

## Council work session agenda

---

**Tuesday, November 12, 2019**

**2:00 PM**

**Metro Regional Center, Council Chamber**

---

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

**2:05 Safety Briefing**

**Work Session Topics:**

2:10 Emerging Technology PILOT Program Updates [18-5308](#)

Presenter(s): Eliot Rose, Metro

Attachments: [Work Session Worksheet](#)

2:40 Southwest Corridor Light Rail Update [19-5300](#)

Presenter(s): Malu Wilkinson, Metro  
Chris Ford, Metro

Attachments: [Work Session Worksheet](#)

3:25 Regional Investment Strategy Update [19-5301](#)

Presenter(s): Andy Shaw, Metro

**3:55 Chief Operating Officer Communication**

**4:00 Councilor Communication**

**4:05 Adjourn**

## Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights) or call 503-797-1536. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at [www.trimet.org](http://www.trimet.org).

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

Metro tôn trọng dân quyền. Muốn biết thêm thông tin về chương trình dân quyền của Metro, hoặc muốn lấy đơn khiếu nại về sự kỳ thị, xin xem trong [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Nếu quý vị cần thông dịch viên ra dấu bằng tay, trợ giúp về tiếp xúc hay ngôn ngữ, xin gọi số 503-797-1700 (từ 8 giờ sáng đến 5 giờ chiều vào những ngày thường) trước buổi họp 5 ngày làm việc.

### Повідомлення Metro про заборону дискримінації

Metro з повагою ставиться до громадянських прав. Для отримання інформації про програму Metro із захисту громадянських прав або форми скарги про дискримінацію відвідайте сайт [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). або Якщо вам потрібен перекладач на зборах, для задоволення вашого запиту зателефонуйте за номером 503-797-1700 з 8.00 до 17.00 у робочі дні за п'ять робочих днів до зборів.

### Metro 的不歧視公告

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

### Ogeysiiska takooris la'aanta ee Metro

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

### Metro의 차별 금지 관련 통지서

Metro의 시민권 프로그램에 대한 정보 또는 차별 항의서 양식을 얻으려면, 또는 차별에 대한 불만을 신고 할 수 [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). 당신의 언어 지원이 필요한 경우, 회의에 앞서 5 영업일 (오후 5시 주중에 오전 8시) 503-797-1700를 호출합니다.

### Metroの差別禁止通知

Metroでは公民権を尊重しています。Metroの公民権プログラムに関する情報について、または差別苦情フォームを入手するには、[www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)。までお電話ください。公開会議で言語通訳を必要とされる方は、Metroがご要望に対応できるよう、公開会議の5営業日前までに503-797-1700（平日午前8時～午後5時）までお電話ください。

### សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

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

### إشعار بعدم التمييز من Metro

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

### Paunawa ng Metro sa kawalan ng diskriminasyon

Iginagalang ng Metro ang mga karapatang sibil. Para sa impormasyon tungkol sa programa ng Metro sa mga karapatang sibil, o upang makakuha ng porma ng reklamo sa diskriminasyon, bisitahin ang [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Kung kailangan ninyo ng interpreter ng wika sa isang pampublikong pulong, tumawag sa 503-797-1700 (8 a.m. hanggang 5 p.m. Lunes hanggang Biyernes) lima araw ng trabaho bago ang pulong upang mapagbigyan ang inyong kahilingan.

### Notificación de no discriminación de Metro

Metro respeta los derechos civiles. Para obtener información sobre el programa de derechos civiles de Metro o para obtener un formulario de reclamo por discriminación, ingrese a [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Si necesita asistencia con el idioma, llame al 503-797-1700 (de 8:00 a. m. a 5:00 p. m. los días de semana) 5 días laborales antes de la asamblea.

### Уведомление о недопущении дискриминации от Metro

Metro уважает гражданские права. Узнать о программе Metro по соблюдению гражданских прав и получить форму жалобы о дискриминации можно на веб-сайте [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Если вам нужен переводчик на общественном собрании, оставьте свой запрос, позвонив по номеру 503-797-1700 в рабочие дни с 8:00 до 17:00 и за пять рабочих дней до даты собрания.

### Avizul Metro privind nediscriminarea

Metro respectă drepturile civile. Pentru informații cu privire la programul Metro pentru drepturi civile sau pentru a obține un formular de reclamație împotriva discriminării, vizitați [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Dacă aveți nevoie de un interpret de limbă la o ședință publică, sunați la 503-797-1700 (între orele 8 și 5, în timpul zilelor lucrătoare) cu cinci zile lucrătoare înainte de ședință, pentru a putea să vă răspunde în mod favorabil la cerere.

### Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

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

**Emerging Technology PILOT Program Updates**

*Work Session Topics*

Metro Council Work Session  
Tuesday, November 12, 2019  
Metro Regional Center, Council Chamber

## PILOT PROGRAM – PHASE 2 PROGRAM FRAMEWORK

---

Date: November 5, 2019

Department: Planning and Development

Meeting Date: November 12, 2019

Prepared by:

Eliot Rose, [eliot.rose@oregonmetro.gov](mailto:eliot.rose@oregonmetro.gov)

Presenters: Eliot Rose, Project Manager

Length: 30 minutes

### ISSUE STATEMENT

Our region is seeing significant growth in new transportation services, including ride-hailing, micromobility, car sharing and online travel information. We know that these changes are having significant impacts on our communities and our transportation system, but we don't fully understand whether or how they can support our regional goals.

The Planning and Development program Learning Opportunities in Transportation (PILOT) program is a competitive funding program launched by Metro in 2019. The program funds short-term implementation projects that test new approaches to transportation and technology transportation in order to develop the information, capacity, and partnerships that support Metro and its partners in taking more significant action on technology. The first round of projects are now underway, and staff are preparing for the next round of funding, which will be issued in 2021. The PILOT program is one of the only regional grant programs in the U.S. focused on emerging technology, and is the only one that has such a strong focus on equity.

At this work session, staff will update Council on the current round of projects, share lessons learned from the process to date, and seek Council feedback on the program structure for the next round of funding. Staff will then seek consideration of the program structure by the Transportation Policy Alternatives Committee and Joint Policy Advisory Committee on Transportation (JPACT) in winter of 2019-2020.

#### What is the PILOT program?

The PILOT program is a grant program that aims to:

- Test how emerging technologies – including ride-hailing; car, scooter, or and bike sharing; ride matching; microtransit; and online/mobile travel information, payment, and incentives – can improve equitable, shared, and active transportation options
- Collect and share information on results
- Develop cross-sector partnerships that support ongoing success in the region's work on emerging technologies

The program was identified as a next step for Metro in the 2018 Emerging Technology Strategy, which was adopted by Council as part of the 2018 update to the Regional Transportation Plan. The Strategy found that emerging technologies could significantly impact Metro's regional goals, both for better and for worse, and called on Metro to develop policies and tools to steer them toward positive outcomes. Emerging technology is developing rapidly, and as a result there isn't a lot of information on best practices available, so the PILOT program provides resources for Metro and its partners to learn by doing.

After a lengthy outreach process to refine and promote the program and help applicants develop project ideas, Metro opened a call for PILOT applications in early 2019. We received nine applications for over \$540,000 in funding and gave four awards totaling \$150,000. The four funded projects are all now underway, and all are focused on better understanding and overcoming the barriers that communities of color and other disadvantaged groups face to accessing emerging technology.



### **ACTION REQUESTED**

Staff seeks Metro Council direction on potential changes to the PILOT program's budget and structure that could help to expand the reach and impact of the program.

The first round of PILOT funding was focused on equitable access to transportation, engaged new non-profit and private sector partners that Metro has not yet worked with, and ended up oversubscribed in spite of asking applicants to implement innovative solutions to challenging problems on a limited budget. However, projects largely focused on providing access to emerging technologies in communities where these options are already available, largely in the City of Portland. Staff have identified potential changes to the program could help to support projects across the region and better engage the full range of potential partners to bring new options to the many areas of the region that need them most.

### **IDENTIFIED POLICY OUTCOMES**

As directed by Exhibit A to Metro Ordinance No. 18-1421 and described in the Emerging Technology Strategy of the 2018 RTP, the PILOT program was identified to test how Metro and our partners can use technology to advance equity and provide better, more efficient travel options; collect information on how we can best implement the policies contained in the Emerging Technology Strategy; and develop partnerships that enable long-term success.

The results of this next grant process will guide Metro and its partners in developing and implementing policies and programs related to emerging technology.

### **POLICY QUESTION(S)**

1. What feedback does Council have about the future direction of the PILOT program?
2. Does Council support staff's recommendation (see below) to expand the PILOT program's focus from providing equitable access to emerging technologies in communities where those technologies are already available to providing equitable access plus bringing new options to people and communities that need them most?
3. Are there changes to the PILOT program structure that staff should explore to ensure that the project reaches partner agencies and/or communities within the region that did not participate heavily in the initial round of the program? The following section discusses some of the changes that staff are considering.

### **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

Policy options for Council to consider include:

*Option 1:* Maintain the current program structure. Under this approach, Metro would likely continue to fund similar equity-focused, community-led projects that we have funded under the first round of the program. Under this approach, PILOT projects would likely continue to be largely nonprofit-led and focus on communities where emerging technologies are already available – primarily in the City of Portland. Projects would likely focus primarily on equity outcomes, but may not do as much to help people shift from driving to more sustainable and affordable modes.

*Option 2:* Expand the program in order to achieve the following additional outcomes:

## REGIONAL MOBILITY POLICY UPDATE

- Support pilot projects in new areas of the region – particularly regional centers outside the City of Portland - that are not yet as fully served by emerging transportation options
- Better engage participation of government partners to make the policy changes and leverage the more significant resources that are needed to bring emerging technologies to new markets
- Create more significant impacts that not only help all people access emerging technology, but also help people shift away from peak-period, drive-alone motor vehicle trips to more sustainable and affordable options

Under this option, we would still maintain the focus on equitable access to emerging technology and robust participation from community-based organizations that characterizes the current program – in the context of larger, more impactful projects that are more evenly distributed across the region. Some of the tools that we could use to implement this change include increasing the size of the program budget as well as making complimentary administrative changes suggested by program partners, such as:

- Increasing minimum grant sizes or partnership requirements (i.e., requiring that projects involve a private, non-profit, and public agency partner instead of partners from only two of these three sectors)
- Being more prescriptive about eligible project types and desired project outcomes.
- Changing the program structure from a grant model to a collaborative solicitation model, which would allow Metro to provide more support with project administration and pool resources across multiple partners.

### **STAFF RECOMMENDATIONS**

Staff recommends Option 2, expanding the PILOT program. This option will foster projects that test innovative solutions to address the most pressing challenges our region faces – including providing everyone with convenient and affordable options, managing congestion, and reducing greenhouse gas emissions – by better engaging and supporting the full range of project partners throughout the region.

With Council support, staff will continue engaging Metro stakeholders to identify potential changes to the program structure, which we will revise for Council consideration in 2020.

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

Emerging technology is a relatively new area for Metro. Planning and Development created a staff position devoted to planning for emerging technology in 2017, and the 2018 RTP was the first to include an Emerging Technology Strategy. The Strategy is focused on identifying how Metro and its partners can advance the RTP policy goals for equity, climate, safety, and congestion relief as well as support other state, regional and local policy objectives through their work with emerging technology. The Strategy also recognizes the challenges that emerging technology poses the practice of transportation planning due to the fast-developing and unprecedented nature of many new technologies, the relative lack of information on impacts and best practices, and the significant role of the private sector in developing and implementing new technology. The PILOT program is designed to support Metro's policy goals in a way that responds to these challenges and provides learning opportunities for the region's transportation agencies to keep pace with new developments. This understanding is reflected in the description of the program in the

## REGIONAL MOBILITY POLICY UPDATE

Emerging Technology Strategy as well as the implementation of the first phase of the program.

### **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 Dec. 6, 2018.

### **Anticipated Effects**

This project will issue grant funding to projects that help Metro and partners learn how to most effectively guide emerging technology toward meeting regional policy outcomes.

### **Financial Implications**

The initial PILOT program budget of \$150,000 was funded through Metro's general fund. The next phase of the program will likely rely on general fund and potentially other resources, pending the program structure that is developed for the next phase of the program.

