



Exhibit A to Resolution No.  
24-5385

# Draft Public Engagement Guide

February 2024

Metro commits to meaningful public participation because of its power to benefit present and future generations.

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

**So, hello. We’re Metro – nice to meet you.**

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

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SUMMARY: INCLUDES AN ENGAGEMENT PLANNING CHECKLIST; AN AUDIENCE AND POWER MAPPING EXERCISE; GUIDANCE ON APPLYING THE SPECTRUM OF PUBLIC PARTICIPATION; COMMUNITY PARTNERSHIP MODELS AND TIPS FOR EVALUATION.

#### APPENDIX H - EVALUATION FOR PUBLIC ENGAGEMENT

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#### APPENDIX I – COMMUNICATIONS PLANNING TOOLKIT AND INFORMATION

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SUMMARY: INCLUDES GUIDANCE FOR WAYS TO REDUCE COMMON BARRIERS TO PUBLIC PARTICIPATION INCLUDING PLANNING ACCESSIBLE MEETINGS, ADDRESSING LANGUAGE, DISABILITIES, MISTRUST, OR OTHER BARRIERS FOR PEOPLE WITH LOW INCOMES OR OTHER HISTORICALLY MARGINALIZED IDENTITIES, ET CETERA.

## DOCUMENT SUMMARY

The guidance in this document is for Metro staff, the Metro Council, partners, and the public. This guide features three main sections and an appendix:

### **Section 1 – About the Public Engagement Guide**

Provides background information on the guide and presents Metro’s Guiding Principles for Meaningful Public Engagement.

### **Section 2 – Information for community members**

Provides information about Metro’s work, ways to stay informed and opportunities to get involved. This section includes community advisory committees and grants and sponsorships available at Metro.

### **Section 3 – Guidance for Metro staff**

Provides guidance for Metro staff about how to plan, deliver and evaluate public engagement activities for programs, policies and investments.

### **Appendix – Supplemental tools and resources**

Provides a list of supporting information and resources for users of the guide.

### **Updating the guide**

Once the 2024 core guide is adopted, Metro staff will review and update it every three to five years starting in 2027. With every review, there must be a 45-day public comment period before adoption. Metro staff recommend that the Metro Council adopts each updated guide by resolution. Information in the appendix can be updated on an ongoing basis without adoption.

#### **Thank you to the Public Engagement Review Committee**

The Public Engagement Review Committee advised Metro staff and Council on the content of this guide. The committee is tasked with advising the Metro Council on engagement practices. Representatives from Clackamas, Multnomah and Washington counties make up the committee. Members in 2023-24 included:

*Community members:* Carine Arendes, Isaiah Jackman, Makerusa Porotesano, Michael Foley

*Community-based organizations:* Alisa Kajikawa with APANO, Diana Ospina Lara with Hispanic Metropolitan Chamber, Henry Miller with The Street Trust

*Local government staff:* Amanda Garcia Snell with Washington County, Cameron Ruen with Clackamas County, JR Lilly with Multnomah County

# SECTION 1. ABOUT THE PUBLIC ENGAGEMENT GUIDE

## Introduction

The Public Engagement Guide is a flexible tool with information to enable meaningful connections and collaboration between community members, and Metro staff, the Metro Council, local governments, local businesses, and nonprofit organizations. Metro is committed to advancing racial equity, climate resilience and building shared prosperity for our communities.

Public participation is an important part of planning for future transportation projects, parks and natural areas, garbage and recycling, affordable housing and supportive services, and arts and culture venues. Members of the public can use the guide learn how to provide input on Metro decisions.

The Metro Council, staff and Metro advisory committees use the guide along with policies across the organization to plan and carry out engagement activities. The guide strengthens Metro's engagement practices by inviting more voices to the table to listen and learn from one another. It supports policymakers to make informed decisions that point the organization in a direction of growth and accessibility.

This guide supports Metro's efforts toward repairing past harms and building accountability to the people Metro serves. It also offers an opportunity to create shared understanding about basic engagement terminology and best practices for inclusive and meaningful public engagement.

### Desired outcomes:

- People have accessible information and meaningful opportunities to participate in programs, services, or decision-making processes at Metro.
- Metro creates welcoming spaces that encourage civic leadership and connection through community-led activities and building capacity for ongoing engagement.
- The Metro Council makes decisions that are well-informed and responsive to the needs and perspectives of the diverse communities of greater Portland.

## History of the guide

### Past versions of the guide

Metro is required to periodically update a public engagement guide as the designated Metropolitan Planning Organization by the State of Oregon and the United States Federal Highway Administration. The purpose of the guide is to inform and involve the public in regional transportation planning as one of the conditions of receiving federal grants that Metro awards to local cities and counties for transportation projects.

Metro adopted its first Public Engagement Guide, formerly known as Public Involvement Policy for Transportation Planning, in 1995 and updated it in 2004 and 2009. The last version of the Public Engagement Guide was adopted in 2013 after a period of research, community outreach activities and a public comment period.

In 2019, during the impacts of the COVID-19 pandemic, Metro did not conduct a full update to the guide; instead, Metro informed the public about regional transportation planning work within a document called [\*“Be involved in building a better system for getting around greater Portland.”\*](#) The relevant information in that document is updated and included in the current version of the guide.

### **What led to changes in the 2024 version?**

The 2024 guide generally follows a similar structure to the 2013 version. The similarities include a list of guiding principles, important information for the public, guidance for staff on how to plan and evaluate engagement activities, and an appendix with supplemental resources. The updates in this guide reflect best practices for public participation.

Metro works towards building a culture of learning for Metro staff and the greater Portland region by convening diverse voices and applying their input.

Metro’s work is always evolving and has shifted over time as a result of continued learning and the development of several new guiding policies, such as:

- The [Strategic Plan to Advance Racial Equity, Diversity and Inclusion](#)
- The [2030 Regional Waste Plan](#)
- The [2018 Affordable Housing Bond](#)
- The [2019 Parks and Nature Parks Bond](#)
- Updates to the [Regional Transportation Plan](#) and [the Metropolitan Transportation Improvement Program](#).

Below is a list of some of the changes at Metro since 2013 that influence Metro’s community outreach practices:

- Metro, as the region’s designated Metropolitan Planning Organization, receives guidance from the United States Federal Highway Administration and the Federal Transit Administration as part of their responsibilities for regional transportation planning. The most recent guidance related to the public engagement guide include:
  - Simplify the guide through summaries, visuals, and other techniques to ensure the information is easy to understand for the widest possible audience.
  - Inform the public about Metro’s outreach efforts at key decision points in the regional transportation planning work.
  - Include information about all of Metro’s service departments.
  - Include explicit procedures for outreach with traditionally underserved populations.
  - Include criteria or a process to evaluate the effectiveness of outreach activities.
  - Conduct a 45-day public comment period before adopting the new public engagement guide.

- In 2016 Metro adopted the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. (See summary in Appendix A). Putting the Strategic Plan into practice led to more engagement opportunities for community members, such as advisory committees for government oversight; culturally specific education programs; community partnerships with organizations that are led by Black people, Indigenous people, people of color and young people; and participation in regional transportation planning. Other outcomes have included things like improving access to parks and nature and to garbage and recycling service.

The goals of the plan are:

- Goal A: Metro convenes and supports regional partners to advance racial equity.
  - Goal B: Metro meaningfully engages communities of color.
  - Goal C: Metro hires, trains and promotes a racially diverse workforce.
  - Goal D: Metro creates safe and welcoming services, programs and destinations.
  - Goal E: Metro's resource allocation advances racial equity.
- In 2021, Metro developed a tool called the Racial Equity Framework to support staff in applying an equity lens to project planning. This planning tool ensures staff considers resources, impact, research and critical questions about public engagement early in their project planning processes. This tool includes a worksheet, tools, resources and step-by-step instructions for applying the framework.
- Staff trainings, guidance and new procedures:
  - All staff are required to receive yearly trainings on racial equity and gender inclusion.
  - Staff also have access to optional training opportunities on topics like trauma-informed care, climate resilience, public participation, Tribal Government Affairs and other topics related to Metro's work.
  - Metro created guidelines to simplify contracting processes for community partnerships and reduce barriers for public participation in public engagement events. Guidelines include providing childcare, providing translation and interpretation services, offering transportation or participation stipends, and meaningfully including community members in decision-making processes.
- In 2020 a COVID-19 Community Engagement Policy was created to reflect Metro's commitment to racial equity through inclusive engagement within the context of a public health crisis. The policy calls for Metro to apply practices that make it possible for Black people, Indigenous people and people of color to reclaim and use their power to influence needed changes in their community.
- In 2020, Metro launched a pilot grant program to support community-based organizations in civic engagement activities through capacity building.
- In 2021, Metro hired a Tribal Policy Liaison to build a formal process to involve and consult Tribes as independent government partners. Metro invites Tribes to participate in key regional decisions that may impact cultural resources, treaty rights or otherwise be of interest to Tribes. Besides Metro's efforts to build better relationships with



Tribes, Metro also offers more trainings and opportunities for staff to learn about Tribal affairs and about engaging with Urban Indigenous community members.

- The unequal impacts from the global COVID-19 pandemic, the wildfires in Oregon in 2020, and the international uprisings after a police officer killed George Floyd during an arrest have continued to deepen our collective understanding about the need to lead with race in regional governance.
  - For example, Metro made improvements to security practices at the Metro Regional Center and developed a policy that prohibits hateful speech and behavior at the public garbage and recycling transfer stations Metro manages. These changes are designed to make Metro buildings more welcoming and safer for Black, Indigenous, Asian-American, and people of color, people who speak limited English, and people experiencing houselessness.
- In 2023, the Metro Council adopted eight new Guiding Principles for Meaningful Public Engagement. The update integrates the guidance from members of the Public Engagement Review Committee made up of local government staff, community partners and community members, along with input from the Metro Council and Metro staff. The new guiding principles serve as the foundation of the Public Engagement Guide in 2024.
  - The Metro Council last adopted guiding principles for public involvement in 1997. Those principles were updated for the 2013 guide. The 2013 principles, along with the principles of the COVID-19 Community Engagement Policy, informed the guiding principles in the 2024 guide. This guide includes more information on how to use the guiding principles.

## Metro's Guiding principles for meaningful public engagement

The guiding principles inform planning and carrying out virtual and in-person public engagement activities. They create a foundation to sustain an equitable and democratic culture of collaboration and accountability at Metro.

Metro's priorities advance racial equity, climate resilience and shared prosperity within the services offered to the public. The guiding principles reflect Metro's values related to communicating and engaging with the diverse communities it serves.

The success of Metro's engagement efforts depends on the ability to meet people where they are and to consider people's diverse needs and personal experiences when making decisions about Metro services, programs, policies, or investments.

### Metro's guiding principles for meaningful public engagement are:

1. Public participation is an essential part of Metro's decision-making.
2. Transparency about decision-making is fundamental to successful public service and includes communicating about project outcomes and the impact of community contributions to the process.
3. Meaningful public engagement processes apply equity, diversity and inclusion strategies and tools to help identify and address the needs of impacted, underserved, and historically excluded communities.
4. Engagement and communications are accessible, informative, timely and inclusive of a rich diversity of lived experiences and perspectives.
5. Collaboration and capacity-building efforts with community-based organizations, programs, initiatives, and individuals that are impacted, underserved, or historically excluded are essential to address regional issues equitably.
6. Intergovernmental collaboration, coordination, and consultation are essential to address regional issues holistically and efficiently.
7. Evaluation of engagement activities during and after a project encourages responsiveness, growth, and process improvement.
8. Adaptive project timelines allow for meaningful engagement with the most impacted audiences early and throughout the project.

### *Using the principles:*

Go to Appendix C to see desired outcomes and examples of applying each principle to engagement practices.

## SECTION 2. INFORMATION FOR COMMUNITY MEMBERS

### Welcome to Metro

Thank you for your interest in collaborating with Metro! When you work with Metro, it benefits the region for generations to come. Your input, questions, participation, and feedback will help ensure Metro's work is responsive to the needs of the community.

This section features summary information about Metro for members of the public. It is intended as a starting point for anyone seeking more information about Metro. We hope that it will inspire you to seek out opportunities to get involved!

Throughout this section you will find links to explore Metro's website, opportunities to subscribe to newsletters and email updates, contact information for Metro staff to request more information or propose an idea. The summary information includes:

- What is Metro?
- Inclusion and racial equity strategy
- Disability and language access
- Community advisory committees
- Tools for businesses

### Be informed

Disability or language accessibility →  
[Get accommodations](#)

Information in other languages →  
[Oregonmetro.gov/languagehub](https://oregonmetro.gov/languagehub)

Subscribe for updates of your choice →  
[Oregonmetro.gov/subscribe](https://oregonmetro.gov/subscribe)

Stories on Metro News →  
[Oregonmetro.gov/MetroNews](https://oregonmetro.gov/MetroNews)

Follow us.



[Contact Metro →](#)

Main line: 503-797-1700

TDD/TTY: 503-797-1804

Most Metro staff can be reached by  
sending email to:

firstname.lastname@oregonmetro.gov

### Metro Regional Center

600 NE Grande Ave

Portland, OR 97232

## What is Metro?

Metro is a regional government that brings people together to make decisions about where we grow, how we get around and what happens to our waste. Metro guides investments in jobs, housing, transportation, parks and nature and arts and culture venues while working to protect farms, forests and clean air and water for future generations.

Metro serves more than 1.7 million people within Clackamas, Multnomah, and Washington counties. The service area is split into six Metro districts and includes Portland, Oregon and 23 other surrounding cities. From the Columbia River to the bend of the Willamette River near Wilsonville, and from Forest Grove to the banks of the Sandy River at Troutdale. [See a list of cities and counties in the Metro region →](#)

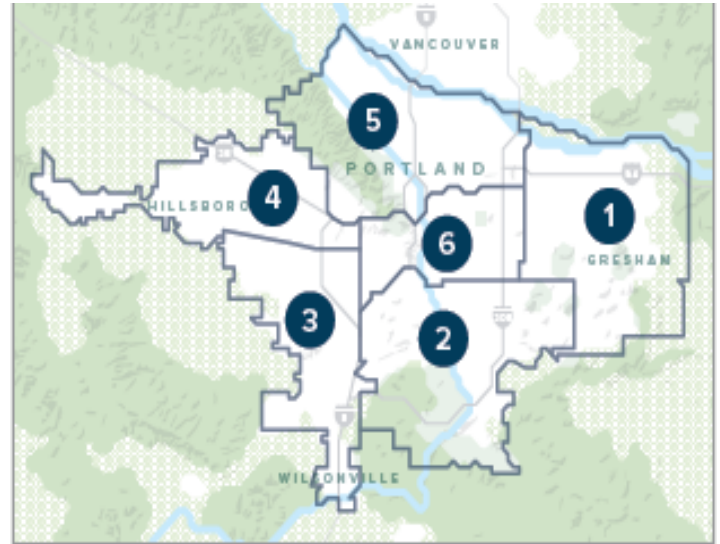


Figure 1- Metro's Six Districts

### Services summary

Metro owns and operates 18,000 acres of parks and natural areas, the Oregon Zoo, Portland's 5 Centers for the Arts, Portland Expo Center and the Oregon Convention Center. Two recycling and garbage transfer stations accept garbage, recyclables and hazardous waste from residents, businesses, and commercial haulers. Metro manages two housing bonds to support the creation of affordable housing and provide support services for people in the region. Metro also provides the public tools for everyday living, from a recycling hotline to community education, research data information, and sells recycled MetroPaint.

### Regional coordination

Public participation is essential to the success of Metro's work. Metro offers various online and in-person opportunities for people to inform policy decisions, participate in community programs, or build community partnerships.

Much of Metro's work is done in coordination with local cities, counties, and various community partners. Metro also consults with Tribal governments as sovereign nations recognizing their connection to the land since time immemorial.

## The Metro Council and leadership structure



### The 2023 Metro Council

*In order from left to right: Juan Carlos González, District 4, Mary Nolan, District 5, Ashton Simpson, District 1, Lynn Peterson, Metro Council President, Christine Lewis, District 2, Duncan Hwang, District 6, Gerritt Rosenthal, District 3*



The Metro Council leads the organization and consists of a president, elected regionwide, and six councilors who are elected by and represent one district every four years in nonpartisan races.

As elected representatives, Councilors play an important role at Metro including providing guidance on the major projects or initiatives from various departments, creating new policies, putting Metro's values into practice and bringing diverse perspectives to the regional planning process.

The **Metro Auditor**, elected regionwide, is responsible for supervision of Metro's annual financial statements and for assessing Metro's performance. The Auditor and their team conducts performance audits for Metro's work and publishes yearly reports.

The Metro Auditor offers staff and the public a way to report fraud, waste or abuse of resources or a position in any Metro or Metropolitan Exposition Recreation Commission facility or department through the [Accountability Hotline](#). [Learn more about the Metro Auditor →](#)

### Organizational Structure

The council appoints a chief operating officer and a deputy chief operating officer to carry out council policies and manage Metro operations and employees. The chief operating office oversees a diverse workforce of more than 1,600 employees including department directors park rangers, economists, teachers, scientists, designers, planners, animal keepers, stagehands, and cartographers. [Click here for a list of Metro department managers and directors →](#)

## How can I connect with Metro Councilors?

Metro Councilors live in the Metro region and have stepped up to serve their communities. They want to hear from the people they serve.

