FREGONESE ASSOCIATES

Alternative Land Use and Transportation Scenario Planning Case Studies in Oregon

A review of five case studies in Oregon

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Scenarios Report

prepared for

Oregon Department of Transportation

prepared by

Fregonese Associates

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report

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date

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Executive Summary

This study focuses on five case studies of past alternative land use and transportation scenario planning efforts in the state of Oregon. The purpose is to provide insight to the Oregon State House Bill 2186 MPO Greenhouse Gas Emissions Task Force on how scenario development planning is conducted for MPOs of various sizes and characteristics.

The five case studies examined include the following:

1. Bear Creek Valley Regional Problem Solving Process.
2. Central Lane Region 2050;
3. Making the Land Use, Transportation, and Air Quality Connection Study (LUTRAQ);
4. Metro 2040 Growth Concept; and
5. Salem Futures.

Fregonese Associates conducted interviews with the project staff and consultants who worked on each of the scenario planning efforts and reviewed past reports, memos, and data to compile each case study's findings.

A review of these case studies provides several insights:

- The **Bear Creek Valley Regional Problem Solving** process began in 2000 when the Rogue Valley Council of Government was awarded a Regional Problem Solving (RPS) grant from the Oregon Department of Land Conservation and Development. The RPS process is now in the final with ten of the eleven participating jurisdictions expected to adopt local land use policies and ordinances in accordance with the regional agreement by 2010. The RPS effort shows how a region can take state mandated goals and work together to reach agreement on local implementation strategies. This sense of local control through regional collaboration appeals to the participants. The considerably long process resulted in discontinuity amongst participants, as elected officials changed hands, and other participants moved in and out of the negotiations. Continuing education of participants, evolving leadership, and serious commitment including millions of dollars in direct and indirect dollars were needed to move the process along. Specific targets and a timeline for completion would have also helped move the process forward.
- The **Central Lane Region 2050** began in 1999 out of a desire to manage increased growth in the region, especially outside of the Eugene/Springfield metropolitan area. Lane Council of Governments received a Transportation Growth Management grant from a joint project of the Oregon Department of Transportation (ODOT) and the Oregon Department of Land Conservation and Development (DLCD). The process took approximately seven years, a million dollars, and created tools for local jurisdictions, analyzed possible development scenarios, and produced strong technical work but ultimately

the negotiations broke down and a regional planning strategy was never adopted. As a result there has not been a strong regional vision to guide policy in the region for 20 years. The jurisdictions involved in the process did not share a common perception of the benefits in participation. The length of the process made it difficult to sustain participation. The jurisdictions needed incentives or enforcement to remain committed to the process. The region is now moving more towards local planning rather than a regional approach as Eugene and Springfield are in the process of creating two separate urban growth boundaries, rather than their current joint boundary.

- **Making the Land Use, Transportation and Air Quality Connection Study (LUTRAQ)** grew out of a proposal by Washington County and the Oregon Department of Transportation to build a Western Bypass in 1988. What began as opposition to the bypass project by an active citizens group, 1000 Friends of Oregon, evolved into a comprehensive planning effort to analyze five alternatives to accommodate growth projections on the west side of Portland. The findings of LUTRAQ informed the Metro 2040 Growth Concept and increased the attention paid to land use and transportation planning in Oregon. The project helped develop state-of-the-art transportation modeling to better forecast travel behavior associated with land use patterns and was instrumental in encouraging the development of integrated land use and transportation development scenarios across the country. LUTRAQ was an innovative process led by a non-profit advocacy organization that spent approximately a million dollars to perform a rigorous analysis and develop the LUTRAQ alternative scenario. It was the first time a land use alternative was included in a Draft Environmental Impact Statement for a new highway project. The project led modeling innovations and assisted in the planning and evaluation of the Westside light rail.

- The **Metro 2040 Growth Concept** is the Portland metropolitan region's 50-year strategy for managing growth. Auto-oriented development patterns at the fringe of the urban growth boundary in the 1990's led Metro to hold a highly publicized public conversation about what the region valued and what conscious choices it wanted to make on where growth should go. The successful adoption and implementation of the 2040 Growth Concept formed a policy foundation that led to efficient use of land, redevelopment, high transit use, and reduced regional vehicle miles traveled in the Portland metropolitan region. The innovative and extensive public engagement effort spent over 1.5 million dollars alone (compared to $280,000 for consultant support) to bring growth management into the public consciousness leading to a well respected and publicly endorsed plan based on the participation of thousands of residents. The successful implementation of the 2040 Growth Concept was aided by state requirements to review the 20 year land supply for accommodating the projected household and employment growth within the urban growth boundary. In addition, Metro's unique home-rule charter that allows the regional government to direct, fund, and mandate growth

management at the regional level such as the Regional Transportation Plan and locally through its Urban Growth Management Functional Plan, which establishes specific requirements and tools for local governments to meet goals established in the 2040 Growth Concept.

- **Salem Futures** was a long-range planning effort that began in 1998 to develop an integrated land use and transportation plan to guide future development in the City of Salem. The project was conducted by the City of Salem with support from the Mid-Willamette Valley Council of Governments with a $500,000 grant from the Transportation Growth Management fund provided by ODOT and DLCD. The planning effort developed a series of land use and transportation alternatives and through modeling and analysis; the city staff recommended a preferred alternative scenario for adoption. Ultimately, the city council adopted a set of policies that resembled the base case scenario during the update of the city's comprehensive plan in 2009. Despite never implementing the preferred alternative which called for a significant expansion of the Salem-Keizer urban growth boundary, Salem is experiencing infill and redevelopment due in part to a policy tool that has been in place for thirty years, an urban service area designation. The urban service area focuses growth in the central city where existing infrastructure can support new development, and outside the boundary developers much pay for new infrastructure as determined by the city. The City of Salem has not expanded its urban growth boundary (UGB) since its inception but is now conducting an economic opportunities analysis that could result in a recommendation to expand the UGB.