## **BACKGROUND**

Greater Portland is growing quickly, with more than two thousand new residents each month. New developments in transportation and technology mean that the number of options available to residents of the region is growing as well. For example, people took over 12 million Uber and Lyft trips – roughly ten percent of the number of transit trips in the region – in the City of Portland alone in the past year. The City of Portland's BIKETOWN bike share, launched in 2016, carried 300,000 trips in its first year; two years later when electric scooter sharing came to Portland people took 300,000 scooter trips in the program's first month. Smartphone apps have become the most popular way for people to get information on their travel choices, while the number of people who get information from other sources has declined swiftly. It's fundamental to our future to have a variety of safe, 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. In some cases, emerging technologies support this goal, whereas in other cases they compete with transit and other existing options, offer premium services that aren't accessible to the people who need new transportation options the most, or create new safety risks for travelers.

In December 2018, JPACT and the Metro Council adopted a significant update to the Regional Transportation Plan following three years of engagement that included over 19,000 touch points with community members, community and business leaders, and regional partners. The 2018 RTP was the first to include an Emerging Technology Strategy, which focused on identifying how Metro and its partners can advance the RTP policy goals for equity, climate, safety, and congestion relief as well as support other state, regional and local policy objectives through their work with emerging technology. The Strategy identified four action items for Metro to pursue in the coming two years: developing regionally consistent policies on emerging technology, providing partners with data and tools that they can use to plan for emerging technology, advocating for state and federal technology policy that supports Metro's goals, and creating the PILOT program. Metro has made progress on all of these action items, but we have led with the PILOT

## REGIONAL MOBILITY POLICY UPDATE

program because it provides resources and develops capacity that supports implementation of the other actions.

The first phase of the PILOT program launched in September 2018 with \$150,000 in funding. During the first phase, the program goals were to:

- Test how emerging technologies can improve equitable, shared, and active transportation
- Collect and share information on how projects perform
- Develop partnerships between public agencies, community groups, new mobility companies, and others that support ongoing success in the region's work on emerging technologies

Because the program was new, Metro began by accepting letters of interest, and staff offered feedback to help potential applicants refine their project ideas and form teams. PILOT applications were due in February 2019, and Metro received nine applications for over \$540,000. Metro convened a review panel to review these applications that included diverse perspectives and expertise in community development, equity, transportation project delivery, technology, and public-private partnerships, as well as a Metro Council representative. The panel recommended four awards totaling \$150,000, and projects are all under contract and beginning work as of November 2019.

The four funded projects, summarized below, are all focused on better understanding and overcoming the barriers that communities of color and other disadvantaged groups face to accessing emerging technology.

<b>Project partners</b>	<b>Project name / description</b>	<b>Grant amount</b>
APANO, ROSE CDC, Car2Go	<i>New Mobility at the Orchards of 82<sup>nd</sup></i> : Provide Jade District residents with pre-funded accounts that they can use to pay for bike and scooter share, ride-hailing, and transit, as well as education, assistance, and technology to help them access new modes	\$30,000
Latino Network, Uber, TriMet	<i>Latinx Ride Share Promotion</i> : Provide ride-hailing credits and travel assistance to help Latinxs reach educational programs and services at locations throughout the region	\$55,000
OPAL, Portland Transport, Rosewood Initiative	<i>East Portland Transit Appliance</i> : Install screens displaying real-time information on transit arrivals at community locations in East Portland near lines with increased transit service	\$30,000
Ride Connection, Full Path, Trillium Transit	<i>Trip Planning for All</i> : Develop a trip planning tool that provides information on demand-response / special needs transportation services in the region	\$35,000

PILOT was the first new funding program launched in Planning and Development since the adoption of Planning and Development's Equity Strategy, and it focuses on options that are often market-driven instead of designed to serve all people's needs. The program placed a particular emphasis on making sure that people of color and people from other historically

## REGIONAL MOBILITY POLICY UPDATE

marginalized communities were engaged throughout the grant process and played a leading role in the funded projects.

The PILOT program is meant to be an iterative process that guides Metro and its partners' work on emerging technology more broadly. We want to use the lessons learned from the PILOT projects to inform how our region plans for, invests in, and regulates emerging technology. We also want to focus future rounds of the program on the issues where the region is most in need of the resources and that these grants can provide. Metro staff have been evaluating the PILOT process in order to understand what changes to the program structure may be necessary. Staff interviewed 2019 PILOT applicants and advisory panel members, tracked partners' level of engagement throughout the grant process, and continue to monitor both the implementation of PILOT projects and new developments in emerging technology throughout the region. The table below summarizes how the PILOT program has performed with respect to the goals that can be evaluated based on the information received to date. Some of the goals listed in the table are explicit program goals; others are implicit aspects of Metro's work and mission.

<b>Goal</b>	<b>Successes</b>	<b>Opportunities to do more</b>
Test new approaches to shared / active / equitable transportation	PILOT funded a strong set of projects focused on providing equitable access to emerging technologies.	The funded projects seem unlikely to shift significant numbers of trips from driving to shared and active modes.
Create cross-sector partnerships	PILOT drew significant interest from across sectors, and funded a number of private/non-profit partnerships. Multiple teams that didn't receive a grant continue to move forward.	Public agencies play a relatively minor role in the funded projects, and none submitted applications. Some agencies came close, but didn't complete applications due to lack of capacity or support from leadership.
Fund projects across the region	Two of the four PILOT projects are regional in scale.	None of the funded projects focus on Washington or Clackamas Counties.
Leverage other investments in transportation and technology	Though the program did not require a match, funded projects leveraged over \$95,000 of matching support, due in part to the program's use of general funds, which drew private resources.	The program missed opportunities to align with partner efforts, including Portland's dockless scooter pilot and TriMet's Multimodal Trip Planner.
Create an engaging, transparent, and equitable grant process	Panelists and applicants feel that the process helped build partnerships, made it easy to engage, and valued the expertise of community.	Some struggled to interpret program goals, and encouraged Metro to be more prescriptive about the type of projects it wants to see.

The PILOT program is one of the only regional grant programs focused on innovative approaches to transportation, and is the only one that has such a strong focus on equity.



## REGIONAL MOBILITY POLICY UPDATE

This is especially notable given that PILOT is the first new funding program launched since the adoption of Planning and Development's Equity strategy, and it focuses on options that are often market-driven instead of designed to serve all people's needs. The program reached new non-profit and private sector partners that Metro has not yet worked with, engaged people from across sectors and across the region, and ended up oversubscribed in spite of asking applicants to implement innovative solutions to challenging problems.

However, the program could have done a better job engaging public agency partners and communities throughout the region, not only to achieve Metro's goals, but also to support the broader success of Metro's emerging technology work, which often relies on local policy changes and resources. Metro surveyed members of its Emerging Technology Working Group, which consists of staff from 16 of the public agencies in the region that are most actively engaged in issues related to emerging technology, to better understand how it could better engage partner agencies in the PILOT program and other emerging technology work. The survey revealed a high degree of interest in working with a variety of emerging technologies in communities throughout the region. The most common barriers that respondents faced to advancing this work were a lack of staff and technical capacity and insufficient funding. When asked what Metro could do to help advance its partners' work on emerging technology respondents said that funding, convening partners, sharing data, and providing technical support would all be useful.

Without any major changes, the PILOT program can continue to fund projects that help to create more equitable access to technology and transportation options in places where they are already available. The lessons learned from these projects will help to improve equity policies and programs in communities that are well-served by new options and that have public and community resources to engage with emerging technology – primarily in the City of Portland over the short term, and potentially in some of the region's other large cities over the longer term. Some key aspects of the program to maintain based on feedback received so far include:

- A strong emphasis on equity
- Use of flexible funding sources (general funds instead of state/federal funds)
- A phased selection process that allows Metro to vet ideas before the final application
- Opportunities for pre-application networking, feedback and technical assistance

The evaluation also identified potential changes to help the PILOT program better explore new approaches to mode shift, engage local governments, and bring new mobility options to communities in the region that need them the most. Some of these changes could include:

- Increasing the minimum grant size and/or overall funding amount to support more significant learning opportunities and projects in areas that the market might not otherwise serve
- Changing the program structure from grantmaking to a collaborative solicitation process, which would allow Metro to take a more active role in assisting participants with project development and management

## REGIONAL MOBILITY POLICY UPDATE

- Focusing on a narrower range of project types that would provide the most benefit to the region and best benefit from Metro's assistance, which would allow Metro to provide more effective technical support and create more clarity for grantees
- Reallocating resources from implementing projects to planning and developing projects, which could allow Metro to provide more technical support and reduce risk for grantees

Metro staff are currently managing the existing grants while keeping an eye on how PILOT projects can advance understanding of emerging technology in the region and preparing for the next round of the program. This work session is an early opportunity for Council to weigh in on potential program changes. Over the coming months, staff will work with stakeholders – including TPAC and JPACT; current grantees; public, private, and non-profit organizations that participated in the first round of the program; and a staff-level working group consisting of public agencies and transportation management associations that are working on issues related to emerging technology – to refine the program structure based on Council direction and present a revised program structure for Council consideration in Spring 2020.

### ATTACHMENTS

- Is legislation required for Council action? **No**
- If yes, is draft legislation attached? **No**
- What other materials are you presenting today?
  - Powerpoint (to be provided at the work session)

## **Southwest Corridor Light Rail Update**

*Work Session Topics*

Metro Council Work Session  
Tuesday, November 12, 2019  
Metro Regional Center, Council Chamber

## SOUTHWEST CORRIDOR LIGHT RAIL UPDATE

---

Date: November 4, 2019  
Department: Planning & Development  
Meeting Date: November 12, 2019

Prepared by: Chris Ford, x1633,  
[chris.ford@oregonmetro.gov](mailto:chris.ford@oregonmetro.gov)  
Presenters: Malu Wilkinson, Chris Ford  
Length: 20 minutes

---

### **ISSUE STATEMENT**

TriMet's Steering Committee for the SW Corridor Light Rail project has been considering options to close a funding gap by reducing the cost of the project through design and scope adjustments, identifying new sources of funding, or both. On November 18, the steering committee will make a recommendation to the TriMet General Manager on these options. The focus of this work session is to review the options and seek Council direction.

### **ACTION REQUESTED**

Councilor Dirksen, Metro's representative on the steering committee, has requested Council guidance on the project partner staff recommendation to affirm the Southwest Corridor Light Rail Project as defined in the Preferred Alternative, closing the funding gap through a combination of scope reductions and increasing local funding as well as the proposed federal request.

### **POLICY QUESTION(S)**

Does Council support the position of maintaining four through travel auto lanes on SW Barbur Boulevard and terminating at Bridgeport Village, as identified in the Preferred Alternative? If so, does Council support the approach of finding additional local and federal funding for the SW Corridor project to fill the funding gap?

### **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

1. Support the Preferred Alternative as adopted by Metro Council, with minor adjustments to mitigate adverse impacts and reduce costs. This is the status quo and is the option recommended by project partner staff, appears to have the most support from project partners, and would result in the most project benefits and likely the most competitive federal rating. This option would require additional funds to be committed to the project, potentially from the proposed transportation funding measure, the State of Oregon and perhaps other sources.
2. Retain four through auto lanes on Barbur Boulevard, but terminate short of Bridgeport Village. This option would reduce project benefits related to removing drivers from I-5, likely reduce the project's federal rating in the competitive funding process, and may result in lower levels of funding from Washington County perhaps necessitating identification of additional non-federal funds.
3. Reduce through auto lanes on a portion of Barbur Boulevard but retain the terminus at Bridgeport Village. This option would still improve person through-put compared to no project, but at a lower level than the Preferred Alternative, and would divert traffic to I-

5 and arterial roadways. This option has not been endorsed by the City of Portland, who will likely receive the roadway after a post-project jurisdictional transfer, and does not have official support from ODOT, who are required to ensure the safety of cars queued at interstate ramp terminals. Mayor Snider of Tigard has clearly stated his opposition to this option. This option may require supplemental environmental review, which could delay the project and thereby increase construction costs.

### **STAFF RECOMMENDATIONS**

Staff recommends Option 1 above. Southwest Corridor project partner staff will be recommending that option to the steering committee. The viability of Option 1 has been enhanced by TriMet's ability to reduce project costs with design and engineering changes, thereby decreasing the funding gap.

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

In November 2018, after a seven year planning process, Metro Council approved a Preferred Alternative for the SW Corridor Light Rail project. The Preferred Alternative was recommended by Metro's project steering committee and endorsed by multiple local jurisdictions and agencies. These actions were based on the findings of a Draft Environmental Impact Statement (DEIS), public comment and staff input.