Community members are encouraged to attend public Council meetings as listeners or participants, reach out to Councilors with questions, ideas or concerns and they can sign up for Councilor email newsletters. Request to meet with a Metro Councilor to discuss your ideas and concerns.

You can submit written comments or testimony on topics listed on Council meeting agendas. There is also time set aside in public business meetings for the public to talk about any topic for a couple minutes, even if it is not on the agenda. Communication can take place in any language.

Sharing your personal perspective on a particular topic or upcoming decision is called testimony. You can submit your testimony via email, on an online form or directly to the Council during a Council meeting.

[Find out how to give testimony here →](#)

[Who is my Councilor? →](#)

[How to join a Metro Council Meeting →](#)

Interested in running for office?

[Learn about Metro Council elections →](#)



## Diversity, inclusion and racial equity



Metro strives to be a welcoming and inclusive place for people of all abilities and backgrounds. It wants to ensure people can access and enjoy Metro venues, parks, programs and services without any barriers. Metro's vision is to transform structures and processes not only to identify and remove barriers to access and participation but also to center the experiences of disabilities communities and their needs.

Many communities face unequal access to information, resources, and economic opportunities due to past policies, practices and decisions that are based on racial discrimination and prejudice. Underserved communities include, but are not limited to, Black, Indigenous, Latinx/e, Asian American and Pacific Islander, immigrants, youth and people with low incomes or with disabilities.

These communities also experience an unequal burden of the costs of economic growth, face higher barriers to participation in the regional planning process, and are highly impacted by the climate crisis. Metro is committed to leading its work with these inequities in mind and to work towards building a community where economic opportunities are accessible for all, where underserved and historically marginalized groups feel welcome, liberated, and safe.

[Metro's Diversity, Equity and Inclusion](#) program works to address the unequal distribution of resources and economic opportunities, to increase the opportunities for participation for underserved groups so they can participate in the decisions that impact their lives. The program works to provide support and tools to Metro staff, Metro Council and community partners to create an equitable region for all.



A summary of the most recent [Strategic plan to advance racial equity, diversity, and inclusion](#), adopted in 2016, is included with this guide in Appendix B. The strategic plan is set to be updated after 2024.

The plan was built on a set of core principles:

- Lead initiatives and programs with a racial equity lens.
- Generate support to create real and lasting cultural change.
- Partner with communities of color.
- Commit to measure progress.

A key component of the strategic plan is that each Metro department develop their own racial equity action plans that are unique to the department needs and structure. [These plans](#) were created in consultation with community members and racial equity minded-groups.

## Your access needs matter

Metro wants you to participate, let us know how we can make meetings and events more accessible to you. Metro is committed to ensuring its services and engagement activities are accessible to every resident of the region.

### **Accessibility for people with disabilities**

Metro generally provides aids and services upon request to persons with disabilities so they can participate equally in programs, services and activities. All Metro meetings are wheelchair accessible. Individuals with service animals are welcome at Metro facilities, even where pets are generally prohibited.

If you need a communication aid, sign language interpreter or other accommodation, email [accessibility@oregonmetro.gov](mailto:accessibility@oregonmetro.gov) or call 503-797-1890 or TDD/TTY 503-797-1804 72 hours in advance.

### **Services available to people who are not proficient in English**

Metro provides information about Metro's programs and services in Arabic, Chinese, Hmong, Japanese, Khmer Cambodian, Korean, Laotian, Nepali, Persian, Romanian, Russian, Somali, Spanish, Tagalog, Ukrainian and Vietnamese.

Metro would be happy to provide live interpretation services and written materials in your language upon request. Work with the appropriate Metro staff to get the information you need.

Metro can answer your question about a program or service in up to 180 languages. Call 503-797-1890 and indicate the language you speak. If you need a language interpreter at a public meeting, call 503-797-1890 (8 a.m. to 5 p.m. weekdays) five business days in advance.

Metro respects civil rights. [Know your rights →](#)

### **What if I have a complaint?**

You can report any discrimination by email, mail, phone or by submitting an online form to

[→ Discrimination Complaint form](#)

For complaints of discrimination because of race, color, national origin, sex, age or income level

- fill out the online discrimination form, or
- call or email Phone: 503-797-1890 | [clifford.higgins@oregonmetro.gov](mailto:clifford.higgins@oregonmetro.gov)
- Send mail to Clifford Higgins, Title VI coordinator at Metro, 600 NE Grand Ave., Portland, OR 97232

For complaints of discrimination because of disability:

- fill out the online discrimination form, or
- call 971-940-3157 or 503-797-1804 TDD | email [accessibility@oregonmetro.gov](mailto:accessibility@oregonmetro.gov)
- mail to Heather Buczek, ADA coordinator and Accessibility Program Manager, Metro, 600 NE Grand Ave., Portland, OR 97232



## METRO DEPARTMENTS AND ENGAGEMENT

Metro offers a variety of opportunities for public engagement including events, community advisory committees, education, grants and sponsorships, and tools for organizations and businesses. Current opportunities for engagement are available on the Metro website and often shared through newsletters.

### Get involved

How can I add my voice to decisions?

Find a list of current projects at → [oregonmetro.gov/public-projects](https://oregonmetro.gov/public-projects)

#### Metro Council office

[Contact the Metro Council office.](#)

Ph. 503-797-1540 | 503-797-1793 fax

#### Affordable Housing

[Supportive Housing Services](#)

[Affordable Housing Bond Program](#)

[housing@oregonmetro.gov](mailto:housing@oregonmetro.gov)

#### Garbage and recycling resources

[Tools for living](#) | Call 503-234-3000

#### Metro Parks and Natural areas

[Park access, nature education and more](#)

[parksandnature@oregonmetro.gov](mailto:parksandnature@oregonmetro.gov)

#### Planning, development, and research

Land use and urban growth

[about urban growth boundary](#)

Regional transportation planning

[Transportation plans, maps and more](#)

[transportation@oregonmetro.gov](mailto:transportation@oregonmetro.gov)

Data Resource Center

[Maps, information and more](#)

[DRC@oregonmetro.gov](mailto:DRC@oregonmetro.gov)

## Visitor Venues

[oregonmetro.gov/venues](https://oregonmetro.gov/venues)

Learn about Metro's visitor venues and how they support the regional economy. You can also find contact information, upcoming events or engagement opportunities on their website.

[Oregon Zoo](#) →

Questions? [503.226.1561](tel:503.226.1561)

[Oregon Convention Center](#) →

Questions? [ask@oregoncc.org](mailto:ask@oregoncc.org)

[Portland Expo Center](#) →

Phone: 503.736.5200

Email: [info@expocenter.org](mailto:info@expocenter.org)

[Portland's 5 Centers for the Arts](#) →

What to find out what events are coming up?

[www.portland5.com/visitor-info](https://www.portland5.com/visitor-info)

## Other services

[Metro historic cemeteries](#) →

[Education resources](#) →

[Jobs at Metro](#) →

[Contract Opportunities](#) →

[Grants and resources](#) →



## Advisory Committees

Sustaining a culture of collaboration, continued learning and civic leadership requires public participation. Metro's regional partners and community members participate in various Metro committees to help guide and oversee our work. Membership in committees reflect the diverse perspectives of the region while advising the Metro Council, Auditor and staff.



Committees may meet for a limited term to advise on a particular project or advise Metro on an ongoing basis. Membership of these committees is varied, representative of diverse perspectives and conversations are shaped around specific topics, policies or plans.

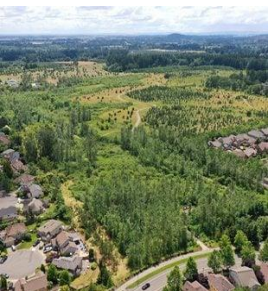


Community and partner participation in committees is a valuable use of time because of the opportunities to hear from diverse perspectives and the oversight over Metro's work.

Metro strives to be an inclusive and welcoming place. Whether you're a seasoned community advocate or newer to volunteering your time for your community, there is space for everyone. Meetings may take place in-person or virtually. Metro provides stipends, translation and accommodations to community members who face barriers to participation.



For current list of open positions or additional information on committees, visit the [Metro Advisory Committees](#) page →



### Committee on Disability Inclusion

Metro's 15-member Committee on Disability Inclusion helps Metro apply an intersectional accessibility lens to its processes for making decisions and creating policies, and to its projects and initiatives across the organization.

### Committee on Racial Equity

The Committee on Racial Equity advises Metro Council on strategies to advance racial equity across Metro's work areas.

### Joint Policy Advisory Committee on Transportation

The Joint Policy Advisory Committee on Transportation makes recommendations to the Metro Council on transportation needs in the region.



### Metro Central Community Enhancement Grant committee

The Metro Central Enhancement Committee administers funds generated by enhancement fees collected at Metro Central Station to neighborhood groups.

### **Metro Policy Advisory Committee**

Established by the Metro Charter in 1992, MPAC advises the Metro Council Regional Framework Plan.

### **Metro Technical Advisory Committee**

MTAC is a 35-member committee of planners, citizens and business representatives that provides detailed technical support to the Metro Policy Advisory Committee.

### **Public Engagement Review Committee**

PERC serves as a key component of Metro's efforts to develop successful public engagement processes.

### **Regional Waste Advisory Committee**

The Regional Waste Advisory Committee helps guide the implementation of the 2030 Regional Waste Plan.

### **Smith and Bybee Wetlands Advisory Committee**

The Smith and Bybee Wetlands Advisory Committee provides diverse stakeholder perspectives to advise Metro on caring for the Smith and Bybee Wetlands Natural Area.

### **Transit-Oriented Development Steering Committee**

The Transit-Oriented Development Steering Committee provides expert guidance, review and recommendations on Metro's transit-oriented development investment activities.

### **Transportation Policy Alternatives Committee**

The Transportation Policy Alternatives Committee provides technical input to the Joint Policy Advisory Committee on transportation planning and funding priorities for the region.

### **Tri-County Planning Body**

The Supportive Housing Services Tri-County Planning Body helps create goals, strategies and metrics, and guides a regional investment fund to address homelessness.

### **Affordable housing bond community oversight committee**

The affordable housing bond community oversight committee oversees the implementation, outcomes and annual reporting of the 2018 Affordable Housing Bond.

### **Supportive housing services regional oversight committee**

The supportive housing services regional oversight committee provides oversight over the 2023 supportive housing services tax. They ensure the fund is fulfilling its goals, and makes

annual reports and presentations to the Metro Council and the boards of commissioners of Clackamas, Multnomah and Washington counties regarding the program's progress.

### **Natural Areas and Capital Program Performance Oversight Committee**

The Natural Areas and Capital Performance Oversight Committee keeps Metro accountable and transparent in its use of capital funds from the \$475 million 2019 nature bond and the parks and natural areas levy, which raises about \$19 million a year.

### **Nature in Neighborhoods capital grants review committee**

A team with a mix of backgrounds and commitment to Metro's parks and nature mission review grant applications and make funding recommendations. Members may have backgrounds in water quality and habitat restoration, landscape architecture, real estate, community development, workforce development, job training and apprenticeship programs, climate adaptation and resilience policies and practices, sustainable development techniques or community partnerships. The Metro Council makes all grant awards.

### **Nature in Neighborhoods Community Choice Grants Program Design and Review Committee**

With support from Metro staff, the Program Design and Review Committee establishes bylaws, ground rules, meeting procedures, roles, and other Committee norms to guide their work. This Committee will represent the community during program design; vet projects submitted by the community for adherence to program goals and criteria; and refer the community's final vote for project funding to the Metro Council.

## **Doing business with Metro**

Metro purchases a variety of goods and services.

### **Common contracts include:**

- construction and maintenance
- architecture and engineering
- forestry and landscaping
- foodservice and supplies
- professional, technical and scientific services
- communications and photography

[Small business events and resources](#) →  
[Current requests for bids and proposals](#) →  
[Small business training and development](#) →

## **Tools for working**

[oregonmetro.gov/tools-working](https://oregonmetro.gov/tools-working)

Metro provides tools for businesses. Metro also licenses solid waste facilities and helps small businesses with hazardous waste disposal.

- [Guide for businesses to reduce food waste](#)
- [A guide to travel options for employers](#)
- [Regional contractor's business license](#)

### **CONTACT**

Metro procurement  
[doingbusiness@oregonmetro.gov](mailto:doingbusiness@oregonmetro.gov)

## SECTION 3. GUIDANCE FOR STAFF

### Introduction

This section of the public engagement guide is primarily for Metro staff. It provides guidance for planning and carrying out engagement activities with the public. The guidance is supplemented by tools and resources included in hyperlinks or within the appendix of the public engagement guide.

The standard practices for communication in this guide can help advance transparency with the public for those who want to stay informed or weigh in on topics of interest. Establishing standard communications and engagement planning processes across departments can also lead to inclusivity and more consistent experiences for community members.

Engagement plans are developed on a project-by-project basis using a combination of the public engagement guide section 3, the guiding principles for meaningfully public engagement from section 1, and department and agency-wide policy guidance. Decisions about engagement and communications strategies should build upon continued learning from evaluations, public input and research.

As a reminder, the desired outcomes for the application of the public engagement guide are:

- People have accessible information and meaningful opportunities to participate in programs, services, or decision-making processes at Metro.
- Metro creates welcoming spaces that encourage civic leadership and connection through community-led activities and building capacity for ongoing engagement.
- The Metro Council makes decisions that are well-informed and responsive to the needs and perspectives of the diverse communities of greater Portland.



### Language check!

**Meaningful public engagement** includes the perspectives of people and communities who may be affected by Metro decisions. It is rooted in nurturing relationships, taking into consideration the communication and engagement needs of participants. It acknowledges the role trauma plays in people's lives. Meaningful public engagement requires transparency with participants about how their input can affect change.





## Language check!

**Public:** The term public in this guide is inclusive of all community members, including businesses, nonprofit organizations, the media, local governments, etc.

**Community(ies):** This term can refer to all members of the public broadly or used to describe specific groups that have a shared characteristic such as a connection to a place, identity, social experience, language, religion, or cultural practice.

### Using “community” or “public” engagement

The terms are often used interchangeably. Both can describe engagement strategies with all people served within Metro’s boundary. Members of the public are all part of the community, as well.

However, when creating an engagement strategy or plan, an unexamined use of either word to group all audiences generally can lead to unintended consequences, such as the continued marginalization of groups who have unique communication needs from the dominant culture. This is due to the lasting social and institutional impacts of systemic discrimination unconsciously influencing the default ways people communicate and engage with one another.

To address this complex reality, Metro uses “**public engagement**” more commonly to include all people regardless of background,

identity, income status or historical access to information and social or political influence. For instance, this guide is a Public Engagement Guide.

Given the impact discrimination has had on certain group’s ability to access resources and benefit from shared prosperity, Metro meaningfully includes and prioritizes the needs of people who have been historically marginalized to prevent more inequality.

Metro staff is encouraged to use “**community engagement**” more specifically to refer to engagement approaches that seek to include groups who are and have been overburdened by a lack of representation and systemically excluded from participating in the identification of or the solutions to regional issues.

These groups include young people under 30, older adults, immigrants, Urban Indigenous people, Black people, Asian-Americans, Pacific Islanders, people with disabilities, people with low incomes, members of the LGBTQIA2S+ community, or people who are living unhoused.

*Note:* Although Tribes have been historically marginalized as well, outreach to Tribal governments is not considered community engagement because it is a formal consultation within a government-to-government relationship that recognizes their status as sovereign nations.

## Planning for engagement

Planning for public and community engagement should begin early in the planning stage of new policies, programs or public service provision and be updated as the project progresses. The project timeline, decision-making process and budget should be informed by community engagement and communication needs. Each new project, initiative and program will have unique goals, resources and impacts to people or the environment based on the department's focus.

Staff should begin with a review of the [2021 Racial Equity Framework Tool](#) as a project and budget development planning tool before delving into developing an engagement strategy. There are overlaps within guidance of the framework tool and best practices for public engagement planning, so this step will be helpful.

This guidance was written with the expectation that staff would use the Racial Equity Framework Tool, the Guiding Principles for Meaningful Public Engagement, and department or agency-wide policies to inform their projects and engagement plans. Work with your project sponsor and the communications department to choose a strategy that will lead to the highest public benefit and racial equity outcomes for the project. If you run into challenges combining guidance from these policies, work with the communications team to select a best path forward.

### Reflect before choosing an engagement strategy or tactic

A project team that is considering public and community engagement for a new project should have a draft project plan developed before deciding on an engagement or communications strategy. If the project goal is specifically about involving community members in a program, proceed with applying the steps that are applicable.

This section can help staff reflect and decide if they need to develop a full scale or limited scale engagement strategy, and if so, what resources and timeline they may need to set in place.

