the planning process; and

WHEREAS, the Oregon Transportation Commission (OTC) is the sole authority for approval of proposed amendments to the OHP and will be consulted at key milestones in the planning process; and

WHEREAS, the first phase of the update included a formal scoping period to build agreement on the overall approach for the Regional Mobility Policy update, including the project objectives to be addressed and ways to engage stakeholders and the public in the process; and

WHEREAS, from April to October 2019, the Metro Council, JPACT, Metro Policy Advisory Committee (MPAC), Metro Technical Advisory Committee (MTAC), Transportation Policy Alternatives Committee (TPAC), the Transport Subcommittee of TPAC, the OTC Chair and other public officials, city and county staff, land use and transportation practitioners and representatives from business, environmental, racial and social equity, climate, public health, housing, freight and transportation organizations across the Portland-Vancouver metropolitan area provided input as to what outcomes should be addressed as part of the update; and

WHEREAS, the work plan seeks to increase regional and state collaboration and coordination through a combination of partnerships, focused technical and policy discussions, sound technical work, and strategic engagement to update the region's mobility policy to support ongoing efforts to link land use and transportation planning to implement the 2040 Growth Concept and the Climate Smart Strategy; and

WHEREAS, the stakeholder and public engagement plan seeks to be inclusive and strengthen existing partnerships, and build new partnerships with local, regional, state and federal governments, business and community leaders, freight shippers, transit providers, port districts and historically marginalized communities through a strategic engagement approach that helps build public trust in government and builds support for and momentum to adopt the updated regional mobility policy during the next update to the RTP; and

WHEREAS, on October 23, 2019, MPAC reviewed the draft work plan and draft stakeholder and public engagement plan, and on November 21, 2019, JPACT recommended Metro Council approval of the Regional Mobility Policy Update Work Plan, identified in Exhibit A, and the Regional Mobility Policy Update Stakeholder and Public Engagement Plan, identified in Exhibit B; now therefore

BE IT RESOLVED that the Metro Council approves the Regional Mobility Policy Update Work Plan, identified in Exhibit A, and the Regional Mobility Policy Update Stakeholder and Public Engagement Plan, identified in Exhibit B.

ADOPTED by the Metro Council this \_\_\_\_ day of December 2019.

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Lynn Peterson, Council President

Approved as to Form:

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Carrie MacLaren, Metro Attorney



# REGIONAL MOBILITY POLICY UPDATE

## KEY SCOPING MEETINGS | APRIL TO DECEMBER 2019



The Regional Mobility Policy Update project is a joint effort of Metro and ODOT. Throughout 2019, Metro and ODOT staff have worked closely together with local, regional and state partners to scope the project. A report summarizing scoping engagement activities and feedback received will be available in October.

Month	Who	When	What
April	CTAC	4/23	<ul style="list-style-type: none"> <li>• Project update</li> <li>• Seek feedback on initial scoping questions</li> </ul>
	PBOT	4/29	
May	EMCTC TAC	5/1	
	WCCC TAC	5/2	
	TPAC	5/3	
June	Portland Freight Committee	6/6	<ul style="list-style-type: none"> <li>• Project update</li> <li>• Seek feedback on project goals, approach and potential issues to address to inform development of work plan and engagement plan</li> </ul>
	TPAC/MTAC workshop	6/19	
	Council WS	6/25	
July	Stakeholder interviews	All month	
	JPACT	7/18	
	County public health and transportation staff discussion	7/22	
August	Stakeholder interviews	All month	
	WCCC TAC	8/1	
	Community Leaders Discussion Forum	8/2	
	CTAC	8/27	
September	Stakeholder interviews	All month	
	EMCTC TAC	9/4	
	TPAC	9/6	
	Portland Pedestrian Advisory Committee	9/17	
	C-4 Metro	9/18	
	MTAC	9/18	
October	DLCD/Metro/ODOT State Agency Coordination	10/2	<ul style="list-style-type: none"> <li>• Project update</li> <li>• Seek feedback on draft work plan and engagement plan</li> </ul>
	TPAC	10/4	
	EMCTC	10/14	
	WCCC	10/14	
	JPACT	10/17	
	Portland Bicycle Advisory Committee	10/22	
	MPAC	10/23	
November	TPAC	11/1	<ul style="list-style-type: none"> <li>• Seek recommendation to JPACT on work plan and engagement plan</li> </ul>
	Council	11/5	<ul style="list-style-type: none"> <li>• Seek feedback on draft work plan and engagement plan</li> </ul>
	JPACT	11/21	<ul style="list-style-type: none"> <li>• Seek recommendation to the Metro Council on work plan and engagement plan</li> </ul>
December	Council	TBD	<ul style="list-style-type: none"> <li>• Consider JPACT's recommendation</li> </ul>



## REGIONAL MOBILITY POLICY UPDATE

# Scoping summary

*This joint effort between Metro and the Oregon Department of Transportation will update the way the region defines mobility and measures success.*

### Project overview

The project will establish an updated policy for planning purposes that considers all modes of travel and a broader array of outcomes, beyond the level of congestion, to guide this work. These outcomes include healthy communities, air quality, climate, safety and equity. The updated mobility policy will guide development of regional and local transportation plans and the evaluation of potential impacts of plan amendments and zoning changes on the transportation system.

Greater Portland is on the move – and a region that is rapidly growing. More than a million people need to get to work, school, doctor's appointments, shopping, parks and home again each day. With a half-million more people expected to live in the Portland area by 2040, it's vital to our future to have a variety of safe, equitable, affordable and reliable options for people to get where they need to go – whether they're driving, riding a bus or train, biking, walking or moving goods.

Our growing and changing region needs an updated policy to better align the mobility policy with the outcomes we would like to see for greater Portland, our transportation system and our communities.

### Project scoping

Scoping is an early phase of project management that helps the project team and decision-makers hear from stakeholders about what should be included in a project and how to define success.

In April, the project team began seeking feedback on draft project objectives and a proposed approach to the project. Comments and feedback were solicited through October 2019 through more than 28 discussions with local and regional advisory committees, one forum with community leaders and a combination of briefings and interviews with stakeholders from across greater Portland representing local government, transit, business, freight movement, commuter, affordable housing, public health, environmental and racial equity perspectives, among other stakeholders. In addition, regional planning staff were interviewed to understand the intersection of the mobility policy and land use and other transportation issues.

Based on the comments and feedback received during these discussions and interviews, staff has updated the draft project outcomes and proposed approach for further discussion with and decisions by JPACT and the Metro Council in fall 2019.

## Key terms

**Policy:** a statement of intent and direction for achieving desired outcomes at the regional and system level.

**Measure:** a metric that is used to set targets and standards and to assess progress toward achieving the policy. The current measure for mobility is defined as a ratio of vehicle volume-to-capacity (v/c ratio).

**Target:** a specific level of performance that is desired to be achieved within a specified time period. The RTP defines v/c-based targets to implement the current mobility policy.

**Standard:** a performance threshold that is less flexible than a target. ODOT and local governments use the v/c ratio to regulate plan amendments, mitigate development impacts and determine road design requirements at a local or project level.



## Key themes from comments and feedback

### Feedback informing project outcomes

#### Outcomes generally

There is broad support for updating the policy, the draft project outcomes and the need for an updated policy that accounts for all modes and focuses on people and goods. Other comments urged that the region clearly define its goals for mobility and what we want to accomplish and then begin to define the best way to measure it. In addition, many people highlighted the importance of a final regional mobility policy that should advance multiple outcomes for the system, such as goals around safety, racial equity and climate.

Participants at the community leaders' forum encouraged recognizing the authority inherent in the policy to seek opportunities to move both transportation and land use goals forward, specifically around equity, safety, climate, travel options and affordable housing. On this point, some participants at the forum asked about including Vision Zero as a goal within this framework to prioritize pedestrian safety over vehicle throughput.

People also raised issues regarding the current policy, including concerns that it doesn't fully capture the experience on urban arterials, benefits of multimodal projects and the distribution of benefits and impacts. Comments also expressed frustrations with the current policy and how it impacts other planning decisions, with a sense that land use decisions should be leading transportation decisions not having the transportation policy constraining land use decisions.

On the other hand, there was an argument for an additive process rather than simply replacing the current measure and a request for the project to build a full understanding of the influence of the current policy, measures and standards and the impact of proposed changes. In addition, some people appreciated the simplicity of the current measure.

*"We need to measure for the most efficient system for the most people."*

*"We should measure for equitable travel time across travel options by race and income."*

*"Standards should be clear and objective, providing a fair way to get mitigation from developers."*

#### Equity

Many respondents felt the policy should result in basic adequate service for all people across age, income, gender and abilities with a focus on the experiences of historically marginalized communities. Specifically, lower income employees rely more on off-peak travel times, and people with lower income and people of color more often have to travel longer distances and have fewer travel options.

*"The policy should result in basic adequate service for all groups across age, income, gender and abilities with further benefits accruing progressively so that those at greater initial disadvantage receive greater initial benefit."*



### **Development and housing production**

Some people highlighted the impact of the mobility policy on potential land use decisions, development and housing production and how an updated policy could be used to encourage development in line with local and regional land use goals, including compact, mixed-use development and the provision of affordable housing.

*“The mobility standards help guide long-term plans but are also used in development decisions today.”*

### **Affordable travel options**

Many participants emphasized the need to support affordable travel options, with some specifically pointing to including travel options in a mobility performance measure. There were some respondents who specifically wanted measures that included connectivity, both in addressing gaps in the system and also the interrelationship between land use and walking, biking and using transit.

### **Context-sensitive approach**

Most participants encouraged a policy that took different communities and conditions into consideration, either through variability in performance measures or the targets/standards in applying those measures.

*“Different parts of the region have different travel options available and different land use patterns; many areas are underserved by bike, pedestrian and transit connections.”*

### **Implementation**

Several people raised the need for the policy to align at different levels of implementation and use from both transportation and land use perspectives as well as from the state and regional levels to the county and city level. Some respondents encouraged ensuring that it could clearly translate to guidance during project development.

### **Feedback informing project approach**

#### **General approach**

Overall, there is broad support for the approach, particularly the use of examples and case studies to illustrate the issues with the current policy and then test alternative mobility policy approaches in line with a context-sensitive approach. Some comments encouraged strong consideration of key issues, including the regulatory framework around the policy, implications for project design and system development charge programs, and how it is implemented during plan amendment versus development review, and potential impacts on addressing climate change, equity and safety.

#### **Engagement strategies**

Ideas and requests around who to engage included local communities and historically marginalized communities to ensure they have a voice in changes; local jurisdictions on data and analysis methods that impact multimodal planning; Metro’s Research Center and ODOT’s Transportation Planning and Analysis Unit (TPAU) in defining the analysis methodologies early in the process; public health practitioners; Southwest Washington Regional Transportation Council; and the county coordinating committees.

#### **Evaluation and prioritization of measures**

There were some comments that reflected participants’ contemplation of how organize, evaluate and prioritize potential measures, including finding the right balance between modern and smart measures that account for complexity of systems, are intuitive and can be readily calculated at different scales. Legal defensibility was also raised by many stakeholders as a key criterion.

*“Replacement measures need to be evaluated with criteria that include: simplicity, consistency, sensitivity, granularity, tractability and, to the extent possible, metrics that connect to broader goals such as greenhouse gas reduction and safety improvements.”*



## Defining mobility

Some conversations specifically asked participants to define mobility. During these conversations, the concern was raised that the term is more generally thought of in relation to disability and personal mobility devices. That being said, the concept of regional or travel mobility was generally described in terms of the individual or community experience.

*"Getting to where you need to go safely, affordably and reliably no matter your age, gender, race, income level, ZIP code – mobility is strongly influenced by equitable access to transportation options."*

*"The movement of people from place to place by multiple forms of travel."*

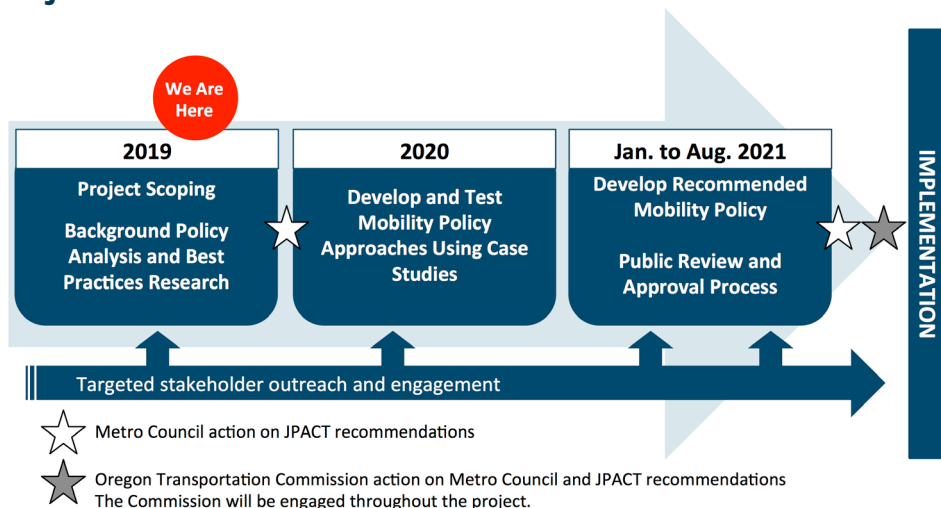
*"The region needs to define mobility from the user experience perspective, on the ground, reality... [A] ratio of experienced travel time to free flow travel time... is important to compare congestion across the region in understandable terms."*

*"Ease of getting around, but people have different thresholds about what "ease" means, so it's hard to measure."*

*"We cannot talk about mobility without talking about accessibility, predictability and efficiency, which are all really important for mobility."*



## Project timeline



## Questions?

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Learn more and sign up for  
project updates at  
[oregonmetro.gov/mobility](http://oregonmetro.gov/mobility).

## Next steps for 2019

### Fall

Transportation Research and Education Center (TREC)/Portland State University begins background research

Project team finalizes work plan and engagement plan for JPACT and Metro Council consideration and prepares reports documenting engagement activities and feedback

### October - December

JPACT and Metro Council discussions and consider approval of work plan and engagement plan



Oregon Department of Transportation  
and Metro

# Regional Mobility Policy Update

STAKEHOLDER INTERVIEW REPORT

Prepared by JLA Public Involvement

10/23/2019



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

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

**Project website:** [www.oregonmetro.gov/mobility](http://www.oregonmetro.gov/mobility)

*The preparation of this strategy was financed in part by the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration. The opinions, findings and conclusions expressed in this strategy are not necessarily those of the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration.*

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# 1.0 Introduction

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## 1.1 BACKGROUND

Metro and the Oregon Department of Transportation (ODOT) are working together to review and revise the policy on how the region defines and measures mobility in regional and local transportation system plans (TSPs) and during the local plan amendment process in the Portland area. The updated policy will guide development of future regional and local transportation plans and the evaluation of potential impacts of plan amendments and zoning changes on the transportation system.

The current 20-year old mobility policy is adopted in the Regional Transportation Plan (RTP) and Policy 1F (Highway Policy) of the Oregon Highway Plan (OHP), and measures the ratio of motor vehicle volume to motor vehicle capacity during peak travel periods to identify transportation needs and adequacy of the transportation system to serve planned land uses. These thresholds are referred to as the volume-to-capacity ratio (v/c ratio).

This project to update the Regional Transportation Plan's 20-year old "interim" mobility policy was identified in the 2018 Regional Transportation Plan (RTP) as necessary to better align the mobility policy with the comprehensive set of shared regional values, goals and desired outcomes identified in the RTP and 2040 Growth Concept, as well as with local and state goals.

## 1.2 PURPOSE OF THE INTERVIEWS

This planning effort is in the scoping phase. Policy makers, business and community representatives, and transportation and land use practitioners (consultants and city/county/ regional/state/federal staff) were interviewed with the purpose of understanding how they define mobility, as well as to collect insights as to their desired outcomes from the update to the current mobility policy. Additionally, interviewees were asked to share the challenges and opportunities they see or experience related to the region's mobility and/or the mobility policy.

The feedback from these interviews supplements other project scoping engagement activities conducted by ODOT and Metro since April 2019, and have been used to help develop both a work plan and public engagement plan for consideration by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council that will guide the planning process as the project moves forward in 2020.

## 1.3 PROCESS

Stakeholders from a mix of interests and experience were interviewed to ensure a wide range of viewpoints and perspectives, including:

- Elected officials and policy makers from the Metro Council, Land Conservation and Development Commission and the Oregon Transportation Commission, commissioners from each of the three counties (Clackamas, Multnomah, and Washington), and public officials from TriMet, ODOT, and Metro
- Staff transportation and land use practitioners from all three counties, as well as from ODOT Region 1, the Federal Highway Administration, Port of Portland, Department of Land Conservation and Development, and from select cities within the Portland area



- Transportation and land use consultants or experts from DKS Associates, Kittelson and Associates, Angelo Planning, WSP, and Radler White Parks & Alexander. LLP
- Business, economic development, freight, and trade representatives
- Community representatives from a variety of backgrounds and organizations ranging from equity, environmental justice, sustainability/environmental protection, transit/bike/pedestrian advocacy, seniors and disability rights, and transportation advocacy

A total of 64 people were interviewed in person or by phone from July to September of 2019, with a total of 10 group interviews and 31 individual interviews. For a full list of the stakeholders involved in these interviews, refer to **Appendix A**.

Interviewees were asked to answer a series of questions with topics ranging from personal or agency-specific definitions of mobility, potential measures of mobility, application of the policy, as well as mobility as it relates to equity, safety, and other modes of transportation. Questions varied depending on the level of experience or expertise the interviewee had in regards to the current mobility policy. Interviewers also asked for suggestions on the public engagement process for the mobility policy update.

This document summarizes the results of those interviews.