1.0 Matrix of Case Studies

The five case studies reviewed in this report represent a range of transportation and land use scenario planning conducted for varying geographic scales and differing levels of effort. The matrix in Table 1.1 has been designed to allow the reader to quickly scan the eight case studies and when appropriate, dig deeper into the land use and transportation scenario planning alternatives described in the following pages. The matrix of characteristics includes three categories of information:

1. MPO and Scenario Development Characteristics
2. Socioeconomic Characteristics
3. Travel and Transit Characteristics

MPO and Scenario Development Characteristics

The following data help to provide a snapshot of the MPO as well as the scenario planning efforts spearheading the land use and transportation development process,

- MPO: The name of the MPO that led or was involved in the scenario planning effort;
- Year of Implementation: The year in which the scenario development was implemented in the MPO planning process;
- Legal Land Use Authority: Whether the MPO has the ability to enforce land use decision-making; and
- Number of Scenarios: The number of scenarios or alternatives evaluated through the visioning process.

Socioeconomic Characteristics

The following socioeconomic data are derived from the U.S. Census through the 2000 Decennial Census. Most data refers to the MPO area, but when appropriate, it is clearly stated when the data refer to the MSA or County-level.

- Population;
- Land Area, square miles;
- Density, persons per square mile;
- Median Household Income;
- Persons Under 18 Years; and
- Persons 65 Years and Over.

Travel and Transit Characteristics

The following data travel data are derived from the U.S. Census through the American Community Survey.

- Mean Travel Time to Work in Min (2000).

The following data are derived from the National Transit Database developed by the Federal Transit Administration. The following information refers to transit travel characteristics from the transit district within the MPO.

- Available Public Transit;
- Annual Passenger Miles (2007); and
- Average Weekday Unlinked Trips (2007).

2.0 Summary of Oregon MPOs

Table 1.1 Matrix of Oregon Case Studies Using Alternative Land Use and Transportation Scenario Development

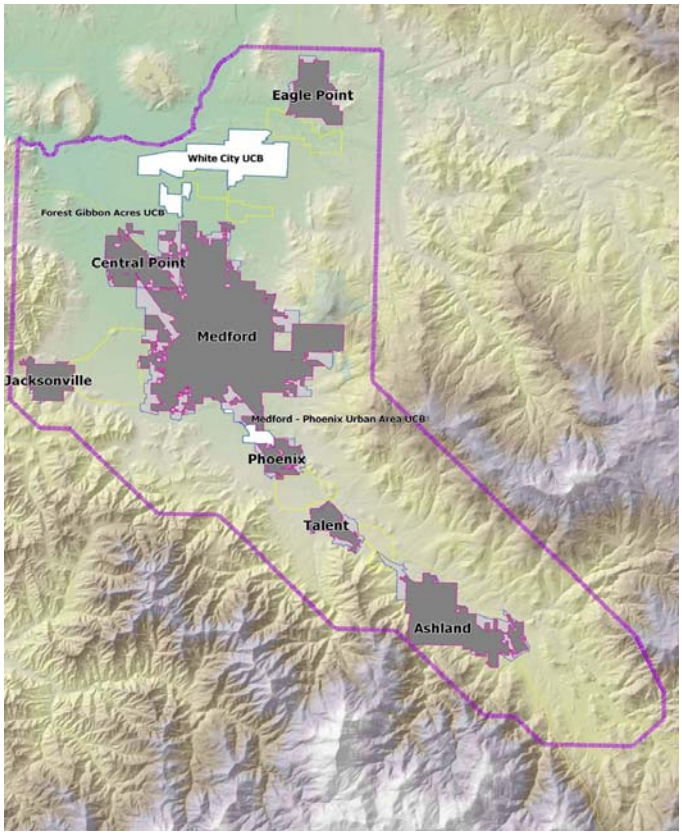
	Bear Creek Valley RPS Process (2000)	Central Lane Region 2050 (2000)	LUTRAQ (Land Use, Transportation, Air Quality Connection) Study (1990)	Metro 2040 (1990)	Salem Futures (2000)
MPO	RVMPO	LCOG	Washington Co within Metro	Metro	MVCOG
Population	181,269	322,959	311,554	1,400,000	136,694
Land Area, sq. miles	2,800	78	107	365	68
Density, persons per sq. mile	738 (Ashland), 220 (Eagle Point)	1,343 (Springfield-Eugene)	724	3,021	940
Median Household Income	$36,461	$36,942	$35,554	$30,0930	$38,881
Persons Under 18 years	25%	24%	27%	26%	27%
Persons 65 Years and Over	16%	13%	10%	12%	12%
Available Public Transit	Bus, DRV*	Bus, DRV	Bus, Light Rail, DRV	Bus, Light Rail, DRV	Bus, DRV
Vehicle Miles Traveled/Day/Capita	18.7 (Medford)	18	20	12.4	12.4
Daily Transit Boardings	unavailable	5,919	63,189	280,000	3,941
Year of Implementation	Pending	Never Adopted	Informed Metro 2040	1995-1997	2009 comp plan update
Legal Land Use Authority	Pending	No	No	Yes	Yes
Number of Scenarios	3	3	4+ LUTRAQ in Western Bypass Analysis	3+ PA**	3+ PA