### 1. Draft project scope

**PURPOSE:** *What is the need or motivation for the project, policy or program?*

**GOALS:** *What are the project goals or desired outcomes? Why?*

**DECISIONS:** *Build a decision-making framework. What are the major decision-points? Who will decide? What is Metro's role in this field of work?*

**RESOURCES:** *What staffing is available to support the project? What is the draft budget for your project? Engagement planning can help finalize the project budget.*

**PROJECT RISKS:** *What are the potential benefits or challenges to people, the community, or the environment? What could be the impacts if you did or did not meet your goal(s)?*



## 2. Pre-planning for engagement

**PURPOSE:** *What is the need or motivation for engagement with the public on this project?*

**POSSIBLE GOALS:** *What gaps in information exist that public participation can fill? How can public participation help advance the project goals?*

**STRATEGY:** *Can engagement inform the overall process? Consider the major project decision-points and if public awareness or participation makes sense at some or all phases. Note that building awareness is a communications strategy but is not engagement on its own.*

**RESOURCES:** *What staffing, and budget is available to support engagement if you decided this makes sense or your project? Does the budget have space for translation services, stipends, mailers, a community partnership, or contractor?*

**INFORMATION GATHERING:** *What geographic area is impacted by the project? What has Metro already heard from the public on this topic? Are there similar projects that you can reference externally or internally?*

**ASSESS FOR RISKS:** *Is there general internal consensus about the purpose and goals for this project? Did your project risk assessment reveal potential risks for people or the environment? What groups of people should know about this? Who may be most impacted? Are there political sticking points the project team or Metro Council should be aware about?*

**FUTURE COMMUNICATIONS:** *What should people know about this? Will you need to do education about the topic? What languages are spoken in the project's geographic area?*

**AUDIENCES:** *Who may be impacted by or interested in this project? Are there vulnerable populations in the geographic area of impact? Who are they? Could this be of interest to Tribal governments?*

**PAUSE:** At this point, you should have enough information to decide if a public and community engagement strategy is needed and you may have an idea of the scale needed. If a robust engagement strategy is not needed but it is important to build awareness about your project, you could move to develop a communications plan.

### Engagement planning checklist

These steps serve as guidance to help project teams prepare for involving the public in decisions about policies, programs or investments that have not been adopted yet. They can also help staff be intentional about embedding meaningful public participation within the implementation of Metro programs and services such as internships or education services.

The list of steps is extensive but the steps relevant to each project may vary. For purposes of this guide, the “project” is referred to as the program, policy or decision Metro seeks to achieve. Public engagement planning helps staff prepare for meaningful public participation in project

decision-making process or the provision of services within existing programs. In some cases, outreach to the public is meant to implement an existing Metro Council or department priority or program.

1. Clarify internal expectations from project leadership team.
  - Understand the history, context, and environment of your engagement project.
2. Establish a project team with roles and responsibilities.
  - Update the decision-making framework, if needed.
3. Define goals for engagement. Review *Appendix B – Using the Guiding Principles for Meaningful Public Participation* and your department’s guidance.
4. Develop an engagement budget. This may be a draft and be finalized once you choose engagement tactics.
5. Scope for a community partnership or hire a contractor (if applicable)
6. Audience mapping
  - Conduct an audience assessment through an audience power-mapping exercise.
  - Identify *key audiences* that may be highly impacted by the project. Identify vulnerable or historically marginalized groups in this group as well.
  - Identify *potentially interested* audiences, this may include groups who may or may not be impacted.
  - Identify groups who may be *interested* and should be informed about opportunities to engage, even if the impact and connection is not apparent to you.
  - Consider jurisdictional partners or Tribal governments in your audience mapping.
  - Establish the ideal level of influence and involvement for each audience to achieve the most benefit and equitable outcomes.
    - Use the spectrum of participation and results from an audience power mapping exercise to help you prioritize your resources in this step.
    - Be sure to consider what will be public vs. community engagement.
7. Develop a risk assessment of hot topics or potential issues.
  - Politically charged topics should include subject matter experts and decision-makers to help advice on your project.
  - Does your project have a historical or current impact on historically marginalized communities?
8. Select engagement tactics that would help provide the appropriate level of influence or involvement for key audiences and interested parties.
9. The engagement tactics used should also consider your risk assessment to ensure that Metro hosted meetings and spaces are inclusive and mindful of participants needs.
10. Team collaboration. Consider who on the team or at Metro should be the relationship holder for each audience to ensure staff have the capacity and the proper authority to be responsive along the way. Here are some suggestions:

- For Tribes – Metro’s Tribal Policy Liaison and Metro Council office should be involved in developing the outreach strategy and it’s best for them to do the outreach to Tribes.
  - Business community – the project manager may be best suited to hold these types of relationships depending on the types of businesses.
  - Non-profit organizations – this relationship could be held by an engagement professional or project manager depending on the team structure.
  - Community members – in some cases, your community partner may be best to coordinate with community members to ensure their comfort and to develop trust with Metro staff over time. However, accountability to the community lies on Metro staff.
11. Develop an engagement timeline considering the project milestones.
  12. Develop a communications plan. See Appendix I – Communications planning toolkit.
    - Make space for internal and external communications.
  13. Document your process, decisions, conversations, and contacts to prepare for reporting.
  14. Establish an evaluation plan during and for after your engagement project is over.
    - Evaluation should include a mix of methods including qualitative and quantitative.
    - If you are providing stipends, evaluation time can be built into your timeline and tasks with community members from the beginning.
    - See Appendix H –Evaluation for public engagement for tips.

## **Best practices for public participation**

- Be transparent about how public participation can impact a decision or program.
- Start with information you (or Metro) has already heard. Avoid asking the same questions over and over unless there is a timely reason to do so.
- Consider translation or other physical accommodations for creating welcoming spaces and reaching your key audiences in a meaningful way.
- Community partnerships require capacity building and collaboration to develop and engagement strategy.
- Be mindful of group power dynamics when planning gatherings. Prioritize the needs of those with the least informal and formal power and influence.
- Don’t take public mistrust or dissent personally. Instead, think about how you can support a democratic process where diverse voices are heard and considered meaningfully.
- Listen and be responsive. Ensuring people are heard and valuing their time can help foster a civically engaged public and work towards trust over time.
- Find the time to just be with people.
- Always report back to participants and the public about how their input was used.
- Take care of your needs so you can be self-reflective about how your identities and position influence how you show up in public spaces.



# Appendix A – Legal requirements for the public engagement guide

*Metro is the metropolitan planning organization (MPO) designated by Congress and the State of Oregon, for the Oregon side of the Portland-Vancouver urbanized area, serving 1.7 million people living in the region's 24 cities and three counties.*

### **Legal responsibilities and guidelines**

This Public Engagement Guide establishes consistent guidelines to ensure people have meaningful opportunities to be involved in the regional planning process. The guide also provides examples of the tools and techniques that Metro may use to communicate with and receive input from the public.

Following the Federal Highway Administration, 23 CFR 450.316(a), this guide serves as Metro's documented, "process for providing citizens, affected public agencies, representatives of public transportation employees, freight shippers, providers of freight transportation services, private providers of transportation, representatives of users of public transportation, representatives of users of pedestrian walkways and bicycle transportation facilities, representatives of the disabled, and other interested parties with reasonable opportunities to be involved in the metropolitan transportation planning process."

In accordance with the Federal Transit Administration circular, FTA C 4702.1B, this guide serves as Metro's documented, "outreach plan to engage minority and limited English proficient populations, as well as a summary of outreach efforts made since the last Title VI Program submission. A recipient's targeted public participation plan for minority populations may be part of efforts that extend more broadly to include other constituencies that are traditionally underserved, such as people with disabilities, low-income populations, and others."

### **Federal requirements**

- Code of Federal Regulations – Title 23 – Highways– Chapter I- Federal Highway Administration, Department of Transportation Subchapter E- Planning and research-, § 450.316 Interested parties, participation, and consultation.
- Moving Ahead for Progress in the 21st Century Act (MAP-21), public Law 112-141 as passed by Congress and signed by President Barack Obama on July 6, 2012.
- The National Environmental Policy Act of 1969 (NEPA), (included in Appendix C for more information).
- Title VI of the 1964 Civil Rights Act, 23 USC 140, 23 CFR 200, and 49 CFR 21.
- Executive Order 12898 – Federal Actions to Address Environmental Justice in Minority Populations and Low-income Populations, signed Feb. 11, 1994 by President Bill Clinton.
- Executive Order 13166 – Improving Access to Services for Persons with Limited English Proficiency, signed Aug. 11, 2000 by President Bill Clinton.
- Americans with Disabilities Act (ADA) of 1990, 42 USC 126 and 49 CFR 27.19.
- Age Discrimination Act of 1975, 42 USC. Sections 6101-6107.

### **Oregon state requirements**

- Administrative Rules of the Oregon Department of Land Conservation and Development Commission, Oregon Statewide Goal 1 - Citizen Involvement, OAR 660.
- Oregon Revised Statutes Comprehensive Land Use Planning Coordination, ORS 197.175
- Oregon Revised Statutes Local Government Planning Coordination; Coordination Agreements, ORS 195.020 to 195.040.
- Oregon Revised Statutes Opportunity for Public Comment on New Fee or Fee Increase, ORS 294.160.
- Oregon Public Records Act, ORS 192.410 to 192.505.
- Oregon Public Meetings Law, ORS 192.610 to 192.690.

#### **Metro requirements**

- Metro Charter, Office of Citizen Involvement.
- Resolution No. 97-2433, Metro Citizen Involvement Principles.
- Ordinance No. 12-1275, Establishing the Metro Public Engagement Review Committee.
- Resolution No.12-4375, Metro Diversity Action Plan.
- Resolution No. 16-4708, Strategic Plan to Advance Racial Equity, Diversity, and Inclusion
- Resolution No. 19-1431, the 2030 Regional Waste Plan
- Resolution No. 23-5331, Metro's New Guiding Principles for Meaningful Public Engagement
- Resolution No. 22-5293, Incorporating Inclusive and Plain Language Best Practices



## Appendix B - Using the Guiding Principles for Meaningful Public Engagement

The guiding principles inform planning and carrying out of virtual and in-person public engagement activities. They create a foundation to sustain an equitable and democratic culture of collaboration and accountability at Metro.

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## Thank you to the Public Engagement Review Committee

The Public Engagement Review Committee advised Metro staff and Council on the content of this Appendix. The committee is tasked with advising the Metro Council on engagement practices. Representatives from Clackamas, Multnomah and Washington counties make up the committee. Members in 2023-24 included:

*Community members:* Carine Arendes, Isaiah Jackman, Makerusa Porotesano, Michael Foley

*Community-based organizations:* Alisa Kajikawa with APANO, Diana Ospina Lara with Hispanic Metropolitan Chamber, Henry Miller with The Street Trust

*Local government staff:* Amanda Garcia Snell with Washington County, Cameron Ruen with Clackamas County, JR Lilly with Multnomah County



## PUTTING THE GUIDING PRINCIPLES INTO PRACTICE

Many factors affect how Metro engages with people, businesses, nonprofits and government partners. Metro staff should review the following information in addition to *Section 3 - Guidance for staff* when planning new projects. This information will help staff assess their needs and decide what communications or public outreach approach might be most effective for their project.

The information below was developed with input from the Public Engagement Review Committee, the Committee on Racial Equity, the Metro Council and Metro staff. It offers context and guidance for users of the guide to deepen their understanding of each principle.

Desired outcomes of principle	Putting it into practice
Principle 1	
Public participation is an essential part of Metro’s decision-making.	
For people	<ul style="list-style-type: none"><li>• Metro budgets adequately for public engagement and communications.</li><li>• Metro acknowledges that solving complex regional issues and repairing past harms requires a civically engaged public.</li><li>• Public engagement is valued as part of the technical project management processes.</li><li>• Metro offers ongoing engagement opportunities beyond specific projects.</li><li>• Metro convenes and connects diverse perspectives to each other to build a culture of collaboration and learning.</li></ul>
<ul style="list-style-type: none"><li>• People use their power to affect changes they need.</li><li>• Metro’s decisions meet the needs of the diverse communities they serve.</li></ul>	
For Metro	
<ul style="list-style-type: none"><li>• Staff, Metro Council and partners are informed about the needs of the diverse communities they serve.</li><li>• Metro develops sustainable, equitable and impactful policies.</li></ul>	
Principle 2	
Transparency about decision-making is fundamental to successful public service and includes communicating about project outcomes and the impact of community contributions to the process.	

Desired outcomes of principle	Putting it into practice
<p><b>For people</b></p> <ul style="list-style-type: none"> <li>• Important information is easy to find and easy to understand.</li> <li>• People generally understand Metro’s major decisions and how Metro arrived at those decisions.</li> <li>• Participants feel their time and input is valued even after engagement activities are complete.</li> </ul> <p><b>For Metro</b></p> <ul style="list-style-type: none"> <li>• Metro is accountable to the communities they serve.</li> <li>• Metro maintains and promotes internal practices that make it easy to share important information with people in a timely manner.</li> </ul>	<ul style="list-style-type: none"> <li>• Metro’s website is accessible and easy to navigate.</li> <li>• Metro staff responds to public information requests in a timely manner.</li> <li>• Summary reports are written in plain language and are easily accessible to staff and the public.</li> <li>• Metro staff provides documents in multiple languages relevant to key audiences.</li> <li>• Metro creates a repository of existing input from the public for use in future projects.</li> <li>• <i>New or ongoing projects:</i> Metro clearly describes project goals, key decision-points, decision-making structures, and the purpose for public engagement. People are informed about the potential impact public input can have.</li> <li>• <i>After project completion:</i> Metro shares information about what informed major decisions, who was engaged, and major trade-offs considered within the process. Metro reports back to participants and interested parties.</li> </ul>

### Principle 3

**Meaningful public engagement processes apply equity, diversity and inclusion strategies and tools to help identify and address the needs of impacted, underserved, and historically excluded communities.**

Desired outcomes of principle	Putting it into practice
<p><b>For people</b></p> <ul style="list-style-type: none"> <li>• Communities participate or lead in developing the solutions to complex regional problems based on their personal experiences.</li> <li>• Harm during or after engagement processes is avoided and discussed if it happens.</li> <li>• The needs of those most affected and with the least institutional power are considered first.</li> </ul>	<ul style="list-style-type: none"> <li>• Metro staff apply a racial equity strategy to their planning processes.</li> <li>• Metro hires a workforce that is representative of the communities they serve.</li> <li>• Staff has access to useful trainings in topics such as trauma-informed care, best practices for facilitation, racial, gender and disability justice, and how to consult with Tribal governments.</li> <li>• Metro develops processes for identifying when trauma triggers or harm happen during engagement activities as well as for resolving them.</li> </ul>
<p><b>For Metro</b></p> <ul style="list-style-type: none"> <li>• Metro puts into practice the Strategic Plan to Advance Racial Equity, Diversity, and Inclusion.</li> <li>• Metro works towards accountability and repair of past harms.</li> <li>• Metro’s approach to governing is to put people first.</li> <li>• Metro ensures compliance with Civil Rights Laws</li> </ul>	<p><i>Tools to consider:</i></p> <ul style="list-style-type: none"> <li>• Metro’s Racial Equity Framework and Budget Tool</li> <li>• The Spectrum of Community Engagement to Ownership by Rosa Gonzalez</li> <li>• <a href="#">White Culture Characteristics</a> by Tema Okun.</li> </ul>

#### Principle 4

**Engagement and communications are accessible, informative, timely and inclusive of a rich diversity of lived experiences and perspectives.**

Desired outcomes of principle	Putting it into practice
<b>For people</b> <ul style="list-style-type: none"> <li>• Important Information is easy to find and understand.</li> <li>• People of different backgrounds and experiences feel included and see themselves represented in Metro’s work.</li> </ul>	<ul style="list-style-type: none"> <li>• Metro applies inclusive communications strategies and tools to ensure people with different needs and abilities can be informed or get involved.</li> <li>• Metro invests in reducing or eliminating common barriers to public participation.</li> <li>• Metro provides high quality language access services so that people who speak limited English can meaningfully participate.</li> </ul>
<b>For Metro</b> <ul style="list-style-type: none"> <li>• Metro creates a welcoming environment for all people in both physical and digital spaces.</li> <li>• Metro staff increase public participation in projects and programs.</li> <li>• Metro eliminates or reduces common barriers to participation to increase accessibility for all.</li> </ul>	<ul style="list-style-type: none"> <li>• Metro hosts gatherings and online spaces that are trauma-informed and responsive to the unique language and cultural norms of participants.</li> <li>• Metro invests in supporting staff through tools, trainings, and research.</li> <li>• Staff are culturally responsive to prevent harm when they interact with people.</li> <li>• Metro invests in local communities throughout the region beyond specific projects.</li> <li>• Metro develops standard communications and engagement practice standards for staff.</li> </ul>

## Principle 5

**Collaboration and capacity-building efforts with community-based organizations, programs, initiatives, and individuals that are impacted, underserved, or historically excluded are essential to address regional issues equitably.**

Desired outcomes of principle	Putting it into practice
<p><b>For people</b></p> <ul style="list-style-type: none"> <li>• <b>Individuals grow their civic leadership and use their power toward justice and liberation.</b></li> <li>• <b>Community organizations persist as community assets.</b></li> </ul> <p><b>For Metro</b></p> <ul style="list-style-type: none"> <li>• <b>Metro advances shared prosperity through capacity building.</b></li> <li>• <b>Increases participation by historically excluded residents.</b></li> <li>• <b>Metro makes decisions that are well-informed by the needs of the people they serve.</b></li> <li>• <b>Metro directs resources towards non-project specific engagement activities to continue building and nurturing relationships.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Metro creates partnerships with shared agreements – partnerships that are mutually beneficial.</li> <li>• Metro ensures community partners are well-resourced to meet project goals and outcomes, and to reduce burnout.</li> <li>• Metro works to reduce barriers to participate in community engagement activities.</li> <li>• Metro’s engagement practices develop civic leadership among people Metro serves.</li> </ul>

## Principle 6

**Intergovernmental collaboration, coordination, and consultation are essential to address regional issues holistically and efficiently.**

<p><b>For people</b></p> <ul style="list-style-type: none"> <li>• <b>Regional issues related to transportation, affordable housing, garbage and recycling, parks and natural areas and civic leadership are managed in a holistic manner.</b></li> <li>• <b>People engaged at various levels of government have a similar experience.</b></li> </ul> <p><b>For Metro</b></p> <ul style="list-style-type: none"> <li>• <b>Metro contributes to a culture of civic leadership as a regional convener.</b></li> </ul>	<ul style="list-style-type: none"> <li>• As a regional government Metro convenes city, county, state, and Tribal governments to manage and resolve regional issues holistically and efficiently.</li> <li>• Metro learns about the unique needs, experiences, and geographic connections of partner agencies, such as cities, counties and Tribal governments.</li> <li>• Metro consults with Tribes as sovereign nations applying a government-to-government relationship approach.</li> </ul>
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**Principle 7****Evaluation of engagement activities during and after a project encourages responsiveness, growth, and process improvement.****For people**

- People can influence improvements to government processes by participating in evaluations.