The Preferred Alternative was not a discrete alternative designed for and evaluated by the DEIS, but rather was selected from various options reviewed. A rough estimated cost for the Preferred Alternative was included in the DEIS and an initial funding plan evolved based on that rough estimate. Once the Preferred Alternative was approved, TriMet began advanced designs from roughly 3% completion toward 15% completion with detailed engineering and surveying work that identified different property and utility impacts. These efforts also contemplated adjustments to avoid, minimize and mitigate adverse effects identified in the DEIS and public comment as well as federal stormwater treatment requirements.

In July, the SW Corridor team received an updated project cost estimate that accounted for better understanding of project design and risks as well as a change to the annual project inflation rate, and increased project contingency based on updated federal requirements. As is typical for large infrastructure projects in early design, the assumed cost to deliver the project increased. The delta between the updated project cost and the assumed Preferred Alternative budget was approximately \$462 million dollars compared to the initial funding plan. With this new information, the project team developed a work plan to identify an inclusive menu of options to both reduce project cost and increase project funding. The work plan assumed that the Project Steering Committee would make a recommendation on the overall scope and funding of the project in order to inform both a possible 2020 funding measure and the content of the Final Environmental Impact Statement.

The project elements identified as possible scope refinements were analyzed based on technical feasibility and associated cost savings. Concurrently, project leadership engaged in conversations with potential project funders regarding the feasibility and appetite for



closing a portion of the gap by delivering additional funds from existing and/or new sources.

Given the scale of the funding gap, the scope refinements identified had to be large in scale. Options considered included reducing through auto lanes on Barbur Boulevard, realigning light rail to run adjacent to I-5 instead of in Barbur Boulevard, design alterations in the Tigard Triangle, running light rail on a single track in key locations, different train equipment and reducing the length of the project. Ultimately further analysis narrowed the options with the most cost savings to reducing auto lanes on a portion of Barbur Boulevard and terminating the project north of Bridgeport Village at Upper Boones Ferry or Hall Boulevard.

In the meantime, TriMet has been able to identify \$55 million in property impact reductions and \$74 million in design refinements and the City of Portland has verbally committed to allowing the Project access to the \$65 million in funding from ODOT which was identified in the Jurisdictional Transfer agreement for Barbur Boulevard. TriMet has also updated its initial funding plan to pursue an additional \$50 million from the federal New Starts program, and the Metro staff preliminary recommendation includes \$975 million from the regional funding measure toward the project. Taken together, these adjustments have reduced the funding gap to approximately \$83 million compared to the initial funding plan.

The question remains for the project steering committee whether to undertake one of the major scope reductions (narrowing Barbur or terminating short of Bridgeport Village) or to continue to work to identify additional sources of funding.

## **ATTACHMENTS**

- Is legislation required for Council action? ☐ Yes ☒ No
- If yes, is draft legislation attached? ☐ Yes ☐ No
- What other materials are you presenting today?

## **Regional Investment Strategy Update**

*Work Session Topics*

Metro Council Work Session  
Tuesday, November 12, 2019  
Metro Regional Center, Council Chamber

Materials following this page were distributed at the meeting.

# **PILOT: Phase 2 program framework**

Metro Council Work Session

November 12, 2019

# Our purpose today:

To update Council on lessons learned from the first round of the Partnerships and Innovative Learning Opportunities in Transportation (PILOT) program to date and receive feedback on the next phase of the program.



# Emerging technologies



**Automated vehicles (AVs)**



**Connected vehicles (CVs) and CV infrastructure**



**Electric vehicles (EVs)**



**Ride-hailing**



**AV/EV transit vehicles**



**Microtransit**



**Car share**



**Bike / scooter share**



**Travel information and payment**



**New data sources**

# Why PILOT?

How do we meet our regional transportation goals?



PUBLIC REVIEW DRAFT

## 2018 Regional Transportation Plan

*A blueprint for the future of transportation in the greater Portland region*

June 29, 2018

[oregonmetro.gov/rtp](http://oregonmetro.gov/rtp)

How should we approach emerging technology?



PUBLIC REVIEW DRAFT

2018 Regional Transportation Plan

## Emerging Technology Strategy

*A strategy for guiding innovation to support the greater Portland region's goals*

June 25 2018

[oregonmetro.gov/rtp](http://oregonmetro.gov/rtp)

How do we guide innovation?

Partnerships and Innovative Learning Opportunities in Transportation

Guide innovation toward advancing equity and improving travel options

Develop information and partnerships

# Emerging tech policy priorities



**Choices**



**Equity**



**Information**



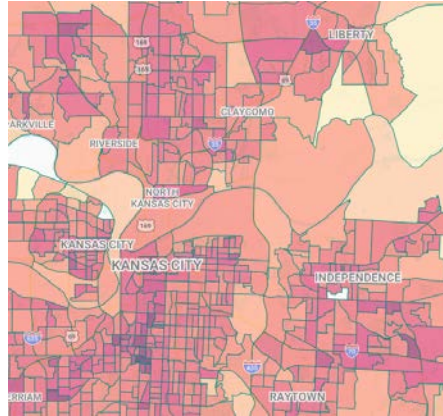
**Innovation**



# Metro's two-year emerging tech plan



**PILOT program** fosters partnerships and firsthand information / experience



**New data and tools** to plan for and manage emerging tech



**Regional policy coordination** on new mobility options

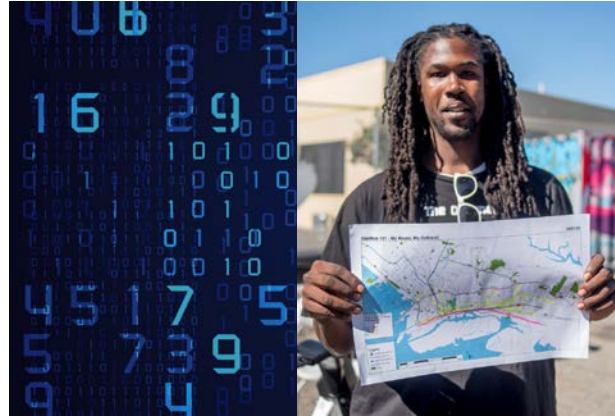


**State and federal policy advocacy** to maintain local and regional authority to do what's best for the public

# PILOT program goals



**Goal 1: Test** new approaches to improving shared, active, and equitable transportation using emerging tech



**Goal 2: Collect information** to understand results, benefits, and challenges



**Goal 3: Develop partnerships** across sectors that lay the groundwork for future success



# PILOT program structure

Approved by Metro Council in July 2018:

- Total funding available: \$150,000
- Amount applicants are allowed to request: \$25,000-\$150,000
- Eligible applicants: Teams consisting of public agencies, non-profits, and/or private companies.
- Grant period: Two years, from July 2019 through June 2021
- Funding source: Metro General Fund
- Selection process: hold pre-applications to vet potential projects, projects recommended by external panel (with Council representation) and approved by COO



**100** people at the launch event  
**32** letters of interest  
**9** applications requesting **\$541k**  
**4** grants totaling **\$150k**

# 2019 PILOT projects

Project partners	Project name / description	Grant amount
<b>APANO</b> , ROSE CDC, PBOT, various companies	New Mobility at the Orchards of 82 <sup>nd</sup> : Provide Jade District residents with accounts that they can use to pay for transit and a variety of new services, as well as education to help them access new modes.	\$30,000
<b>Latino Network</b> , Uber, TriMet	Latinx Ride Share Promotion: Provide ride-hailing credits and travel assistance to help Latinxs reach educational programs and services at locations throughout the region	\$55,000
<b>OPAL</b> , Portland Transport, Rosewood Initiative	East Portland Transit Appliance: Install screens displaying real-time information on transit arrivals at community locations in East Portland near lines with increased transit service	\$30,000
<b>Ride Connection</b> , Full Path, Trillium Transit	Trip Planning for All: Develop a trip planning tool that provides information on demand-response / special needs transportation services in the region	\$35,000

# What we heard from participants

“The program was well-organized and each stage of the grant was carefully planned out.”

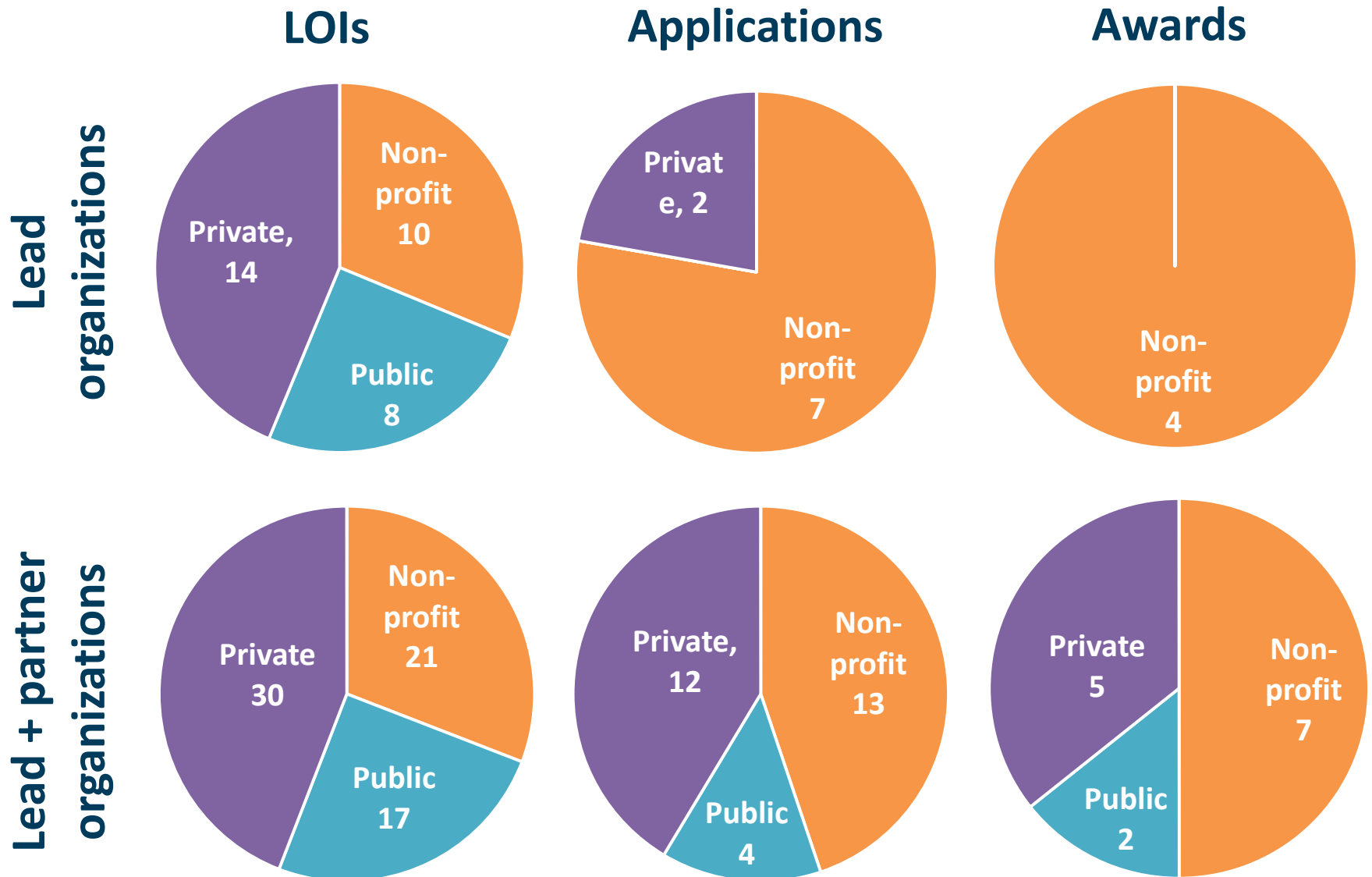
“Interested parties appreciated Metro facilitating matchmaking opportunities and connecting community based organizations with private companies”

“Metro valued the expertise of community based organizations.”