*DRV = Demand Response Vehicles
**PA = Preferred Alternative

3.0 Bear Creek Valley RPS

The Bear Creek Valley scenario process began in 2000 when Rogue Valley Council of Government (RVCOG) was awarded a Regional Problem Solving (RPS) grant from the Oregon Department of Land Conservation and Development. The RPS process continued discussions that started during a community-driven initiative to establish a regional planning project in Jackson County called OurRegion that occurred from 1995-1998 and later the City of Medford's Multijurisdictional Committee on Urban Reserves to plan for future growth.

Jurisdictions within the valley recognized that the cumulative effects of growth—both historical and projected future household and employment development—were better addressed through cooperation, collaboration, and shared process. Since 2000, eleven jurisdictions within the region have been working to agree on a regional approach to growth management that is dependent upon local jurisdictional implementation. The RPS process is now in the final stage of implementation, with ten of the eleven jurisdictions expected to adopt local land use policies and ordinances in accordance with the regional agreement by 2010.



I. MPO CHARACTERISTICS

Rogue Valley Council of Governments (RVCOG) is an association of 22 member governments, special districts and educational institutions in Southern Oregon. RVCOG also serves as the Rogue Valley Metropolitan Planning Organization (RVMPO). Although the MPO's policy functions are overseen by a committee of elected and appointed officials from Ashland, Talent, Jacksonville, Central Point, Medford, Phoenix, Eagle Point, Jackson County, ODOT, and the Rogue Valley Transportation District, it is staffed by the RVCOG.

The following demographic data and characteristics are based on the study area of the Air Quality Maintenance Area (AQMA). The RPS used AQMA as the study area because it has been studied extensively for transportation and air quality planning and it encompasses the cities and rural areas experiencing the greatest growth pressures.

- **Population (2000):** 181,269 (Jackson County);
- **Land area (2000):** 280,000 square miles, 1.8 million acres (Jackson County);
- **Density (2000):** Range of densities from 738 people per square mile in Ashland; 662 people/sq mile in Medford; 219.6 people/sq mile in Eagle Point;
- **Median household income (2000):** $36,461 (Jackson County);
- **Persons under 18 years old (2000):** 25.72 percent (Jackson County);
- **Persons 65 years old and over (2000):** 16 percent;
- **Daily vehicle miles traveled per capita (2007):** 18.7 (Medford, FHWA); and
- **Daily transit boardings (2000):** less than 1 percent transit ridership.

Source: RPS Report, US Census for Jackson County

II. SYNOPSIS OF LAND-USE TRANSPORTATION SCENARIO PLANNING

Primary Reason(s) for the Project

The Rogue Valley Council of Governments (RVCOG) responded to concerns about pressures from growth and sprawl in the region by establishing a citizen-driven regional planning project in Jackson County called OurRegion in 1995. This initiative included a 50-year land use scenario and broad recommendations for protecting the region from sprawl. The cities in this region are located close to each other; therefore land use decisions in one jurisdiction were impacting adjoining jurisdictions. Each individual jurisdiction was experiencing common pressure to grow and develop but exploring solutions

independently. It was apparent that action was necessary and OurRegion had introduced the benefits of collaborative planning to the region. When the project concluded, many were interested in continuing the process of regional collaborative planning, so they applied for RPS status.

This process was the first step to make regional planning more acceptable as a concept in order to address transportation and land use related frictions between jurisdictions.

In 2000 the region was awarded a grant under Regional Problem Solving because the jurisdictions had shown an ability to cooperate amongst themselves on issues of regional importance, the region had shown significant progress with several early efforts of regional planning, and the problems identified for resolution through RPS were important and compelling. The RPS Process came up with three problem statements that would inform the design of the process:

1. Lack of a Mechanism for Coordinated Regional Growth Planning
2. Loss of Valuable Farm and Forest Land Caused by Urban Expansion
3. Loss of Community Identity

Schedule and Year Implemented

The Bear Creek Valley RPS Process has been ongoing since 2000 and as of fall 2009, the process is awaiting final participant agreement, which is anticipated by October 2010. Currently the RVCOG is preparing findings and the local jurisdictions are preparing for local adoption of implementing ordinances. DLCD has said they will officially recognize the agreement.

MPO, Other Agency and Consultant Hours and Costs Required

If in-kind contributions were counted (such as the hours worked at the individual jurisdictions), the costs of the RPS process thus far would be upwards of several million dollars. The vast array of project partners at all levels of government make it hard to calculate hours worked. A project manager at RVCOG worked part time on the project for many years; independent consultants worked for 2.5 years at .5 full time employment (FTE). Assuming one staff member from every jurisdiction works on public involvement and attends meetings, we can assume .5 FTE from each jurisdiction for eight years.

Funding

- RVMPO: $310,000
- Local Jurisdictions: $261,998
- State of Oregon: $319,720
- DLCD RPS grant for $85,000 awarded in April 2000

III. AUTHORITY

Legal Authority and Legislative Requirements of the Scenarios

The RPS process is currently in the final phase in which local jurisdictions are voting on the adoption of the RPS plan. Each participating jurisdiction has one vote, regardless of size. DLCD will officially recognize the plan and each specific jurisdiction will be adopting policies agreed to within the regional agreement. Each jurisdiction will implement locally through their comprehensive plan, zoning and other codes. The State will hold individual cities accountable to their comprehensive plan, including urban reserve areas selected, higher densities in new growth areas, and conceptual plans.