**For Metro**

- Staff develop shared learning and improve engagement practices.
- Staff are innovative and responsive.
- Metro staff practice self-reflection and avoid perfectionism.

- Metro works with partners to define goals and metrics to measure effectiveness of engagement and communications practices.
- Metro staff seek participant feedback after engagement opportunities and adapt as needed.
- Metro staff have the space in their work plan to practice self-evaluation.
- Metro works to improve its culture by collaborating, clearly communicating, and avoiding perfectionism.

**Principle 8****Adaptive project timelines allow for meaningful engagement with the most impacted audiences early and throughout the project.****For people**

- People feel like their time and input is valued.
- People gain trust for Metro's decisions and work.

**For Metro**

- Staff gain knowledge to improve future engagement and communications activities.
- Metro's approach to governing puts people first.

- Metro responds to unexpected information or situations whenever possible.
- Public input can influence a change in a project's direction.
- Timelines may be shortened if staff or Council have the necessary information to understand the impacts of their decisions, or when responding to an unexpected emergent need such as a natural disaster or public health crisis.





# Appendix C – Racial Equity Framework Tool and Summary of Strategic Plan to Advance Racial Equity, Diversity and Inclusion

## METRO RESPECTS CIVIL RIGHTS.

Metro respects civil rights Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance.

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).

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.



## RACIAL EQUITY FRAMEWORK

# Aligning decision-making practices to advance the values of diversity, equity and inclusion

## Introduction

Metro is committed to building an equitable institution to ensure that all people who live, work and recreate in the greater Portland area have the opportunity to share in and help define a thriving, livable and prosperous region. We recognize, now more than ever, the importance of lifting up the reality of anti-Black racism as a key factor in addressing historic inequities.

Like other government agencies, Metro has historically used an equality approach, rooted in colorblindness, for its decision-making. We have an opportunity to lead with racial equity as we try something different, rethink how programs are designed and for whom, change how decisions are made, and truly center the most marginalized communities in all of our work.

This Racial Equity Framework and worksheet is intended support that work. Its purpose is to help ensure that a racial equity analysis is applied when decisions about Metro's budget and public services are being made, whether they're around long-term planning, policy creation, program development or resource allocation. The Framework and worksheet are intended to be a resource for Metro staff and leadership – and to be one that continually adapts through the practice of racial equity work at Metro. Use of this Framework and Worksheet supports alignment with Metro's with [Council adopted Strategic Plan to Advance Racial Equity, Diversity and Inclusion in 2016](#). The use and practice of a Racial Equity Framework is critical to achieve racial equity at Metro and in our region's communities so that race ceases to be a predictive factor in life outcomes.

## ACKNOWLEDGEMENTS

This Framework is adapted from many different resources and leading equity experts from across the nation and the region, including the [Government Alliance on Race and Equity Racial Toolkit](#), adaptation of [Metro's Racial Equity Guidance Questionnaire](#) (Appendix H) and was co-designed by various stakeholders from across Metro.

Special acknowledgement to: Marta McGuire, Carey Stacy, Brandon Goldner, Gloria Pinzon, Kimm Fox-Middleton, Gaylen Beatty, Jeff Frkonja, Joe Gordon, Katie Hentges, Molly Chidsey, Reed Brodersen, Sebrina Owens-Wilson, Robyn Williams, Cassie Salinas, Raahi Reddy and consultant Scott Winn.

## Defining a Racial Equity Framework

Many current racial inequities are sustained by structures, systems and practices that repeat patterns of exclusion, even when people within those structures do not intend to perpetuate them. A racial equity framework provides an approach to address systems and processes at the institutional and individual level that may inadvertently perpetuate inequities. The framework is intended to identify specific concepts and systems that must be addressed to eliminate exclusionary practices.

A Racial Equity Framework includes the following main components:<sup>1i</sup>

### Values

Defining racial equity and giving specific attention to the values and assumptions that guide decision making processes.

### Decision making processes

A broad look at the structure of decision making processes paying close attention who participates (or doesn't) in decision making and how their input is linked to the outcomes of the decisions. This requires changes to the design of decision making processes to increase access and opportunity to those who have been previously excluded.

### Methods, analysis and tools

Use of specific methods to eliminate exclusionary practices. This includes using tools, analysis and methods to check our own implicit bias and assess more clearly power dynamics in the effort, providing distinct participation mechanisms for those most impacted, considering who benefits and who is most impacted by decisions, and ultimately shifting the way we make decisions.

### Organizational policies

Organizational level policies to support the implementation and incorporation of the racial equity framework and associated practices. This includes guidance for required use of methods and policies that support participation mechanisms such as creation of committees in ways that address power imbalances among groups and stipends for community participation in decision making processes.

## LEVELS AT WHICH RACIAL INEQUITIES OCCUR

### Structural

The interplay of policies, practices and programs of differing institutions which leads to adverse outcomes and conditions for communities of color compared to white communities that occurs within the context of racialized historical and cultural conditions.

### Institutional

Policies, practice, and procedures that work to the benefit of white people and to the detriment of people of color, usually unintentionally or inadvertently.

### Individual/Interpersonal

Pre-judgment, bias, stereotypes or generalizations about an individual or group based on race. The impacts of racism on individuals – white people and people of color (internalized privilege and oppression). Individual racism can result in illegal discrimination.

Source: City of Seattle's Race and Social Justice Initiative

## Metro's Racial Equity Framework

Building these components within Metro's organization includes reaffirming existing values and commitments in addition to the development of new approaches to our work and how we make decisions. Metro's framework is outlined below and is intended to evolve over time.

### Values advancing racial equity

Metro is committed to advancing racial equity, which centers the values of diversity, equity and inclusion in decision making and ensuring that all people in the Portland metropolitan region have the opportunity to reach their full potential. This includes:

- An understanding that, due to structural racism, Black, Indigenous and other people of color (BIPOC), experience inequitable health, education, criminal justice and economic outcomes.
- A commitment to advance strategies to support and invest in Black Lives and transform systems that create or perpetuate harm.
- A commitment to redesigning and centering new programs, policies or planning efforts to benefit and support BIPOC communities so that they may thrive in our region.
- An understanding that a traditional approach to decision-making without a racial equity considerations will result in communities of color bearing the disproportionate impacts.

In addition to these values and commitments, Metro departments have additional policy guidance including strategic plans and internal equity goals to guide decision making in policies and programs to advance racial equity. This guidance coupled with agency values provide the foundation of the racial equity framework and value set to guide decision making and advance progress toward racial equity goals. It is critical to build shared understanding of these sets of values and how they inform and are used in decision making.

### Decision making processes

Aligning decision making practices with these values requires close attention to the structure of decision making practices including who has access and opportunity to participate and how their input is linked to the outcomes of decisions.

In both internal and external decision making processes, this includes prioritizing representation from BIPOC communities and equity leaders and providing opportunities for direct interaction with decision makers and ability to shift power inequities.

Rethinking how we structure decision making will require new methods of analysis, participation mechanisms and engagement approaches, and power relationships.

### Diversity

The importance, acknowledgement and honoring of difference among people. This includes variance in race, ethnicity, gender, age, religion, nationality, language preference, socioeconomic status, sexual orientation and others.

### Equity

Ensuring everyone has what they need to be successful and reach similar outcomes.

### Inclusion

The degree to which individuals from all backgrounds are able to participate fully in the decision-making process within an organization or group.

## **Methods, analysis and tools<sup>ii</sup>**

Aligning decision making practices with our values also requires the adoption of new tools, analysis and methods in our everyday work. There is not a universal approach to applying a racial equity analysis and tools. Methods must be tailored to specific policy and program decisions and coupled with staff trainings to increase equity literacy. Metro will continue to expand our set of racial equity tools over time and in collaboration with others. Examples of current tools and methods are listed below.

**Data collection and analysis:** Assessment of current community conditions that may be impacted by the proposed decision with attention to demographics and historical, economic and environmental conditions.

**Social and economic power analysis:** A social power analysis is a tool that can be used to determine who has the decision-making power or influence, historically and today, to inform this decision, as well as who has the power to change this decision. This analysis is supported data collection that consider who is positively and negatively affected by the proposed decision.

**Appointed representation:** Appointed representation is a participation mechanism for appointing individuals from specific social groups who have the least influence and are most impacted by the proposed decision.

**Decision mapping:** This tool supports the design of a process to include individuals and groups that lack access and opportunity to participate in decision making. Conceptual mapping of a process is used to determine how and when individuals or a group may be included in decisions and how their input is linked to outcomes. A key aspect of this is identifying decision points to inform how to situate participants to influence decisions rather than serve as a review body.

**Reflective questions:** Incorporating specific questions into decision making processes help address implicit bias and shift the way we make decisions. These may include questions such as: Who benefits and who is burdened by this decision? In addition, more extensive and in-depth questions may tailored to the specific policies and programs.

Appendix A includes a racial equity worksheet that provides a general illustration of incorporating some of these tools. All the tools and methods must be tailored to the specific area of work or decisions and coupled with efforts to increase equity literacy among staff.

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<sup>i</sup> i McGuire, Marta (2020). A Case Study of an Equity Lens: Key Insights for Transforming Practice in Public Organizations. Manuscript in preparation

<sup>ii</sup> McGuire, Marta Conklé, "Addressing Structural Inequalities in Planning Processes: A Case Study of an Equity Lens" (2020). Dissertations and Theses, Paper 5474.

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## Appendix A: Metro's Racial Equity Worksheet

This worksheet provides an example for applying racial equity tools within decision making processes. This is intended to provide a general illustration of a step-by-step process and reflective questions that may be used to ensure we listen and engage affected individuals and communities in our decision making, factor in the impacts on marginalized communities and to shift the way we make decisions on projects and programs to advance racial equity.

---

**Step 1:** Convene an internal team that consists of racial equity leaders and/or staff of color to participate in answering the questions and identifying equity considerations. Determine how and when individuals or a group may be included in decisions and develop agreements with the group to clarify roles and how their input will be linked to outcomes.

**Step 2:** Using Metro's racial equity strategic plan or your department's plans, identify the goals and outcomes related to the project or program under development. Document your answers to and consider the following reflective questions:

- How does this project or program advance the identified racial equity goals? What are the specific long-term racial equity outcomes that will be impacted by this decision?
- What have you learned from past partnerships with communities of color that could inform these racial equity outcomes and goals?

**Step 3:** Use data to better understand conditions experienced by communities of color impacted by this decision. Determine the most impacted communities of color to determine engagement efforts. This includes collecting data to describe the current community conditions that may be impacted by this program or project. Document your answers and consider the following reflective questions:

- What stories and perspectives from the community exist regarding this project or program?
- What are the current racial inequities related to this project?
- What are historic racial inequities related to this project or program? What are the root causes of the conditions?
- What performance level data do you have associated with Metro's existing programs or policies impacting the decision?
- Take a critical look at the data: How is it biased? What is missing? Are some communities being systematically over- or under-represented in the data? Are the data sufficient to determine the most impacted communities of color.

**Step 4:** Collaborate and engage with the most impacted communities to inform the decision-making process.

Using data collected, evaluate who has the decision-making power or influence, historically and today, to inform this decision, as well as who has the power to change this decision. Design a process to include the individuals or groups who have been marginalized in decision-making to further consider:



- 
- Is the racial equity outcome desired by the community?
  - Who will benefit from this decision?
  - Who will be burdened by this decision?
  - What factors exist that are producing or perpetuating racial inequities related to this decision?

Other reflective questions to consider:

- How have these communities been engaged by Metro and what have we learned?
- What do we know already, based on previous engagements, about the priorities for this community?
- What opportunities should Metro create to expand and deepen engagement?
- How can their perspectives, stories and solutions be gathered and centered to determine the decision around the program or practice?
- What are other essential stakeholders needed to inform this decision?
- How can you engage internal stakeholders (staff of color/staff with a racial equity expertise) to inform decision?

**Step 5:** Apply a racial equity lens: Reconvene your internal stakeholder team to use the information gathered to make recommendations for decisions on the program or project. Based on your data collection, community engagement and internal staff knowledge:

- Summarize who will benefit and be burdened from this decision. What might be unintended consequences of this decision and how to mitigate them?
- Identify the factors that may be causing and maintaining the benefits and burdens on the individuals, groups and communities identified.

If the program or project is recommended to move forward, incorporate the results into the design of the program or project and inform what resources will be needed and consider:

- What resources and funding do staff and community need for success?
- What are other decisions, policies and practices needed to ensure success?
- What other institutions and organizations are needed to partner with in order to hasten achievement on racial equity outcomes?

**Step 6:** Identify how will you ensure accountability, communicate and evaluate results.

- How will you re-engage with communities most impacted to share the decision and implementation plan?
- How will Metro be accountable for implementation and achieving racial equity goals and outcomes?
- How will you track progress and evaluate the impact of this decision over time?

Questions regarding this worksheet, contact [equity@oregonmetro.gov](mailto:equity@oregonmetro.gov)



## Attachment C – Summary of Strategic Plan to Advance Racial Equity, Diversity and Inclusion



Metro

Strategic plan to advance  
racial equity, diversity and  
inclusion Executive summary





Metro is committed to working together with people, businesses, nonprofit organizations and public partners to create a Portland region where:

- All individuals and communities benefit from a strong economy with quality, living-wage jobs, stable and affordable housing, safe and reliable transportation, and a healthy environment with clean air and water.
- Racial equity is recognized as the backbone of good governance. To ensure the success of everyone, we must work together to end inequities that affect historically marginalized communities. We must remove barriers so that everyone can realize their full potential and contribute to and participate in our collective community and economy.
- Our public structures, institutions and processes address social and economic disparities for people of color. Those disparities are rooted in a history of discriminatory laws, policies and practices.
- Diversity is celebrated and all communities meaningfully participate in public decision-making.

## The strategy

Metro will build upon and strengthen its ongoing equity work by implementing interrelated strategies to create long-term institutional, structural and cultural change:

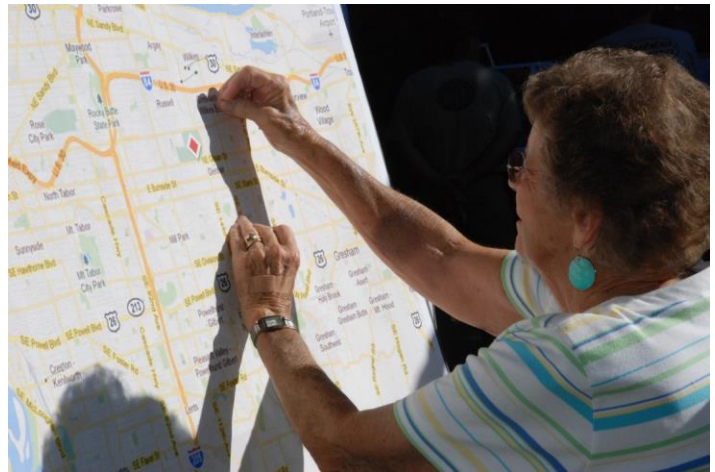
**Lead with racial equity** Focusing on eliminating the disparities that people of color experience in all aspects of social well-being, especially in those related to Metro's policies, programs, services and public spaces.

**Broaden the impact** Addressing the disparities that affect the most marginalized to generate solutions that address the needs of all other historically marginalized groups.

**Generate support to create real and lasting cultural change** Building a structure for Metro leaders, staff and region partners including community to engage in conversations about race, make concrete and measurable institutional changes and create a foundation for on-going reflection and needed change within the organization and Portland region.

**Partner with communities of color** Ensuring that members of these communities are involved in Metro's equity efforts to create greater trust and accountability.

**Measure progress** Measuring and recognizing milestones and improvements to increase and maintain momentum along the route to greater racial equity and change.



## Why racial equity?

The Portland metropolitan area's population is growing and changing. Like most of the nation, our cities and counties are becoming more diverse. It is projected that by the year 2045, people of color will be the majority in the United States.