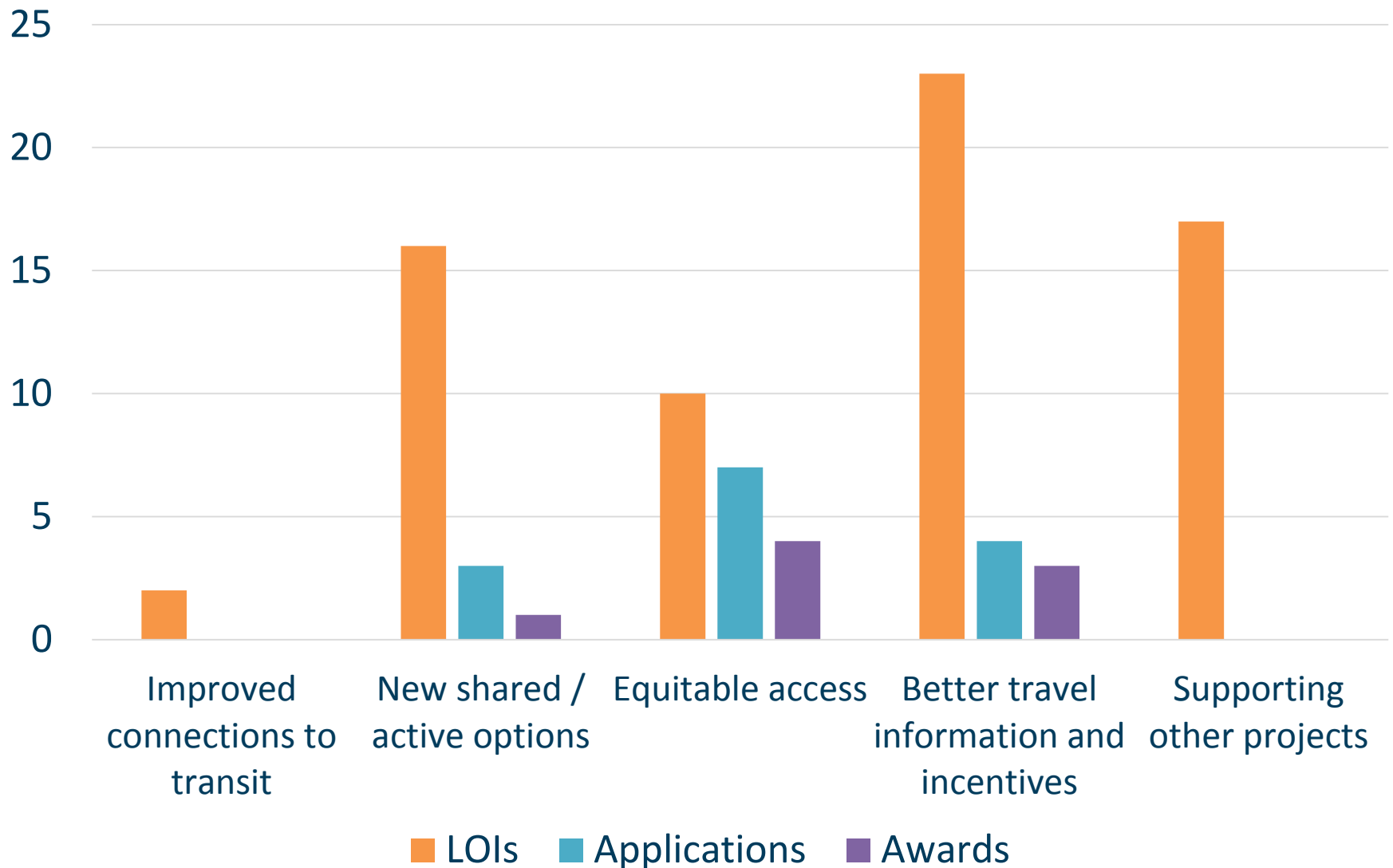
“Panelists weren’t clear on Metro’s intended balance between innovation and equity.”

“Metro could be more explicit about the types of communities they are trying to serve with the PILOT program.”

# Who engaged with the program?



# What outcomes were projects trying to achieve?



# What we heard from local partners

- Over half have tech-related projects planned in the coming two years, and many others have planning activities
- The main challenges include lack of resources and capacity
- The most useful types of support that Metro can provide are funding, partnership building, and data sharing


# Did we meet our goals?

Goal	Successes	Opportunities to improve
Advance equity and transportation choices	Equity	Choices
Form partnerships	Non-profit / private	Public agency partners
Support work across the region	2 regional projects	No local projects outside of Portland
Leverage resources	\$95K in match	Aligning with partner projects, reducing partnership risks
Engaging / equitable process	Formed new partnerships and fostered engagement	Hard to understand what Metro wants



# Options for phase 2

	Option 1: Stay the course	Option 2: Expand the program
<b>Who</b>	Mostly non-profits and private companies	Non-profits, private companies, public agencies
<b>What</b>	Equitable access to current transportation options	Equitable access to current options and new options that improve transportation choices
<b>Where</b>	Primarily city of Portland, some regional projects	Communities throughout the region
<b>How</b>	Competitive grants	Competitive grants or other approaches...

A black and white photograph of a person riding a bicycle on a paved path. The person is wearing a helmet, a dark tank top with 'CENTER 45' on it, and jeans. The bicycle has a basket on the handlebars with the 'gotcha' logo. The background shows a grassy area and some people sitting on a bench.

What “other  
approaches”  
are there?

## **SACOG (Sacramento) Regional Bike Share RFP**

- 3 cities propose bike / scooter share ideas and service areas
- SACOG compiles these into a single RFP and helps administer it
- Each city gets 50 shared ebikes / scooters

# Potential ways to expand PILOT

- Increasing the program budget
- Making other administrative changes:
  - Increasing minimum grant size
  - Strengthening partnership requirements
  - Being more prescriptive about eligible project types
  - Changing the program structure from a grants to a collaborative solicitation model
  - Putting more resources into developing potential projects

# Questions for Council

- What priorities do you have for:
  - Who this program engages?
  - What type of projects it supports?
- Should we focus on:
  - Cultivating new ideas and partnerships – even if they aren't “shovel-ready?” or
  - Developing projects that can be implemented quickly and successfully?

**[oregonmetro.gov/pilotgrants](https://oregonmetro.gov/pilotgrants)**  
**[oregonmetro.gov](https://oregonmetro.gov)**

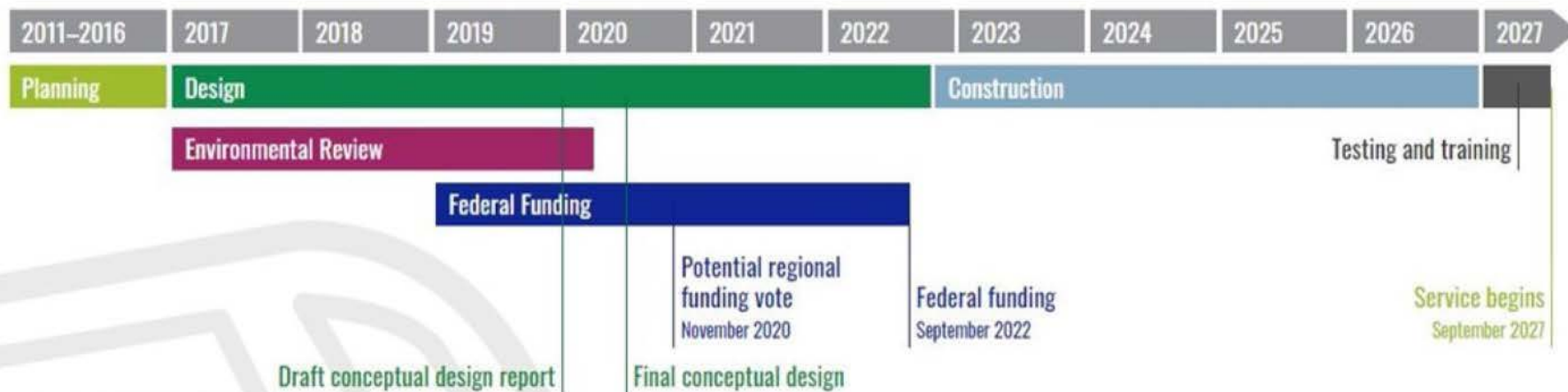
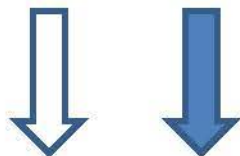




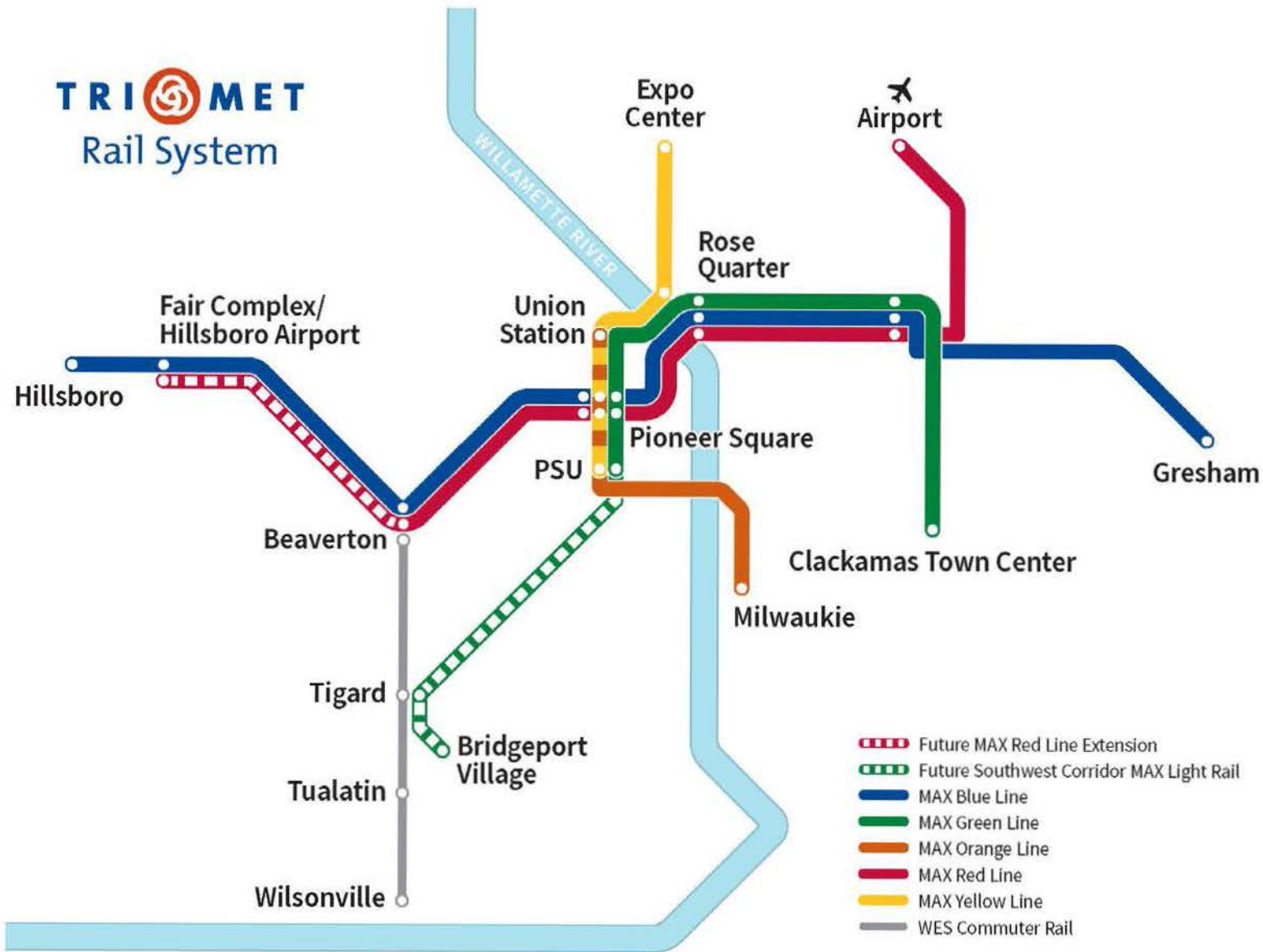


# **SOUTHWEST CORRIDOR LIGHT RAIL PROJECT**

**Council Work Session**  
**November 12, 2019**



**TRI MET**  
Rail System







There could be 340,000 residents in  
the Southwest Corridor by 2035-

**70,000**

**more than today.**

[swcorridorplan.org](http://swcorridorplan.org)