There are two central provisions of the RPS statute (ORS 197.652-658) that provide direction on the degree of flexibility from Oregon's statewide land use system, 197.656 (2) and 197.656(2)(c). These provisions allow RPS to create new land use regulations and amend comprehensive plans and land use regulations so long as they conform, on the whole, to the statewide planning goals.

Legal Authority of the MPOs

As in every metropolitan area over 50,000, the Rogue Valley area must have a Metropolitan Planning Organization (MPO) that conducts transportation planning in order to qualify for federal transportation funding. Its authority does not extend to land use, and RVMPO cannot mandate land use changes; however, it does act as a convening body for individual jurisdictions to work towards objectives that benefit the region as a whole. The opportunity for regional control as an alternative to state mandates appeals to the cities of the Rogue Valley. The cities are becoming increasingly receptive regional planning facilitated by the MPO.

How did this Relate to the Regional Transportation Planning Process in Context of LRTP?

Initially the RPS Process was not coordinated with the Long Range Transportation Plan (LRTP). If the RPS Process outcomes integrate into city comprehensive plans, then the LRTP would take land use into account when reevaluating regional transportation plans. As region develops in accordance to comprehensive plan, there will be denser new centers. RVMPO will coordinate the Regional Transportation Plan (RTP) update process and will expect cities to provide the needed information. The MPO will do planning on rights-of-way but will need help from ODOT in terms of legality of selecting and dedicating planned rights-of-way.

IV. POLICY FRAMEWORK / ENVIRONMENT

Range of Land Use Alternatives Analyzed and Implemented

The RPS Process came up with three land use scenarios:

- **No Policy Change**: This scenario assumes development occurs based on current goals and policies.
- **Regional Attractor**: This scenario assumes that employment and population growth in the region is concentrated in defined regional centers.
- **Nodal Development**: This scenario places transit-friendly mixed-use centers of development in the urban reserve areas. It assumes that there will be a roughly equal amount of employment and population in the same area.

Transportation Modeling

The fundamental purpose of transportation modeling in the RPS process was to indicate whether future urbanization of any of the proposed urban reserves presented a potential fatal flaw in the operation of the transportation system. ODOT's Transportation Planning Analysis Unit conducted three major stages of modeling with the Oregon Department of Transportation's LUSDR land use and transportation model.

1) The model was run multiple times to generate 30 future land use scenarios based on the proposed urban reserve areas and generalized comprehensive plan designations for existing urban areas and the proposed urban reserves.

2) Additional modeling was conducted to determine the effect that additional improvements to the road network would have on congestion.

3) Further modeling was done to explore the joint effects of three different land use scenarios and five transportation scenarios.

The modeling showed that the proposed urban reserves had no fatal transportation flaws and highlighted the impact that different land use strategies had on transportation infrastructure to manage the demands of future population.

Public Outreach Component

2000-2001: Public involvement was seen as a critical element to the success of RPS by all participants. At the start of the project there was an organized effort to collect formal public input by two citizen committees, the project Citizen Involvement Committee and the Resources Lands Review Committee.

2001-2006: Two years into the project, jurisdictions began to work independently to involve citizens. All local jurisdictions developed citizen involvement

strategies to ensure significant opportunities to provide feedback and contribute to the decision making process, using a series of public meetings, surveys, presentations, and mailers. The public meetings were interspersed with formal planning commission or city council meetings to consider the input. In addition, a region-wide online survey was available. In December 2002, the project produced a 12-page insert with a circulation of 40,000 copies in the Mail-Tribune that summarized the project and its accomplishments.

2006-2008: RPS Policy Committee and Technical Advisory Committee members held a series of public meetings and hearings to provide a detailed update on the process and encourage additional citizen involvement. In addition, the project held two major public hearings on the plan in White City and Talent.