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## 2.0 Summary of Major Messages

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- **Broad support and enthusiasm expressed for an updated policy.** While suggestions or preference for how to update the policy varied, all interviewees expressed support, and most expressed enthusiasm, for updating and adapting the mobility policy to better serve the region.
- **Develop a broader, more holistic mobility policy.** Nearly all interviewees supported developing a mobility policy that is not just vehicle based and does not just measure volume/capacity. Interviewees suggested a number of ways the policy could be more holistic including expanding the policy to include all modes, applying an equity lens, and taking into account safety, accessibility, network connectivity, connectivity between modes, and system completion.
- **Ensure the new policy is legally defensible and not overly complex.** The primary value of the current policy is that it is widely understood and accepted by those to whom it applies. It is regional, it is legally defensible for plan amendments and development review because it has been tested over time, and it is relatively easy to explain and apply. Jurisdictions, in particular, are concerned that a complex policy can lead to confusion, a lack of accountability or use in decision-making, and further barriers to development and transportation improvements.
- **The current policy, standards and measures are insufficient or not working:**
  - Most jurisdictions and transportation consultants noted that, given our growth and funding constraints, it is not always possible to meet the policy and standards; therefore the policy has decreased in its impact on planning. While it may help prioritize projects for the TSPs, it is not realistic to assume additional capacity required to meet the policy will actually be funded, or that vehicle capacity is appropriate in all situations.
  - All jurisdictions and many community stakeholders agreed that the policy does not recognize or take into account opportunities for moving people and goods by other modes, and can inhibit investments that promote use of travel options, such as walking, biking, and use of transit.

- Many policy makers, community members, and staff of other jurisdictions pointed out that the policy is dated and does not address other goals of the region, such as climate change, public health, equity, and housing.
- **A policy with one set of measures, but different targets:** Most interviewees felt the policy and measures should remain the same regardless of land use context or type of road, but were supportive of developing a toolkit for applying the measures and assigning targets in a way that considers the planned land uses in an area and/or the function of the road. Many participants were undecided about *how* the application of the measures and assigned targets should differ, but a large majority expressed that a “one-size-fits-all” approach was not appropriate. There was general support for having a policy that had a consistent set of measures and:
  - Applying different targets for more urbanized areas with more travel options available versus the developing areas that have fewer options; and/or
  - Applying different targets and/or measures based on the purpose or function of the facility (eg. throughways and freight routes versus arterials).

A few stakeholders suggested the policy’s measures and targets should be applied uniformly, with the expectation that all of the region should be developed to ultimately support the land use and transportation goals of the region.

- **Most commonly suggested measures:**
  - Travel time and reliability
    - Easily understood by the public
    - Supports the freight industry
    - May be more effective than v/c for systems that cannot meet v/c targets
  - Transit coverage and frequency
    - Can be linked to bike and pedestrian network completion
    - Supports transit dependent populations, but needs to consider paratransit and deviated routes
    - Helps reduce the need to drive, drive alone trips, and vehicle miles traveled
  - Safety
    - Needs to be included either as a part of measuring mobility, or included as a separate measure
  - Access to destinations
    - Include first/last mile connectivity to transit from jobs, housing, and other destinations (e.g., 20-minute neighborhoods)
    - Promotes mobility for all modes and complete communities
    - Can help meet equity goals
  - Network connectivity
    - Can be applied on both a large and small scale (e.g., system-level and plan amendment scales)
    - Needs to have a defined and agreed-upon network before setting as a measure
  - Vehicle miles traveled (VMT)
    - Look to California as a guide
    - May help achieve other goals, such as reducing greenhouse gas emissions and equity goals
    - Difficult to defensibly measure, may only work at the system level
  - Volume to capacity (v/c)
    - Too simplistic to be the only measure

- Useful for identifying issues in the system
  - Can help with vehicle movement which benefits the economy
  - Provides legally defensible data
- **Significant support for an equitable transportation system, but no agreement on what that is or how to accomplish it.** Generally, most define an equitable system as one that serves all people with safe, reliable, efficient, and affordable options, especially for those with the most need in order to access affordable housing, jobs, and services.
  - Many stress that to achieve this we should invest where there are identified communities with the most need.
  - Many others stress that multimodal investments intended for equity are now serving the young, white privileged population. Housing affordability and other factors have contributed to displacement, dispersing communities of color and low income residents to outer areas of the region with fewer options to find affordable housing. They are now car dependent so vehicle capacity is an equity issue.
  - Others point out that historically marginalized communities will continue to move in the region, and that the best way to serve them is to ensure sufficient transportation choices throughout the region.

*Note: Each of these perspectives was raised by a variety of interviewees representing the spectrum of stakeholders, including those representing historically marginalized and underserved communities.*

- **Align with the current uses of the mobility policy.** This update should aim to sync up the full range of uses of the current policy, including development review and project design.
- **The most common success factors mentioned by stakeholders were:**
  - A more holistic approach to measuring mobility
  - More carrot, less stick approach to reducing VMT
  - A policy that uses an equitable and culturally responsive approach, specifically in regards to how the transportation system supports historically marginalized and vulnerable communities as they relate to social and demographic identity
  - Implementation – the policy will be broadly supported and adopted by all jurisdictions and used
  - Reduction of congestion
- **Comments on the update process and stakeholder engagement:**
  - Engage typical users
  - Engage stakeholders from outside the region that travel through the region or to key destinations in the region (e.g., Portland International Airport, freight intermodal facilities, universities, hospitals, etc.)
  - Look to California’s work on VMT measures, call on experts that worked on developing that legislation and implementation at regional and local levels
  - Work with representatives from underserved communities to define an equitable transportation system
  - Provide opportunities for practitioners from jurisdictions across the region to learn about each other’s needs in building a new policy

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## 3.0 Summary by Question

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This section is broken down by question, as well as by the type of interviewee (policy makers, community and business representatives, and transportation and land use practitioners). The icons below can help identify the type of interviewee responses that are being summarized.

### Policy Makers



### Community and Business Representatives



### Transportation and Land Use Practitioners



## 3.1 DEFINE MOBILITY

Policy makers and community/business representatives were asked: **“What does the term “mobility” mean to you in the context of a community?”**

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### COMMON RESPONSES:

The definitions volunteered by interviewees generally fell into one of the following two related categories:

- *All transportation system users* can access their destinations – home, work, services – in a timely, efficient, and affordable way by their choice of mode.
- Movement of *goods and people*.

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### VARIATIONS AND ADDITIONAL POINTS:

- Flexibility in the system
- How the system handles the volume of all movement
- How transportation and mobility contributes to livability
- Transportation that is responsive to individual needs
- Proximity as it relates to and promotes mobility
- People-centered transportation
- Mobility is broader and more complex than just congestion
- Transportation is not an end, but a means to an end for healthy, engaged, and successful communities
- “Isn’t transportation for transportation’s sake”

## 3.2 INTERVIEWEES' BACKGROUND ON THE EXISTING POLICY



### POLICY MAKERS' AND COMMUNITY/BUSINESS REPRESENTATIVES' FAMILIARITY WITH THE EXISTING POLICY

Policy makers and community/business representatives were asked: **“Are you familiar with the current regional mobility policy?”**

- Most community members did not have former experience with the mobility policy and some felt that, based on the factsheet and information they were provided, they would not be qualified to participate. However, following encouragement and gaining an understanding that the interview would be based more on values than technical knowledge, they were more comfortable and eager to voice their perspective.
- A majority of policy makers were familiar with the mobility policy and its purpose, but not with the specifics or general application. *Note: Some had a significant depth of knowledge on the policy due to their history and/or responsibilities.*



### PRACTITIONERS' USE OF THE EXISTING POLICY

The transportation and land use practitioners (transportation agency staff and consultants) were asked: **“How do you/does your agency use the current regional mobility policy, standards and targets?”**

*Note: This does not provide details on how each interviewee uses the policy, but represents the range of responses.*

The practitioners noted they use the policy and standards in the context of their TSPs, plan amendments, development review, projects, federal NEPA process to define purpose, establishing alternative mobility standards, and TPR compliance.

- The policy can help identify problems and prioritize road projects at the system level.
- Most stated that it is not a useful tool or else that it is not an adequate planning tool, and that it's becoming less and less viable. They pointed out that the standards are frequently not achievable and/or are not helpful for creating TSPs that meet today's goals of multimodal plans and walkable neighborhoods.
- Practitioners pointed out that they will move forward with planning even when it is a challenge to meet the policy:
  - TSPs – local jurisdictions will prioritize local projects, but for facilities that are subject to the standards and requirements of the policy, jurisdictions will often defer the problem by referring to the need for a refinement study.
  - Plan amendments – in order to meet the policy in their plans, practitioners will often create a “polite fiction” and include projects that have a low likelihood of getting built or funded.
  - Development review – when a development proposal is submitted that doesn't meet the mobility standards, but is not expected to receive significant opposition and is supported by the jurisdiction, the jurisdiction will make a calculated risk and approve the proposal with the assumption that there won't be an appeal.



- There's a disconnect between mobility for travel through the region and mobility as it relates to access and safety.
- The TSPs need to be manipulated in order to meet the demands of the policy.
- The table of mobility standards and targets is a precise measuring tool in an imprecise environment.
- The policy still works for smaller MPOs and the jurisdictions outside the Metro area.
- The current policy can impede planned development, particularly new housing, and the implementation of the Beavercreek Concept Plan in Oregon City was held up as an example by several interviewees.
- The TSPs are required by the TPR to coordinate land use and transportation planning. When planners are not able to adequately reconcile the planned land use and transportation within the TSP, it pushes the responsibility to meet the mobility policy down the line to the plan amendment and then development review.
- Practitioners that are responsible for healthy industry noted that it is helpful in development review and capital projects for understanding third party impacts to adjacent businesses.
- It is used as a basis for requesting exceptions.
- One jurisdiction stated that they feel the policy has been successful and they continue to use it to plan for and build out their system.
- The mobility policy can pose an issue during jurisdictional transfers, such as Barbur Blvd. or 82<sup>nd</sup> Ave.
- In TSPs it is used to identify needs and priorities.
- The designation of a mixed-use multimodal area (MMA) is not fully utilized because of the City of Portland Transportation Impact Analysis (TIA) requirements. Due to past practices, there have been changes at the local level that take advantage of what the MMA designation allows. However, the City of Portland has not updated their local master plan process to remove the requirement for additional traffic analysis.

### 3.3 STRENGTHS AND WEAKNESSES OF THE EXISTING POLICY AND SYSTEM



#### POLICY MAKERS' PERSPECTIVES ON THE EXISTING SYSTEM

Policy makers were asked **“When thinking about mobility, what do you believe is working/not working with the current system?”**

#### WHAT'S WORKING

- The policy is consistent between state and regional plans.
- There has been a lot of community and regional discussion about how to address mobility issues, and efforts have been made to develop solutions.
- The hub and spoke transit model was effective when building out the initial system.
- In regards to plan amendments:
  - The policy forces a conversation that ensures the community understands the implications of decisions – it doesn't force compliance, but builds understanding and support.
  - The current policy provides an opportunity to say “no, this isn't going to work,” which avoids the difficulties that result from saying “no” at the development review stage.

- In regards to TSPs:
  - The policy creates a conversation about the purpose and need for projects.
- One policy maker noted, the policy has accomplished what it was intended to accomplish, however it's dated and doesn't address the goals for serving other modes, reducing climate impacts, promoting equity, etc.

## WHAT'S NOT WORKING

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- The targets aren't effective at helping communities get to the vision and goals they are trying to achieve.
- The targets can't be met which has resulted in confusion as to what is able to be done.
- The current policy doesn't allow for the growth of the region, specifically in regards to population and congestion.
- There is public frustration with overall congestion and flaws in the transportation system.
- There is a sense of disconnect between the public and transportation planners and decision-makers.
- The current policy doesn't work for multimodal transportation planning.
  - Ex. Lloyd Center is very multimodal (I-5, streetcar, MAX, bus, bike, ped), but the mobility standards can only look at vehicle capacity and they don't allow for flexibility or consideration of the vehicle trip reduction benefits of compact land use and increased walking, biking, and use of transit. Nor does it allow for the benefits of limiting vehicle capacity in order to promote the other modes.
- The hub and spoke model for transit doesn't serve the region in terms of connecting communities and employment centers, and there is a growing need to build out a grid system for transit.
- The interstate system and throughways should serve longer through trips, not shorter local trips, and needs to remain functional for the commerce that relies on through trips.
- Inefficient and/or poor coordination between the federal, state, and local systems.
- There are not enough resources to accomplish what needs to be done.
- It is thwarting development: SDCs, affordable housing, TODs, and jobs.
- The policy needs to be flexible to allow it to be scaled up to the vision.
- The policy doesn't allow for significant densification around key rapid transit facilities.
- There are serious gaps in mobility for all modes – particularly in regards to transit in Clackamas and Washington counties.
- The current policy is too obtuse for the public to understand easily.
- The standards still point to large, expensive transportation projects when there is very little money to fund those projects.
- The policy doesn't incorporate an equity lens or link to affordable housing, and doesn't allow for increased densities in areas designated for future growth and development.
- Measurements are focused on transportation, but transportation is only a part of how communities work.
- The infrastructure doesn't support population growth and makes it difficult for people to get around quickly and easily without relying on automobiles.
- It takes too long to get exceptions or go through the process to develop and request approval of alternative mobility standards by the Oregon Transportation Commission.
- The policy doesn't address issues related to first/last mile connectivity in regards to accessing transit.
- In regards to TSPs, it's easy to understand and identify the problems, but no one has come up with ways to realistically address the problems in ways that meet the policy when they require unfundable or

unbuildable capacity improvements, or improvements that are counter to the planned land uses, such as walkable neighborhoods.



## COMMUNITY AND BUSINESS REPRESENTATIVES' PERSPECTIVES ON THE EXISTING SYSTEM

Community/business representatives were asked **“When thinking about mobility, what do you believe is working/not working with the current system?”**

### WHAT'S WORKING

A majority of community/business representatives either did not respond to how the system functions well, or explicitly noted that the system is not effective. Of those few that provided ways in which the system is functioning well, the most common response acknowledged that **the system has been effective at connecting people to Portland's downtown urban core by a variety of modes**. Other comments included:

- Efforts to expand transit
- Promoting active transportation
- Vision Zero
- Applying an age-friendly lens to transportation decisions

### WHAT'S NOT WORKING

**Congestion and lack of transit coverage and service expansion to keep up with growth** were the most common issues mentioned by community/business representatives. Other issues included:

- Safety issues
  - Vulnerable communities are at a much higher risk of traffic-related injuries or fatalities
- The “one-size-fits-all” approach to road planning and design resulting in conflicts between modes, safety issues, inefficiency, and poor traffic management
- Inequitable distribution of travel options
- Significant gaps in travel options exist in some parts of the region
- Current hub and spoke model for transit
- Conflicts between modes
- Displacement and gentrification
- Lack of affordability (housing and transportation)
- Inadequate transportation for the mobility-challenged population
- System gaps and lack of connectivity between modes
- A system that doesn't support the goal of reducing drive alone trips, reliance on automobiles, and VMT
- Lack of attention to travel needs other than the traditional home-to-work system user, i.e. travel for needs other than employment, alternative work hours, etc.



## PRACTITIONERS' USE OF THE EXISTING POLICY

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The transportation land use and transportation practitioners were asked: **“What do you believe is working and not working with the current regional mobility policy, standards and targets?”**

### WHAT'S WORKING

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While most practitioners agreed that the current policy is inadequate, nearly all agreed that a primary value of the current policy is that it is known, understood and accepted by those who must rely on it.

*“There is a threshold. You know how to measure it. You know how to mitigate. No one questions its validity. Developers don't argue. Engineers get it.”*

Additional points included:

- It identifies where the congestion problems are in a TSP and therefore helps when prioritizing projects for a 20-year timeframe.
- It is effective and legally defensible for exactions.
- The public is concerned about congestion and wants auto mobility; the policy identifies congestion and auto mobility deficiencies. *Note: This issue was acknowledged by jurisdictions responsible for planning for developing outer parts of the region, as well as for those established in urban centers in the region.*
- Several traffic engineers stressed that v/c is still one of the best tools for understanding the safety and capacity of intersections.
- The staff of one jurisdiction stated that the policy has been working for implementing their concept plans.
- The policy makes it easy to collect data and measure.
- Freight is essential to our economy and it relies on vehicle mobility.
- If a plan amendment fails, ultimately the local jurisdiction can move forward regardless.
- It provides a link to identify consistency with the Transportation Planning Rule.

### WHAT'S NOT WORKING

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Nearly all practitioners agreed that the policy is either insufficient or just unworkable.

- “It's dated.” “It's all about moving cars.” It does not allow for movement of people and goods through other modes.
- “It's antiquated.” It doesn't reflect the region's goals for climate change, VMT reduction, health, equity, etc. and actually works against those goals. It is in conflict with our city's goals and policies.
- “It's broken. It no longer works to create continuity from long-range planning to projects.” (TSP, to plan amendment, to development review, to projects).
- The transportation system doesn't work. Freeways aren't working. Arterials aren't working.

- Freight chooses to move outside of peak travel times when possible, but increasingly throughout the day there is not enough capacity to support them during off-peak travel times.
- The measures work but the policy doesn't help us achieve the goals we want to achieve.
- The OTC alternative mobility process is too onerous, and potential solutions are unclear.
- No land use balance – can't implement concept plans.
- The results of Metro's peak spreading model can be misinterpreted in how it addresses the measure.
- Does not do a good job of addressing connectivity and system gaps.
- The policy only takes into account peak hour travel, not how a street works during off-peak hours.
- Doesn't get you the nuances that travelers experience, such as delay and travel time.
- V/c doesn't make sense to the public.
- If you use the peak spreading model it doesn't work with the standards.
- The standards are often impossibly high, specifically with the 30<sup>th</sup> highest hour measure.
- Doesn't address how to create a quality community.
- The land use solutions, just as other modes, are not seen as mitigating factors in meeting the mobility policy. Feels like the developer is being punished for making choices that reduce drive alone trips and reliance on automobiles.
- The policy requires capacity improvements, i.e. left turn lanes that impede MAX travel and therefore make the train less attractive to users.
- For jurisdictions that have a hierarchy of transportation (e.g., pedestrian, bike, transit, etc.), drive along trips are the lowest priority, yet the policy prioritizes vehicle trips to be the highest priority, (e.g., Portland).