---



# 13-17

**hours of congestion a day:**

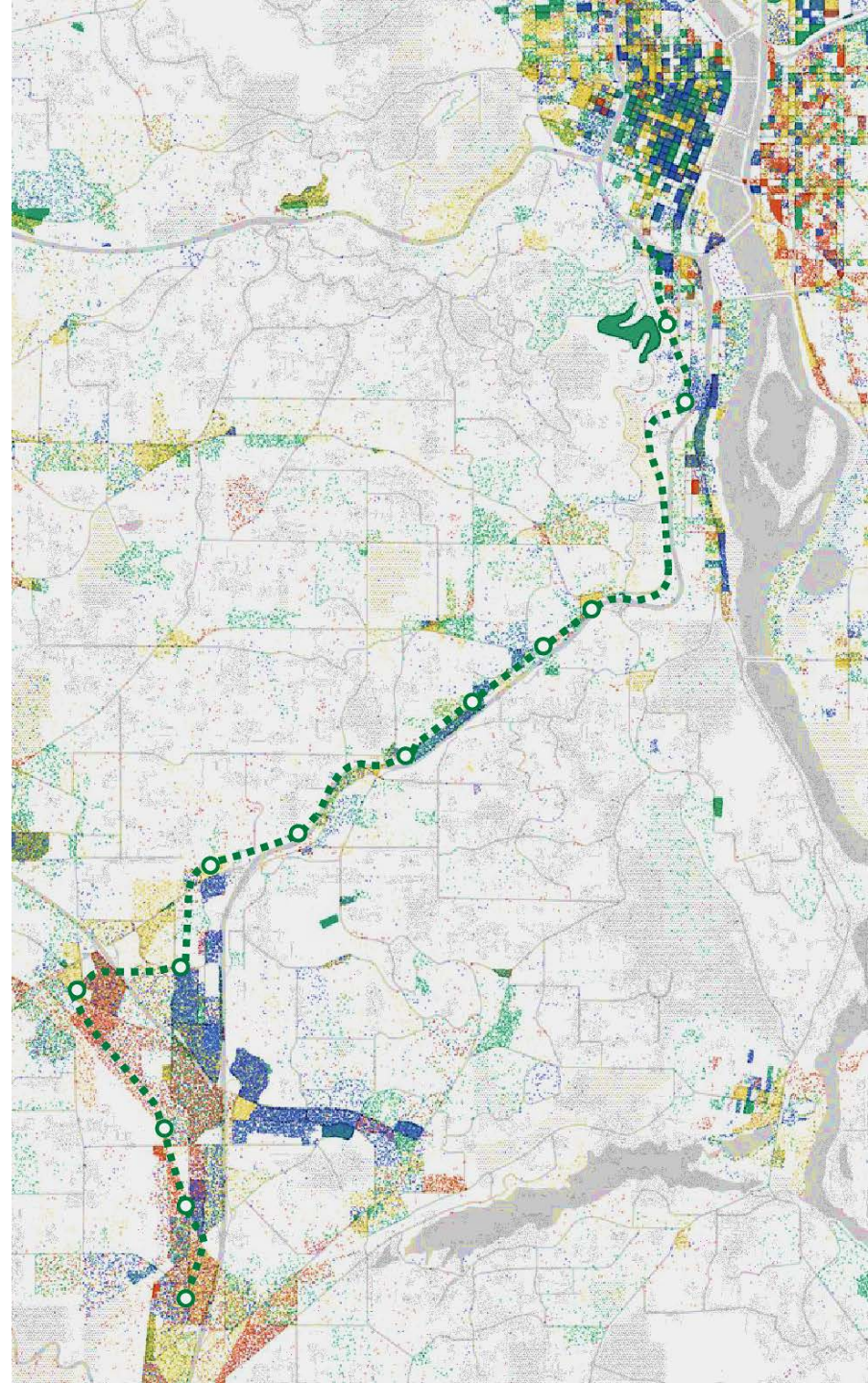
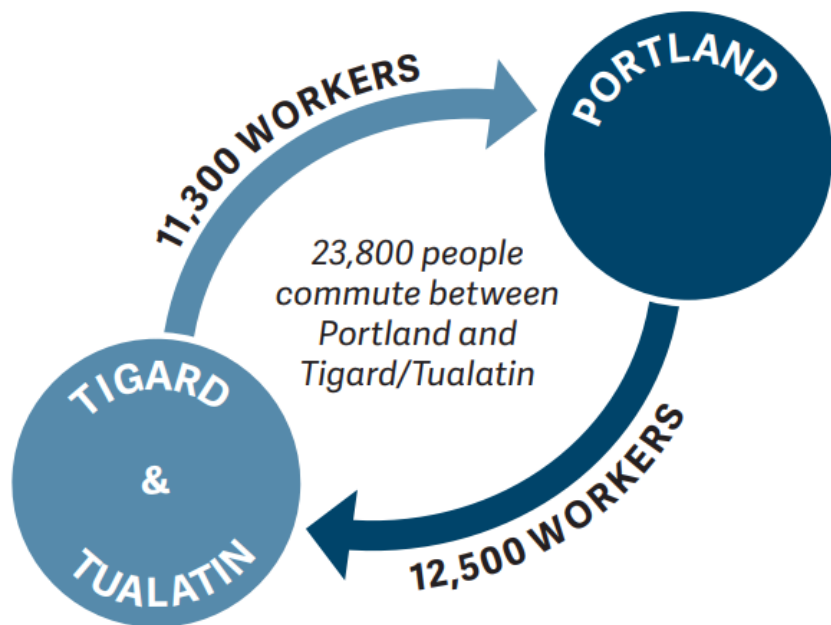
That's how bad traffic will be on Interstate 5  
between Portland and Tigard in 2035.

[swcorridorplan.org](http://swcorridorplan.org)