Summary of Project Objectives Met

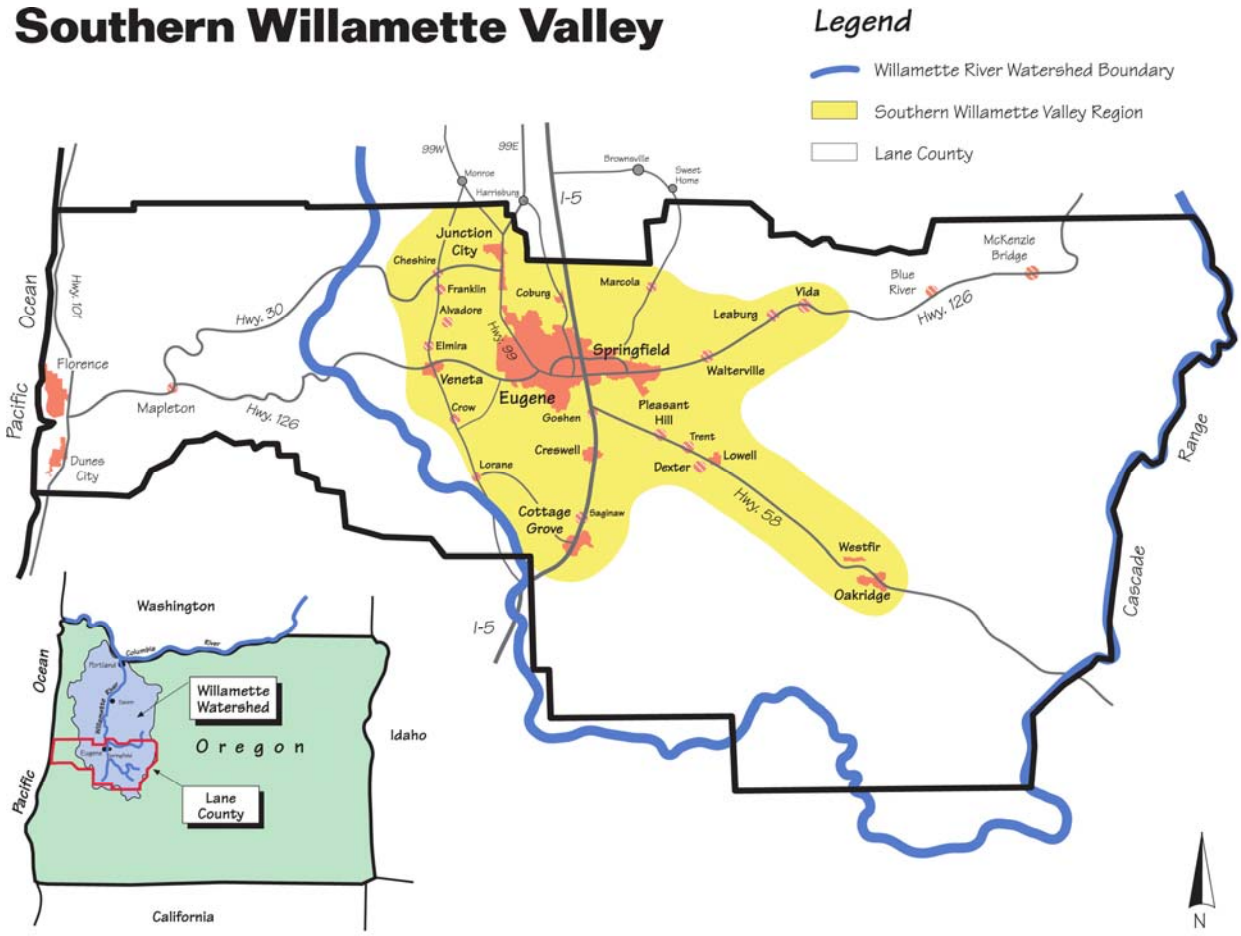
Throughout the Bear Creek Valley RPS Process there has been increased collaboration between member jurisdictions. Local jurisdictions in the area appreciate the ability to maintain and enhance local control by coordinating their efforts. As a result, most member cities are becoming more receptive to MPO involvement on a regional scale. Despite the long span of this project and the departure of one jurisdiction, the process is expected to be moving towards approval.

V. OBSERVATIONS

The Bear Creek Valley process shows how the local jurisdictions within a region can take state mandated goals and work together to develop locally workable implementation strategies. Open collaboration and strong inter jurisdictional relationships helped the project. The project would have benefitted from a focus on discreet outcomes, such as a commitment to develop a regional transportation plan or other specific achievement, rather than agreement on a general overarching growth strategy. Specific targets and a timeline for completion would have also helped move the process forward.

4.0 Central Lane Region 2050

The Central Lane Region 2050 began in 1999 out of a desire to manage increased growth in the region, especially outside of the Eugene/Springfield metro area. Region 2050 was born out of the collaboration of the Lane County Board of Commissioners and the city councils of Coburg, Cottage Grove, Eugene, Junction City, Lowell, Oakridge, Springfield and Westfir to pass formal resolutions endorsing the concept of a Regional Growth Management Strategy. Lane Council of Governments (LCOG) was directed to develop the project and seek funding.



I. MPO CHARACTERISTICS

- **Population (2000):** 322,959 (Eugene-Springfield MSA);
- **Land area (2000):** 49,756 acres, 77.74 square miles
- **Density (2000):** 1,343 people per square mile (Eugene/Springfield MSA);
- **Median household income (2000):** $36,942;
- **Persons under 18 years old (2000):** 24.3 percent;
- **Persons 65 years old and over (2000):** 13.3 percent;
- **Daily vehicle miles traveled per capita (2007):** 18 (Eugene, FHWA); and
- **Daily transit boardings (Lane Transit, 1999):** 5,919 (APTA).

Source: Southern Willamette Valley Regional Growth Management Strategy

II. SYNOPSIS OF LAND-USE TRANSPORTATION SCENARIO PLANNING

Primary Reason(s) for the Project

The main impetus for the project followed the growth management strategy that the City of Eugene completed. The result of the strategy was a plan to grow up, not out, putting major restraints on the Urban Growth Boundary. Constrained growth within the UGB caused concern that the strategy would force new development outside Eugene and Springfield and result in unprecedented growth in Creswell, Veneta and Coburg. These small cities were already growing faster than anywhere else in the county and as a result, were not prepared for the increased pressure on the existing infrastructure. Most of the available developable land was located in these small cities. There was a fear that without regional planning, and given the constrained growth in Eugene, these underserved small communities would end up with increased sprawl. The scenarios grew out of a desire to work together to avoid sprawl in the rural areas. The scenarios were meant to inform the regional goals, objectives, and actions that would accompany the agreed-upon 2050 Regional Growth Management Strategy. The mission was to think about what could be accomplished now to ensure that the region would have the desired look and feel in 50 years If successful, Region 2050 would have created a regional strategy to manage growth.