### 3.4 THINKING ABOUT POTENTIAL ALTERNATIVE MEASURES OF MOBILITY

All interviewees were asked to review the potential new measures of mobility to be explored in the update to the Regional Mobility Policy and identify the measures they felt would best serve the region's needs. The potential measures include:

- Movement capacity for people and goods throughput, all modes (driving, riding a bus or train, biking, walking or moving goods)
- Vehicle miles traveled (VMT)
- Travel time and reliability for motor vehicles, including freight and transit
- Transit service coverage and frequency
- Bike and pedestrian network completion
- Mode share
- Network connectivity
- Access to destinations by a variety of modes

Interviewees were also given the opportunity to suggest additional measures for exploration, as well as comment on whether the volume/capacity measure (v/c ratio) should continue to be used as a part of the updated Regional Mobility Policy.



## POLICY MAKERS' RECOMMENDED MEASURES

For the policy makers, the following measures received the strongest support.

### Transit service coverage

- Need to be making transit-friendly planning decisions, specifically in regards to future growth, development, population, and need
- Remove barriers to using transit

### Access to destinations by a variety of modes

- Choice of mode needs to be a main aspect of this measure
- Need to consider flexibility in regards to access to transportation and destinations
- Can be difficult to measure
- Need to consider equity
- Support complete communities (20-minute neighborhoods)
- Can have different needs depending on the functional class and usage along a corridor

### Travel time and reliability

- This is something the public can understand and has meaning

Policy makers provided comments or support on the following measures:

- People and goods movement capacity and throughput
  - Throughput is a key aspect of this measure
  - Needs to explicitly call out other modes
- Volume/capacity
  - Considers congestion and vehicle movement which can benefit the economy
  - Should be used as a diagnostic tool, not as the base for decision-making
- VMT
  - Use California as a guide
- Bike and pedestrian network completion
  - Addresses gaps in the system
- Network connectivity
  - It's critical to have a defined network that is agreed upon prior to using network connectivity as a measure
- Mode share
  - Most suggested that measures for alternative modes would be more effective, and that this was better understood as an outcome, not a measure.
  - A few explicitly opposed this as a potential measure due to concerns that the trips were not fungible between modes, or that it would not be easily understood.

### Some general comments included:

- This shouldn't be about how it works for the Portland area, but rather how we serve statewide needs in the context of the system in the Portland area.
- Measure trend lines for future planning.
- Develop a measure for technology and innovation, i.e. AV, EV, rideshare, ridehailing, etc.
- Limit the number of measures (3-4) in order to accomplish goals.
- Measures need to support multimodal transportation.
- Safety is an outcome – find measures that ensures that outcome.



## BUSINESS AND COMMUNITY REPRESENTATIVES' RECOMMENDED MEASURES

Business and community representatives provided feedback on all of the suggested measures, summarized below.

### Access to destinations by a variety of modes (*this measure received the strongest support from the community/business representatives*)

- Enables comparisons between and promotes mobility for all modes
- Should be the standard for measuring success
- Can help address needs resulting from growth
- Can help address needs based on social and demographic identity – needs specific to age, location, income, race, gender, etc.
- Promotes development and transportation investments that are place-based (proximity to destinations)
- Addresses congestion
- Engage the community to better understand what destinations are most important – use community input to develop a destination value hierarchy
- Connect to commercial corridors
- Safety needs to be explicit
- Needs to address system gaps
- Needs to include freight

### Travel time and reliability

- Important for the freight industry
- Supports the workforce
- Include other modes of transportation, specifically active transportation modes (pedestrian, bikes, etc.)
- Needs to consider environmental justice
- Focus on efficiency, not just trying to force people out of cars by making driving inefficient
- Ensure the assessment is based on reality, i.e. peak hour travel for various modes
- Create a mode hierarchy
- Should serve as the overarching measure

#### People and goods movement capacity and throughput for all modes

- This should serve as the baseline or “umbrella” for transportation decisions
- Ensure transit is included
- Does not take into account the factors that impact use of all modes of transportation
- Link to the access to destinations measure
- Should be guided by the travel time and reliability measure

#### Vehicle miles traveled

- Proven and has had success in California
- Can be used to track congestion
- Meets the needs of the community
- Aligns with the goals of addressing climate change, creating livability, and measuring the impacts of development
  - One interviewee felt that climate goals need to be explicit in the measure

#### Bike and pedestrian network completion

- Can address safety in regards to mode conflicts and access
- Can address gaps in the system (sidewalks, bike paths/lanes, etc.)
- Investments shouldn't be at the expense of freight and vehicle travel
- Has the potential to promote future displacement and issues related to equity
- Needs to be holistic in terms of addressing system gaps

#### Transit service coverage

- Supports transit dependent people
- Reduces drive alone trips
- Addresses issues related to first/last mile connections to transit
- Should take into account paratransit and deviated routes

#### Mode share

- Make decisions that incentivize people to use modes other than SOVs
- Needs to be more explicit about climate change

#### Network connectivity

- Connect to commercial corridors
- Don't use a “one size fits all” approach to connectivity
- Make connectivity for all modes explicit in the measure
- Could be built into the access to destinations measure
- Seems too abstract

#### Volume/capacity

- Can serve as a good measuring tool
- Too simplistic to serve as the only measure



- Needs to be rational when determining capacity
- Useful for identifying congestion hotspots
- Is legally defensible

**Some general comments included:**

- Accessibility needs to account for the housing and transportation cost burden - specifically in regards to displacement.
- Safety is important to consider in relation to congestion and conflicts between modes.
- Equity needs to be explicit in all measures included in the policy.
- Measures need to account for transportation innovation, i.e. AV, EV, rideshare, etc.
- Measure changing behavior, i.e. telecommuting, alternative work hours, etc.
- Climate needs to be explicit.
- Measure impacts to natural and regional resources.
- Measure the effectiveness of coordinating land use and transportation planning.



## PRACTITIONERS' RECOMMENDED MEASURES

Most practitioners acknowledged all the listed measures were valuable considerations, but almost all practitioners also stressed that, to be effective, the policy would need a clear and narrow set of measures.

The following measures were most commonly suggested:

### Bicycle and pedestrian network completion and transit coverage and frequency

- Interviewees frequently discussed these two measures in combination.
- A broader *system* completion (bike, pedestrian, transit, etc.) was discussed as a measure:
  - The City of Portland has developed and tested a tool, tying it to SDCs.
  - California has done market-based work – a developer can be required to pay into a system completeness fund.
- There would need to be clear criteria to define system completion and the targets to completion.
- Topography and/or density need to be considered when defining appropriate levels.
- Need to stop thinking of bike and pedestrian investments as the mitigation.
- Participants discussed a variety of ways to measure transit service, including proximity to jobs and housing, trip time, and seats per hour.
- Clackamas County developed but did not adopt a more holistic mobility policy. They identified multiple measures for bike and pedestrian connectivity, including a bicycle level of stress and measure.

### A vehicle measure: Travel time reliability for vehicles, including freight and transit AND/OR Volume to Capacity – v/c

- Most interviewees suggested that a measure for vehicles still needs to be included in the updated mobility policy.

- Most who preferred travel time and reliability suggested it was more intuitive for communication with non-practitioners and more meaningful.
- It was suggested that travel time and reliability may be more useful than v/c for systems that can't be fixed to meet v/c targets
- Reliability is critical for the movement of freight.
- Transit reliability could be measured separately.
- Many – particularly the practitioners with the technical expertise and responsibility to assess the v/c – felt that v/c is still one of the best tools.
  - Provides the most legally defensible data
  - Particularly useful for measuring capacity and safety of intersections
  - Supporters of v/c believed it was easier for people to understand
- Some believed both measures should be used, practitioners within several agencies debated among themselves about which of these measures were most useful.
- A return to Level of Service – LOS – was suggested only once, noting it is still used by some of the jurisdictions for at least some of their facilities. However, several interviewees cautioned that returning to LOS would be a regression.
- A few supported establishing a vehicle cap, such as the cap established by the City of Portland.

#### Vehicle Miles Traveled (VMT)

This measure received the most polarized feedback.

##### **Support:**

- Some saw great potential for using VMT as an overarching measure to achieve many of the other measures as well as regional goals (mode shift, equity, etc.).
- There was a suggestion that a tool could be built from a VMT system metric in combination with a system completeness measure.
- A couple practitioners saw benefit in having consistency between western states and building on California's work.
- Some noted that VMT supports the Statewide Transportation Strategy (STS) for reducing greenhouse gas emissions.

##### **Concern:**

- Some felt VMT was not practical or defensibly measurable, especially for development review and project design.
- Some practitioners pointed to Oregon's different state regulatory framework. California has CEQA (the California Environmental Quality Act) that drives decision making. Oregon has the Statewide Planning Goals and related land use laws, including Goal 12 and the TPR.
- One jurisdiction expressed concern that as a community at the edge of the region with an imbalance of jobs to housing, most residents would commute out of their jurisdiction to work in another community making it difficult for them to compete.

The practitioners provided some feedback on the other measures, as described below:

- Movement of people and goods, all modes – This received broad support, but most felt it was more of a goal or the fundamental purpose of the mobility policy, rather than a measure.
- Network connectivity was recommended by several practitioners as a measure that could be applied on a large and small scale (e.g., TSP and plan amendment scales).
- Access to destinations was a consistent priority or used as a key part of the definition of mobility, but a number of practitioners stated that other measures could be effective at achieving accessibility.
- Mode share was generally not supported and was suggested as an outcome rather than a measure.

**Some general comments included:**

- There will be great benefit to a regionally adopted set of measures. They will be legally challenged and therefore need broad support and application.
- Many of these are all high-level planning goals; they won't work as measures when developing a plan or looking at a proposed development.
- Using the terms "target" and "measure" instead of "standard" is a good step.
- The measures ultimately need to work for development review, as well. They need to help establish a defensible nexus between the development and any required improvements or investments.
- The measures need to be able to identify incremental change. Using a bunch of measures won't work.
- Consider the possibility of different measures for the plan and for development review.
- We do not yet have good predictive tools for other modes.
- Which should come first – adopting a policy that creates a demand for better tools to generate the needed data, or adopting a policy that is dependent on data from tools that are currently available?

## 3.5 CONSISTENCY/FLEXIBILITY OF POLICY, MEASURES, AND TARGETS



### POLICY MAKERS ON POLICY CONSISTENCY/FLEXIBILITY

Policy makers were asked: **“Do you feel the policy, associated measures, and targets should be applied differently depending on the areas?”**

- A majority of policy makers felt there should be a common set of measures with potentially different targets – specificity depending on the area.
- The application of the policy/measures/targets needs to take into account density.
- The application should recognize the needs in employment centers.
- Any variation in the application of the policy/measures/targets should not promote urban sprawl.
- “It’s like the blind man and the elephant, the region looks very different across the region, for Portland and Metro staff they’re great and very smart, but they don’t understand. They’re looking at the world as a blind man, from the perspective of the urban center. If you look in the outer suburbs you don’t have a grid system, you don’t have transit. They need to be measured differently.”
- Some policy makers felt any necessary variations could be captured through functional class.
- It was noted that it would depend on what the measures are, but that the policy needs to allow for differences in the areas.

- It's important to consider topography, geography, and development, as well as look at gaps – ex. kids in landlocked areas only have the option of using SOVs to leave their area and we need to provide alternative modes in suburbs.
- One policy maker felt the policy/measures/targets should not be applied differently depending on the area, unless there are benefits, noting that there's been an unequal way of measuring across the region.

Policy makers were asked: **“Do you feel the policy, associated measures, and targets should be applied differently depending on the type of road and road use?”**

- It was suggested that the application of the policy/measures/targets should address the purpose of the roadway.
- Many felt that having modes existing side by side doesn't work on all roadways and can create safety issues.
- One policy maker felt it could be problematic because the functional class can look different depending on the community, and that it will change over time, i.e. 82<sup>nd</sup> Ave.
- One policy maker noted that there is not enough money to make every road function for all modes safely.



## COMMUNITY AND BUSINESS REPRESENTATIVES ON POLICY CONSISTENCY/FLEXIBILITY

Community/business representatives were asked: **“Do you feel the policy, associated measures, and targets should be applied differently depending on the areas?”**

- A strong majority (80%) of the community/business representatives felt that application of the policy/measures/targets should differ depending on the area.
- Many felt that the policy should remain the same throughout the region, but that the targets should be applied differently based on the reality of the area (i.e. existing infrastructure, population, density, need, etc.)
- Many suggested the concept of a “sliding scale” for applying targets in order to motivate different areas to meet regional mobility goals, while being conscientious of what is achievable at a given point in time within that area.
- The different stages of development across the region and differences in the availability of travel options were a common reason for supporting varied applications of the policy/measures/targets.
- **Other comments included:**
  - Apply the policy in a local, neighborhood, and/or community specific way
  - Assess the activity in the area and apply the policy accordingly
  - Ensure the policy is formed in a way that reflects the regional values

Community/business representatives were asked: **“Do you feel the policy, associated measures, and targets should be applied differently depending on the type of road and/or road use?”**

- All of the community/business representatives that gave a direct response to this question expressed mild to strong support for applying the policy/measures/targets differently based on the type of road and/or road use. Interviewees commonly suggested performing analyses of the road to identify the primary mode usage in order to determine how best to apply the policy/measures/targets.

- Many felt that applying a “one-size-fits-all” approach to roadways has a negative impact on the mobility of all modes.
- Many felt that allowing the policy/measures/targets to be applied differently based on the type of road would help alleviate issues in the system resulting from conflicts between modes.
- **Other comments included:**
  - Allowing for variations in how the policy/measures/targets are applied will help freight mobility
  - Create a “toolkit” for each road type and use it to help when applying the policy/measures/targets
  - The built form of a road should be the driving force in making transportation investments
  - Ruling out the addition of lanes or capacity has a negative impact on freight



## PRACTITIONERS ON POLICY CONSISTENCY/FLEXIBILITY

When asked whether there should be differences in the policy, measures or targets, it was a quick and easy, “Yes!” for many of the practitioners.

Others required more thought. While nearly all eventually decided there should be an allowance for differences either based on area or road type, they were deeply concerned about “future proofing” areas that will likely become more dense in time, ensuring our region’s goals are achieved, and protecting the region from sprawl.

Only one jurisdiction’s staff did not support flexibility. They noted that ultimately our outer suburban areas want the same access and mobility options, so it makes sense to include these targets even at the beginning to ensure the system can accommodate them.

### Regarding differences based on area:

- Most replied that they supported allowing *different* targets with the *same* policy and measures. Suggested considerations for varied application of targets were:
  - Need to acknowledge that different areas have different barriers to mobility.
  - Density and/or topography. What are the existing and future limitations and opportunities for meeting the targets?
  - Connectivity and availability of other modes. For instance, if TriMet is not investing in the outer areas, we can’t hold them to the same transit targets, but it should still be a measure, and we can create facilities that provide for safe, accessible bus stops or park and rides.
  - Land uses (industrial vs residential), affordable housing. What are the access needs? Aspiration should be to ultimately make complete communities throughout the metro area.
  - May not even need vehicle standards for areas that have achieved a specified level of development with a specified level of available travel options. Some roads should or can be only so wide.

### Regarding differences based on functional class or type of roadway:

- Several practitioners supported allowing different targets and, potentially, measures, with the same vision/policy. The primary rationale was for the difference to be based on the designated users or purpose of the road. For instance:

- The role of interstates and throughways is to support statewide and interstate travel through the Portland area and cross-regional travel; not local trips.
- For the sake of freight mobility, designated freight routes need different and/or higher standards for vehicle travel time reliability.
- Designated bike routes need measures and targets that ensure the function and safety for cyclists.
- As a caution, one interviewee stressed that drivers all have apps on their phones that don't care if it's an arterial, collector, or throughway. From a user perspective it won't matter what type of road it is.

## 3.6 ACCESSIBILITY, SAFETY, EQUITY, AND OTHER MODES



### POLICY MAKERS' PERSPECTIVES ON ACCESSIBILITY, SAFETY, EQUITY, AND OTHER MODES

Policy makers were asked **"How would you determine if we have a transportation system that promotes accessibility?"** (Note: Interviewees were informed that the definition of accessibility, in this sense, is not limited to ADA considerations.)

- Addressing first/last mile connectivity, specifically as it relates to transit
- 20-minute neighborhoods
- Transit based on connectivity and/or a transit grid system

Policy makers were asked to address equity and issues related to equity as it relates to mobility:

- "Feels like we're playing whack-a-mole"
  - Look at underserved communities from a modality perspective, speaking to basic gaps. How much bike/pedestrian infrastructure, transit is within reach.
- Past policies have thwarted affordable housing and have isolated underserved communities
- "We need to do a better job, to agree we're not going to get it right the first time, and give ourselves the grace to learn and improve. I'm not sure we know what equity is, and we can't define it based on what we think it is. We need to go to the underserved communities to get their definition of equity."
- Ex. Happy Valley has a huge Asian-American community and they choose it because of the ability to have a home with enough room for multigenerational families, but they still need access to transit.
- Include people of color and different income groups to help define equitable transportation.
- We don't have the same resources as other "head-office" cities (Seattle, San Jose, San Francisco), we can't do it all at once. However, we can't wait for "perfect," we have to make imperfect decisions in order to get the "boat to rise for all."
- Understanding equity areas and ensuring they have access to what they need by a variety of modes
- Need to build a system that serves all people, first/last mile connections to transit are part of that
- A functioning system and region relies on people of all communities being able to get where they need to go – the ripple effect



## COMMUNITY AND BUSINESS REPRESENTATIVES' PERSPECTIVES ON ACCESSIBILITY, SAFETY, EQUITY, AND OTHER MODES

Community/business representatives were asked **“How would you determine if we have a transportation system that promotes accessibility?”** (Note: Interviewees were informed that the definition of accessibility, in this sense, is not limited to ADA considerations.)