---

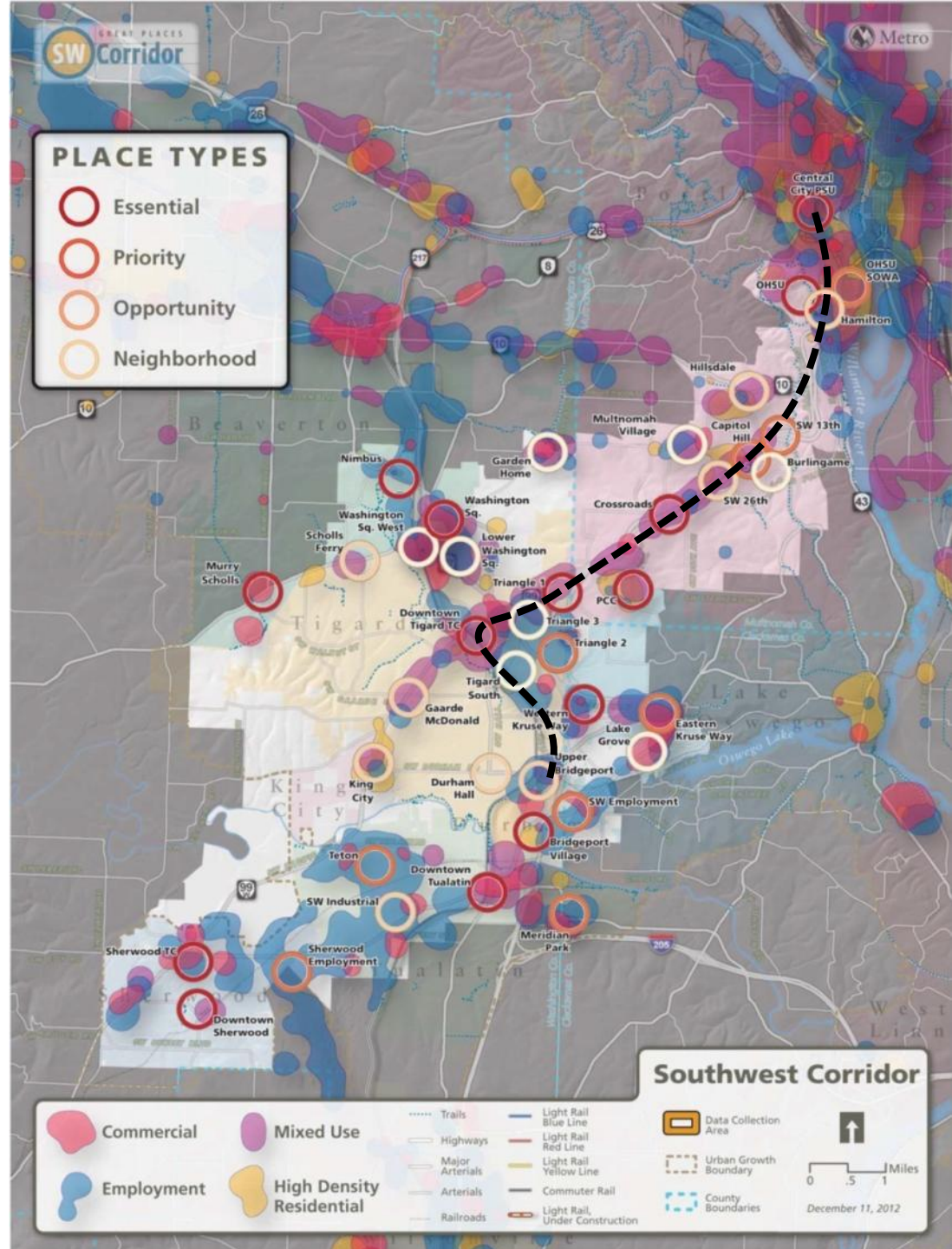


## Linking job centers



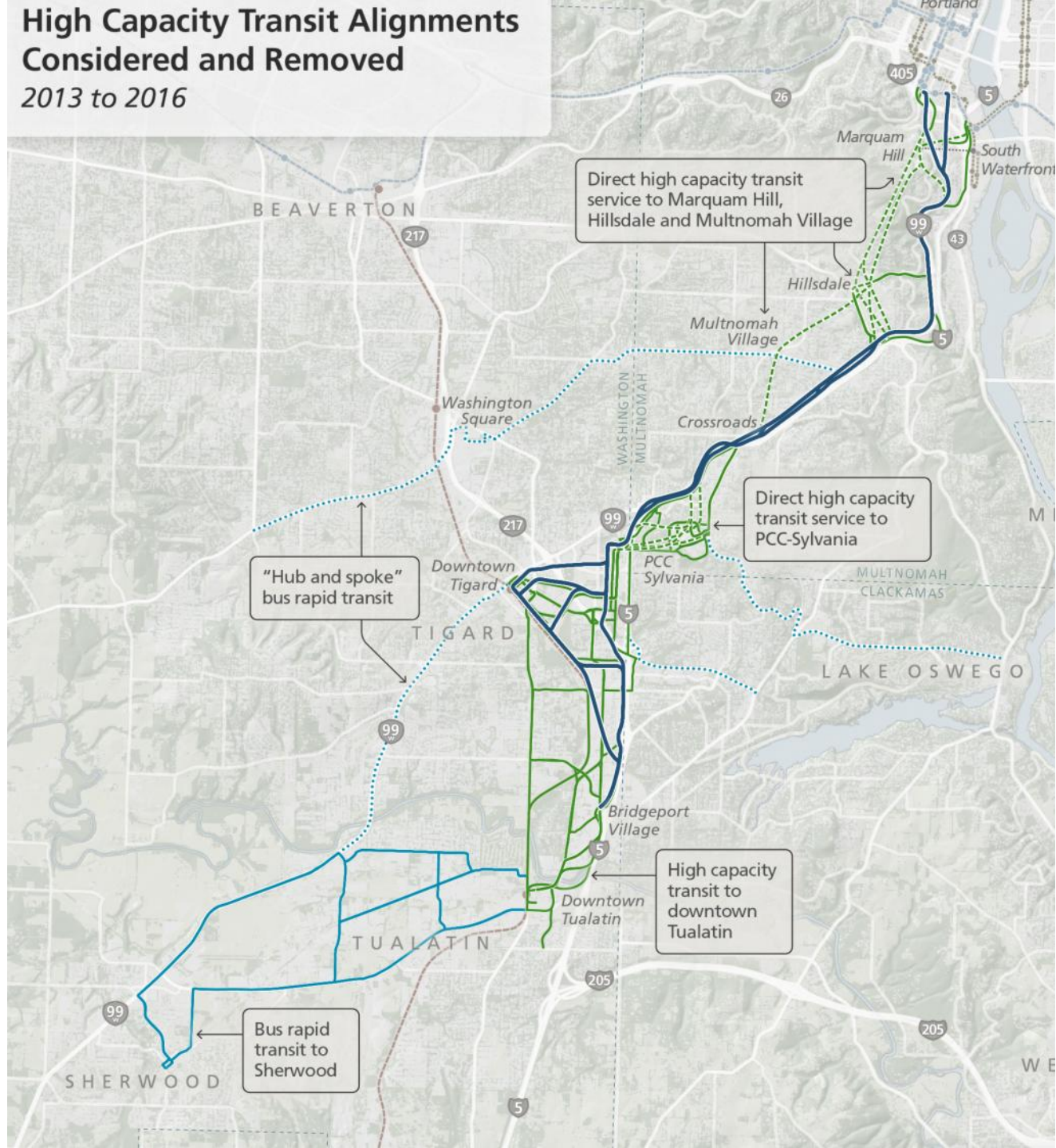


We started  
with land use  
to connect to  
places

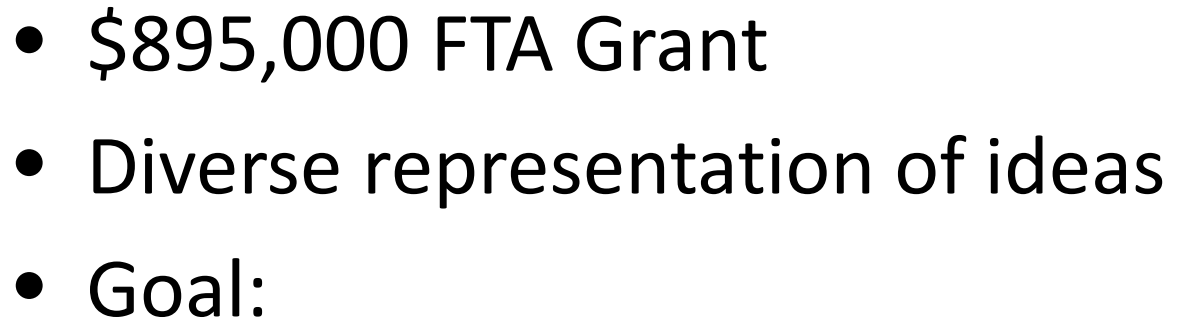


# High Capacity Transit Alignments Considered and Removed 2013 to 2016

Over 60  
alignment  
options were  
considered







# Project Goals

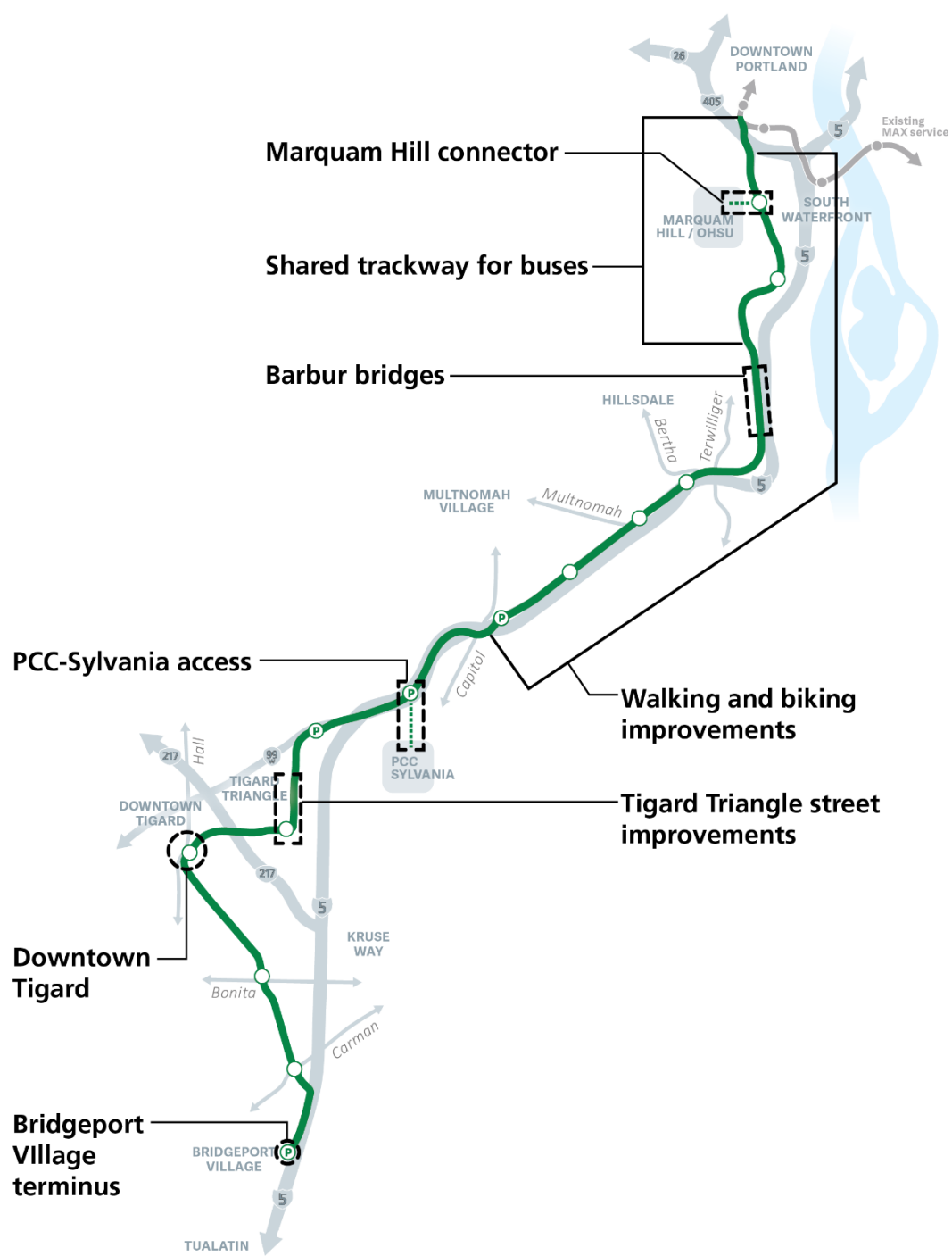
- Address residential and business displacement
- Expand the breadth and depth of influence among affected people
- Reduce disparities and improve conditions for affected people
- Preserve and expand affordable housing
- Advance economic opportunity for all and build community capacity for wealth creation
- Promote transportation mobility and connectivity
- Develop healthy and safe communities

# A Project About People





**11 miles**  
**13 stations**  
**30 minutes**  
**39,000 riders/day**  
**1 in 5 commuters**



# Since LPA adoption...

- Designs updated 15%
  - ♦ Avoid or minimize impacts
  - ♦ Greater detail and updated cost estimates
- Exploration of route adjustments
  - ♦ Unresolved locations
  - ♦ Cost reduction
- Ongoing environmental review
- Early TOD planning

# Funding assumptions

Partner	Request (\$ millions)
FTA	1,250
Regional Measure	850
State of Oregon	150
TriMet	75
City of Portland	75
Washington County	75
Metro / RFFA	50
<b><i>Subtotal</i></b>	<b><i>2,525</i></b>
Interim Finance cost	(150)
<b>YOE scope target</b>	<b>2,375</b>

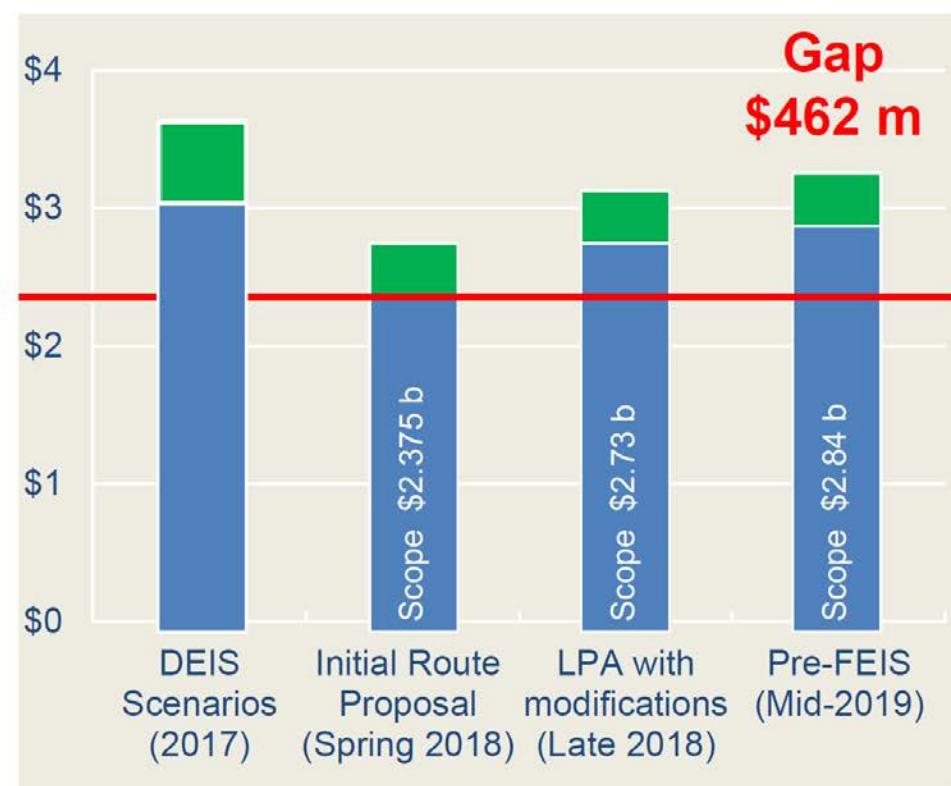
# Updated designs and risks

July 2019

## Cost estimates (billions)

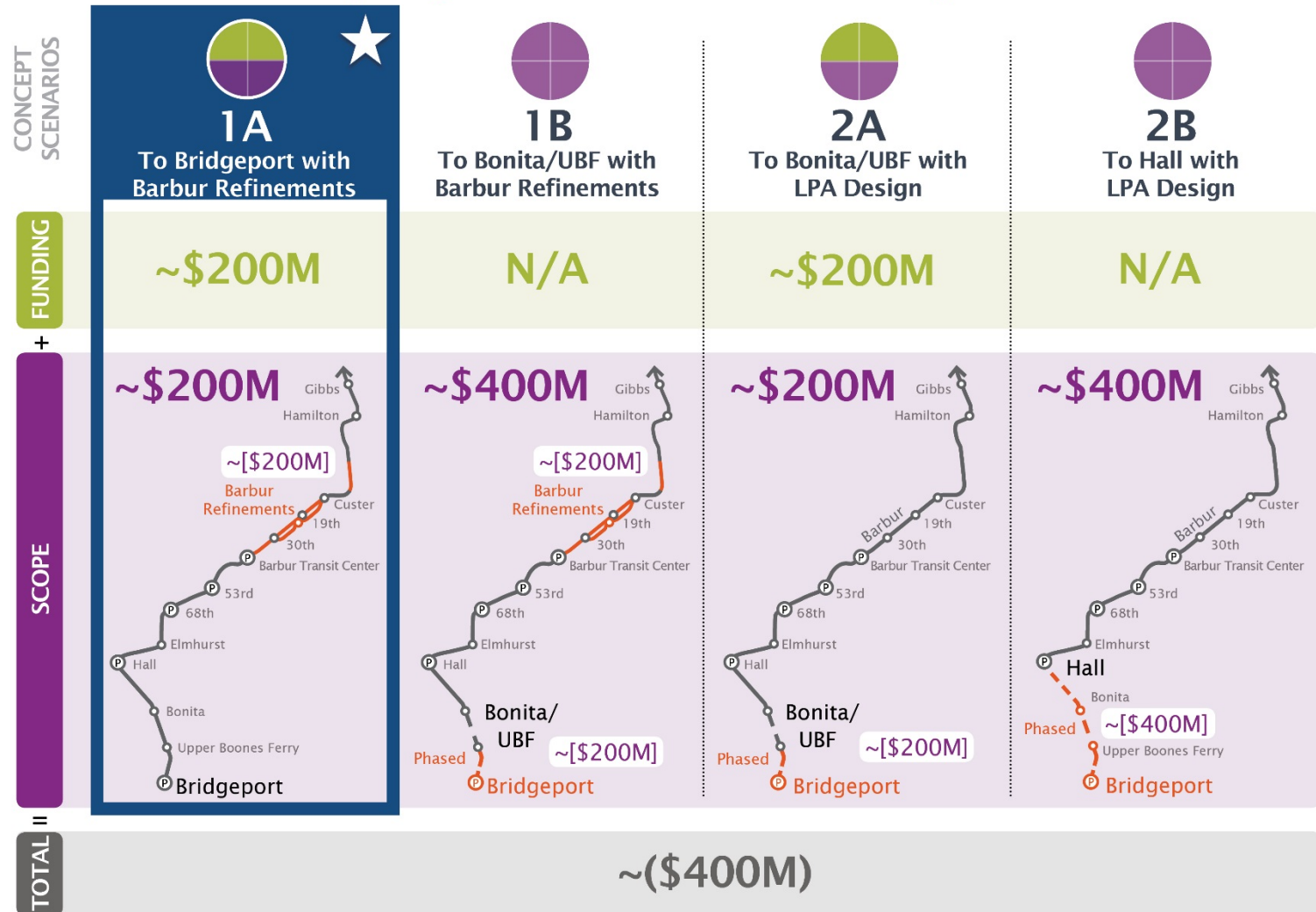
Scope target  
\$2.375 b

Finance costs  
Scope



# Options: scope, funding

What project could be built by 2027?