Our current and future diversity will help develop and maintain sustainable economic growth if we proactively address the issue of racial equity. Research shows that places that attain more economic growth are those with greater racial inclusion and smaller racial income gaps.

Unfortunately, most communities of color in the Portland area currently experience the worst economic and social outcomes of any demographic group, due to a long history of exclusionary and discriminatory policies.

To prepare for a healthy and prosperous future, Metro, other cities and counties, schools, community and philanthropic organizations, and businesses are taking a long, hard look at equity. It's not only the right thing to do; it's the smart way to improve our present and plan for our future.

There is no need to choose between equity and economic growth. Equity and community diversity positively impact the larger economy and have become the superior economic growth model across the country.

*By addressing the barriers experienced by people of color in the Portland metropolitan area, we will effectively also identify solutions and remove barriers for other groups, like women, low-income residents, people with disabilities, LGBTQ community, older adults and young people.* The result will be that all people in the Portland area will experience better outcomes.

## Organizational goals, objectives and actions

This strategic plan is built around five long-term goals. The goals are deliberate guideposts that direct Metro in creating specific objectives, actions and measures of evaluation and accountability as the agency works to help the Portland area reach its equitable and prosperous destination.

The proposed actions are centered on those that the entire agency can do to advance racial equity, diversity and inclusion. A major deliverable of this strategic plan is for each Metro department and venue to develop its own equity action plan specific to their programs, policies and services within 24 months of the adoption of this strategic plan.

The strategic plan will also work together with the Diversity Action Plan to increase the effectiveness of Metro's diversity, equity and inclusion work. Building on the foundation created by the Diversity Action Plan, the Strategic Plan will provide Metro leadership and staff additional tools and authority to make change.

## Equity and Equality

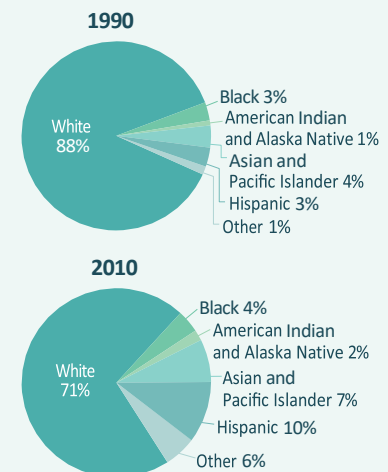
Not everyone needs glasses to see. But those that do require a specific prescription to enable them to see. Some people are severely visually impaired or are blind.

**Equality:** Believing that everyone should get the same glasses regardless of their specific need.

**Equity:** Understanding that some have greater visual difficulties than others, therefore only those that need glasses get them and each prescription fits that person's specific needs. Some people are blind, so they need entirely different solutions to perceive things that seeing people experience through sight.

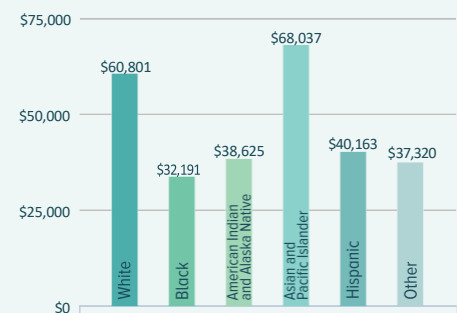
### The region is diversifying ...

PERCENT OF POPULATION BY RACE/ETHNICITY  
Tri-county region. Source: US Census, 1990, 2010 SF1-QTP6



### ... but regional inequities persist.

MEDIAN HOUSEHOLD INCOME, BY RACE/ETHNICITY  
Portland MSA, 2011-2013. Source: US Census, American Community Survey three-year estimates





#### ABOUT METRO

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region.

Voters have asked Metro to help with the challenges that cross those lines and affect the 24 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

## Five Strategic Goals

The five long-term strategic goals identified in this plan are:

### **A. Metro convenes and supports regional partners to advance racial equity.**

Metro brings together diverse partners from across the Portland metropolitan region to reduce racial disparities and improve outcomes in communities of color through coordinated and innovative approaches. Metro leads by convening decision-makers and providing research and technical support to assist local jurisdictions in equity initiatives. Metro also proactively convenes regional partners to support a racially diverse construction workforce.

### **B. Metro meaningfully engages communities of color.**

Community relationships based on trust, policies that strengthen community involvement and community oversight of implementation ensure that communities of color are meaningfully engaged and influence the Metro decisions and programs that impact their lives. Metro commits to co-creating with the community, learning from the collective wisdom and building the capacity of community leaders.

### **C. Metro hires, trains and promotes a racially diverse workforce.**

Metro has an organizational culture that is welcoming and inclusive of all people of color. Through training and hiring practices that break down barriers for applicants of color, Metro achieves a racially diverse workforce with opportunities for advancement and strong retention and promotion rates for staff of color. All Metro staff receives the training and support necessary to become culturally proficient and equitably serve all residents of the Portland metropolitan region.

### **D. Metro creates safe and welcoming services, programs and destinations.**

Communities of color are aware of and feel welcome to access Metro's diverse services, programs and destinations. Through better understanding of the needs of culturally specific communities and the impacts of its programs and services, Metro provides safe and welcoming environments and experiences that enrich the lives of community members.

### **E. Metro's resource allocation advances racial equity.**

Metro advances economic opportunities for communities of color through various avenues including equitable contracting practices, distribution of investments, and grant programs.



**So, hello. We're Metro – nice to meet you.**

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# Appendix D – Public Engagement for Regional Transportation Planning

Be involved in building a better system for  
getting around greater Portland.

## METRO RESPECTS CIVIL RIGHTS.

Metro respects civil rights Metro fully complies with Title VI of the Civil Rights Act of 1964 that requires that no person be excluded from the participation in, be denied the benefits of, or be otherwise subjected to discrimination on the basis of race, color or national origin under any program or activity for which Metro receives federal financial assistance.

Metro fully complies with Title II of the Americans with Disabilities Act and Section 504 of the Rehabilitation Act that requires that no otherwise qualified individual with a disability be excluded from the participation in, be denied the benefits of, or be subjected to discrimination solely by reason of their disability under any program or activity for which Metro receives federal financial assistance.

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).

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we've already crossed paths.

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## INTRODUCTION

**Roads and transit lines don't stop at the city line – and neither do people, goods or services.**

Among its responsibilities in serving the people of a growing region, Metro is the designated Metropolitan Planning Organization (MPO), for the Oregon portion of the Portland-Vancouver metropolitan area. In this role, Metro is authorized by Congress and the State of Oregon to coordinate and plan investments in the transportation system for the greater Portland three-county area. In addition, Metro uses this authority to help ensure the public, cities, counties, transportation agencies, Tribal governments and others affected persons have meaningful opportunities to participate in and provide input on these planning and investment decisions.

### Community voices

There are many stories from the nearly 2 million residents across our region. Three residents share their perspectives and challenges in getting around.



"I know that we had the snow recently, so that made driving very difficult in some areas because there were a lot of potholes. And besides that, I think traffic in general [is a problem], depending on the area. My commute can be anywhere from 40 minutes to an hour and a half." – Adam, Cornelius resident



"I use a mobility scooter if there's a long distance in between places I'm traveling... I do have to drive on the streets sometimes because the sidewalks are bad. I mean, there are places where there are no sidewalks and it leaves the necessity to ride in the road with a mobility scooter, or even with a walker." – Annadiana, Forest Grove resident



"My ideal transportation experience would be one where I didn't necessarily have to transfer from route to route so often, because that's where I tend to miss more buses and have to wait for longer periods of time." – Tana, Portland resident

Metro works collaboratively with the public, cities, counties, transportation agencies and state, federal and Tribal governments to:

1. Create a long-range transportation plan—called the Regional Transportation Plan—that looks at least 20 years into the future and identifies priority projects that are eligible to receive federal and some state transportation funding,
2. Document how all federal transportation money will be spent in the greater Portland region for a defined four-year period in the Metropolitan Transportation Improvement Program (MTIP) and report on how these investments are consistent with the Regional Transportation Plan and state and federal requirements.
3. Decide how to invest Regional Flexible Funds—a small subset of transportation funding that Congress sends directly to metropolitan planning organizations.
4. Lead planning and development efforts in cooperation with TriMet and other partners to expand public transit and address other transportation needs.
5. For each of these activities, Metro relies on the diverse range of experiences and perspectives of people in greater Portland to help create solutions that work for all people who live, work and travel in the region. **This document outlines how to get involved.**





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## REGIONAL TRANSPORTATION PLAN

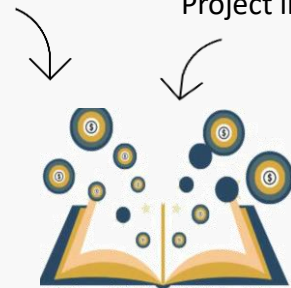
The Regional Transportation Plan is a blueprint to guide investments for all forms of travel – motor vehicle, transit, bicycle and walking – and the movement of goods and services throughout the greater Portland region. The plan – coordinated with local and regional land use plans – identifies current and future transportation needs, investments needed to meet those needs, and what funds the region expects to have available over the next 20 plus years to make those investments a reality. The regional transportation plan has two main sections:

- The policy section sets the vision, goals, performance targets and policies that guide planning and investment in the greater Portland's system of roads, bridges, bikeways, sidewalks, transit and freight routes.
- Two project lists that include priority projects from local, regional, or state planning efforts that also included opportunities for public input as they were developed by those entities.

### Components of a regional transportation plan

Policies

Project lists



Updates to the plan are prepared pursuant to state and federal requirements.

## Be involved in the Regional Transportation Plan

This section outlines the phases of updating the Regional Transportation Plan, engagement opportunities for the public to be involved in each phase and the key engagement questions asked during each phase.

During key comment opportunities, notices with requests to share are sent to neighborhood association/CPO, local agency newsletter, transportation management

association and community based organization partners and contacts. (See Notices with requests to share.) Information and notices are also sent via email to members of the transportation planning interested persons list (sign up at [oregonmetro.gov/subscribe](http://oregonmetro.gov/subscribe)).

### **Phase 1: RTP update initiation**

About three years before the Regional Transportation Plan update is due, (first six months of the update process), Metro works with decision-makers, partners and interested parties to identify people and groups to engage; develop project goals, a work plan and a public engagement plan; and compile data and analysis tools. This is sometimes called the scoping phase and results in a work plan and public engagement plan that is adopted by JPACT and the Metro Council to guide the rest of the process.

**Engagement opportunities:** interviews, briefings, online surveys, small group discussions focused on marginalized and underserved communities, in-person and virtual workshops, development of interested persons contact list, online stories of the transportation challenges facing people in the region, public comment at committee meetings, project website.

**Questions for public involvement:** What are the key transportation challenges that need to be addressed? What policies are outdated, restrictive or do not consider the key elements and implementation challenges? How can the planning process engage more people, businesses and other interested parties (especially those who have been historically excluded from governmental decision-making)? How does Metro ensure a transparent, inclusive and equitable process?

### **Phase 2: Update policy framework, transportation needs and revenue forecast**

About two and a half years before the Regional Transportation Plan update is due (and for about 12 months of the process), Metro works with decision-makers, partners, interested parties and the public to identify key trends and challenges in transportation; update or reaffirm the vision, goals and policies for the region's transportation system, monitor existing conditions and forecast future growth using the outcomes-based evaluation framework to identify current and future transportation needs; and update the forecast of funding that is reasonably expected to be available in the region.

**Engagement opportunities:** online surveys, discussion groups or forums focused on marginalized and underserved communities, updates to interested persons contact list, online stories of the transportation challenges facing residents and how the current transportation system is working for people, public comment at committee meetings on plan vision, goals and policies that will guide development of the investment strategy.

**Questions for public involvement:** What are the transportation challenges that need to be addressed? What is working in the transportation system? What has changed (or is



changing) in jobs, education, housing, moving goods, accessing services, and the environment that needs to be considered when planning for the future of the transportation system? What kind of system do we want to see in the future? How much funding do we anticipate will be available?

### **Phase 3: Building the investment strategy**

About a year and a half before the Regional Transportation Plan update is due, (and about 12 months of the process), Metro works with decision-makers, Tribes, jurisdictional partners, interested parties and the public to begin updating the project lists; assess and report on how the proposed investments in the transportation system will impact achievement of the plan's performance goals across safety, equity, climate, mobility and economic outcomes; and refine the project lists as an investment strategy to better achieve priority outcomes, particularly in the near-term.

**Engagement opportunities:** online surveys, discussion groups or forums focused on marginalized communities, work groups convened to address specific policy topics, updates to interested persons contact list, online stories of the transportation challenges facing residents and how the current transportation system is working for people, review and comment (letter, email, public communication at committee and council meetings) of draft project lists and the assessment of draft investment strategy.

**Questions for public involvement:** (Confirm at the beginning of this phase:) Are these the right goals and policies to lead the project list? (As the project lists are coming together:) Does this draft list get us to our priority outcomes, meet our goals and align with our shared values?

### **Prioritizing projects for the Regional Transportation Plan**

Clackamas, Multnomah and Washington counties and cities within each county recommend priority projects for their jurisdictions in partnership with county coordinating committees. Oregon Department of Transportation (ODOT), the Port of Portland, TriMet, SMART and other agencies work with the county coordinating committees and the City of Portland to recommend priority projects. The City of Portland recommends projects after reviewing priorities with its community advisory committees.

The project lists are separated into two categories:

1. **Constrained Project List:** the projects that fit within a constrained budget of federal, state and local funds can reasonably expect over 25 years under current funding trends.

2. Unconstrained Strategic Project List: additional priority investments (not constrained to the budget based on current funding trends) that could be built with additional resources.

To qualify for federal or state transportation funding, a project must be included on the “constrained” project list of the most recent Regional Transportation Plan. Prior to approval, these lists are assessed to determine how well they are meeting the policy priorities identified in the policy section of the plan.

Cities and counties periodically update local transportation plans to be consistent with the policies of the RTP, to address new state or federal requirements and to reflect changes in local needs and priorities. Not all projects from local plans move into the RTP because transportation investments relying on local funding sources are not required to be in the RTP unless they may have a significant regional impact.

ODOT, Port of Portland, TriMet and SMART periodically update their system plans for both capital (new, expanded or major improvements to facilities) and operational and maintenance improvements. On occasion, there are cross-agency plans that may lead to projects that could leverage or benefit from other identified investments. These would qualify for inclusion in the RTP project lists.

Each responsible jurisdiction or agency has its own timing and develops its own process for engaging the public through the update of its transportation system plan. To influence the transportation projects that are included in the Regional Transportation Plan – and built – the first step is to be involved in these plans.

**Questions for public involvement:** What are the transportation challenges that need to be addressed? What are the investment priorities to meet transportation needs?

#### **Phase 4: Finalizing and adopting the plan**

Starting about nine months before the update is due, Metro works with decision- makers, partners, interested parties and the public to prepare a public review draft of the Regional Transportation Plan that will be taken through the final public review and decision-making process. The adoption process typically identifies a number of changes to the public review draft plan in response to comments received.

**Engagement opportunities:** updates to interested persons contact list, minimum 45-day review and comment (letter, email, phone, public comment at committee and council meetings) of the draft Regional Transportation Plan, testimony at hearings, online survey on the key themes and results of the draft plan. Ads are placed in local newspapers to announce the formal comment period and scheduled hearings associated with the adoption of the plan.

**Questions for public involvement:** When implemented, will this (list or policy) get us to our priority outcomes, meet our goals and align with our shared values? What needs to be considered on the local and regional levels when moving forward with these projects and policies? What policies need further refinement (ahead of or as part of a future update)?

### **Amending the plan**

Occasionally, the Regional Transportation Plan is amended prior to a scheduled update. This may be necessary if an individual project is listed as being in a planning phase in the plan but now is moving to an implementation phase, or if funds are unexpectedly available for a project that was listed as an additional strategic priority investment (and must now move to the constrained project list to qualify for those funds). Amendments are also sometimes needed in response to new state or federal requirements that must be addressed prior to the next scheduled update. Amendments to the plan follow the same decision-making process as updates to the plan.

**Engagement opportunities:** updates to interested persons contact list, minimum 45-day review and comment (letter, email, phone, public comment at committee and council meetings) of the draft Regional Transportation Plan amendment, testimony at hearings.

### **Regional Transportation Plan: Stay informed**

Information about the Regional Transportation Plan – as well as other stories about the greater Portland region’s transportation system and how it affects our quality of life – are published periodically on Metro News ([oregonmetro.gov/news](https://oregonmetro.gov/news)). These stories are also promoted on Metro’s social media feeds.

#### **UPDATES → Required every 5 years → Next update is in 2028**

The plan is updated with input from community members, business, community leaders, transportation agencies and governments.

Information about the updates are sent via email to subscribers.

The engagement process for the 2028 update will begin in 2025.

### **Regional Transportation Plan: Decision making structure**

Decisions for the Regional Transportation Plan are shared between the Metro Council and the Joint Policy Advisory Committee on Transportation, or JPACT. Metro conducts its work through various committees that provide planning, policy and funding recommendations to JPACT and the Metro Council.