- Many community/business representatives felt that to promote accessibility you need a system that is affordable, efficient, easy, and safe for all users on all modes – *“cheap, fast, safe, and easy.”*
- Other comments included:
  - Address the “first mile, last mile” barrier to using modes other than SOVs – provide multimodal options within a reasonable distance of all users
  - Build complete multimodal systems that seamlessly connect to each other
  - Create a hierarchy of destinations based on need in order to measure accessibility

Community/business representatives were asked **“How would you determine if we have a transportation system that is equitable?”**

- Many suggested developing a policy that helps protect communities from gentrification and displacement.
- A common theme among community/business representative comments was that the transportation system needs to be serving those with the most need. Specifically:
  - Addressing the geographic disparities in the transportation system that have disproportionate impacts on displaced, gentrified, and/or vulnerable communities, specifically in regards to transit coverage.
  - Addressing the housing and transportation cost and travel time burdens
- Multiple community/business representatives suggested performing robust community engagement in current and historically underserved communities to identify and address equity issues. It was noted that commonly multimodal/active transportation investments in communities of color can be seen as an indicator of impending gentrification.
- Other comments included:
  - Increase access to modes
  - Link affordable housing, employment, and development when making transportation investments
  - Make equity the primary lens
  - Include aging and disabled populations in equity discussions and seek universal design when possible
    - *“Age is an equalizer. The system serves you less as you age, regardless of race, gender, income, or location.”*
  - Geography plays a key part in equity. The transportation system is consistently lacking in areas with vulnerable communities.

*Age is an equalizer. The system serves you less as you age, regardless of race, gender, income, or location.*

Community/business representatives were asked **“How would you determine if we have a transportation system that is safe?”**

- Many noted that conflicts between modes lead to safety issues.
- Many felt that safety was missing from the potential measures.
- A common comment noted the importance of considering the perception of safety for individual users. Examples included:
  - How users feel with the presence of transit police based on experience and identity
  - User confidence and comfort when navigating the transportation system during different times of day and on different modes, i.e. women, aging adults, disabled individuals, people of color, etc.
- The Vision Zero goal was mentioned multiple times both in regards to suggestions for using it as a measure for safety (injuries and fatalities related to traffic incidents), and because some felt the measure was too simplistic and did not adequately demonstrate the safety of the network.
- Other comments included:
  - Safety is addressed in other policies and regulations in the region and does not need to be built into the update
  - Engage the community in order to determine the best way to address safety issues

Community/business representatives were asked **“How would you determine if we have a transportation system that supports other modes?”**

- Key themes from community/business representatives answers to this question included:
  - Considerations for ADA and paratransit, including exploring place-based options for transit coverage, i.e. deviated routes, shuttles for transit dependent users to meet basic needs (groceries, social interaction, etc.)
  - Providing for users that use multiple modes within a single commute, i.e. providing adequate parking and bike storage at MAX stations
  - Providing multimodal options in communities with the most need



## PRACTITIONERS' PERSPECTIVES ON EQUITY

Practitioners generally covered the issues of accessibility and safety when discussing measures and the current system. When asked **“How do we determine whether we have an equitable transportation system?”** the key messages were as follows:

- There was universal support for striving for a more equitable transportation system, one that provides for all modes, ensuring transportation options at a basic level.
- There was also a lack of confidence that the field of practitioners have the right qualifications to define an equitable transportation system. They encouraged the project team to seek input from communities of color, low-income, disabled and other underserved communities.
- Displacement was a major concern with two primary perspectives:
  - We need to target investments to underserved communities and identify actions to avoid and mitigate displacement
  - Transportation investments will create displacement, so the best approach is to work toward a complete system throughout the Portland area.



- A number of practitioners noted that some of the biggest historical displacement has been due to major infrastructure projects (I-5), so the mobility policy should include protection of neighborhoods.
- A few expressed concerns that there are racist policies on which some engineering practices are based, creating substantial impacts to black and lower income communities, and a hypothesis that v/c and LOS have contributed to those impacts.
- Areas with a higher concentration of underserved populations will have a higher percentage of transportation disadvantaged – transit dependent and mobility challenged – so should receive priority for investments in alternative modes.
- Community colleges are a good resource for tracking where the populations are moving.
- On the other hand, a number of practitioners discussed challenges to investing in serving underserved populations:
  - Some areas have significant diversity, but it is dispersed, not concentrated. Nonetheless, they need the mode options.
  - The industrial areas employees are often from underserved populations. Transit doesn't serve these communities. They must rely on cars.
  - Investing in transportation for industry creates family-wage jobs for non-college educated.

## 3.7 MANAGING FOR PROJECT SUCCESS

All interviewees were asked what outcomes *would* and *would not* want to see as a result of this update to the policy.



### POLICY MAKERS

#### Good Outcomes:

- This effort needs to provide a roadmap for the policy from the TSP to plan amendments to development review to capital projects
- Relevant today and tomorrow – planning for future – way people live and want to live
- Reduce trips people have to take and don't want to take - choices
- Support the economy
- Flexibility with clarity, that allows context but is easily understood and can be applied
- Leads to implementation with an eye for plan amendments and projects
- Something that is fully embraced by the Council and OTC
- Process in place for making decisions that we all agree on
- Identify the underserved areas and gaps and use that to provide better service and options for all
- Transportation improvements done through an equity lens
- Understandable to real people, not just transportation professionals
- A policy that doesn't just look at v/c, but looks at the goals of safety, equity, and capacity in order to give a better measurement of our strengths for all modes
- Something more flexible to meet goals

### Concerns/Bad Outcomes:

- Something that works for the Portland area and the communities within but not for the State as a whole
  - “We can’t put walls around what happens in the metro area, we still need a functional state system through the metro area. Can’t be parochial.”
- Something that puts us at a disadvantage to winning dollars and meeting goals – it’s a planning tool, the current policy falls short
- Something that contributes to sprawl



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## COMMUNITY AND BUSINESS REPRESENTATIVES

### Good Outcomes:

- A more equitable and culturally nuanced approach to measuring mobility
- Using a “less stick, more carrot” approach to reducing SOV use
- Taking a broader, more regional approach to the policy
  - Not applying a “one size fits all” approach across the region, understanding the different needs
- Using more than one measure for mobility
- Policy that measures both for mobility as well as accessibility (they are not the same, but go hand in hand)
- Reduction of congestion and traffic
- Identifying the shared goals of reducing conflicts between the modes
- A policy that is framed to address externalities, i.e. climate, public health, safety, displacement, etc.

### Concerns/Bad Outcomes:

- A continuation of the same policy and measures, or keeping the status quo
- Taking an approach that tries to force people out of cars, rather than providing better options
- A rigid, “one size fits all” approach to areas and roads with different needs
- A measure that focuses too heavily on vehicle mobility
- Freeway expansion
- Prohibiting increased capacity



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## PRACTITIONERS

### Good Outcomes:

- It will define and measure moving people and goods, not just vehicles.
- It will support our broader community goals.
- It will be measurable and clear, easy to understand and apply, and therefore is implemented.
- It will support, not de-incentivize, the 2040 plan, allowing for increased development in centers and corridors.
- It will advance equity, safety and address climate change.
- It supports freight reliability.

- A clear policy with targets and measures for the TSP and plan amendments, but also a roadmap on how to carry it through development review and capital projects.

#### Concerns/Bad Outcomes:

- It will just be a tweak of the existing system, because it's known and comfortable.
- It reduces freight mobility.
- We don't want a thick manual on how to apply the policy.

*We don't want a thick manual on how to apply the policy.*

## 3.8 PROJECT PROCESS AND FUTURE ENGAGEMENT

### INTEREST IN FUTURE ENGAGEMENT

Interviewees were asked if they were **interested in participating in further engagement opportunities related to this effort to update the Regional Mobility Policy**. All interviewees expressed interest in further participation, with a few community and business representatives indicating tentative apprehension to further participation based on availability and level commitment, and/or suggesting that the perspective they were chosen to represent could be better represented through an alternative individual.

### INDIVIDUALS AND/OR ORGANIZATIONS TO INCLUDE IN FUTURE ENGAGEMENT

Interviewees were asked to suggest additional individuals and/or organizations to include in future engagement. A full list of their responses is included in **Appendix B**.

### MESSAGING AND PROJECT COMMUNICATION

Policy makers, practitioners, and business/community representatives were asked for their thoughts on how to adapt the messaging and communication for the project and Regional Mobility Policy.



#### POLICY MAKERS

Many policy makers felt there was need for a broader range of voices involved in the process. Additionally, some policy makers felt that the project would benefit from improving the messaging to explain what the policy is and why the update is happening in a way that is tailored to those without technical experience.



#### COMMUNITY AND BUSINESS REPRESENTATIVES

Many business and community representatives had suggestions for future messaging around the project. Of those that provided feedback on this topic, a significant number felt the factsheet language was too focused on the

technical details of the policy and felt it distracted from how the policy actually relates to the average person, regardless of background, community, or industry. Other comments included:

- Personalize and tell a story in the messaging, and tailor it to the audience
- Explain the purpose and goals of this project as it relates to the region, communities, and industries in a way that is high level and tangible – summarize
- Explaining in terms of the year 2040 can be hard to comprehend – express the urgency and actionable nature of the project and policy
- Make the values explicit
- Use examples of how it impacts transportation and land use decisions
- Express the urgency and relevancy of this update for the region
- Coordinate and engage affordable housing representatives, the major shipping industry, business associations, and chambers of commerce



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## PRACTITIONERS

While many transportation and land use practitioners focused mainly on how best to improve the mobility policy, a number had suggestions for future communication and engagement practices during the update process. One of the major suggestions came from **both small and large jurisdictions and requested the opportunity for jurisdictions to learn about each other's needs to better understand what would make the mobility policy work across the region.** Other comments included:

- Engage more people within the agencies that perform the technical work in applying the standards
- Reach out to and engage members of underserved and historically marginalized communities to better define an equitable transportation system
- Use and learn from similar efforts in other parts of the country, specifically in California
- Look to existing and relevant case studies, as well as perform case studies in order to test the different concepts being considered and build confidence that the resulting policy will be defensible and practical
- Look to Clackamas County's work developing an alternative mobility policy

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## SUGGESTED INFORMATIONAL TOOLS

Interviewees were asked to supply any additional documents or tools that could help inform this effort. Documents are included in **Appendix C**.

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# 4.0 Key Challenges to Address in the Update Process

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As discussed in previous sections, there is unquestionable support for developing a policy that takes into account a broader definition of mobility than just motor vehicle capacity and v/c. There is also broad commitment to the

region's hallmark land use, climate and social equity goals and values. However, as is also evident in the previous sections, there are a number of challenges to address in order to develop a policy that balances these objectives and that is broadly accepted and used. Key among those challenges are the following:

- Stakeholders urge Metro and ODOT to adopt a mobility policy that will be **practical – simple, applicable and legally defensible**.
  - Stakeholders stressed that the policy needs to remain simple enough to ensure it will actually be broadly adopted and applied. Most interviewees supported a narrow set of measures that would account for transit and active transportation, as well as motor vehicles. However, the set of their suggested measures varied significantly from stakeholder to stakeholder, especially for vehicle capacity.
  - In addition to being simple, stakeholders stressed that the new policy needs to be legally defensible at each stage of its application – TSP, plan amendment, development review, and design of capital projects.
  - Stakeholders, especially practitioners and policy makers, will want tangible evidence that the policy works and can be applied by agencies with diverse needs, and with a range of resources and abilities. *To accomplish the practicality and legal defensibility, stakeholders would like measures that are tested and proven – such as through case studies that illustrate how the policy works in different areas of the Portland region – and that rely on data that is readily available now or will be before the policy is implemented.*
- The process for updating the mobility policy needs to explore how to provide **flexibility based on area and/or road type**, while maintaining and supporting the region's goals and values for a well-connected, integrated, multimodal system. While nearly all stakeholders recognized a need for flexibility, very few expressed confidence about how best to do so. Most stakeholders will approach this challenge with an open mind, but will want evidence that any variations are justified. For areas and roads that are in earlier stages of development, most stakeholders will want the update process to *explore the concept of allowing flexible targets while also ensuring the application of lower targets does not remain stagnant, and that if lower targets are applied it does not imply that an area or road will not have to meet higher targets in the future in order to maintain the goals and values of the region.*
- Many of the **community and business stakeholders found the purpose and nature of the policy confusing**. While the information in the factsheet helped to some degree, it was only after providing more tangible examples of how the policy is used and how it affects them that they were able to have a meaningful discussion about the policy. Additionally, many community and business stakeholders came to the interview with the impression that they would need to have technical knowledge in order to meaningfully participate. In future communications during the mobility policy update process, information about the policy and process needs to be developed in a way that is easily understood by those being engaged, and highlights the value-based nature of discussion. *Tailor communications to the stakeholders using real world examples of how the mobility policy is used and how it affects them, their industry, their interests, and/or the community they represent.*
- Stakeholders were very supportive of updating the mobility policy in a way that **promotes an equitable transportation system**, however, there were varying opinions on how to define equity as it relates to transportation, as well as how to make transportation investments in order to achieve an equitable transportation system. Despite the differing viewpoints, stakeholders across the board suggested that the

mobility policy should be updated using an equity lens. They stressed that Metro and ODOT should first *reach out to underserved and historically marginalized communities to more clearly understand how they would define an equitable transportation system and to understand how the policy could best help achieve that*. Many suggested not only reaching out to the representatives of advocacy organizations, but also to members of those communities that daily rely on and struggle with all aspects of the existing system.

## Appendix A: List of Stakeholders Interviewed

Policy Makers	
Name	Affiliation
Council President Lynn Peterson	Metro Council
Chair Bob Van Brocklin	Oregon Transportation Commission
Vice-Chair Robin McArthur	Land Conservation and Development Commission
Commissioner Jessica Vega Peterson	Multnomah County
Commissioner Paul Savas	Clackamas County
Commissioner Roy Rogers	Washington County
Doug Kelsey	TriMet
Jerri Bohard	ODOT
Margi Bradway	Metro

Transportation and Land Use Practitioners	
Name	Affiliation
Bill Holstrom	DLCD
Matt Crall	
Jennifer Donnelly	
Chris Deffebach	Washington County
Tom Harry	
Jinde Zhu	
Stacy Shetler	
Karen Buehrig	Clackamas County
Joe Marek	
Richard Nys	
Joanna Valencia	Multnomah County
Jessica Berry	
Eric Hesse	City of Portland
Eric Engstrom	
Peter Hurley	
Bob Kellett	
Laura Terway	Oregon City
Dayna Webb	
Phil Healy	Portland of Portland
Tom Bouillion	
Avi Tayar	ODOT Region 1
Chi Mai	
Rachael Tupica	Federal Highway Administration
Nathaniel Price	
Nick Fortey	
Linda Swann	
Carl Springer	DKS Associates
Matt Hughart	Kittelson and Associates
Frank Angelo	Angelo Planning
Darci Rudzinski	



Transportation and Land Use Practitioners	
Kirsten Pennington	WSP
Christe White	Radler White Parks & Alexander. LLP

Community and Business Representatives	
Name	Affiliation
Commissioner Pam Treece	Westside Economic Alliance
Corky Collier	Columbia Corridor Association
Jarvez Hall	East Metro Economic Alliance
Ady Everette	Business for Better Portland
Heather A. Hoell	Venture Portland
Rob Freeman	Fred Meyer Distribution
Lanny Gower	Con-Way Freight, Inc.
Jana Jarvis	Oregon Trucking Association
Waylon Buchan	
Tyler Lawrence	Green Transfer
Willy Myers	Columbia Pacific Building Trades Council
Jillian Detweiler	Street Trust
Mariana Valenzuela	Centro Cultural
Hannah Holloway	Urban League of Portland
Jeff Pazdalski	Westside Transportation Alliance
Glenn Koehrsen	TPAC Community Representative
Elaine Freisen-Strang	AARP
Bandana Shrestha	
Julie Wilke	Ride Connection
Bob Sallinger	Audubon Society
Ted Labbe	Urban Greenspaces Institute
Chris Rall	Transportation for America
Kelly Rodgers	Street Smart

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## Appendix B: Suggested Engagement

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AAA Oregon	No More Freeways PDX
American Aging Association	Operation Engineers Local 701
APANO	Oregon Environmental Council
Central Eastside Industrial Council	Oregon Latino Health Coalition
City Observatory	Oregon Trails Coalition
Community Cycling Center	Own Consulting
Community Vision Inc.	Physicians for Social Responsibility
Disability Rights Oregon	Portland African American Leadership Forum
Disability Services Advisory Council	Portland Business Association
East Metro Economic Alliance	Portland Community Reinvestment Initiatives Inc.
East Portland Land Use and Transportation Committee	Portland Freight Committee
Franz Bakery Distribution	Portland Housing Advisory Commission
Friends of Trees	Portland Planning Commission
Getting There Together Coalition	Portland Public Schools
Habitat for Humanity	Portland Public Schools Parent Teacher Associations
Hacienda CDC	Renew Oregon
Intel	Ride Connection Board of Directors
Jade District	Rose CDC
Jarrett Walker and Associates	Self Enhancement Inc.
Laborers Local 737	Sightline Institute
Latino Health Coalition	Special Transportation Fund Advisory Committee
Metro Transportation Funding Task Force	Street Trust
Multnomah County Social Services	Verde
Nike Shuttle Staff	

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## Appendix C: Suggested Informational Tools

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[Transportation for American: Guiding Principles \(Updated September 2019\)](#)

[Metro Transportation Funding Taskforce \(various materials\)](#)

Ted Talks: A Day in the Life Series (how people move through the city)

[ODOT Transportation Systems and Operations Management Plan \(2017\)](#)

[Transportation Research Board \(relevant studies and documents\)](#)

Washington County travel time information (unreleased)

[San Francisco Transportation Demand Management Tool](#)

[Clackamas Regional Connections Study Task 4.1.2 Implementation Recommendations Memo](#)

Clackamas County Social Services Needs Assessment Survey 2019

[Clackamas Regional Center Connections Project Task 4.2 Transportation System Safety Performance Measures](#)



Metro



Oregon  
Department  
of Transportation

## Metro/ODOT Regional Mobility Policy Update Work Plan

*A joint effort between Metro and the Oregon Department of Transportation will update the way the region defines mobility and measures success for our transportation system.*

This Work Plan defines the project purpose, objectives, background and major tasks to be completed by Metro and the Oregon Department of Transportation (ODOT) with the support of a Consultant in the time period between January 1, 2020 and Fall 2021.