Schedule and Timeline for Implementation

- Region 2050 began in the summer of 1999
- Proposed completion date was 2006

- Southern Willamette Valley Regional Growth Management Strategy was released in 2006
- Four of the jurisdictions did not endorse so the process did not result in implementation

MPO, Other Agency and Consultant Hours and Costs

- $1 million was spent on the entire process.
- LCOG Staff dedicated to the project included one project manager working nearly full time and GIS staff. LCOG has many in-house capabilities so there was less need to pay consultants.
- Fregonese Associates created a land capacity model
- Region 2050 was staffed by a Regional Technical Advisory Committee (RTAC) comprised of the managers and planners from the eleven local governments, LTD, local utilities, the Department of Land Conservation and Development, other state agencies, and the League of Women Voters. They spent 2 hours a month for seven years in meetings.
- Regional Policy Advisory Board was made up of appointed elected officials from each local government, a Lane Transit District Board member and a staff from the Governor's office. The Regional Policy Advisory Board and the RTAC met regularly once a month from 1999-2006.

Funding

- Oregon Department of Land Conservation and Development
- Oregon Transportation and Growth Management Program (TGM) in partnership with ODOT
- Environmental Protection Agency
- Transportation modeling was paid for by ODOT

Transportation Modeling

Before transportation modeling was done, a Land Capacity Model was created. The Land Capacity Model was meant to perform the following functions:

- Calculate the development capacity of the UGBs and Potential Future Growth Areas; estimate the amount of buildable land, by type and density.
- Allocate the coordinated regional population projection to urban growth boundaries and Potential Future Growth Areas.
- Identify the location of Potential Future Growth Areas for those jurisdictions that wish to amend their comprehensive plans consistent with the *Strategy* to expand their UGBs and/or to designate Urban Reserves
- Provide a 50-year land use framework for planning water and wastewater facilities and transportation systems.

The transportation modeling was done by LCOG. A typical transportation demand forecasting model was used in the process. It was a four step model that looked at travel demand, mode choices, where travel wants to go and then assigns it to a network that can be multimodal. At the time transportation modeling was done for Region 2050, a RTP update process, *TransPlan,* had just been completed. The update process was robust and comprehensive in that it looked at seven alternative scenarios. These scenarios varied land use, type of transit, and looked at different levels of roadway investment. The result was a difference in reduction of VMT between the scenarios. This successful process left LCOG well prepared to do transportation modeling for the three scenarios in Region 2050.

III. AUTHORITY

Legal Authority and Legislative Requirements of the Scenarios

The strategy released in 2006 has no legal authority. It provides guidelines to help the participating jurisdictions manage growth. Region 2050 lost the backing of the cities of Eugene, Springfield, Cottage Grove and Lane County and as a result was not seen as a legitimate policy tool and was never adopted. Likely implementation will be seen in changes to local comprehensive plans, including urban growth boundaries (UGBs - a 20 year land supply) and Urban Reserves (a 50 year land supply), ordinances, and codes, and intergovernmental agreements.

Legal Authority of the MPOs

LCOG is the MPO for the Central Lane Region. In the state of Oregon, MPOs are designated to coordinate transportation planning in an urbanized area of the state, and are required of all urbanized areas over 50,000 in order to receive any federal transportation funding. LCOG has no authority to implement land use mandates in the local jurisdictions. It can however, serve as a coordinating body to assist local jurisdictions include recommended regional maps and policies into their decision making.

How did this Relate to the Regional Transportation Planning Process in Context of LRTP?

Region 2050 followed on the heels of a successful RTP update process, *TransPlan.* The Region 2050 process, however, did not impact future RTP updates. Eugene/Springfield tends to do transportation planning with a metro focus rather than regional. Overall, transportation planning in the area did not become more regional as a result of the Region 2050 process.

IV. POLICY FRAMEWORK / ENVIRONMENT

Range of Land Use Alternatives Analyzed

Three scenarios were evaluated:

1. **Compact Urban Growth:** In this scenario, the region would develop at highest concentration practical with most growth occurring in metro cities. The type of development that occurs in this scenario is more compact and built at higher densities. Most of the rural areas outside of the UGBs stay much the same as they are today except for Goshen, Pleasant Hill and Alvadore – which become part of the metro UGB.

2. **Satellite Communities:** More of housing and employment share is distributed among small cities in this scenario. The small cities develop at lower densities than Eugene and Springfield. The communities closest to the metro area grow to have densities similar to small cities and are called "growth centers". These are Alvadore, Goshen and Pleasant Hill.

3. **Rural Communities:** In this scenario, growth is distributed throughout rural lands. Houses are built on one and two acre lots. The population of the rural area more than doubles in this scenario.

Public Outreach Component

The public involvement process was called *Design Your Future*. There were three parts in the process:

Phase 1: **Frame Strategy (Year 2000 – 2002)** This phase included:

- A regional tour
- Panel displays
- A booklet and survey distributed throughout the region in 2002
- Regional livability conference
- Website with materials and data
- Three focus groups; one with Springfield, Pleasant Hill and Jasper residents, a second with Junction City, Veneta and Elmira residents, and a third with Cottage Grove and Creswell residents.

About one percent of the total households in the Southern Willamette Valley were involved. The alternative growth scenarios were prepared and evaluated based on the public input gathered in this phase.