# Scope recommendations

Scope	Amount
Right of Way Adjustments – Multiple Locations	- \$24 m
Stormwater Infrastructure	- \$32 m
Reduced Crossovers (6)	- \$34 m
Red Rock Creek Structure	+ \$11 m
Upper Boones Ferry Traffic Mitigation	+ \$5 m
Operations & Maintenance Facility	- \$15 m
Systems Substations	- \$10 m
Right of Way Adjustments – SW Gibbs	- \$20 m
Right of Way Adjustments - SW Custer/13th	- \$10 m
<b>Total</b>	<b>- \$129 m</b>

# Funding recommendations

**Metro:** initial recommendation up to \$975M  
affirms regional benefit of reaching Bridgeport

**FTA potential:** other cities recently requested  
amounts over \$1.25B

- SW Corridor to Bridgeport rates very well

**State of Oregon potential:**

- Importance of addressing I-5 congestion
- Value of improving Barbur Boulevard to facilitate jurisdictional transfer





LPA

To Bridgeport with  
Modifications

FUNDING

\$240M

+

SCOPE

\$129M



GAP

&lt;\$100M

# Updated Funding Plan

Revenue	(in millions)
Incorporate Jurisdictional Transfer funds	+ \$65
Regional funding measure contribution	+ \$125
FTA Small Starts contribution	+ \$50
<b>Total</b>	<b>+ \$240</b>

**Remaining gap ~ \$93M**

**MOS**To Bonita/UBF with  
Modifications

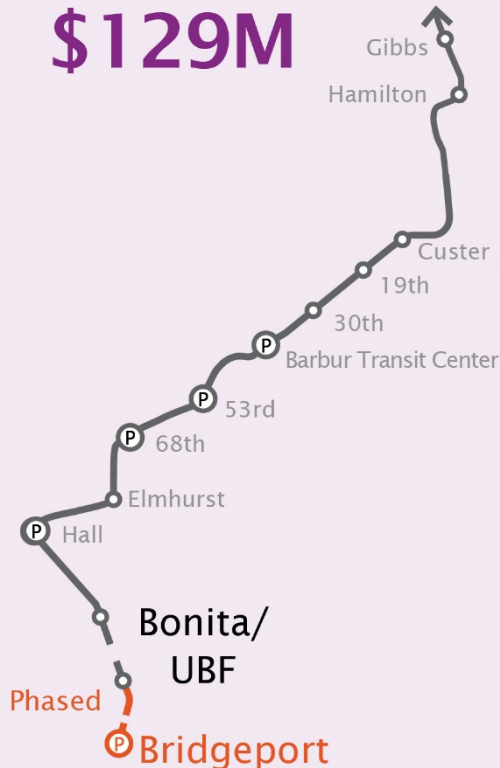
FUNDING

&lt;\$240M

+

SCOPE

\$129M



# Interim Terminus

*Must be able to function as a stand-alone project and not be dependent on any future segments being constructed*

Recommendation:

**Bonita/Upper Boones Ferry**

As far south as possible:

- Serves the most riders and reduces the most Vehicle Miles Traveled
- Most attractive for Washington County and ODOT funding contributions
- Most competitive per FTA ratings

# Next steps

## Conceptual design report

- Public draft in Winter, final in Spring

## Ongoing environmental work

- Final EIS anticipated in Summer

## Equitable development strategy

- Working with partners to implement

# Policy questions

- Does Council support the position of maintaining 4 through-travel auto lanes on SW Barbur Boulevard and terminating at Bridgeport Village, as identified in the Preferred Alternative?
- If so, does Council support the approach of finding additional local and federal funding for the SW Corridor project to fill the funding gap?



# **SOUTHWEST CORRIDOR LIGHT RAIL PROJECT**

**Council Work Session**  
**November 12, 2019**

# Business & Workforce Awards

## **Mercy Corps NW**

Getting minority and women-owned businesses ready to weather the impact of Light Rail construction

## **IRCO & OHSU**

Providing immigrants, people of color, and other marginalized communities access to career advancement opportunities in healthcare

# Equity & Housing Awards

## **Community Partners for Affordable Housing (CPAH)**

Engaging historically marginalized communities in the design of existing and future affordable housing developments

## **Home Forward**

Helping the Muslim community in SW Corridor navigate and influence affordable housing opportunities



# Equity & Housing Awards

## **Proud Ground**

Helping targeted communities access affordable homeownership opportunities in the SW Corridor

## **Momentum Alliance**

Enhancing the ability of communities of color to participate and influence the SW Corridor Plan

# Long-Term Implementation

- Federal Grant expires in July 2019
- Next 10 years are key to successful outcomes
- Support of local and national philanthropy will likely be necessary to keep a coalition of partners together
- Time is right- there is support to undertake these efforts now

# Regional Investment Strategy: Update

Council work session  
Nov. 12, 2019



Metro



# Housing bond: Implementation IGAs at Council

- Beaverton, Clackamas Co.:  
Nov. 21
- Washington County:  
Dec. 5
- Gresham, Home Forward:  
TBD (Reviewed by  
Oversight Cmte Nov. 6)





# #GetMoving2020: Updated next steps

- |                        |  |
|------------------------|--|
| <b>Nov. 13</b>         | <b>MPAC update</b>   |
| <b>Nov. 19</b>         | <b>Metro Council work session</b><br>Tier 1 projects update, recommendation overview                         |
| <b>Nov. 20</b>         | <b>Task Force meeting</b><br>Tier 1 Corridor project discussion continues                                    |
| <b>Dec. 11</b>         | <b>New Task Force meeting</b> – Location TBD<br>Revenue mechanism options presentation                       |
| <b>Dec. 18</b>         | <b>Task Force meeting</b><br><b>Clackamas C.C., Harmony Campus</b><br>Tier 1 Corridor project recommendation |
| <b>Jan. 7 &amp; 14</b> | Metro Council receives recommendation  |
| <b>Jan. 9</b>          | Tentative Metro Council public hearing   |



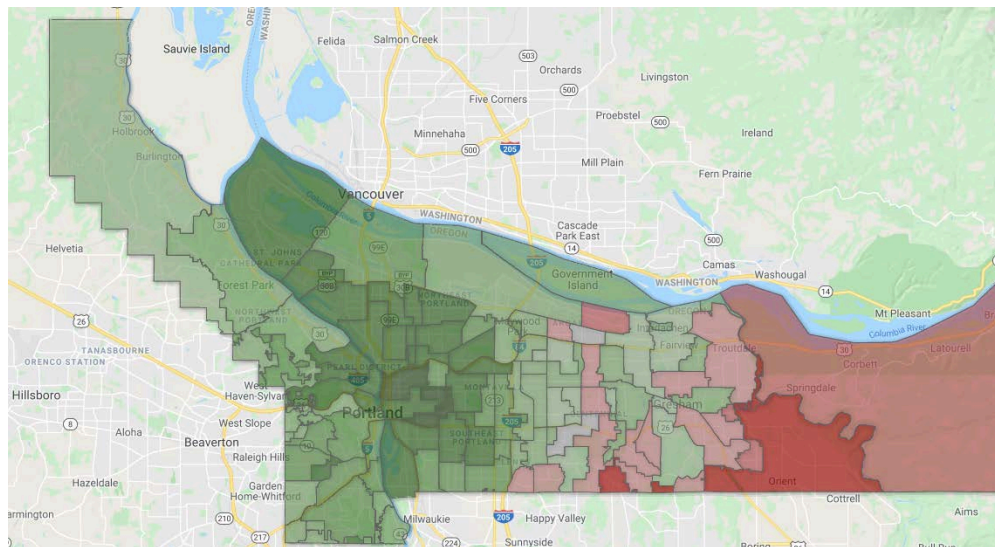
# Widespread support for habitat, water quality, access to nature

**Overall: 66.78% Yes**

Clackamas: 62.22%

Multnomah: 70.97%

Washington: 62.20%



# Next steps for Parks & Nature bond

**November:** Complete internal scoping

**Partner appreciation gathering:**

**Dec. 4, 5-7 p.m., June Key Delta Center**

**Late January:** Refinement work plan discussion at work session –  
Engagement, timelines, resources

**Sale of bonds:** Under discussion





# Opportunities in equitable development: Southwest Corridor

## Overview

Historically, decisions on major public investments have not fully involved the people impacted by the immediate or downstream effects of these investments.

Without bringing in the perspectives of the full range of impacted stakeholders, the social and economic implications of major transportation, land use and economic development decisions are not adequately explored. This lack of direct dialogue results in missed opportunities to effectively address key concerns, develop sustainable solutions and, ultimately, achieve equitable outcomes.

### An opportunity in the Southwest Corridor

Housing and education costs are rising significantly in the greater Portland region, and changes in workforce demands and rising population growth continue to put pressure on the region's existing infrastructure and social services.

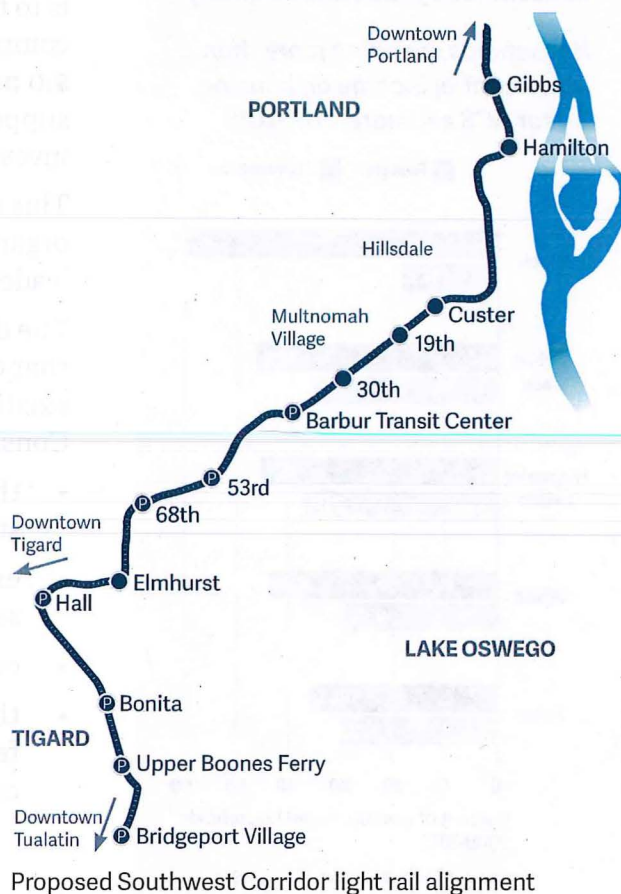
The Southwest Corridor – stretching from downtown Portland to Tigard and Tualatin – is home to more than 10 percent of the region's population and more than 250,000 jobs. One of the fastest growing areas in the state, the Southwest Corridor is experiencing increased traffic congestion, growing demand for transit service and unsafe conditions for people walking and biking.

**Thanks to an initial Federal Transit Administration grant, Metro has worked with its partners to explore how a proposed light rail and other investments in the Southwest Corridor can support community development and improve the quality of life for people of all incomes and backgrounds.**

Emerging best practices in equitable community development demonstrate that new approaches are needed to engage with and ensure that planning efforts – and the public benefits – extend to people of all incomes, races and ethnicities. The Southwest Corridor Equitable Development Strategy continues to be an unprecedented opportunity to engage community as active partners in developing and implementing a strategy to achieve more equitable outcomes as the light rail extension is built.