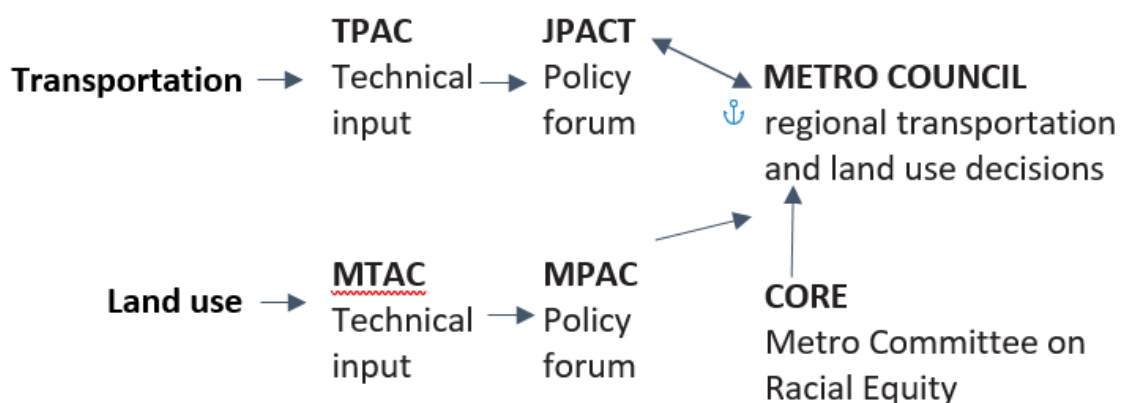
JPACT – comprising 17 members that serve as elected officials or representatives of transportation agencies across the region – shares joint responsibility for the direction and details of the plan, and the Metro Council either approves the plan as recommended by JPACT without changes or refers the plan back to JPACT.

To aid with technical details of the plan, JPACT is advised by the Transportation Policy Alternatives Committee, or TPAC. TPAC’s 21 members consist of technical staff from the same governments and agencies as JPACT, plus a representative from the Southwest Washington Regional Transportation Council and six community members appointed by the Metro Council.

Since the Regional Transportation Plan has implications on the region’s land use (how we develop and expand for future jobs and housing), the Metro Council is also advised on the plan by the Metro Policy Advisory Committee, or MPAC. MPAC comprises 21 voting members representing cities, counties, special districts and the public through three community representatives, as well as six non-voting members. MPAC advises the Metro Council on growth management and land use issues at the policy level, and the Metro Technical Advisory Committee, or MTAC, provides input to MPAC at the technical level.

All meetings are open to the public. A complete calendar of meetings is available on the Metro website: [www.oregonmetro.gov/calendar/month](http://www.oregonmetro.gov/calendar/month).

Additionally, people can receive email updates about individual committee meetings by contacting [transportation@oregonmetro.gov](mailto:transportation@oregonmetro.gov) and requesting to be added to a committee’s distribution list. Members of the public can watch meetings on zoom, or attend in-person when that is an option. Each meeting includes an opportunity for public comment. Feedback from engagement activities is summarized and provided to the Metro Council and regional advisory committees prior to key milestones in the process.



## Be involved in local transportation system plans

As mentioned, projects submitted to the Regional Transportation Plan are from local, regional or state planning efforts that included opportunities for public input. The first step in influencing what transportation projects will be in the Regional Transportation Plan is to be involved in these plans.

State transportation planning rules adopted in 2022 include new requirements for equity-centered public engagement during transportation system planning and other new and expanded requirements for preparing local transportation plans that must be addressed through future plan updates, primarily between 2024 and 2029 or an agreed upon alternate schedule.

The following is a list of cities and counties in greater Portland with the date of their current transportation system plan and when the city or county is anticipated to next update their plan. Three cities – Durham, Maywood Park and Rivergrove are currently exempt by the state from preparing a transportation system plan through 2033 after considering five factors, including anticipated growth and adequacy of the existing transportation system. Find the cities and counties where you live, work and travel and consider getting involved in the next transportation system plan update.

- Beaverton, 2010 (update anticipated in 2025)
- Clackamas County, 2022 (amendment) (update anticipated in 2026)
- Cornelius, 2022 (amendment) (update anticipated in 2028)
- *Durham, exempt through 2033*
- Fairview, 2022 (amendment) (update anticipated in 2031)
- Forest Grove, 2014 (update anticipated in 2027)
- Gladstone, 2017 (update anticipated in 2027)
- Gresham, 2013 (update anticipated in 2026)
- Happy Valley, 2023 (update anticipated in 2024)
- Hillsboro, 2022 (update anticipated in 2035)
- Johnson City, exempt King City, 2024 (update anticipated in 2035)
- Lake Oswego, 2017 (amendment) (update anticipated in 2026)
- Maywood Park, *exempt through 2033*
- Milwaukie, 2018 (amendment) (update anticipated in 2025)
- Multnomah County, 2016 (not scheduled)
- Oregon City, 2022 (amendment) (update anticipated in 2027)
- Portland, 2018 (update anticipated in 2028)
- Rivergrove, *exempt through 2033*

- Sherwood, 2014 (update anticipated in 2026)
- Tigard, 2022 (update anticipated in 2027)
- Troutdale, 2022 (amendment) (update anticipated in 2029)
- Tualatin, 2014 (update anticipated in 2024)
- Washington County, 2019 (update anticipated in 2028)
- West Linn, 2016 (update anticipated in 2029)
- Wilsonville, 2016 (amendment) (update anticipated in 2028)
- Wood Village, 2017 (update anticipated in 2027)

Projects are also identified in other plans and studies that are prepared by Oregon Department of Transportation, TriMet, SMART, the Port of Portland, Tribal governments, and Metro through their respective planning processes that provide opportunities for public input. Metro's investment planning is addressed in the **Be involved in investment area planning** section.

**Questions for public involvement: What are the transportation needs and challenges that need to be addressed? What should be the priority investments to meet the transportation needs on the local (or highway or transit system) level?**



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## METROPOLITAN TRANSPORTATION IMPROVEMENT PROGRAM

The Metropolitan Transportation Improvement Program, or MTIP, documents how all federal transportation money is to be spent in the greater Portland region over the next four years. The MTIP also documents state- and locally-funded projects deemed regionally significant. In order to qualify for some state and federal funds, the projects listed in the MTIP must be included in the Regional Transportation Plan. Thus, the MTIP is often referred to as the document that puts the Regional Transportation Plan into action.

As the designated metropolitan planning organization for the greater Portland region, Metro is required to prepare and administer the MTIP. Metro works in cooperation with all of the region's local agencies – including the cities, counties and the Port of Portland, the regional transit agencies (TriMet and SMART) and ODOT to incorporate and implement all federally funded and regionally significant projects into the MTIP.

The most recent MTIP was adopted in 2023 for federal fiscal years 2024-27. The next MTIP is planned for adoption in 2026. The MTIP is incorporated without change into the State Transportation Improvement Program, or STIP, Oregon's statewide transportation capital improvement program. Like the MTIP, Oregon's STIP covers a four-year period, and is updated every three years.

### Be involved in the Metropolitan Transportation Improvement Program

The development of Metropolitan Transportation Improvement Program is a multi-year process, since the beginning policy conversations guide how the several jurisdictions and agencies program and document their portions of the larger MTIP.

The jurisdictions and agencies are responsible for any necessary public engagement to inform decisions on their programming. For instance, Metro funds regional programs and local projects through funding from specific federal programs and engages the public in these decisions. This process, currently referred to as the regional flexible funds allocation process, is addressed

However, the development of the MTIP itself is primarily a technical exercise to ensure the projects that are scheduled and funded over the next four years are consistent with local and regional plans, are consistent with state and federal requirements, have funding that is reasonably expected to be available and are able to advance in a timely, logical fashion.

This means that public engagement for the MTIP is designed more towards promoting governmental coordination, transparency and accountability towards those goals than to help shape a plan on a local or regional level.

### **Phase 1: MTIP initiation**

About two years before the MTIP is due, Metro works with decision-makers and partners to update the MTIP policies, building an agreement on how jurisdictions and agencies are expected to demonstrate how MTIP projects are consistent with local and regional plans, are consistent with state and federal requirements, have funding that is reasonably expected to be available and are able to advance in a timely, logical fashion.

**Engagement opportunities:** Review and comment (letter, email, phone, public comment at committee and council meetings) of the draft MTIP policies.

### **Phase 2: Adopting the MTIP**

Starting about nine months before the MTIP is due, Metro works with decision-makers and partners to create a legislative draft of the MTIP that will be taken through the final decision-making process. The draft MTIP is published about five months before JPACT and the Metro Council are scheduled to take legislative action.

**Engagement opportunities:** minimum 30-day review and comment (letter, email, phone, public comment at committee and council meetings) of the draft MTIP, testimony at hearings, online survey on high level performance analysis of the draft MTIP.

### **Amending the MTIP**

Occasionally, the active MTIP is amended. This may be necessary if additional funding becomes available or if conditions on the ground lead jurisdictions to delay one project in favor of another.

**Engagement opportunities:** minimum 30-day review and comment (letter, email, phone, public comment at committee and council meetings) of the MTIP amendment

### **MTIP: Stay informed**

Information about the development of the MTIP – as well as other stories about the greater Portland region’s transportation system and how it affects our quality of life – are published periodically on Metro News ([oregonmetro.gov/news](http://oregonmetro.gov/news)). These stories are also promoted on Metro’s Facebook and Twitter feeds.

During key comment opportunities for the MTIP, notices with requests to share are sent to neighborhood association/ CPO, local agency newsletter, transportation management association and community based organization partners and contacts (see page 6).

In addition to the methods above, ads are placed in local newspapers to announce the formal comment period and scheduled hearings associated with the adoption of the MTIP.

## Notices with requests to share

During key comment opportunities, notices with requests to share are sent to neighborhood associations, citizen participation organizations, and community planning organizations. Because of the number of neighborhood associations and CPOs in the region, Metro employs a “phone tree” technique, sending the notice to city and county contacts and asking them to share with associations and organizations in their jurisdictions. Currently, Metro sends notices to:

- City of Beaverton Neighborhood Program manager
- City of Cornelius city manager
- City of Forest Grove Community Development director
- City of Gresham Office of Neighborhoods and Community Engagement
- City of Happy Valley Community Services & Public Safety director
- City of Lake Oswego Long Range Planning
- City of Milwaukie Community Programs coordinator
- City of Portland Office of Neighborhood Involvement
- City of Oregon City Community Development director
- City of Tigard Neighborhood Program coordinator
- City of Tualatin Office of the City Manager
- City of West Linn Citizen Engagement coordinator
- City of Wilsonville Community Development director
- Clackamas County Public and Government Affairs manager
- Multnomah County Office of Citizen Involvement
- Washington County Citizen Participation Organization Program coordinator
- In addition, Metro sends notices to local agency newsletter and transportation management association partners and contacts:
  - Ride Connection, Inc.
  - TriMet
  - Westside Transportation Alliance
  - Intertwine Alliance
  - GoLloyd

- Washington County Land Use and Transportation Department
- Explore Washington Park
- South Waterfront Community Relations

Metro also sends notices to community-based organization partners, usually through individual relationships built through ongoing partnerships and other engagement activities, asking them to distribute to their organization and constituencies as they see fit. These often include but are not limited to:

- 1000 Friends of Oregon
- AARP
- Asian Pacific American Network of Oregon
- Bike Portland
- Building Trades
- Center for Intercultural Organizing
- Centro Cultural
- Coalition of Communities of Color
- Community Cycling Center
- EcoDistricts
- Immigrant & Refugee Community Organization
- Latino Leadership Network of Washington County
- Latino Network
- Metropolitan Alliance for Workforce Equity
- Momentum Alliance
- Native American Youth and Family Center
- OPAL
- Oregon Environmental Council
- Oregon League of Conservation Voters
- Oregon Sierra Club
- Oregon Tradeswomen, Inc.
- Oregon Walks
- Rosewood Initiative
- Safe Route to Schools
- Self Enhancement, Inc.
- The Street Trust
- Transportation for America
- Urban League of Portland
- Unite Oregon
- Washington County Citizen Action Network
- Verde





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## INVESTMENT AREAS

Metro's Investment Areas program guides development of high capacity transit (MAX, rapid bus, rapid streetcar) projects and supporting walking, biking and roadway investments in major transportation corridors. With partners, the program develops shared investment strategies that align local, regional, state, federal, community and private interests to leverage resources and maximize benefits.

Metro partners with cities, counties, the state, TriMet and the federal government to plan land use and transportation investments to connect downtowns, main streets and employment areas around the region. Some of these plans have resulted in new high capacity transit like the Orange Line MAX connecting Portland and Milwaukie and Division FX, the high-capacity bus service along Division Street in Southeast Portland.

Metro leads the planning, analysis and much of the public engagement for investment areas. State and local transportation agencies are responsible for construction of roadways, walking and biking facilities. TriMet and/or other transit agencies are responsible for construction and operation of transit system improvements.

Metro's Investment Areas program also guides land use implementation projects such as brownfields assessment, economic development analysis and industrial site readiness. Public engagement for these types of projects is tailored for the partnerships, scope and goals for each project. The information below expresses the typical project and public engagement phases of a transportation corridor plan that may lead to a high capacity transit investment.

## Equitable development strategies

Improved access to transit is often a great benefit to the surrounding neighborhoods. When new infrastructure such as light rail comes in, property values rise. This benefits some people, but rents and other housing costs also increase, hurting other members of the community. Many are pushed out and displaced; small businesses close; the character of the neighborhood is irreparably altered.



When initiating investment area plans, Metro convenes government and community members, employers, affordable housing providers, business leaders, philanthropic organizations and educational institutions to create equitable development strategies that support community development and improve the quality of life for people of all incomes and backgrounds.

## **Be involved in investment area planning**

The development of an Investment Areas plan – especially a plan that may have a high capacity transit investment – is a multi-year process, with multiple opportunities to be involved.

### **Phase 1: Prioritizing investment areas in the Regional Transportation Plan**

The Regional Transportation Plan prioritizes areas to study for high capacity transit investment. For instance, the Powell-Division transit and development study led to enhanced bus service on Division Street from Portland to Gresham and the Southwest Corridor Plan led to a local preferred alternative for a MAX line from Portland to Tigard and Bridgeport Village and the project is now seeking funding for construction. These two areas were included in the Regional Transportation Plan project list.

### **Phase 2: Local land use planning**

Depending on the project, there may be a step of examining and updating the local land use plans (e.g., zoning, focused investment) to identify ways to leverage a potential transit investment to further meet local goals for growth, housing and jobs.

For the Southwest Corridor Plan, for instance, the study and planning project led by Metro was preceded by efforts by the City of Portland (with the Barbur Concept Plan), the City of Tigard (Tigard High Capacity Transit Land Use Plan) and the City of Tualatin (Linking Tualatin). Each of these plans had their own public process to examine how the cities would like to develop or redevelop in key areas that could be connected with and supported by an investment in transit infrastructure.

### **Phase 3: Investment strategy - project initiation**

At the least, one goal of an Investment Areas project is to develop, with partners and the public, an investment strategy – a coordinated set of infrastructure and other investments across jurisdictions that together provide more benefit and better outcomes than if the investments were made separately without a critical eye to the goals, scheduling and effects of the other improvements.

Metro first works with partners, other interested parties and the public to determine the scope of the study and planning project, determining the breadth of the study – both in physical area as well as in the issues that it will address. Often referred to as “scoping,” this phase determines the goals for the project, including defining the problem the project is

meant to solve. Later phases of the project determine potential solutions to study further, though ideas for what is needed are collected from the partners, other interested parties and the public. Note that there may be an additional scoping process as part of the NEPA review, described in The National Environmental Policy Act section.

**Engagement opportunities:** interviews with interested parties, neighborhood association/CPO and community based organization discussions, online surveys, canvassing at community events, focus groups, discussion groups focused on historically marginalized communities, development of interested persons contact list, online stories of the transportation challenges facing residents in the area, public comment at committee meetings.

#### **Phase 4: Investment strategy - wide range of options and screening criteria**

Once the project has a clear scope, Metro works with partners, other interested parties and the public to determine what potential solutions could work together to solve the defined problem. This can include assessing local, regional and state transportation plans to determine what infrastructure and other investments have been identified as needed to meet community and transportation goals as well as identifying new ideas that can meet those needs.

Either as part of this phase or as its own phase, engagement activities also ask, “Given that we can’t afford all solutions, how should we prioritize?” This means asking the public to help the project team and decision-makers determine what criteria will be used to decide which solutions should move forward as a part of a final investment package.

Answers to this may focus on environmental impact, community development opportunities, transportation safety, transportation options, reduction in traffic through a certain area, or cost and availability of funding.

**Engagement opportunities:** online surveys, canvassing at community events, open house or community forum, online stories of the transportation challenges facing residents in the area, public comment at committee meetings.

#### **Phase 5: Defining the investment strategy**

Using information from the partners, interested parties and the public, the project team develops a draft investment strategy and recommends next steps for further project development for any major transportation investment (such as a high capacity transit line or major roadway project). Metro then works with decision-makers, partners, other interested parties and the public to refine the investment strategy to be used by partners to prioritize investments and any additional planning efforts to leverage local, regional, state and federal dollars.