Phase II: Develop Alternatives (Year 2003 – 2005) During this phase the public provided input on the three alternative growth scenarios as well as the revised Regional Goals and Objectives. This phase included:

- An interactive workshop

- Outreach to groups
- A region-wide newsletter and survey (170,000 were inserted into papers)
- 14 community meetings (June – September 2005)

Phase III: Create Strategy (Year 2006) The Draft Regional Growth Management Strategy was prepared, evaluated, and available for review and comment in this phase. Public outreach included invitations to everyone that had participated in earlier phases to comment on the Draft Strategy.

Summary of Project Objectives Met

The project objective – adopting a regional planning strategy that had local consensus – was not met. There is an increased focus on individual plans in recent years by the individual jurisdictions. In fact, Eugene and Springfield are currently in the process of separating their UGB from the current configuration of one shared UGB. Individual jurisdictions are increasingly focused on individual plans. Since the comprehensive plan in 1984 there was been no strong regional vision to guide policy.

There are benefits to be cited as well; the process resulted in increased general awareness about these issues that were new to people in 1999. It does inform some local growth management strategies and local jurisdictions are able to use the tools introduced in the process. Additionally, the data compiled from Region 2050 process is used widely for water, natural resources etc data. For instance, the data were used by local jurisdictions to fill out necessary federal processes about wetlands and environmental impact statements.

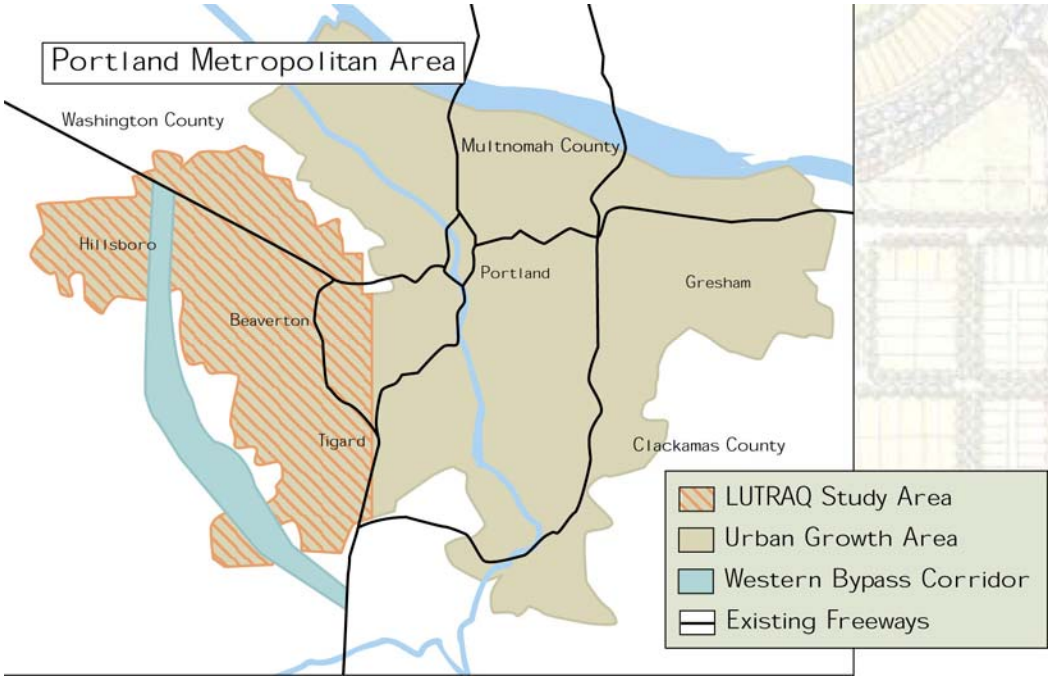
V. OBSERVATIONS

- It is necessary to have perceived benefit for participation; jurisdictions need incentives or enforcement to remain committed to a process like this. What jurisdictions were getting out of the plan was not tangible to anyone.
- If funding was connected to participation it may have kept jurisdictions involved that ultimately pulled out of the process.
- Ensure that the tools that draw jurisdictions into the process remain available. Regional Problem Solving (RPS) was no longer available after two jurisdictions pulled out of the process. Without that available others pulled out.
- The process resulted in sound technical work, presented in white papers prepared by each of the elements. These papers are helping jurisdictions with implementation today. But the process gave no weight to the technical work so its affect on the future is diminished.

- For the amount of work being done, the policy body was really thin. Need more than one representative from each agency.
- Participants got tired with the process and it was difficult to sustain. Ironically, more time was needed to reach a place of agreement on a regional strategy.
- Ten or twenty year constraints need to be taken off the table and it needs to be looked at for a 50 year horizon. Those short term constraints may not exist in the longer term.

5.0 LUTRAQ

The Land Use, Transportation and Air Quality Connection (LUTRAQ) grew out of a proposal by Washington County and the Oregon Department of Transportation to build a Western Bypass. What began as opposition to the bypass project by an active citizens group evolved into a comprehensive planning effort to analyze five alternatives to accommodate growth projections on the west side of Portland. The study was designed to meet all applicable Federal and State highway planning requirements. The LUTRAQ alternative included in ODOT's analysis was developed by 1000 Friends of Oregon. The project was initiated in 1988 and wrapped up in 1997. The findings of LUTRAQ informed the Metro 2040 Growth Concept and increased the attention paid to land use and transportation planning in Oregon.