This work plan was shaped by and builds on significant engagement and technical work completed during the project scoping phase from April to December 2019, including stakeholder interviews and background research conducted by the Transportation Research and Education Consortium (TREC) housed within Portland State University (PSU).

### Project purpose

The purpose of this project is to:

- Update the regional transportation policy on how the Portland area defines and measures mobility for people and goods to better align how performance and adequacy of the transportation system is measured with broader local, regional and state goals and policies.
- Recommend amendments to the Regional Transportation Plan and Policy 1F of the Oregon Highway Plan (Table 7 and related policies for the state-owned facilities in the Portland metropolitan planning area boundary).

The updated policy will be considered for approval by the Joint Policy Advisory Committee on Transportation (JPACT) and the Metro Council as an amendment to the Regional Transportation Plan (RTP) as part of the next RTP update (due in 2023). The updated policy for state owned facilities will be considered for approval by the Oregon Transportation Commission (OTC) as an amendment to Policy 1F of the Oregon Highway Plan.

The updated policy will be applied within the Portland area metropolitan planning area boundary and guide the development of regional and local transportation system plans and the evaluation of the potential impacts of plan amendments and zoning changes on the transportation system as required by Section 0060 of the Transportation Planning Rule (TPR). In addition, the updated policy will provide a foundation for recommending future implementation actions needed to align local, regional and state codes, standards, guidelines and best practices with the new policy, particularly as it relates to mitigating development impacts and managing, operating and designing roads.

### Project objectives

The 2018 RTP is built around four key priorities of advancing equity, mitigating climate change, improving safety and managing congestion. The plan recognizes that our growing and changing region needs an updated mobility policy to better align how we measure the performance and adequacy of the transportation system for both people and goods. The comprehensive set of shared regional values, goals and related desired outcomes identified in the 2018 RTP and 2040 Growth Concept, as well as local and state goals will provide overall guidance to this work.

The following project objectives will direct the development of the updated mobility policy that meets these broad desired outcomes for the Portland metropolitan region.

The project will amend the RTP and Policy 1F of the OHP to:

1. Advance the region's desired outcomes and local, regional and state efforts to implement the 2040 Growth Concept and 2018 RTP.
2. Support implementation of the region's Climate Smart Strategy, the Statewide Transportation Strategy for Reducing Greenhouse Gas Emissions and related policies.
3. Address growing motor vehicle congestion in the region and its impacts on statewide travel as well as transit, freight and other modes of travel.
4. Develop a holistic alternative mobility policy and associated measures, targets, and methods for the Portland region that focuses on system completeness for all modes and system and demand management activities to serve planned land uses. The updated policy will:
  - a. Clearly and transparently define and communicate mobility expectations for multiple modes, users and time periods, and provide clear targets for local, regional and state decision-making.
  - b. Address all modes of transportation in the context of planned land uses.
  - c. Be innovative and advance state of the art practices related to measuring multimodal mobility.
  - d. Use transportation system and demand management to support meeting mobility needs.
  - e. Help decision-makers make decisions that advance multiple policy objectives.
  - f. Address the diverse mobility needs of both people and goods movement.
  - g. Balance mobility objectives with other adopted state, regional and community policy objectives, especially policy objectives for land use, affordable housing, safety, equity, climate change and economic prosperity.<sup>1</sup>
  - h. Distinguish between throughway<sup>2</sup> and arterial performance and take into account both state and regional functional classifications for all modes and planned land uses.
  - i. Consider system completeness and facility performance for all modes to serve planned land uses as well as potential financial, environmental and community impacts of the policy, including impacts of the policy on traditionally underserved communities and public health.
  - j. Recognize that mobility into and through the Portland region affects both residents across the region and users across the state, from freight and economic perspectives, as well as access to health care, universities, entertainment and other destinations of regional and statewide importance.
  - k. Be financially achievable.
  - l. Be broadly understood and supported by federal, state, regional and local governments, practitioners and other stakeholders and decision-makers, including JPACT, the Metro Council and the Oregon Transportation Commission.
  - m. Be legally defensible for implementing jurisdictions.
  - n. Be applicable and useful at the system plan, mobility corridor and plan amendment scales.

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<sup>1</sup> Including the Oregon Transportation Plan, state modal and topic plans including OHP Policy 1G (Major Improvements), Oregon Transportation Planning Rule, Metro 2040 Growth Concept, Metro Regional Transportation Plan, Metro Regional Transportation Functional Plan and the Metro Congestion Management Process.

<sup>2</sup> The RTP Throughways generally correspond to Expressways designated in the Oregon Highway Plan.

### **Project requirements and considerations**

The project will address these requirements and considerations:

1. Comply with federal, state and regional planning and public involvement requirements, including Oregon's Statewide Planning Goals, ORS 197.180, the process set forth in OHP Policy 1F3 and associated Operational Notice PB-02.
2. Consider implications for development review and project design.
3. Consider implications for the region's federally-mandated [congestion management process](#) and related performance-based planning and monitoring activities.
4. Coordinate with and support other relevant state and regional initiatives, including planned updates to the Oregon Transportation Plan and Oregon Highway Plan, ODOT Region 1 Congestion Bottleneck and Operations Study II (CBOS II), ODOT Value Pricing Project, Metro Regional Congestion Pricing Study, Metro Regional Transportation System Management and Operations (TSMO) Strategy update, jurisdictional transfer efforts and Metro's update to the 2040 Growth Concept.
5. Document data, tools and methodologies for measuring mobility.
6. Provide guidance to jurisdictions on how to balance multiple policy objectives and document adequacy, i.e. consistency with the RTP and OHP, in both transportation system plans (TSPs) and plan amendments, when there are multiple measures and targets in place.
7. Recommend considerations for future local, regional and state actions outside the scope of this project to implement the new policy and to reconcile differences between the new system plan and plan amendment measures and targets and those used in development review and project design.

## Background

The greater Portland area is a region on the move – and a region that is rapidly growing. More than a million people need to get to work, school, doctor’s appointments, shopping, parks and home again each day. With a half-million more people expected to be living in the region by 2040, the significant congestion we experience today is expected to grow. As congestion grows, vehicle trips take longer and are less predictable, which impacts our quality of life and the economic prosperity of the region and state. It’s vital to our future to have a variety of safe, equitable, affordable, and reliable options for people to get where they need to go – whether they are driving, riding a bus or train, biking, or walking. Moreover, congestion in the Portland area is affecting the ability of businesses statewide and out of state to move goods through the region and to state and regional intermodal facilities and in the Portland area.

In December 2018, JPACT and the Metro Council adopted a significant update to the Regional Transportation Plan (RTP) following three years of extensive engagement with community members, community and business leaders, and state, regional and local partners. Through the engagement that shaped the plan, Metro heard clear desires from policymakers and community members for safe, equitable, reliable and affordable transportation options for everyone and every type of trip.

Reasons Metro and ODOT are working together to update the current mobility policy include:

- **The greater Portland region cannot meet the current mobility targets and standards as they are now set in the 2018 RTP and Oregon Highway Plan (OHP).** As the region continues to grow in population, jobs, travel and economic activity, and continues to focus growth in planned mixed-use and employment centers and urban growth boundary expansion areas, there will be increasing situations in which the current RTP and OHP mobility targets and standards cannot be met.
- **The 2018 RTP failed to meet the current policy, particularly for the region’s throughway system,** triggering the need to consider alternative approaches for measuring mobility and transportation system adequacy under state law.
- **Cities and counties are increasingly unable to meet the current policy or pay for needed transportation investments.** This is especially true in planned urban growth areas and in new urban growth boundary expansion areas that require plan amendments and zoning changes. The OHP establishes the volume-to-capacity (v/c) measure as a standard for plan amendments.
- **The current policy focuses solely on motor vehicles** and does not adequately measure mobility for people riding a bus or train, biking, walking or moving goods, nor does it address important concepts such as reliability, system completeness, system and demand management strategies or access to destinations.
- **The current policy has led to planned and constructed transportation projects that are increasingly more expensive and that may have undesirable impacts** on land use, housing, air quality, climate, public health and the natural environment, conflicting with local, regional and state goals.
- **ODOT will begin updating Oregon Transportation Plan (OTP) and Oregon Highway Plan (OHP) next year** – this provides an opportunity to coordinate both efforts and to help inform the statewide efforts.

The development of alternative mobility targets and standards must address the requirements of the Oregon Highway Plan, Policy 1F, Action 1F3, consistent with the guidance provided in Operational Notice PB-02, Alternative Mobility targets.



Excerpt from OHP Policy 1F, Action 1F.3

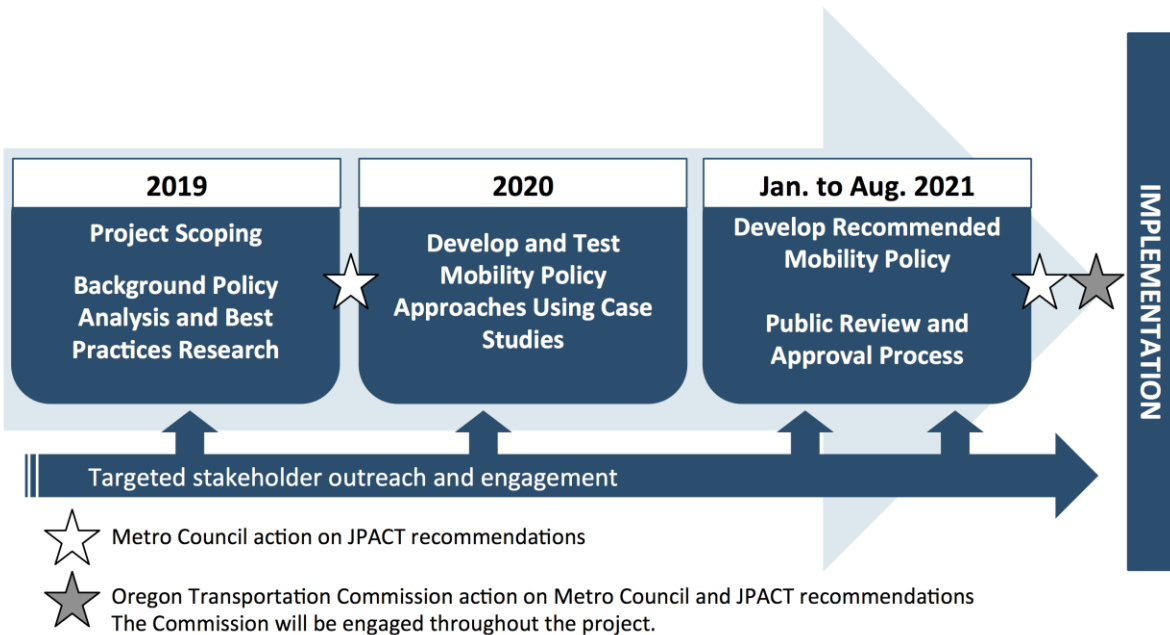
*“In the development of transportation system plans or ODOT facility plans, where it is infeasible or impractical to meet the mobility targets in Table 6 or Table 7, or those otherwise approved by the Oregon Transportation Commission, ODOT and local jurisdictions may explore different target levels, methodologies and measures for assessing mobility and consider adopting alternative mobility targets for the facility. While v/c remains the initial methodology to measure system performance, measures other than those based on v/c may be developed through a multi-modal transportation system planning process that seeks to balance overall transportation system efficiency with multiple objectives of the area being addressed...”*

Adoption of alternative mobility targets by the Oregon Transportation Commission constitutes a major amendment to the Oregon Highway Plan and as such must follow the requirements in the State Agency Coordination (SAC) program under “Coordination Procedures for Adopting Final Modal System Plans.” This effort will address all required consultation, coordination, public involvement and documentation requirements.

### Project timeline

The planning effort started in 2019, and will be completed between January 2020 and August 2021.

### Anticipated timeline for updating mobility policy for Portland region

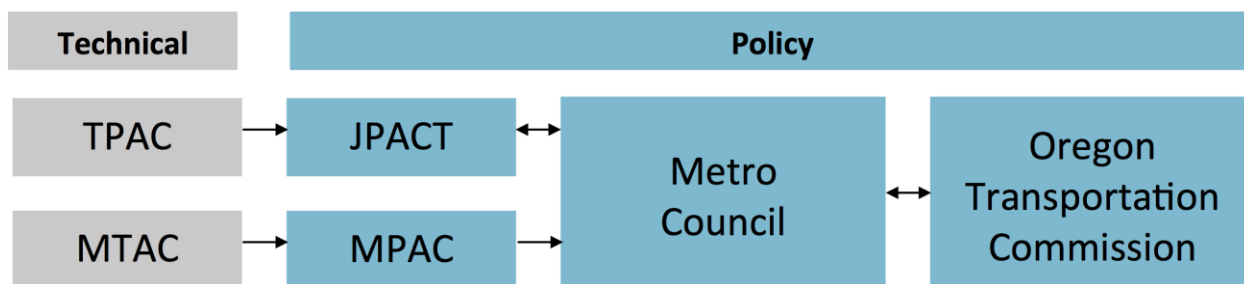


Beginning in Spring 2019, the first phase consisted of engaging local, regional, state, business and community partners to shape this work plan and supporting public engagement plan. During this phase, TREC/PSU researchers conducted background research to provide a foundation of information that will help develop a shared foundation of understanding of the current status of RTP and OHP mobility measures for the Portland area, their history and uses in the region and potential options for new mobility measures, targets and standards for application during regional and local transportation system planning and evaluation of local plan amendments. This phase concluded in December 2019 following JPACT and Council approval of the work plan and public engagement plan for the mobility policy update.

The second phase is anticipated to occur throughout 2020 and will include sharing key findings from the TREC/PSU research, development of criteria for evaluating and selecting potential measures for testing through case studies, identifying case study locations and conducting an analysis of the case studies. Key findings from the case study analysis will be reported in at the beginning of the third, and final, phase in 2021. From January to June 2021, the region will work together to develop and recommend an updated mobility policy and an action plan for implementation of the updated policy for consideration by JPACT and the Metro Council in August 2021.

### Decision-making process and roles

Recommendations prepared through this project will have a variety of review paths prior to being considered for approval by different decision-making bodies.



For deliverables identified for review in the engagement process, these are the primary venues:

**Metro Technical Advisory Committee (MTAC):** Makes broader technical recommendation to MPAC

**Transportation Policy Alternatives Committee (TPAC):** Makes technical transportation recommendation to JPACT

**Metro Policy Advisory Committee (MPAC):** Makes broader policy recommendation to Metro Council

#### Decision-makers

**Joint Policy Advisory Committee on Transportation (JPACT):** Makes transportation policy recommendation to Metro Council on RTP policy and implementation recommendations and proposed amendment to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region)

**Metro Council:** Considers MPAC and JPACT policy recommendations and must concur with JPACT in reaching final action

**Oregon Transportation Commission (OTC):** Considers Metro Council recommendation on proposed amendments to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region) that incorporates updated mobility policy

All meetings are open to the public and include opportunities for public testimony. In addition, summary reports of public outreach and information gathered from engagement activities will be shared with advisory committees and decision-makers in a variety of ways to ensure they have opportunity to contemplate and fully consider stakeholder and public input. More information about stakeholders and planned engagement activities can be found in the Regional Mobility Policy Update Stakeholder and Public Engagement Plan.