**Engagement opportunities:** online surveys, neighborhood association/CPO and community based organization discussions, open house or community forum, public comment at committee meetings

## Step 6: High capacity transit refinement

If it is determined through the investment strategy that the investment area is a viable candidate for a high capacity transit investment to meet local and regional transportation goals, the project may go through a phase of refining what high capacity transit options (MAX, rapid bus, streetcar – and to/from where) should be further pursued. For the Southwest Corridor Plan, for instance, previous work had determined that streetcar would be unable to meet the transportation goals of the corridor connecting Portland, Tigard and Tualatin, and the refinement phase determined that rapid bus service would not be feasible to meet the future transit demand of the corridor, leading to further study for a new MAX line.

**Engagement opportunities:** online surveys, canvassing at community events, neighborhood association/CPO and community based organization discussions, open house or community forum, public comment at committee meetings

## NEPA

With almost any high capacity transit investment, the greater Portland region must rely on a combination of local, regional, state and federal funding. Due to the federal component of any financing plan, Metro must comply with the National Environmental Policy Act, or NEPA, to identify impacts to the human and natural environment.

Jurisdictions planning major transportation projects must adhere to NEPA when using or expecting to use federal dollars. When a major transit project is being considered within the greater Portland region, Metro is the lead agency during planning, and TriMet takes the lead on engineering and construction. Learn about the many layers of NEPA and about the opportunities to be involved in projects that affect you and the future of the region.

For more information about the NEPA processes and how public engagement affects those decisions, read [The National Environmental Policy Act](#) section of this guide., which was adapted from A Citizen's Guide to the NEPA from the Council on Environmental Quality. For more detailed information, visit [ceq.doe.gov](http://ceq.doe.gov).

A NEPA Environmental Impact Statement process (from Scoping through the Final Environmental Impact Statement) can take 2 to 4 years.

**Engagement opportunities:** online surveys, canvassing at community events, neighborhood association/CPO and community based organization discussions, open houses or community forums, online stories of the transportation challenges facing residents in the area, public comment at committee meetings, testimony at hearings.

## Investment Areas: Stay informed

Information about Investment Areas projects – as well as other stories about the greater Portland region's transportation system and how it affects our quality of life – are

published periodically on Metro News ([oregonmetro.gov/news](http://oregonmetro.gov/news)). These stories are also promoted on Metro's Facebook and Twitter feeds.

Throughout the project, information and notices are sent via email to members of the interested persons lists. People can sign up for these lists by visiting the project page (visit [oregonmetro.gov/participate](http://oregonmetro.gov/participate) to see active Investment Areas projects – like the 82<sup>nd</sup> Avenue Transit Project– as well as other things that Metro is working on).

During key comment opportunities, notices with requests to share are sent to area neighborhood association/CPO, local agency newsletter, transportation management association and community based organization partners and contacts (see page 6).

In addition to the methods above, ads are placed in local newspapers to announce the formal comment period and scheduled hearings associated with the adoption of any significant plan or decision, including decisions coming from NEPA processes that come out of the Investment Areas work.

## **Investments areas: Decision making structure**

Decision-making for Investment Area projects are tailored for each project's partnerships, scope and goals. If there are both regional land use and transportation components, the project will ultimately follow the structure that the Regional Transportation Plan follows (see page 3), with MTAC advising MPAC, who advises the Metro Council on land use issues, and TPAC advising JPACT, who advises (with some co- authority) the Metro Council on transportation issues.

To provide the project team direction through the development of the investment strategy and, if applicable, the NEPA process, there is typically a steering committee appointed by the Metro Council. The steering committee usually comprises elected and other officials representing the jurisdictional partners. The steering committee's recommendations hold weight with MPAC, JPACT, the Metro Council and the partner jurisdictions, who often need to take their own legislative action on the investment strategy and high capacity transit decisions.

Emerging practices call for direct community representatives to also be included on the steering committee to represent historically marginalized communities during these decisions. Through some parts of the process – especially when community leaders are not members of the steering committee – a community advisory committee may be appointed to consult on issues that may affect different community interest.

# THE NATIONAL ENVIRONMENTAL POLICY ACT

## **Understanding the environmental impact assessment process helps your voice be heard.**

The National Environmental Policy Act was signed into law on Jan. 1, 1970. NEPA established a process to assess the environmental effects of proposed government funded projects. If federal funds are likely to be used, this assessment must be undertaken before decisions are made to ensure citizen involvement and to make better informed decisions.

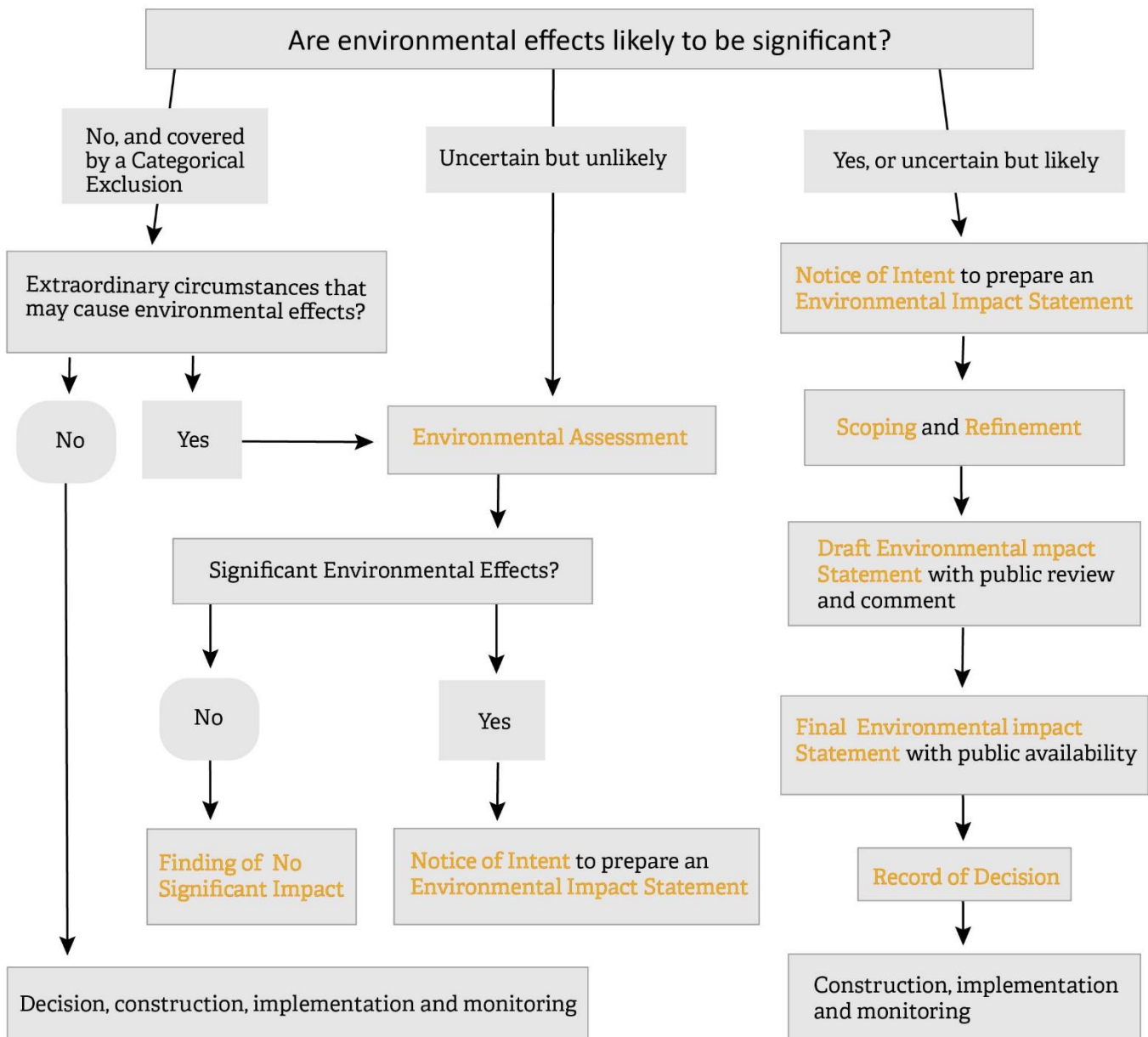
The environmental impact assessment process required by NEPA also serves as a framework to ensure compliance with environmental requirements such as the Endangered Species Act, the National Historic Preservation Act, the Environmental Justice Executive Order, and other federal, tribal, state and local laws and regulations.

For this reason, the assessment process covers not only effects to the natural environment but also the effects to all aspects of the human environment, including aesthetic, historic, cultural, economic, social and health, whether adverse or beneficial. NEPA does not require the selection of the environmentally preferable alternative, nor does it prohibit adverse environmental effects, but it does require decision-makers and the public to be informed of the environmental consequences of a proposed project. Possible steps to mitigate any environmental effects are also identified and defined during the assessment process.

If a project has gone through a Planning and Environment Linkages (PEL) process, agencies can use information, analysis, and products developed during planning to inform environmental review process. For major projects, PEL helps transportation agencies incorporate environmental and community values into transportation decisions early in planning and carry these considerations through project development and delivery. [Learn more about PEL.](#)

## **The NEPA process**

Once a government agency identifies a need for action and develops a proposal for a solution, it must determine if the action would create significant environmental effects. If the agency determines that the actions would not have a significant effect on the quality of the human environment, then it may proceed with the action under an existing Categorical Exclusion. If the agency is uncertain but finds it unlikely that the action would have significant effect on environmental quality, or if the action is not covered by a Categorical Exclusion, it can complete an Environmental Assessment. If the agency is aware that the action may cause significant environmental effects, the agency would proceed to prepare for an Environmental Impact Statement.



## Determining the right NEPA process

### Categorical Exclusion

A Categorical Exclusion is based on an agency's previous experience with the environmental effects of a type of action; examples include making minor renovations to facilities and reconstructing trails on public lands

Previous Environmental Assessments (see below) may have shown no significant negative impact to the environment, so the agency may amend their regulations to include the action as a Categorical Exclusion to streamline the process of repeating the action.



Federal rules specify what can be a Categorical Exclusion and what must follow another NEPA process. Additionally, the agency must ensure there are no extraordinary circumstances that may cause the action to have significant environmental effects to proceed with a proposed action under a Categorical Exclusion.

### **Public input**

For an agency to create a Categorical Exclusion, a draft of the procedure or procedures is published in the Federal Register (accessible at [federalregister.gov](https://www.federalregister.gov)), and a public comment period is required.

### **Environmental Assessment**

The agency develops an Environmental Assessment under any of the following conditions:

- the agency does not have a Categorical Exclusion that covers the proposed action.
- there would be extraordinary circumstances that may cause the action to have environmental effects beyond would be covered by the Categorical Exclusion
- the agency is uncertain of the environmental effects of the proposed action.
- The Environmental Assessment determines the significance of the environmental effects of the proposed action and examines alternative means to meet the need for action. The assessment provides evidence and analysis to determine whether the preparation of an Environmental Impact Statement is needed.

### **Finding of No Significant Impact**

The Environmental Assessment concludes with either a Finding of No Significant Impact or a determination to prepare an EIS. A Finding of No Significant Impact gives the reasons why it was determined that there would be no significant environmental impacts in the implementation of the action. Examples include an urban streetcar project that travels in existing roadways or a short light rail extension through vacant land that is not environmentally sensitive.

### **Public input**

In preparing the Environmental Assessment, the agency is required to involve regulatory agencies and the public to the extent practicable. An agency may choose to mirror the Scoping and/or Environmental Impact Statement public input processes (see next page), notify identified interested parties on the status of the assessment or make available the assessment and a draft Finding of No Significant Impact to interested members of the public. If the type of proposed action hasn't been done before by a particular agency or if the action is something that would typically require an Environmental Impact Statement, the agency is required to make the draft Finding of No Significant Impact available for public review and comment.

## **Environmental Impact Statement**

If the proposed action will, or even may, significantly affect the human or natural environment, the agency must prepare an Environmental Impact Statement. The EIS process is more detailed than a Categorical Exclusion or Environmental Assessment, with specific stages that have their own requirements.

## **Notice of Intent**

The EIS process begins with the publication of a Notice of Intent to prepare an EIS for the proposed action. The notice is published in the Federal Register and gives a brief description of the action as well as possible alternatives. It also describes the scoping process and how the public can participate.

## **Stage 1: Scoping**

Scoping defines the purpose of and need for the project and the alternatives being considered for additional study. During Scoping, the agency determines the range and extent of issues to be addressed in the analyses, identifying issues, project contacts, interested parties and recommendations for the potential solution. Scoping also works to identify issues that will not be significant, or those that have been adequately covered in prior environmental review, and eliminates them from detailed review in the EIS.

## **Public input**

As part of the 30-day Scoping process, the agency identifies interested persons and invites them to participate in the EIS process. Public participation helps identify a fuller range of issues and reasonable alternatives that the agency can evaluate through the EIS process. The agency may conduct public meetings or hearings and will request comments from federal, tribal, state and local agencies that may have interests in the matter.

## **Stage 2 (if needed): Refinement**

The Scoping process is intended to explore and narrow the potential solutions and range of issues to be addressed in the EIS. The agency may choose to continue to refine the results of or resolve issues raised during those processes with a Refinement study.

## **Public input**

During the Refinement study, the agency may choose to mirror or expand the public input process used during the Scoping process.

## **Stage 3: Draft Environmental Impact Statement**

A Draft Environmental Impact Statement includes a Purpose and Need Statement that articulates the problem that the proposed action is meant to resolve. The DEIS objectively evaluates the alternatives and addresses the reasons for eliminating alternatives that are not included for detailed study. All reasonable alternatives that meet the purpose and need of the project and a no-action alternative are evaluated in enough detail that a reader can compare and contrast the environmental effects of the alternatives. The analysis includes the full range of direct, indirect and cumulative effects of the alternatives.



## **Public input**

A notice in the Federal Register and other local and regional public notices announce the availability of the DEIS for review and comment. The comment period for a DEIS is anywhere from 45 to 60 days. During the comment period, the agency may conduct public meetings or hearings and will request comments from federal, tribal, state and local agencies that may have an interest in the matter. The agency analyzes all comments and conducts further environmental analysis as necessary in order to prepare the Final Environmental Impact Statement.

### **Stage 4: Final Environmental Impact Statement**

The Final Environmental Impact Statement responds to the comments received from the public and other government agencies during the DEIS public comment period as well as defines and commits the agency to specific mitigation of specific impacts. The responses can be in the form of changes from the Draft to the Final EIS, factual corrections, modifications to the analyses or alternatives or consideration of new alternatives. A copy or summary of the comments and their responses are included in the FEIS.

**Public input** When the agency publishes the FEIS, the Environmental Protection Agency publishes a notice in the Federal Register. The notice begins the waiting period of at least 30 days, during which decision-makers consider the Purpose and Need, weigh the alternatives, balance objectives and make a decision. During the 30-day period, the FEIS is available for public review.

### **Record of Decision**

The final step in the process is the Record of Decision, which:

- documents the final decision identifies alternatives considered, including the environmentally preferred
- alternative discusses mitigation plans, including enforcement and monitoring commitments addresses all factors that were contemplated in reaching the decision defines how to proceed with the proposed action serves as the decision from the federal government that the project is allowed under NEPA.

## **Supplemental statements**

An agency may be required to prepare a Supplemental Draft Environmental Impact Statement or Supplemental Final Environmental Impact Statement. These may be used to address a substantial change in the proposed action, new circumstances or information relevant to environmental concerns, or specific environmental concerns that may have not been fully realized in the DEIS or FEIS. The comment process and time periods for an SDEIS or Supplemental FEIS would be same as those of the DEIS or FEIS, respectively.

## Building the project

### Preliminary engineering

Concurrent with the FEIS, preliminary engineering advances the project's design from approximately 5 percent to 30 percent engineering in order to establish the cost for the final project.

### Final design

After the Record of Decision is issued, final design work brings design from 30 percent to 100 percent complete, finalizes the finance plan, purchases property, and begins advance construction (the relocation of utilities in conflict with construction areas, etc.). Final construction follows, and then operations can begin.

*This information is mainly adapted from A Citizen's Guide to the NEPA from the Council on Environmental Quality. For more detailed information, visit [ceq.doe.gov](http://ceq.doe.gov)*



- a regional rideshare program that makes carpooling safer and easier and helps people with limited transit access have options to get around
- funding for bicycle racks, wayfinding signage and other tools that help people to walk and bicycle
- funding for pilot projects to test new ways to reach the public through technology or innovative engagement methods.

## **Regional Travel Options Strategy update**

To update the strategy, Metro works with interested parties, including cities, counties and previous grantees, applicants and potential applicants. The Regional Travel Options Strategy is expected to be updated in 2024.

**Engagement opportunities:** updates to interested persons contact list, workshop series to address the elements of the strategy, review and comment (letter, email, phone, public comment at committee and council meetings) of the draft Regional Travel Options Strategy

## **Regional Travel Options: Stay informed**

Information about Regional Travel Options program, projects, sponsorships and grants – as well as other stories about the greater Portland region’s transportation system and how it affects our quality of life – are published periodically on Metro News ([oregonmetro.gov/news](https://oregonmetro.gov/news)). These stories are also promoted on Metro’s social media feeds. To be notified for the next round of Regional Travel Options grants or any updates to the strategy, join the interested persons list by emailing [rto@oregonmetro.gov](mailto:rto@oregonmetro.gov).