### Southwest Corridor Equitable Development Strategy goals

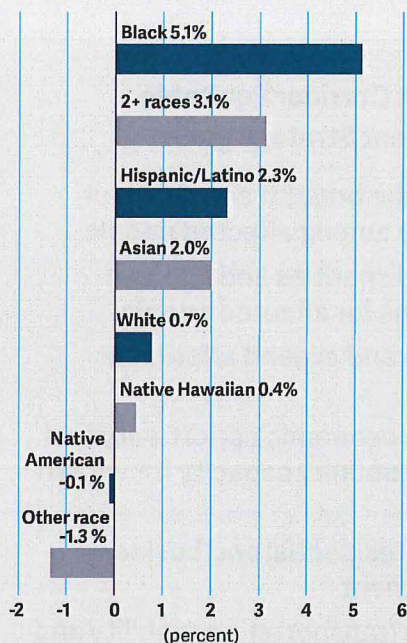
- Expand the breadth and depth of influence among affected people
- Reduce disparities and improve conditions for affected people
- Preserve and expand affordable housing
- Advance economic opportunity and build community capacity for wealth creation
- Address residential and business displacement
- Promote transportation mobility and connectivity
- Develop healthy and safe communities





## SW Corridor population growth and diversity

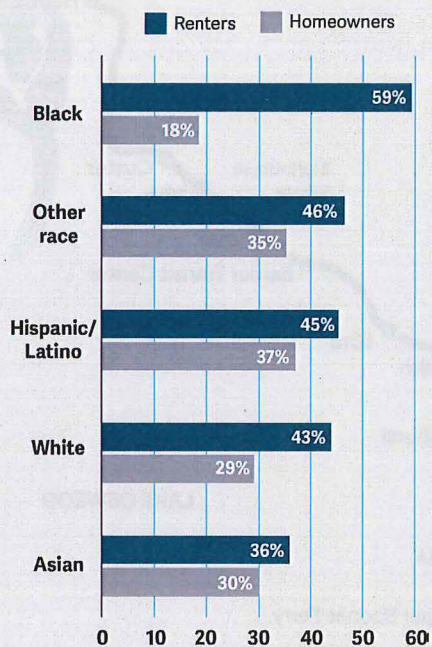
2000, 2011-15 population growth by race



Source: SW Corridor Equitable Housing Strategy, Cities of Portland and Tigard, 2018.

## SW Corridor cost-burdened households by race and ethnicity

Households spending more than 30 percent of income on housing, 5-year ACS estimate, 2011-2015



Percent of cost-burdened households, 2009-2013

Source: American Community Survey (ACS)

# Implementation

## Southwest Equity Coalition

The vision for building on the existing community oversight of the Southwest Equitable Development Strategy, or SWEDS, is for a Southwest Equity Coalition to continue forward through the implementation of the strategy.

The coalition will work to prepare current residents in the Southwest Corridor for the economic forces that will accompany the new light rail line and to ensure that existing residents are able to remain and experience the opportunities that this major public investment will bring. This work is beyond the reach of any single agency or organization – advancing equitable development in the corridor requires a more intentional and collaborative approach.

The coalition leverages existing partnerships and action plans in the SWEDS to stabilize existing residents and businesses while offering opportunities for new residents of all incomes and backgrounds to participate in the community's prosperity.

## The 10-year vision

The Southwest Equity Coalition would serve as the collaborative organization for implementation and advocacy in the corridor over the next 10 years.

The goal for the initial two years of local government assistance is to test effective methods and establish a sustainable, community-led, collective impact model with a 10-year, \$10 million target (combining the initial local government support and staffing with new resources from philanthropic investment).

This support and fundraising would allow community-based organizations in the corridor to continue ownership and leadership of SWEDS implementation.

The design of the coalition will be up to partner organizations that can lift up the voice of the community and leverage existing efforts to advance equitable development.

Considerations for the coalition include:

- the future vision of the Southwest Corridor and this initial strategy
- existing and ongoing commitment or involvement by public sector partners
- community-led or collective impact model
- the long-term (10+ years) local and national philanthropic, federal government and philanthropic resource commitment.



# Coalition 2-5 year action initiatives and current status

Early concept
 Pilot/early work
 Partially resourced
 Resourced/underway

	2-5 year initiative	Lead/possible lead organization	Status
Influence	Formation and operationalization of the Southwest Equity Coalition	Unite Oregon and Community Alliance of Tenants	
Equity	Leadership trainings and targeted engagement to empower low-income residents, communities of color and community- based organizations	Unite Oregon	
	Community Preservation Work Group to provide anti-displacement services and provide parity of tenant protections	Community Alliance of Tenants	
Equitable housing	Implementation of the Southwest Equitable Housing Strategy	City of Portland and City of Tigard	
	Implementation of Regional Affordable Housing Bond in the Southwest Corridor	Metro, Washington County and City of Portland	
	Multi-jurisdictional Memorandum of Understanding to coordinate acquisition and redevelopment of public properties and station area planning	TriMet, Metro, cities and counties	
	Extension of SWEDS pilot projects to implement housing design and siting criteria refinements identified through outreach on culturally specific needs	Home Forward and Community Partners for Affordable Housing	
	Identification of sites for directing outside capital to affordable housing in Southwest Corridor through a Real Estate Investment Trust	Meyer Memorial Trust	
Workforce stability	Major employers engagement to train entry level workers from diverse backgrounds for middle skill/wage career advancement pathways among major employers	Immigrant and Refugee Community Organization, Worksystems Inc. and OHSU	
	Aligned and expanded workforce development resources and programs between Multnomah and Washington counties	Worksystems Inc.	
	Exploration of community and/or public benefits agreements in the Southwest Corridor	Metro and O'Neill Construction	
Business stability	Inventory and survey of disadvantaged businesses to establish improved representation and activate anti-displacement financial and technical resources	Prosper Portland and Mercy Corps Northwest	
	Improved access to affordable commercial space for disadvantaged businesses	Craft 3 and Prosper Portland	
Community Development	Exploration of Community Investment Trust to leverage successful model in East Portland to capture increased property values for community wealth creation in the Southwest Corridor	Mercy Corps	
	Establishment of community land bank organization to secure property for community assets such as affordable housing and/or job/service centers	Proud Ground	
	Groundwork for a tax increment finance district in the Southwest Corridor that advances equitable development outcomes	Prosper Portland	
	Tigard Triangle equitable tax increment finance district implementation	City of Tigard	
Health	Collaboration with coordinated care organizations to improve healthy food access and address other health equity needs in corridor	Oregon Health Authority	
Mobility	Identification of resources and construction of MAX light rail line along with walking, biking and roadway projects in the Southwest Corridor	Metro and TriMet	



## Next steps

The current model seeks to provide resources to a specific set of engaged SWEDS oversight committee partners dedicated to racial equity to develop, staff, and structure the Southwest Equity Coalition as it gets off the ground.

The coalition members are applying for philanthropic funding to support the initial phase of work. This group is exploring how to partner together as a funding or executive committee that can advance the initiative. The goal is for each organization to receive funding to staff and support the Southwest Equity Coalition in these crucial first years. This support will help leverage and enhance existing work to advance leadership training and empowerment.

This funding would also help advance developing a Community Preservation Work Group for anti-displacement services and tenant protections and would pay for staff time to participate in the committee.

The group is seeking additional resources to fund an Equity Coalition Coordinator to be housed at Unite Oregon. This position would be an external co-manager of the Southwest Equity Coalition, representing the overall coalition and managing the project alongside Metro staff.

Additional fundraising from local philanthropies will support specific implementation efforts prioritized by the coalition.



## Prospective Southwest Equity Coalition members

These current Southwest Project Oversight Committee members have expressed strong interest in continuing on as part of an equitable development coalition.

- Ascent Funding
- Business for a Better Portland
- City of Portland
- City of Tigard
- City of Tualatin
- Coalition for Communities of Color
- Community Alliance of Tenants
- Community Housing Fund
- Community Partners for Affordable Housing
- Constructing Hope
- Craft3
- Enterprise Community Partners
- Federal Reserve Bank of San Francisco
- Greater Portland Inc.
- Home Forward
- Immigrant and Refugee Community Organization
- Metro Regional Solutions Center
- Mercy Corps Northwest
- Meyer Memorial Trust
- Momentum Alliance
- Multnomah County Health Department
- Multnomah Village Business Association
- Muslim Education Trust
- Neighborhood House + Hillsdale Neighborhood
- Network for Oregon Affordable Housing
- O'Neill Construction
- OPAL Environmental Justice
- Oregon Health and Science University
- Portland Community College
- Prosper Portland
- Proud Ground
- Southwest Neighborhoods, Inc.
- State of Oregon
- TriMet
- UNITE Oregon
- Venture Portland
- Washington County
- WorkSystems Inc.

# Memo



**Metro**

600 NE Grand Ave.  
Portland, OR 97232-2736

Date: November 6, 2019  
To: Paul Slyman, Chief of Staff  
From: Council Policy Staff  
Subject: Estimated Measure Formation Scope and Resources

---

Over the last several years, Metro has developed three funding measures under the Regional Investment Strategy. In order to understand the potential scope, time and cost associated with the development of a potential Metro measure the following will describe, at a high level, the work done on other measures, and what kinds of resources were allocated for successful implementation of those work plans.

## Planning:

With all three proposed or successfully completed measures, Metro undertook at least 2-years of planning and development on the subject. Arguably, with all three, Metro has been working in and around the subjects for decades. However, if we look just at planning for the specific funding measure, all three had significant development regarding the problem to be solved, best practices in finding solutions, and a series of possible ways forward in advance of beginning the work of measure formation.

The primary materials representing this planning are the "Opportunities and Challenges for Equitable Housing Development" report (2016), the "Parks & Nature System Plan" (2016), and the "Regional Transportation Plan" (2018). Further, all three subjects are represented in the Regional Framework Plan (2011) and the Urban Growth Functional Plan (2015).

## Council Direction:

All three measures were brought to Council under different practical and electoral realities. In advance of measure formation, each item was discussed in relationship to one another and a strategy on how to address all three lines of business were debated before an eventual regional investment strategy was established.

## Staff Teams:

Once Council directed staff to move forward with the regional investment strategy, a multi-departmental staff team was established to shepherd the measure workplan development. Each staff team varied in size and agency participation, so it is difficult to establish how much staff time is needed for a measure's development. In addition, there are technical staff groups built of jurisdictional staff from around the region on each item.

A general educated guess at the minimum staff time needed is shown below, minus any outside support (for example, Department Directors, Council staff, OMA, or the time of agency subject-matter experts who may only do discrete specialized work on the project).

## Consultants:

A large body of consultants are needed to develop a measure. These include technical experts, public opinion surveys and research, communications and media, coalition strategy, meeting/event facilitation, and equity analysis.

#### Engagement:

In keeping with good government engagement practices and to continue to advance the racial equity strategy of the agency, each measure brought together a broad and diverse set of community stakeholders for many months of meetings to discuss the measure formation process and provide community decision-making and awareness on the proposal. These all had several dozen members each, and often included sub-committees. There are also Metro-funded community partnerships with each measure which bring culturally specific community organizations into the process.

In addition to the stakeholder tables, extensive outreach to local jurisdictional staff and elected bodies, culturally specific organizations, interest and activist organizations, and the broader public was undertaken for months or in some cases years in advance of a referral. As an example, the Metro affordable housing measure had 105 formal community advisory partners and 1034 interested parties. They hosted over 40 formal meetings or events with local jurisdictions and business associations, several tours and countless informal meetings through Council and staff constituent engagement.

#### Outcomes:

Not including the process of researching a proposed measure's subject matter—to perform technical evaluation, develop a workplan and engage the community to establish a set of policies, objectives and eventual outcomes for the measure has taken between 9-months to 2-years.

#### Campaign:

After Metro Council refers a measure to the voters, work on the measure is turned over to a campaign which has its own timelines, staffing and resource needs. This memo does not cover the scope and costs of a campaign.

#### General Budget:

The following represents a general sample budget based off current and past measure work.

<b>Sample Measure Development Budget</b>	
Project Staffing	\$ 571,600.00
Public Opinion Research	\$ 135,000.00
Technical Consulting	\$ 75,000.00
Community Partnerships	\$ 100,000.00
Communications	\$ 175,000.00
Project Management, Logistics, Meeting Expenses	\$ 50,000.00
Public Information	\$ 85,000.00
Political Strategy	\$ 80,000.00
<b>TOTAL</b>	<b>\$ 1,271,600</b>

Staffing:

Measure development staffing assumes 1 manager FTE, 1 administrative FTE, .5 Communications FTE, and two Program Analyst FTE – cost includes full salary and benefits for those positions. As mentioned, this does not include drop-in staff time by attorneys, Council staff, or others who may not work full time on the measure but participate in its development.

Summary by FTE	Total Cost
Manager I 1.0	157,737
Admin Specialist 1.0	77,919
Sr Public Affairs Specialist 0.5	58,764
Program Analyst 1.0	138,591
Program Analyst 1.0	138,591
	<b>571,602</b>

Timeline:

On next page.