Decisions (and direction) anticipated

☆	<b>December 2019</b>	Metro Council and JPACT consider approval of work plan and public engagement plan
	<b>June 2020</b>	Metro Council and JPACT provide policy direction on measures to be tested
	<b>March 2021</b>	Metro Council and JPACT provide policy direction on development of staff recommendation for updated regional mobility policy and local, regional and state action plan to implement recommended policy
☆	<b>June – Aug. 2021</b>	Metro Council and JPACT consider approval of updated regional mobility policy and implementation recommendations and proposed amendments to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region) that incorporate updated mobility policy
★	<b>TBD</b>	Oregon Transportation Commissions considers approval of Metro Council recommendation on proposed amendments to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region) that incorporate updated mobility policy following the State Agency Coordination agreement process <sup>3</sup>

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<sup>3</sup> Oregon Revised Statutes [197.180](#)

## Summary of Key Tasks and Anticipated Schedule

Task		Anticipated Schedule
<b>Task 1</b>	<b>Project Management</b> Project management activities necessary to implement this Work Plan and supporting Stakeholder and Public Engagement Plan, manage project organization and delivery of products in a timely and effective manner and enable effective coordination and collaboration.	Jan. 2020 to Aug. 2021
<b>2020</b>		
<b>Task 2</b>	<b>Illustrate Current Approaches (Strengths and Weaknesses)</b> Illustrate “on-the-ground” examples of applications of the current v/c measure and targets. The examples will cover a range of regional facilities (throughways and arterials), 2040 Growth Concept land use types, geographies and availability of travel options. The purpose of the illustrative examples is to identify strengths and weaknesses of the current policy, to be addressed with the updated regional mobility policy. This task includes development of initial evaluation criteria for assessing strengths and weaknesses that will be further refined in Task 6.	Jan. to March 2020
<b>Task 3</b>	<b>Report on 2018 RTP Mobility Performance</b> Document performance of 2018 RTP transportation system (2015 base year and 2040 Constrained networks) for all modes to identify where the region is meeting its mobility goals or falling short, and why it is not feasible to meet current mobility targets in the OHP and RTP. Consistent with <a href="#">ODOT Operational Notice PB-02</a> , the performance documentation will describe existing and future performance at the system plan and mobility corridor levels, distinguishing between arterials and throughways. Performance measures include: traffic conditions, duration of congestion, system completeness (gaps), fatal and serious injury crashes, mode share, transit reliability/delays, average travel times across modes, accessibility to jobs and community places across modes (and comparing households in equity focus areas and households outside of equity focus areas) and average trip length. The documentation will also qualitatively describe other trends that may affect travel in the region, but are not able to be modeled or quantitatively estimated, such as autonomous vehicles, use of ridehailing and other new modes/mobility services and teleworking.	Jan. to March 2020
<b>Task 4</b>	<b>Report on Best Practices Assessment (approaches and measures)</b> Use the best practices review information compiled by the PSU TREC researchers in the scoping phase to illustrate “on-the-ground” examples of the most promising “best practices” measures and approaches for consideration in updating the regional mobility policy. Identify key lessons learned from their application locally and in other states and regions, considering Oregon’s unique legal framework. Recommend potential new policy approaches and related measures as well as improvements to current policy approaches and related measures for consideration in Task 6.	Jan. to March 2020

Task		Anticipated Schedule
<b>Task 5</b>	<b>Identify Case Study Locations</b> Work with TPAC and MTAC to identify and select case study locations. The case study locations may draw from examples identified in Task 2. The process for selecting case study location will include selecting plan amendment case study locations first, and then selecting mobility corridor geographies that encompass the plan amendment case study locations to allow for leveraging data and analysis to the extent possible and consideration of the relationship between system planning and plan amendment analysis needs. The case study locations will use selected 2018 RTP mobility corridor geographies and distinguish between arterials and throughways designated in the RTP. The case studies will test potential measures identified in Task 6 at system plan, mobility corridor and plan amendment scales and consider their applicability at the development review and project design scales.	April to June 2020
<b>Task 6*</b>	<b>Develop Criteria and Select Potential Mobility Measures for Testing</b> Refining evaluation criteria developed in Task 2, develop and select criteria to evaluate existing and potential measures. The assessment of measures in this task will inform selection of measures to carry forward for testing in Task 7. The project team will seek feedback and direction from JPACT, the Metro Council and the Oregon Transportation Commission on the draft criteria and measures selected for testing.	April to Sept. 2020
<b>Task 7</b>	<b>Conduct Case Study Analysis and Prepare Findings</b> Evaluate potential mobility measures identified in Task 6 at case study locations identified in Task 5 to illustrate potential approaches for application at the system plan, mobility corridor and plan amendment scales. The case study analysis will compare the current mobility policy approach to other new potential approaches and measures being tested. The findings will describe consistency with the evaluation criteria identified in Subtask 6.3 as well as the potential impacts of the policy approaches tested on addressing regional priorities outlined in the 2018 RTP: addressing climate change, managing congestion, improving safety and addressing equity by reducing disparities experienced by communities of color and lower income households.	Sept. to Dec. 2020
<b>2021</b>		
<b>Task 8*</b>	<b>Develop Recommended Mobility Policy for the for RTP and Proposed Amendments to OHP Policy 1F</b> Use the findings prepared in Task 7 to develop a recommended mobility policy for the RTP and proposed amendments to Policy 1F of the OHP, including measures, targets, data, methodologies and processes (e.g., documentation of findings) for the Portland metropolitan planning area. The recommended Regional Mobility Policy will be transferrable to local governments and ODOT and will support planning and analysis for future RTP and TSP updates, plan amendments subject to 0060 of the TPR,	Jan. to May 2021

Task		Anticipated Schedule
	system performance monitoring activities and other relevant planning activities in the Portland region. <sup>4</sup>	
<b>Task 9</b>	<b>Develop Local, Regional and State Action Plan to Implement Recommended Mobility Policy</b> Develop matrix of actions and proposed timeline recommended to implement the updated mobility policy through local, regional and state plans, standards, guidelines and best practices. This task will identify data and tool needs to support analysis and monitoring activities. This task will develop guidance to jurisdictions on how to balance multiple policy objectives and document adequacy, i.e. consistency with the RTP and OHP, in both transportation system plans (TSPs) and plan amendments, when there are multiple measures and targets in place. This task will recommend considerations for future local, regional and state actions outside the scope of this project to implement the new policy and to reconcile differences between the new system plan and plan amendment measures and targets and those used in development review and project design. <sup>5</sup>	Jan. to May 2021
<b>Task 10*</b>	<b>Conduct Public Review and Refinement Process</b> Seek feedback on Public Review Drafts developed in Tasks 8 and 9 through a 45-day public review and comment period with two public hearings. Additional refinements will be recommended to address feedback received during the public comment period.	June to Aug. 2021
<b>Task 11*</b>	<b>Conduct Approval Process</b> Prepare final documents and findings for consideration by JPACT and the Metro Council, including a Metro resolution and ODOT staff report, with updated regional policy, including recommended alternative performance measures and targets, recommended analysis data and methods, recommended plan amendments and updates needed to implement new policy in state, regional and local plans and codes. The project team will seek approval of final recommendations for updating the mobility policy by JPACT and the Metro Council. If approved by JPACT and the Metro Council, the recommended amendments to Policy 1F of the Oregon Highway Plan for the Portland metropolitan planning area and supporting ODOT staff report will be forwarded to the OTC for consideration.	June to Aug. 2021

\* Key tasks that will include seeking feedback and direction from JPACT, the Metro Council and the Oregon Transportation Commission.

<sup>4</sup> A Discussion Draft will be prepared for review by Metro's regional technical and policy advisory committees, the Metro Council and the Oregon Transportation Commission. A Public Review Draft will be prepared that incorporates feedback received on the Discussion Draft. The Public Review Draft will be available for broader public and stakeholder review during the 45-day public comment period in Task 10.



**Metro**



**Oregon  
Department  
of Transportation**

## **Metro/ODOT Regional Mobility Policy Update DRAFT Stakeholder and Public Engagement Plan**

*A joint effort between Metro and the Oregon Department of Transportation will update the way the region defines mobility and measures success for our transportation system.*

The stakeholder and public engagement plan supporting the Regional Mobility Policy update guides the strategic engagement approach to be used and identifies desired outcomes for sharing information with and seeking input from identified stakeholders and the public throughout the process. This engagement plan describes project engagement objectives, key stakeholders, the decision-making process and activities that will be implemented to ensure identified stakeholders and the public have adequate opportunities to provide meaningful input to the update. This plan also describes the timeline and milestones and an evaluation strategy to measure success.

The regional advisory committees and county coordinating committees will serve as the primary engagement mechanisms for collaboration and consensus building. In addition to these committees and, focused engagement with other potentially affected and/or interested individuals, communities, and organizations are also important elements of the engagement plan. The information gathered from engagement activities will be shared with decision-makers in a variety of ways to ensure they have opportunity to contemplate and fully consider stakeholder and public input.

### **Engagement objectives**

1. Communicate complete, accurate, accessible, and timely information throughout the project.
2. Provide meaningful opportunities for key stakeholders and the public to provide input and demonstrate how input influenced the process.
3. Actively seek input prior to key milestones during the project and share information learned with Metro Council, regional advisory committees and the Oregon Transportation Commission in a manner that best supports the decision-making and adoption process.
4. Provide timely notice of engagement opportunities and reasonable access and time for review and comment on the proposed changes.
5. Build broad support by federal, state, regional and local governments, key stakeholders and decision-makers, including JPACT, the Metro Council and the Oregon Transportation Commission.
6. Share information and improve transparency.
7. Comply with all public participation requirements.<sup>1</sup>
8. Seek out and consider the mobility perspectives of diverse key stakeholders, including local jurisdictions businesses, freight industries, providers of intermodal facilities and distribution centers, transit providers, historically marginalized communities and those traditionally underserved by existing transportation systems who may face challenges accessing employment and other services, such as low-income households, communities of color, youth, older adults and people living with disabilities.
9. Coordinate engagement efforts with relevant Metro and ODOT initiatives, including planned updates to the Oregon Transportation Plan (OTP) and Oregon Highway Plan (OHP).

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<sup>1</sup> This includes Metro's Public Engagement Guide, Title VI of the Civil Rights Act, the Environmental Justice Executive Order, Oregon's Statewide Planning Goal 1 for citizen involvement, the Oregon Transportation Commission Public Involvement Policy and ORS 197.180, ODOT State Agency Coordination Program and the process set forth in Oregon Highway Plan Policy 1F3 and associated Operational Notice PB-02.



## Key stakeholders

To date, the project team has identified a number of key stakeholders that will be the focus of engagement efforts throughout the process:

- **Community leaders and community-based organizations** through community leaders forums (at two key decision/information points)
- **Business, economic development and freight groups**, including statewide freight and economic perspectives (4-6, with touch points at two key decision/information points in coordination with OTP/OHP updates, as appropriate and considering staff and committee availability)
- **Local jurisdictions and elected officials representing counties and cities in the region** (through county coordinating committees, TPAC/MTAC workshops and regional technical and policy advisory committees, as appropriate and considering staff and committee availability)
- **Special districts**, including TriMet, SMART, Port of Portland and Port of Vancouver (through TPAC, MTAC, JPACT and MPAC briefings and consultation activities)
- **Southwest Washington Regional Transportation Council (RTC) and other Clark County governments** (through Regional Transportation Advisory Committee (RTAC), SW RTC, TPAC, JPACT and MPAC briefings)
- **State agencies**, including the Oregon Department of Transportation, the Oregon Transportation Commission (OTC), the Oregon Department of Land Conservation and Development (DLCD), the Oregon Land Conservation and Development Commission (LCDC), the Oregon Department of Environmental Quality (DEQ) and the Oregon Health Authority (OHA) (through TPAC, MTAC, JPACT and MPAC briefings and consultation activities)
- **State advisory committees**, including the Region 1 Area Commission on Transportation (R1ACT) and and State Modal committees (through briefings conducted in coordination with planned updates to the OTP and OHP)
- **Federal agencies**, including the Federal Highway Administration and Federal Transit Administration (through TPAC and consultation activities)
- **Practitioners**, including consultants involved in the development of transportation system plans, transportation modeling and impact studies and plan amendments in the Portland region (through Oregon Modeling Steering Committee Modeling Subcommittee briefings, technical workshops and expert panels at two key decision/information points)

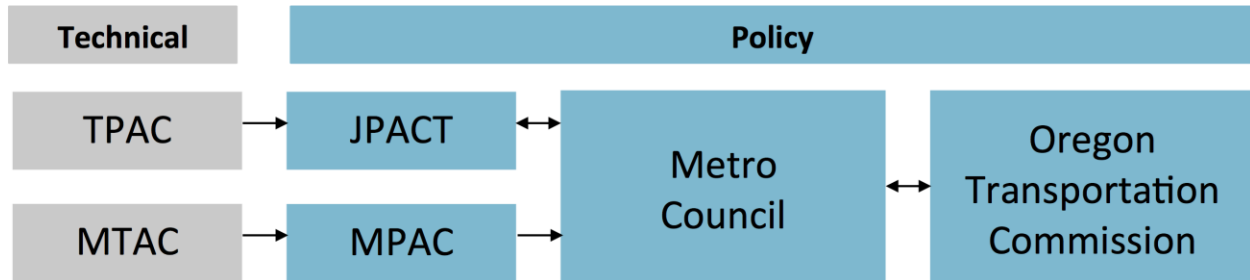
Opportunities for other potentially affected stakeholders and the public to provide input will also be provided as part of regular TPAC, MTAC, JPACT, MPAC and Metro Council meetings, and during the 45-day public comment period.





### Decision-making process and roles

Recommendations prepared through this project will have a variety of review paths prior to being considered for approval by different decision-making bodies.



For deliverables identified for review in the engagement process, these are the primary venues:

**Metro Technical Advisory Committee (MTAC):** Makes broader technical recommendation to MPAC

**Transportation Policy Alternatives Committee (TPAC):** Makes technical transportation recommendation to JPACT

**Metro Policy Advisory Committee (MPAC):** Makes broader policy recommendation to the Metro Council

**Joint Policy Advisory Committee on Transportation (JPACT):** Makes transportation policy recommendation to Metro Council on RTP policy and implementation recommendations and proposed amendment to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region)

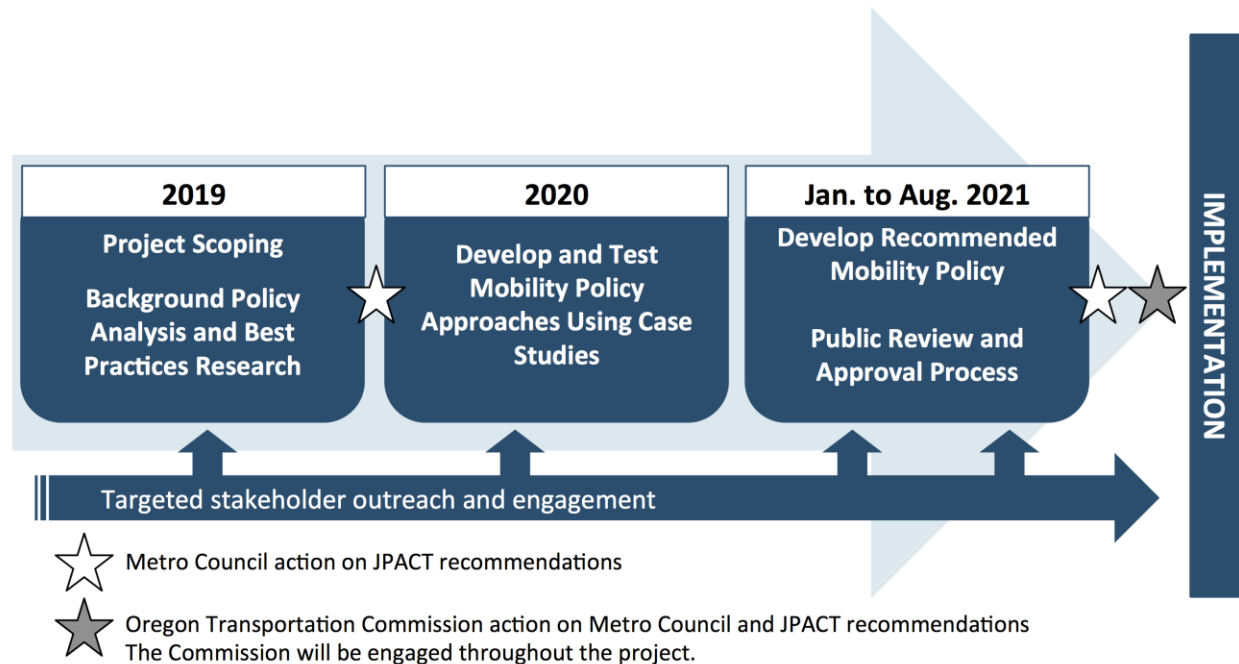
**Metro Council:** Considers MPAC and JPACT recommendations and must concur with JPACT in reaching final action

**Oregon Transportation Commission (OTC):** Considers Metro Council recommendation on proposed amendments to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region) that incorporates updated mobility policy.

All meetings are open to the public and include opportunities for public testimony. In addition, summary reports of public outreach and information gathered from engagement activities will be shared with advisory committees and decision-makers in a variety of ways to ensure they have opportunity to contemplate and fully consider stakeholder and public input.

## TIMELINE AND DECISION MILESTONES

The Regional Mobility Policy update will be completed from January 2020 to Fall 2021.



### Decisions and direction anticipated

☆	<b>December 2019</b>	Metro Council and JPACT consider approval of work plan and public engagement plan
	<b>June 2020</b>	Metro Council and JPACT provide policy direction on measures to be tested
	<b>March 2021</b>	Metro Council and JPACT provide policy direction on development of staff recommendation for updated regional mobility policy and local, regional and state action plan to implement recommended policy
☆	<b>June – Aug. 2021</b>	Metro Council and JPACT consider approval/adoption of updated regional mobility policy and implementation recommendations and proposed amendments to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region) that incorporate updated mobility policy
★	<b>TBD</b>	Oregon Transportation Commissions considers approval of Metro Council recommendation on proposed amendments to Oregon Highway Plan Policy 1F (Table 7 and related policies for the state-owned facilities in the Portland region) that incorporate updated mobility policy following the State Agency Coordination agreement process <sup>2</sup>

<sup>2</sup> Oregon Revised Statutes [197.180](#)

**Communications timeline** to support decision milestones

Phase 1 (Jan – Mar 2020): Prepare materials to explain the issue/problem.

Phase 2 (April-June 2020): Collect feedback to form criteria, pick proposed local case study locations and select measures to test. Technical expert panel(s)/workshop(s)/Forum to develop options.

Phase 3 (Jan-Mar 2021): Share what was learned, opportunities to shape recommended mobility policy and future implementation actions recommendations. Technical expert panel(s)/workshop(s)/Forum to understand impact of options and shape staff recommendations.

Phase 4 (June–Aug. 2021): Public process for review/approval.