## **Regional Travel Options program: Decision making structure**

The program is guided by the 10-year strategy, adopted by JPACT and the Metro Council. The strategy defines the mission, goals and objectives for the program. Metro manages the program, with input provided by TPAC on the grantmaking process and other major program elements. Grant applications are reviewed by a committee of TPAC members and community members for recommendation to JPACT and the Metro Council. For more information about TPAC and JPACT, read [Regional Transportation Plan: Decision making structure](#).

## **Transportation System Management and Operations**

[oregonmetro.gov/tsmo](https://oregonmetro.gov/tsmo)

Transportation System Management and Operations strategies provide money-saving, multimodal solutions that relieve congestion, optimize infrastructure investments, promote travel options and reduce greenhouse gas emissions.

Using a relatively small award from what are currently referred to as regional flexible funds, the program improves the efficiency of the transportation system, providing funding to public- agency partners with regionally prioritized projects to make the system flow more smoothly and safely –without the huge costs of road construction.

These projects include information used by TripCheck. org and relied on by third parties such as Google Maps for current traffic, variable travel information signs and better synced traffic lights. For instance, a project to better coordinate traffic signals in downtown Beaverton improved travel time through the heavily congested area by as much as 12 percent on major arterials like Canyon Road and Farmington Road – and made walking easier by adding more opportunities for someone to get a walk light to cross these busy roads.

Program funding is typically awarded to city and county governments, though prior grantees have included institutions such as Portland State University for data collection, processing and visualization projects.

Visit the [Transportation System Management and Operations webpage](#) to learn about grant opportunities.

### **Strategy update**

The Regional Transportation System Management and Operations Strategy was updated in 2021 and will guide decisions in transportation system management until 2031. To update the strategy, Metro works with interested parties, including cities, counties, the state and transit agencies.

**Engagement opportunities:** typically includes a series of workshops to address the elements of the strategy, learning opportunities to consider national best practices and emerging needs, plus public review and comment opportunities (letter, email, phone, public comment at committee and council meetings) of the draft Regional Transportation Systems Management and Operations Strategy

### **Regional Transportation Systems Management and Operations program: Decision-making structure**

The program is guided by the 10-year strategy, adopted by JPACT and the Metro Council. The strategy defines the vision, goals, objectives and policies for the program. Metro manages the program, with input provided by TPAC on the project funding process and

other major program elements. Project proposals are prioritized by TransPort, a subcommittee of TPAC, for recommendations to TPAC, JPACT and the Metro Council. For more information about TPAC and JPACT, read [Regional Transportation Plan: Decision making structure](#).

## Regional flexible funds

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

Almost everyone can point to an improvement they'd like to see on a roadway or street, a trail connection or sidewalk gap they'd like to see filled. Every few years, Metro has an opportunity to work with residents, businesses and local governments to help make fixes like these around greater Portland.

Funding is provided to the development and construction of local transportation projects.

Recent allocations have prioritized projects that make it safe and convenient to walk, bicycle or access transit, and projects that support economic development and the efficient movement of freight.

Regional flexible funds come from three federal grant programs: the Surface Transportation Program, the Congestion Mitigation/Air Quality Program and the Transportation Alternatives Program. These programs allow greater discretion on how the monies are spent – hence the term “flexible” – which allows for greater focus on local priorities and innovative solutions to transportation challenges.

The development of the regional flexible funds allocation is a multi-year process, since the beginning policy conversations guide how the funds will be appropriated.

## Be involved in Regional Flexible Funds

### Phase 1: Policy update

About two years before the funds are awarded, Metro works with partners, interested parties and the public to update the policies guiding the allocation process. This will set the stage to determine how much of these funds go to things like bond payments for transit projects, how much will go to support regional programs and grants – such as the Regional Travel Options and Regional Transportation Systems Management and Operations grants addressed on pages 16 and 17 – and how much will go to support local jurisdictions to build key projects.

**Engagement opportunities:** online survey on key themes, review and comment (letter, email, phone, public comment at committee and council meetings) of the draft policies

## **Phase 2: Allocation process**

About six months after the policy update, Metro begins discussions with partners to finalize the how the funds will be allocated. Once it is determined how much will go to local jurisdictions for their key projects, Metro solicits applications from the jurisdictions. These are evaluated by a technical panel and put forth for public comment.

**Engagement opportunities:** online survey showing where the applicant projects are and what they would achieve, minimum 30-day review and comment (letter, email, phone, public comment at committee and council meetings) of the projects and technical evaluation, testimony at hearings.

## **Stay informed**

Information about the development of the regional flexible funds allocation process– as well as other stories about the greater Portland region’s transportation system and how it affects our quality of life – are published periodically on Metro News ([oregonmetro.gov/news](https://oregonmetro.gov/news)). These stories are also promoted on Metro’s social media feeds.

During the allocation for these funds, there is a public comment period with notices and requests to share are sent to neighborhood association/CPO, local agency newsletter, transportation management association and community based organization partners and contacts.

## **Regional flexible funds: Decision-making structure**

Decisions for regional flexible funds is shared between the Metro Council and JPACT. To aid with technical details of the program, JPACT is advised by TPAC. For more information on JPACT and TPAC, see the decision-making structure for the Regional Transportation Plan section.

A technical panel of city, county, agency and community partners independently evaluate the allocation applications to produce technical scores based on criteria drawn from the policy direction provided by JPACT and Metro Council. These scores are offered as part of the comment opportunity and considered as TPAC makes its recommendation to JPACT and the Metro Council. For more information about TPAC and JPACT, read [Regional Transportation Plan: Decision making structure](#).

**So, hello. We're Metro – nice to meet you.**

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# APPENDIX E – Tribal Government Consultation for Regional Transportation Planning

Formal consultation process for the Regional  
Transportation Plan and Metropolitan  
Transportation Improvement Program

### *Projects and processes implicated by this process*

Metro updates the Regional Transportation Plan (RTP) every 5 years. The RTP is a blueprint to guide investments for all forms of travel – motor vehicle, transit, bicycle and walking – and the movement of goods and freight throughout the greater Portland region. The Plan identifies current and future transportation needs, investments needed to meet those needs and what funds the region expects to have available to over the next 25 years to make those investments a reality.

Metro issues the Metropolitan Transportation Improvement Program (MTIP) every 3 years. The MTIP records how all Federal transportation money is spent in the Portland metropolitan area. It also monitors and records state- and locally-funded projects that may significantly affect travel in the region.

### *Formal consultation process*

During the scoping phase of the RTP and in advance of the adoption of the MTIP, Metro connects with agencies and Tribes to determine when and how the agencies and Tribes want to consult. Metro offers consultation orientation meetings and discusses the phases of the RTP process. Group meetings are offered for both agencies and Tribes; “one-on-one” meetings are also offered if the agency or Tribe is unable to attend one of the group meetings. Metro also invites agencies and Tribes to submit comment letters following consultation meetings or in lieu of participating in meetings.

During the orientation meetings, Metro describes the project phases and their expected time frames. Agencies and Tribes are asked to identify the phases in which they want to be informed, involved and/or consulted. Attachment A is the “questionnaire” provided to agencies and Tribes. Note that since the RTP and MTIP are on different cycles, both the RTP and MTIP are described. Responses to the questionnaire are documented.

### *Consultation roles*

**Metro** extends invitations to consult, convenes consultation meetings, provides information on the purpose, scope, potential impacts and project schedule for the RTP and MTIP and answers questions from agencies and Tribes both when they are determining their level of consultation and throughout the consultation processes. Metro develops the RTP and MTIP with due consideration of related planning activities within the Metropolitan Planning Area (MPA) as well as issues, concerns or recommendations made through the consultation process.

**Consulting agencies** provide guidance on when and how – through the RTP or MTIP process – they would like to be consulted and advocate for their agency’s values and goals to provide feedback and raise issues, concerns and recommendations to improve the RTP and MTIP processes and final documents.

**Tribes** provide guidance on when and how – through the RTP or MTIP process – they would like to be consulted; advocate for their respective Tribe's priorities, values and goals to provide feedback and raise issues, concerns and recommendations to improve the RTP and MTIP processes and final documents.

### *Responsibilities*

**Metro** consults with agencies and officials responsible for other planning activities within the MPA that are affected by transportation (including state and local planned growth, economic development, tourism, natural disaster risk reduction, environmental protection, airport operations, or freight movements) and coordinates its planning process (to the maximum extent practicable) with such planning activities. Metro develops the RTP and MTIP with due consideration of related planning activities within the MPA.

**Consulting agencies** understand, at a high level, the purpose, scope and potential impact of the RTP or MTIP and relay planning activities under their purview within the MPA that are affected by transportation and identify opportunities for coordinated planning process where practicable.

**Tribes** determine whether to engage in consultation with Metro as the MPO lead in developing the MTIP and RTP. Metro staff make good faith efforts to share at a high level the purpose, scope and potential impact of the RTP or MTIP and the planning process and key decision points so Tribes can determine their interest to consult and engage with Metro. Tribes express to Metro how it can best remove barriers to ongoing and future consultation.

### *Key phases and decision points*

#### **Regional Transportation Plan**

1. Scoping – interested party and partner identification, work plan development, engagement plan development.
2. Framework development – key trends and challenges identification, transportation system vision refinement, outcomes prioritization.
3. Building the investment strategy – defining policy changes, project list updates, draft project list assessment, project list refinement.
4. Adopting the plan – review and comment and adoption process.

#### **MTIP**

1. Adopting the MTIP – review and comment and adoption process.
2. Amending the MTIP – review and comment and adoption of amendments (The MTIP is typically amended when additional funding becomes available or conditions on the ground lead agencies to modify, delay, or advance a project.)

### *Other MPO processes*

**Metro's regional flexible funds allocation** is a process for distributing the small amount of federal funds provided directly to Metro for distribution (decisions fund regional programs and local projects that meet regional priorities). There is no formal consultation process for regional flexible fund allocations.

### *Agencies and Tribes invited to consult*

#### **Agencies**

The following agencies are invited to consult.

##### *Resource agencies*

- Clackamas County Water Environment Services
- Clean Water Services
- Metro Parks and Nature
- National Marine Fisheries Service (NOAA)
- National Park Service (Pacific West Region)
- Oregon Department of Agriculture
- Oregon Water Resources Department
- Oregon Watershed Enhancement Board
- Oregon Department of State Lands
- Oregon Department of Fish and Wildlife
- Oregon Department of Forestry
- Portland Bureau of Environmental Services
- United States Environmental Protection Agency
- United States Fish and Wildlife Service
- United States Forest Service
- United States Bureau of Land Management

##### *Federal, state and local transportation agencies*

- Bonneville Power Administration
- Federal Aviation Administration
- Federal Highway Administration
- Federal Railroad Administration
- Federal Transit Administration
- Federal Transit Administration
- United States Army Corps of Engineers
- United States Department of Labor
- United States Department of V
- Oregon Bureau of Labor and Industries
- Oregon Department of Energy
- Oregon Department of Environmental Quality
- Oregon Department of Land Conservation and Development
- Oregon Department of Transportation
- Oregon Department of Veterans Affairs
- Oregon Parks and Recreation Department
- Oregon State Historic Preservation Office
- Portland of Portland

- Port of Vancouver
- TriMet
- South Metro Area Regional Transit (SMART)
- C-TRAN
- Southwest Washington Regional Transportation Council (RTC)

### **Tribes**

The greater Portland MPA does not include Indian Tribal lands as defined by 25 CFR § 502.12. The greater Portland MPA does however include multiple properties which are owned in fee title by several Tribes. In addition, the lands now known as the greater Portland area are part of the aboriginal homelands, traditional use areas and trade networks of numerous Tribes. Each Tribe's interests are distinct and these interests may overlap and intersect with the static boundaries of the metropolitan planning area in various ways. Metro is currently developing its Tribal Affairs Program. This program is intended to establish mutually beneficial relationships with interested Tribes to inform the agency's work across the region that is now known as the greater Portland metropolitan area. Invitations to consult in Metro's RTP and MTIP planning processes are extended in coordination with the Tribal Affairs Program.

The following Tribes are invited to consult, listed in alphabetical order:

- Confederated Tribes and Bands of the Yakama Nation
- Confederated Tribes of Grand Ronde
- Confederated Tribes of Siletz Indians
- Confederated Tribes of the Umatilla Indian Reservation
- Confederated Tribes of the Warm Springs Reservation of Oregon
- Cowlitz Indian Tribe
- Nez Perce Tribe

## Federal, tribal and state consultation with Metro preferences - survey

Metro is asking for your input on how and when we should reach out to your agency or tribe when conducting planning processes for greater Portland's transportation system.

Please select the level of notification or involvement that would work best for the key stages of the Regional Transportation Plan and the Metropolitan Transportation Improvement Program.

### Agency or Tribe

Best contact for Metro to coordinate with (name and title)

Email address for contact

### Regional Transportation Plan

The Regional Transportation Plan is the 25-year blueprint for greater Portland's transportation system, setting the vision, goals and policies. It also brings together transportation projects from multiple jurisdictions, prioritizing them based on the amount of federal, state and local funds we can expect over the life of the plan.

Metro updates the plan every five years. The update process typically takes about three years.

#### 1. Scoping – stakeholder identification, work plan development, engagement plan development

- ☐ Formal notification via letter
- ☐ Individual briefing and discussion (Metro staff and your staff)
- ☐ Invitation to a “group” briefing and discussion (multiple agencies invited)
- ☐ Interested persons list notification (email to all parties signed up for updates; includes comment opportunities)
- ☐ Direct notification via email
- ☐ Invitation and coordination to comment to decision-making bodies (Joint Policy Advisory Committee on Transportation, Metro Council)
- ☐ Other (please specify)

#### 2. Framework development – key trends and challenges identification, transportation system vision refinement, outcomes prioritization

- ☐ Direct notification via email
- ☐ Formal notification via letter

## Metro's formal consultation process for the RTP and MTIP - Attachment A

- ☐ Individual briefing and discussion
- ☐ Invitation to a "group" briefing and discussion
- ☐ Interested persons list notification
- ☐ Invitation and coordination to comment to decision-making bodies
- ☐ Other (please specify)

### 3. Building the investment strategy – defining policy changes, project list updates, draft project list assessment, project list refinement

- ☐ Formal notification via letter
- ☐ Individual briefing and discussion
- ☐ Invitation to a "group" briefing and discussion
- ☐ Interested persons list notification
- ☐ Direct notification via email
- ☐ Invitation and coordination to comment to decision-making bodies
- ☐ Other (please specify)

### 4. Adopting the plan –refinement and adoption of the plan

- ☐ Individual briefing and discussion
- ☐ Interested persons list notification
- ☐ Invitation to a "group" briefing and discussion
- ☐ Direct notification via email
- ☐ Formal notification via letter
- ☐ Invitation and coordination to comment to decision-making bodies
- ☐ Other (please specify)

### Metropolitan Transportation Improvement Program

The Metropolitan Transportation Improvement Program is the four-year schedule of investments in greater Portland that will use federal and state transportation funds. It also documents local investments that may impact the region's air quality.

Metro updates the plan every four years. The update process typically takes about three years, including policy updates and the process to allocate the small amount of federal funds provided directly to Metro for distribution.

### 1. Initiation – policy update and partner agreements

## Metro's formal consultation process for the RTP and MTIP - Attachment A

- ☐ Formal notification via letter
- ☐ Invitation to a "group" briefing and discussion (multiple agencies invited)
- ☐ Direct notification via email
- ☐ Interested persons list notification (email to all parties signed up for updates; includes comment opportunities)
- ☐ Individual briefing and discussion (Metro staff and your staff)
- ☐ Invitation and coordination to comment to decision-making bodies (Joint Policy Advisory Committee on Transportation, Metro Council)
- ☐ Other (please specify)

### 2. Metro's regional flexible funds allocation – process for distributing the small amount of federal funds provided directly to Metro for distribution (decisions fund regional programs and local projects that meet regional priorities)

- ☐ Direct notification via email
- ☐ Interested persons list notification
- ☐ Invitation to a "group" briefing and discussion
- ☐ Individual briefing and discussion
- ☐ Formal notification via letter
- ☐ Invitation and coordination to comment to decision-making bodies
- ☐ Other (please specify)

### 3. Adopting the MTIP – review and comment and adoption process

- ☐ Individual briefing and discussion
- ☐ Interested persons list notification
- ☐ Direct notification via email
- ☐ Invitation to a "group" briefing and discussion
- ☐ Formal notification via letter
- ☐ Invitation and coordination to comment to decision-making bodies
- ☐ Other (please specify)

### 4. Amending the MTIP – review and comment and adoption of amendments (additional funding becomes available, conditions on the ground lead jurisdictions to delay one project in favor of another)

- ☐ Direct notification via email



## Metro's formal consultation process for the RTP and MTIP - Attachment A

- ☐ Individual briefing and discussion
- ☐ Interested persons list notification
- ☐ Invitation to a "group" briefing and discussion
- ☐ Formal notification via letter
- ☐ Invitation and coordination to comment to decision-making bodies
- ☐ Other (please specify)

### Other Metro work

Metro is also responsible for other efforts, such as managing the urban growth boundary and preserving natural areas. Would you be interested in consulting on these other topics?

### Additional areas of interest

- ☐ Natural areas preservation program
- ☐ Specific parks, trails and natural areas planning
- ☐ Urban growth boundary decisions
- ☐ Garbage and recycling policies
- ☐ Regional transportation studies and investment areas planning

Do you have any comments or suggestions regarding consulting with Metro?