**Decision and communications coordination timeline concept**

TIMEFRAME	January – March 2020	April – June 2020	January – March 2021	April – May 2021	June – August 2021
<b>Who</b>	Metro Council and JPACT	Metro Council and JPACT	Metro Council and JPACT	Metro Council and JPACT	Metro Council and JPACT
		OTC and LCDC	OTC		OTC and LCDC
	Cities, counties and special districts	Cities, counties and special districts	Cities, counties and special districts		Cities, counties and special districts
		CBO Leadership	CBO Leadership		Interested public
		Business & Freight groups	Business & Freight groups		
		R1ACT, OMPOC, OMSC and State modal committees <sup>3</sup>	R1ACT, OMPOC, OMSC and State Modal committees <sup>3</sup>		
<b>Materials</b>	Handout/fact sheet(s) on illustrative examples and best practices	Handout/fact sheet(s) on proposed criteria and case study locations	Handout/fact sheet(s) on case study analysis and findings	Staff recommendation (discussion draft)	Revised staff recommendation (public review draft)
	Video (explaining issue & purpose)		Case study findings report	Handout/fact sheet on staff recommendation	Legislation, including staff report and findings
	Powerpoint(s)	Powerpoint(s)	Powerpoint(s)	Powerpoint(s)	Powerpoint(s)
<b>How</b>	Website information	Panel of technical experts #1	Panel of technical experts #2/ policymaker forum	Website information and comment tool	Website information
	Regional technical and policy committees meetings	Community leadership forum #1	Community leadership forum #2	Hearing(s)	Legislative hearing
		Regional technical and policy committees meetings	Regional technical and policy committees meetings	Regional technical and policy committees meetings	Regional technical and policy committees meetings
		County coordination committees' briefings	County coordination committees' briefings		County coordination committees' briefings
<b>What</b>	Explain the issue	Criteria for selecting measures to test	What we learned	Staff recommendation/ Discussion Draft <ul style="list-style-type: none"> <li>• Mobility Policy</li> <li>• Action Plan</li> </ul>	Revised staff recommendation/
	What we learned in background research	Case study: proposed local locations	Key things for implementation Process for review/approval		Public Review Draft <ul style="list-style-type: none"> <li>• Mobility policy</li> <li>• Action Plan</li> </ul>
Decision		Direction on measures to be tested (~June 2020)	Direction on development of updated policy and implementation actions (~March 2021)		Consider approval/adoption

<sup>3</sup> Briefings will be coordinated with briefings to support planned updates to the Oregon Transportation Plan and Oregon Highway Plan.

## Public engagement tools and materials

These tools and materials will be used and timed to best leverage the needs of the project and inform technical advisory committees and decision-makers:

- **Public Engagement Plan (December 2019)** Details public engagement and decision-making framework, key audiences, schedule and engagement tools and activities.
- **Website (ongoing)** Maintained by Metro staff, the project website will be the primary portal for sharing information about the project. It includes pages that describe project activities and events, the process timeline, and support documents and materials. The site will be used to host an interactive web tool to seek input from the broader public during the 45-day public comment period. At any time, members of the public may submit comments through the project website. Metro and ODOT staff will receive and track comments, and coordinate responses as needed. 
- **Video (Jan-March 2020)** – Develop video to explain the purpose of project, what the mobility policy is, how it is used, what the policy affects (and how) and its strengths and weaknesses. The video will be hosted on the project website to serve as a key information piece throughout 2020 and 2021. It will also be shown in advance of and at briefings and meetings to help explain the update.
- **Technical expert panels/workshops/forums** – A focused effort will be made to engage topical experts, practitioners and key stakeholders to provide input on updating the mobility policy, selecting measures to test and developing implementation recommendations through:
  - TPAC/MTAC workshops (~quarterly)
  - Two expert panels/forums (~June 2020 and Feb. 2021)
  - One policymaker forum (~March '21, possibly combined with technical expert panel)
  - Oregon Modeling Steering Committee Modeling Subcommittee (~Jan. 2020, April 2020 and April 2021)
- **Equity engagement activities (ongoing)** A focused effort will be made to engage historically underrepresented populations. The project team will conduct outreach to leaders of these communities, and seek input on principles to guide updating the mobility policy, select measures to test and develop implementation recommendations through:
  - Two Community Leaders Forums (~June 2020 and Feb. 2021)
- **Hearings** At least two hearings will be jointly hosted by the Metro Council during the 45-day public comment period (~June 2021). The Metro Council will host at least one legislative hearing prior to their final action on the recommended policy (~Aug. 2021). Members of JPACT and the Oregon Transportation Commission will be invited to attend the hearings. A separate hearing before the OTC may also be necessary prior to their action on the JPACT/Council recommendation. 
- **Project newsfeeds and electronic newsletters (ongoing)** Metro staff will develop newsfeeds and e-newsletters to provide information about key milestones, and to invite key audiences and

the public to participate in engagement opportunities. The project will maintain an interested parties email list that will be an ongoing feature of the public engagement plan.

It is expected that newsfeeds and e-newsletters will be developed during these key points:

- Introduction and announcement of the project kick-off (Jan. 2020)
  - Principles to guide refinement of mobility policy, measures and methods (Spring 2020)
  - Release of case study analysis and findings (~Jan 2021)
  - JPACT/Council direction to staff on development of recommended mobility policy and future local, regional and state implementation actions (~March 2021)
  - Public notice and invitation to participate in the 45-day public comment period and release of recommended policy and implementation actions document (~June 2021)
  - Announcement of Metro Council action on Regional Mobility Policy, proposed amendments to the Oregon Highway Plan (Policy 1F) and implementation next steps (~Fall 2021)
- **Publications (ongoing)** Fact sheets, project updates and other materials will be developed to describe the project and specific aspects of the update at key milestones. The materials will be distributed at briefings and meetings. Summary reports documenting the results and findings of major tasks will also be developed and made available on Metro's website and at meetings.
  - Series of fact sheets
    - Explain the policy, issue, and project purpose and process (~Jan. – March 2020)
    - Explain criteria and information about case studies (~Fall 2020)
    - Explain analysis of case studies and findings (~Winter 2021)
    - Explain mobility policy recommendation, effect and recommendations for how it will be implemented at local, regional and state levels (~June 2021)
    - Other topics may be identified through the process
  - Technical memorandums and meeting materials (ongoing)
  - Regional Mobility Policy Recommendations Reports – Discussion Draft and Public Review Draft (~spring 2021)
  - Implementation Recommendations Reports - Discussion Draft and Public Review Draft (~spring 2021)
  - Final report (~summer/fall 2021)
  - Presentations (ongoing)
- **Consultation activities (ongoing)** The project team will consult with regulatory and other public agencies and stakeholders, including OTC, LCDC, DLCD, FHWA, FTA, OHA and others identified during the scoping process. Activities will include: email updates, in-person briefings, offering two group consultation meeting opportunities to provide feedback (~June '20 and March '21) and an invitation to provide feedback during the public comment period (June – July '21).
- **Public engagement reports (ongoing)** Throughout the process, the project team will document all public involvement activities and key issues raised through the process.
- **Final public comment log and stakeholder engagement report (~June 2021)** A public comment log and stakeholder engagement report will be compiled and summarized at the end of the formal 45-day public comment period. The public comment log will summarize comments received and recommended actions to address comments.

## **Oregon Zoo Strategic Plan**

### *Work Session Topics*

Metro Council Work Session  
Tuesday, November 5, 2019  
Metro Regional Center, Council Chamber

## STAFF REPORT

### OREGON ZOO STRATEGIC PLAN

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Date: October 25, 2019  
Department: Oregon Zoo  
Meeting Date: November 5, 2019

Presenter(s) (if applicable):  
Don Moore, Zoo Executive Director  
Sarah Keane, Zoo Finance Director

Prepared by: Sarah Keane x5705  
[sarah.keane@oregonzoo.org](mailto:sarah.keane@oregonzoo.org)

Length: 30 minutes

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#### ISSUE STATEMENT

The Oregon Zoo has drafted a strategic plan to guide the zoo's work in the next three years towards our mission of **creating a better future for wildlife**.

#### ACTION REQUESTED

Staff will seek Metro Council approval of Oregon Zoo's Strategic Plan 2020-2023 sometime in the fall of 2019.

#### IDENTIFIED POLICY OUTCOMES

Approval of the Oregon Zoo's 2020-2023 Strategic Plan will provide clear guidance to staff around key priorities and goals. It will answer the question "where is the zoo going" for key partners and the community. In addition, the annual budget process will utilize the plan for direction regarding the allocation of the zoo's resources.

#### POLICY QUESTION(S) & OPTIONS FOR COUNCIL TO CONSIDER

1. Is Council prepared to vote on the Oregon Zoo's 2020-2023 Strategic Plan?

#### STAFF RECOMMENDATIONS

Staff recommends Metro Council support the Oregon Zoo's 2020-2023 Strategic Plan.

#### STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION

The zoo's draft strategic plan emphasizes seven focus areas and multiple goals within each focus area. Due to the plan's robust nature, it was noted in previous presentations how it can be challenging to absorb that level of information in one presentation.

The initial presentation to Metro Council focused an overview of the process to create the draft of the plan and an overview of all of the focus areas. The second discussion with Metro Council focused more deeply on how the strategic plan draft aligns with established Metro priorities, community engagement, and performance measures.



The November work session aims to highlight two strategic priorities of the draft plan: career pathways and conservation. These key areas emerged in previous discussions as areas of interest for Councilors.

1. For the strategic priority of **Career Paths & Professional Development** *success will look like:*

- Staff can see clear paths for growth and what it takes to get there
- Staff feels supported in their professional development at the zoo

*How we will do it:*

- Defining a clear growth paths for each role, including developing a paid internship program
- Establishing clear process and criteria for how professional development investments are spent
- Develop a zoo-wide training plan that supports staff growth and development

Currently charting a career path at the zoo is not easily done. There are a limited number of positions available and they are highly competitive. Additionally, this priority represents a shift in hiring strategies which will need to be addressed with human resources. Despite challenges there have been several success stories starting with entry to a zoo education program and ending with regular full time employment with the zoo or another Metro department.

Work towards this goal has already begun and different approaches are being piloted. Early learnings indicate several criteria need to be considered to achieve success: the framework to be established will need to be malleable, it will be critical to create connections across all of Metro, extensive manager training and support is necessary, and the pathway entry should be available at multiple levels as opposed to always starting at the bottom.

2. For the focus area to **Advance Wildlife Conservation**, specifically the strategic priority of **Species Recovery** *success will look like:*

- The Integrated Conservation Action Plan (ICAP) is complete with measurable outcomes in place for:
  - Climate action
  - Thriving wildlife
  - Healthy habitats
  - Nature Connection

*How we'll do it:*

- Finalize and implement our Integrated Conservation Action Plan (ICAP) with measurable results
- Focus programs and achieve results in Borneo, East Africa, Arctic, and especially, the Pacific Northwest
- Maximize Association of Zoos & Aquariums (AZA) Species Survival Plan (SSP) partnerships and Saving Animals From Extinction (SAFE) programs

The Oregon Zoo recently hired Dr. Kathayoon Khalil as the Conservation Impact Manager to drive the ICAP process forward. Dr. Khalil started as a ZooTeen at the age of thirteen and spent the next decade in various roles on the education team (camp staff & zoo ambassador assistant coordinator). She has spent the last four years at the Seattle Aquarium as their Evaluator.

The ICAP focuses on four priority regions: Pacific Northwest, Arctic, East Africa, and Borneo. There will be measurable results for species, human dimensions, and landscape. It will highlight the good work already happening and guide which conservation programs to onboard and which ones to sunset.

## **BACKGROUND**

### **Community & Staff engagement:**

The zoo's strategic planning process was designed with co-creation at the core. Touch points with key partners, community groups, and staff were built in at each step in the design process. At the last council work session the draft strategic plan was discussed, zoo staff described the initial outreach to community partners, the all staff communications, and the four day gallery walk. In September an online survey was launched (available in four languages).

There were 115 survey responses (majority coming from zoo staff), in addition several focus groups were conducted during the gallery walks. On a scale of 1-5 the results were as follows:

The plan is clear & easy to understand	4
I am inspired about the zoo's direction	4
I feel confident the zoo is focused on the right things	4
I see my role in the zoo's success	3.5

The following themes were identified and addressed in the plan revision at a design workshop:

- Simplify language and definitions
- More emphasis on education
- Bring conservation work to life
- Call out volunteer experience
- DEI and accessibility clarity

There were 80 relevant comments which were reviewed during the design workshop; 40 of them were incorporated into the strategic plan and 22 will be put into other plans. This work was documented in a decision log. Also, an idea appendix capturing feedback throughout the process was created and will be reviewed at least annually.

## Plan Activation

Staff's role is critical to the success of the strategic plan and as such the thoughtful activation of the plan and the ongoing monitoring is essential.

Plan activation will start at the manager level. Managers will participate in a workshop where they will be incorporating plan goals into their area work plans. Next, the final plan will be shared at an all staff meeting. Managers will then meet with their work teams and connect each staff's goals to the strategic plan.

It is important to keep the plan alive after initial rollout. Zoo staff are committed to providing quarterly progress reports. In addition, visual representations of plan accomplishments and progress will be strategically placed around campus so it is top of mind for staff.

Through connecting our staff to our core mission and empowering them to take innovative approaches, the Oregon zoo will lead the way in **animal care & welfare, advance wildlife conservation, and deliver and inspiring guest experience.**

## ATTACHMENTS

Is legislation required for Council action? ☒ Yes ☐ No

- If yes, is draft legislation attached? ☒ Yes ☐ No
- What other materials are you presenting today? Powerpoint, Strategic Plan Draft, video link



# OREGON ZOO Strategic Plan 2020 – 2023

Our strategic plan is our guide for the next three years as we make progress towards our mission, *Creating a Better Future for Wildlife.*

## Lead the Way in Animal Care & Welfare

We're driven to be a leader among zoos in animal care & welfare—this means creating environments in which all our animals thrive. We will accomplish this by steadily **upgrading habitats** based on basic needs and at the same time, testing **new innovative approaches** that integrate choice and cutting edge techniques to training, enrichment, fitness and **science**.

**100%**  
of Oregon Zoo animals experience positive welfare

## Advance Wildlife Conservation

Wildlife conservation is at the heart of our mission. We'll maximize our impact through meaningful partnerships in **species recovery**, **policy advocacy** work, strong **conservation networks** and inspiring our community and staff to **take action**.

**10,000**  
Conservation actions taken by staff, volunteers, and the community

## Deliver an Inspiring Guest Experience (Every Time)

The guest experience will WOW guests and connect them to our mission. Our campus and experience will be welcoming, modern, and inspiring as guests **learn from staff** and **connect with our animals** at every opportunity.

**70**  
Guest Loyalty Score

## Create Diverse, Equitable, & Inclusive Environments

We are committed to advancing diversity, equity and inclusion and creating safer and more welcoming spaces for everyone.. We're committed to the **access** and **accessibility** for our guests.

Our racial diversity meets or exceeds that of the Portland metropolitan area  
Staff & Guests

## Achieve Financial Sustainability

The success of our organization requires that we continue to improve our financial outlook. We'll be diligent in our **research, strategy**, and **planning** to ensure we steadily increase our revenue while managing expenses so we can continue to invest in our people, animals and mission for decades to come.

**\$7M**  
Reserve

## Provide Meaningful & Fulfilling Staff Experience

Staff is the bedrock of our animal and guest experience. We seek to improve their experience through better **communication**, investments in **professional development** and increasing **connection** to our mission and overall success.

**3.8+**  
Employee Engagement Score

## Connect with our Communities

The zoo is building a **brand** that shares our commitment to animal care and conservation as well as provides **meaningful engagement** with diverse communities throughout the region. We'll build on our strong tradition of communication by carefully listening to stakeholders, leveraging **partnerships**, and co-creating programs and experiences that will achieve our shared goals and mission.

**65%**  
of the community connects the OR Zoo with our conservation mission





**OREGON ZOO**

# Strategic Plan 2020 – 2023

The Oregon Zoo strategic plan was co-created with input from guests, staff, volunteers and the community. It will serve as our guide in innovating for the future, clarifying our priorities, and making strategic trade-offs for the next three years.



## Focus Areas

- » Lead the Way in Animal Care & Welfare
- » Advance Wildlife Conservation
- » Deliver an Inspiring Guest Experience (Every Time)
- » Create Diverse, Equitable & Inclusive Environments
- » Connect with Our Communities
- » Provide Meaningful & Fulfilling Staff Experiences
- » Achieve Financial Sustainability





# Lead the Way in Animal Care & Welfare

We're driven to be a leader among zoos in animal care & welfare—this means creating environments in which all our animals thrive. We will accomplish this by steadily upgrading habitats based on basic needs and at the same time, testing new innovative approaches that integrate choice and cutting edge techniques to training, enrichment, fitness and science.

### RELATED PLANS



DRAFT

100%

of Oregon Zoo  
animals experience  
positive welfare



WHAT SUCCESS LOOKS LIKE	<ul style="list-style-type: none"><li>We are recognized as a leader in animal care by our staff, volunteers, guests, and partners</li><li>Welfare audit program is in place with measurable increases in quality of life including: breeding, diversity of behaviors, and social structure</li><li>Animals have more choice 24 hours a day</li><li>75% of the zoo is monitored for animal welfare science</li><li>We exceed <b>AZA accreditation</b> standards</li><li>We have both maintained and advanced modern zoological practices and philosophies into our work</li></ul>			
	Habitat Upgrades	Habitat & Welfare Innovation	Science & Technology	Staff Support & Empowerment
STRATEGIC PRIORITIES	<ul style="list-style-type: none"><li>Complete welfare audits across the zoo</li><li>Design and implement a welfare continuous improvement plan based on the audit results</li><li>Upgrade habitats to maximize usage of space based on animal welfare science</li><li>Complete bond upgrades successfully and develop a plan for updates to additional habitats and holdings</li><li>Establish funding through a Welfare Audit Action Fund</li></ul>	<ul style="list-style-type: none"><li>Establish an innovation program with a clear process that includes ideation, funding, design, test and implement</li><li>Implement 1-3 new habitat innovations per year depending on size and scope</li><li>Develop specific stories about successes we can share via staff, volunteers, and other outlets</li><li>Advance ambassador animal programming through development of shared vision</li></ul>	<ul style="list-style-type: none"><li>Extend <b>monitoring</b> zoo-wide</li><li>Deepen animal welfare science &amp; development on novel <b>enrichment</b> devices and robotics</li><li>Host a welfare &amp; technology summit to identify partnership opportunities in innovation and habitat design</li><li>Collect data to support stories that our animals are “happy”</li></ul>	<ul style="list-style-type: none"><li>Increase animal care staff time (by a minimum of 15 minutes a day) to focus on innovation and raising the bar on animal welfare and science</li><li>Ensure appropriate staff levels for successful opening of new habitats</li></ul>
HOW WE’LL DO IT				

# Advance Wildlife Conservation

Wildlife conservation is at the heart of our mission. We'll maximize our impact through meaningful partnerships in species recovery, policy advocacy work, strong conservation networks and inspiring our community, staff, and volunteers to take action.

## RELATED PLANS



DRAFT

# 10,000

Conservation actions taken by staff, volunteers, and the community



WHAT SUCCESS LOOKS LIKE

- **ICAP** is complete with measurable outcomes in place for:
  - Climate action
  - Thriving wildlife
  - Healthy habitats
  - Nature connection

- Sustainability plan is established with measurable outcomes in place that align with Metro's sustainability goals
- Measurable results in resource conservation

- We are recognized as a conservation leader within **AZA**, **WAZA**, & **IUCN**
- We are recognized as an important conservation partner both locally and globally
- Staff at all levels are involved in professional societies

- New laws are passed that support wildlife (aligned with **ICAP**)
- Measurement is in place for tracking conservation actions
- Community members participate in zoo sponsored conservation actions (aligned with **ICAP**)

- 100% of staff have done at least 1 **conservation action** in the last year

STRATEGIC PRIORITIES

## Species Recovery

## Campus Sustainability

## Conservation Network

## Advocacy & Engagement

## Staff Involvement

HOW WE'LL DO IT

- Finalize and implement our **Integrated Conservation Action Plan (ICAP)** with measurable results
- Focus programs and achieve results in Borneo, East Africa, Arctic, and especially, PNW
- Maximize **AZA**, **SSP** partnerships and **SAFE** programs

- Create and implement the sustainability plan
- Staff and empower the Green Team to track and report on the implementation of the sustainability plan
- Evaluate systems for efficiency (e.g. energy, water, waste, purchasing, etc.)

- Invest in deeper relationships with elected officials & tribes
- Establish and deepen regional, national and global conservation partnerships
- Provide support for staff to attend and present at conferences
- Work with universities (e.g. PSU, Miami University, etc.) to advance conservation and staff development

- Plan for future conservation campaigns
- Establish a conservation advocacy strategy with defined roles and opportunities for staff, volunteers, and the Oregon Zoo Foundation advocacy committee
- Expand **community conservation/science** opportunities (e.g. Pika Watch)
- Promote conservation action and tell stories of conservation impact through education and interpretive programming

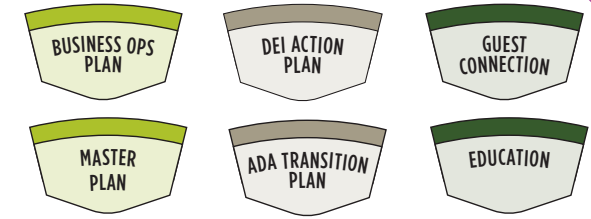
- Continue investments in staff/volunteer driven conservation actions (**SCAT**, etc.)
- Develop a process for funding and allocating staff conservation grants
- **DEI** Provide training on how DEI relates to wildlife conservation



# Deliver an Inspiring Guest Experience (Every Time)

The guest experience will WOW guests and connect them to our mission. Our campus and experience will be welcoming, modern, and inspiring as guests learn from staff and volunteers, and connect with our animals at every opportunity.

## RELATED PLANS



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# 70

## Guest Loyalty Score

As calculated by our Net Promoter Score  
(Baseline 28)

WHAT SUCCESS LOOKS LIKE

STRATEGIC PRIORITIES

HOW WE'LL DO IT

- Guests connect with animals immediately upon entering
- Guests experience a consistent animal experience across all zoo hours
- Guests develop empathy for animals

## Guest Connection to the Animals

- Deliver animal experiences that surprise, delight and educate guests (e.g. pop up animals experiences and magic moments)
- Design for viewable care, feeding, and training
- Adjust staffing schedules and approaches to animal care to maximize animal visibility for guests
- Celebrate the successful opening of new habitats
- Evaluate impacts of animal experiences and educational programming on guest empathy

- 15% increase in year-round attendance by 2023
- **ADA Transition Plan** is in place which meets and exceeds ADA standards

## Campus Upgrades

- Provide increased guest to guest connection areas, seating options and rest areas
- Offer and promote locally sourced food and gift options
- **DEI** Provide clear wayfinding in multiple languages (signage, maps, and/or technology)
- **DEI** Increase overall translation options (staff & technology) with a focus on Spanish, Vietnamese, Chinese/Mandarin, and Russian
- Create better food experiences through consistency and quality
- Experiment with rainy day attractions and activities for guests
- **DEI** Complete development and begin implementation of **ADA Transition Plan**, including all gender bathrooms
- Complete train feasibility study
- Encourage moments for social media sharing with fun backdrops

- Staff regularly interacts with and shares stories with guests
- Guests have increased opportunities to connect with staff and volunteers

## Staff Driven Guest Engagement

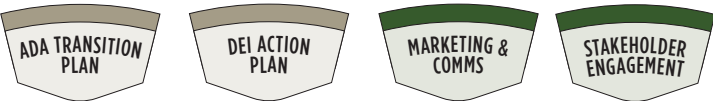
- Provide training for staff and volunteers on how to engage passionately and consistently
- Create opportunities for transformative animal experiences for all staff so they can authentically inspire guests and tell stories
- Provide educational resource guides on key species for staff and volunteers to provide consistent, conservation based, messaging for guests
- Evaluate visitor engagement and conservation learning



# Create Diverse, Equitable & Inclusive Environments

The Oregon Zoo is committed to advancing diversity, equity and inclusion and creating safer and more welcoming spaces for everyone. We're committed to the recruitment, retention and professional growth of a diverse staff and removing barriers to access and accessibility for our guests.

## RELATED PLANS



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## STAFF

WHAT SUCCESS LOOKS LIKE

STRATEGIC PRIORITIES

HOW WE'LL DO IT

<ul style="list-style-type: none"><li>We are actively creating an inclusive, diverse, equitable and accessible work environment</li><li>Our staff, including those in leadership positions and those who connect our guests to the mission, represent diverse cultural backgrounds</li><li>The zoo tracks and maintains retention of diverse employees from marginalized communities at the same or greater rate than those from dominant culture</li><li>People from marginalized communities see the zoo as a desirable place to work and are motivated to apply</li><li>We focus on attracting new staff and volunteers with bilingual or multi-language competency and value those skills in the hiring process</li></ul>		
Learning	Growth & Retention	Recruiting
<ul style="list-style-type: none"><li>Conduct listening sessions with current staff from marginalized communities to understand opportunity areas</li><li>Require awareness training on WHY diversity, equity, and inclusion is important</li><li>Expand <b>DEI</b> tools training</li><li>Provide leadership development programs for non-mgmt staff from marginalized communities</li><li>Create clear career paths from variable hour employee, volunteer and internship roles to permanent roles</li><li>Provide multi-cultural training to all staff and volunteers to increase understanding and create a safe and welcoming work environment for staff of color</li><li>Work with staff from marginalized communities to develop feedback systems, evaluation and support for a safe work environment</li></ul>		<ul style="list-style-type: none"><li>Develop creative and authentic recruiting strategy based on community input</li><li>Refresh recruiting materials and approach to attract under-represented communities and bilingual staff and volunteers</li><li>Require unconscious bias training for hiring managers</li><li>Expand internships, jobs, and service learning for marginalized youth across all departments</li></ul>

## GUESTS

<ul style="list-style-type: none"><li>Zoo facilities and programs are inclusive to all</li><li>Everyone in our community feels a sense of belonging at the zoo</li><li>Effective implementation of the <b>DEI Action Plan</b></li></ul>		
Access	Outreach	Funding
<ul style="list-style-type: none"><li>Work with Metro, EWP and TriMet to expand access for all potential visitors in the region and beyond</li><li>Implement the <b>ADA Transition Plan</b>, including providing inclusive and accessible programs and services</li><li>Evaluate, with the goal of expanding, access programs for communities where price is a barrier</li><li>Apply a racial equity lens and engage culturally specific communities in co-creating programs, services, and communications</li><li>Co-create experiences with disabilities communities</li><li>Host culturally specific events that are co-created with communities</li><li>Use paid media and promotions to better reach under-represented communities</li></ul>		<ul style="list-style-type: none"><li>Identify resources to fund successful implementation of our DEI Action Plan</li><li>Identify a dedicated project manager</li></ul>

# Connect with Our Communities

The zoo is building a brand that shares our commitment to animal care and conservation as well as provides meaningful engagement with diverse communities throughout the region. We'll build on our strong tradition of communication by carefully listening to stakeholders, leveraging partnerships, and co-creating programs and experiences that will achieve our shared goals and mission.

## RELATED PLANS



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65%

of the community connects us with our conservation mission

49% Baseline



WHAT SUCCESS LOOKS LIKE

STRATEGIC PRIORITIES

HOW WE'LL DO IT

- We are seen as a convener in the conservation space
- Co-creation is utilized in designing communications\*\*, events, and programs

## Community Engagement

- Conduct regular listening sessions with key stakeholder communities in service of brand, advocacy, and guest experience
- Targeted outreach to underrepresented guest audiences, especially communities of color
- Leverage the Youth Advisory Council (YAC) and other key advisors to inform decisions and practices
- Share stories of impact with partners, guests and donors so they can see their role in our shared achievements
- Develop stakeholder engagement plan that includes showing how community feedback was used

- We actively seek partnerships with organizations that align with our mission and goals
- Increased impact in conservation, program delivery, and audience connection through the use of partnerships

## Partnerships

- Develop a partnership framework with racial equity lens to identify partners around our strategic priorities and equity action plan
- Establish a process for developing co-created community partnerships, programming, and communications
- Regularly evaluate partner relationships

- Every staff member can articulate and feels responsibility for the values and mission
- Members of the community connect the zoo with our conservation mission
- Key stakeholders feel informed and understand zoo operations

## Brand & Reputation

- Re-branding initiative focused on fostering respect for animals and nature connection
- Form a cross-functional brand team to ensure rebrand roll-out is authentic and successful
- Continue to market ourselves as a conservation and education facility



# Provide Meaningful & Fulfilling Staff\*\* Experiences

Staff is the bedrock of our animal and guest experience. We seek to improve their experience through better communication, investments in professional development and increasing connection to our mission and overall success.

## RELATED PLANS



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**3.8+**  
**Employee Engagement Score**  
3.56 Baseline (scale 1-5)



WHAT SUCCESS LOOKS LIKE

STRATEGIC PRIORITIES

HOW WE'LL DO IT


- Staff feels confident giving input on key decisions
- Staff feels their opinions count
- Staff feels informed about decisions that affect their roles
- Volunteers feel valued and included

## Communication

- Continue a communication philosophy of transparency
- Build and execute an internal communications plan
- Audit current communication channels and processes, and invest in tools as needed
- Designate a resource to implement internal communications
- Establish strong two-way communication channels for staff and volunteers to provide input and receive information
- Ensure consistent interactions and face time between managers and staff and volunteers to foster communication and discuss issues and opportunities


- Staff can see clear paths for growth and what it takes to get there
- Staff feels supported in their professional development at the zoo

## Career Paths & Professional Development

- Define clear growth paths for each role, including developing a paid internship program
-  Establish clear process and criteria for how professional development investments are spent
- Develop a zoo-wide training plan that supports staff growth and development, based on Metro's training strategy

- Staff at all levels understand how their contributions and those of their colleagues affect the success of the zoo
- We celebrate our success as a team
- Staff and volunteers' ideas and innovations contribute to our success

## Connection to the Zoo's Success

- Gain consistency in connecting and understanding how individual goals relate to organizational goals
-  Establish clear and equitable recognition program
- Increase community building and celebration events
- Expand our internal innovation program, Innovators!
- Highlight contributions of all teams to foster respect, appreciation, empathy and teamwork across work groups

# Achieve Financial Sustainability

The success of this organization requires that we continue to improve our financial outlook. We'll be diligent in our research, strategy, and planning to ensure we steadily increase our revenue while managing expenses so we can continue to invest in our people, animals and mission for decades to come.

## RELATED PLANS



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WHAT SUCCESS LOOKS LIKE

- We have increased net contribution per guest
- Revenues exceed expenses annually by \$1M by 2023
- Capital investment has increased to better match AZA benchmarks
- Operational fundraising by Oregon Zoo Foundation has doubled by 2023
- **Master Plan** is refreshed
- Staff understands their role in achieving financial sustainability

STRATEGIC PRIORITIES

### Economic Study

- Assess revenue mix potential for growth over time
- Analysis of revenue line items, expenses, and opportunity areas
- Analysis of seasonal impacts to revenue
- Share outcomes and recommendations

### Transportation Access & Parking Action Plan

- Update and implement Transportation Management Plan
- Evaluate and test the use of parking discounts and other strategies to maintain or increase access

### Pricing Strategy

- Develop data driven pricing strategy
- **DEI** Evaluate and test the use of discounts
- Communicate and implement pricing strategy

### Expense Management

- Align balanced budgets to our strategic plan
- Plan and implement better financial reporting to inform decisions
- Encourage staff to be innovative and improve processes
- **DEI** Prioritize **COBID** and local vendors in contractors and procurement

### Long Term Funding

- Form planning team to drive planning and funding of **Master Plan**
- Assess resources needed to increase federal and state funding
- Develop and maintain commitment to best fundraising practices and analysis
- Plan next fundraising campaign

HOW WE'LL DO IT



# Appendix



## Footnotes

\* For the purposes of this strategic plan, the zoo’s geographic focus extends to the four counties of the Greater Portland area – Clackamas, Multnomah, and Washington in Oregon and Clark in SW Washington

\*\* “Staff” includes Oregon Zoo employees and Oregon Zoo Foundation employees.

\*\*\* “Communications” includes external and internal communications, including interpretive displays.

## Acronyms

- ADA** – Americans with Disabilities Act
- AZA** – Association of Zoos & Aquariums
- COBID** – Certification Office for Business Inclusion and Diversity
- ICAP** – Integrated Conservation Action Plan
- DEI** – Diversity, Equity and Inclusion
- IUCN** – International Union for Conservation of Nature
- SCAT** – Staff Conservation Action Trips
- SSP** – Species Survival Plan
- SAFE** – Saving Animals from Extinction
- WAZA** – World Association of Zoos & Aquariums

## Glossary

### Accessibility

Accessibility is the practice of making your facility, services and programs usable by as many people as possible. We traditionally think of this as being about people with disabilities, but designing and implementing the environment using an accessibility lens means that it can be accessed, understood and used to the greatest extent possible by all people.

### ADA Transition Plan

Accessibility plan that contains two major components – an assessment of physical barriers and a self-evaluation of programs and services. The physical assessment combined with the self-evaluation will become the zoo’s ADA transition and action plan, which will be reviewed by community and adopted in spring 2020. The Oregon Zoo strives to be a welcoming and inclusive facility for people of all abilities.

### AZA Accreditation

Provides a publicly recognized badge signifying excellence in, and commitment to, such things as animal management and welfare, safety, conservation and education; and increases eligibility for funding and grants from certain foundations, corporations, and other sources.

### Collection Plan

An analysis of our animal population: current and future as it pertains to the zoo’s mission, goals, programs and master plan. It is used to guide our future development to achieve effective utilization of limited space and resources.

### Community Conservation/Science

Programming designed to encourage community members to actively contribute to the conservation of a species through participation in research, habitat restoration, invasive species removal or other conservation related activity. *NOTE: Oregon Zoo does not use the term “Citizen Science” as we do not want to imply that all community members participating must be U.S. citizens.*

### Conservation Action

Conservation actions are one-time or low-frequency things that a person does to help wildlife or the environment, such as buying a hybrid car, volunteering on a stream restoration project or voting for an environmental bill.

### DEI Action Plan

Foundational plan for ensuring we achieve inclusive, diverse, equitable and accessible environments for staff and guests. Aligns with and supports Metro’s Racial Equity Strategy.

### Enrichment

The act of improving animals’ lives through stimulating and challenging environments, objects, and activities. It was here, at the Oregon Zoo, in the 1980’s that the concept of environmental enrichment was established.

### Inclusion

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

### Master Plan

20 year plan which guides the zoo’s physical development such as land use, facilities and infrastructure.

### Monitoring

Process of observing animals use of their habitats, activity levels, and social structure in order to make welfare and design decisions.

### Sustainability Plan

Foundation plan that ensures we achieve a sustainable campus and operations. Aligns with sustainability goals set by Metro Council.

### Welfare Audit Program

Annual institution-wide animal welfare review process in accordance with new AZA accreditation standard 1.5 which is designed to:

- Promote a welfare discussion for all animals in our care on an annual basis
- Guide which animals/groups require more detailed welfare assessments
- Contribute to collection planning decisions

The review is designed to yield a high level assessment in each animal area (North America, Africa, Family Farm, etc) and identify specific species or specimens which require an individual assessment. These individual assessments are then prioritized and tracked. This process is one tool in an array of measures that we use to look at animal welfare, which allows us to survey our entire animal population.