I. MPO CHARACTERISTICS

LUTRAQ was an effort initiated by 1000 Friends of Oregon. The LUTRAQ alternative developed an alternative land use, transportation and demand management scenario for Washington County. The urbanized portion of

Washington County is included within the urban growth area managed by Metro, the Portland-area regional government.

The following demographic data, based on the study area of Washington County were used to craft all five alternatives in ODOT's Western Bypass Study, including the LUTRAQ alternative:

- **Population (1990):** 311,554 (Washington County);
- **Land area:** 68,317.3 acres within the UGB in Washington County (37,242 of which are incorporated);
- **Density (1990):** 723.8 persons per square mile (4934.4 people per square mile in incorporated area only);
- **Median household income (1990):** $35,554;
- **Persons under 18 years old (1990):** 27.9 percent;
- **Persons age 65 and over (1990):** 10.1 percent;
- **Daily vehicle miles traveled per capita (2007**): 20 (Portland, FHWA);
- **Daily transit boardings (1995):** 63,189 (American Public Transit Association).

Source: LUTRAQ Report Volume 2: Existing Conditions, US Census (1990)

II. SYNOPSIS OF THE LAND-USE TRANSPORTATION SCENARIO

Primary Reason(s) for the Project

In order to meet mobility needs in the fast-growing communities of Washington County, the Oregon Department of Transportation (ODOT) with its regional partners, including Metro, Washington County, and the cities of Hillsboro, Tualatin, Tigard and Beaverton, initiated a series of transportation studies to determine whether system improvements were warranted. In the late 1980s, a corridor was defined and four alternatives were advanced for consideration in a draft Environmental Impact Statement that was prepared by ODOT. The analyzed corridor stretched from a junction with U.S. 26 in the vicinity of Hillsboro, OR, in a southeasterly arc toward a junction with I-5 in the City of Tualatin, and the alternatives advanced were:

- No Build
- Four-lane limited access highway connection
- Transportation System Management strategies
- Arterial roadway connections with high-occupancy vehicle (HOV)

Several organizations, led by 1000 Friends of Oregon, began questioning the alternatives that had been forwarded in the EIS. These groups were concerned

that construction of the alternatives would worsen our air quality levels (i.e., the Portland region was still classified as a Non-Attainment area by the US EPA), and that they might run counter to the Statewide Planning Goals 3, 4, 11 and 14 on farmland and forest land protection, urban infrastructure, and urbanization. Further, there were active debates in the Portland region about whether the region should densify or expand outside its UGB, and there was growing interest and data about the effects of certain "Smart Growth" principles (often referred to as "neo-traditional planning" in the 1980s) and transit-oriented development which were being built in different parts of the country.

1000 Friends pressed ODOT to "replace the proposed bypass with an alternative that emphasizes transit improvements and complementary changes in land-use policy." (Making the Connections, 1000 Friends) In a bold step that created a new approach ODOT incorporated the alternative scenario developed by 1000 Friends in the Western Bypass Study. The LUTRAQ (Land Use, Transportation, Air Quality Connection) scenario had both a smaller roadway footprint and it reduced auto traffic congestion by focusing development in transit oriented developments. .

Schedule and Timeline of Implementation

- The Western Bypass was introduced in 1988 when Washington County and Metro included the Bypass corridor in their transportation plans.
- Eleven technical reports associated with the analysis of the LUTRAQ alternative were released between 1991 and 1997.
- In 1992 the LUTRAQ alternative was published.
- In 1996 ODOT recommended a preferred alternative, which included many of the LUTRAQ components with a larger number of roadway connections.
- Metro adopted this locally preferred alternative.

Since publication of the Western Bypass EIS, no major roadway improvements have been made in the corridor, but the Westside light rail transit project and the WES (Westside Express Service) commuter rail service were brought into service. In addition, a significant roadway improvement was constructed at the connection of I-5 and OR 217 (north of the Western Bypass alignment), and studies have advanced the concept of significant additional improvements to OR 217 to its northern terminus at US 26. Because many of the LUTRAQ land use and transportation concepts have been incorporated into local land use plans, the Regional Transportation Plans (including the 1994, 1998, 2002, 2004 and 2009 update which is underway) have not included a Western Bypass project

MPO, Other Agency and Consultant Hours and Costs

LUTRAQ:

- 1000 Friends spent $1 million in the creation of the alternative scenario
- Metro spent $40,000 to assist with transportation modeling

Western Bypass Study:

- ODOT provided a part-time project manager and one full time staff for the project
- ODOT hired a consultant team to conduct all analysis

Funding

LUTRAQ Funding Sources:

- Federal Highway Administration
- Environmental Protection Agency
- The Energy Foundation
- Metro provided $40,000 for purchasing the land use forecasting model

Western Bypass Study Funding Sources:

- ODOT

Transportation Modeling

A significant part of the project was the integration of location and land- use forecasting with transportation modeling. All of the LUTRAQ forecasting estimates were completed with Metro's transportation models. The project team worked with Metro to enhance the existing Portland travel forecasting system to better evaluate land use/transportation strategies and revise the four transportation models: (1) auto ownership, (2) destination choice, (3) pre-mode choice, (4) mode choice. A sub area model of the corridor area was constructed at a much finer grain than the regional model was capable of producing. These revisions to the model, which also included advanced work in development of a "pedestrian environmental factor", resulted in forecasts that were clearly sensitive to the mixed land uses in the LUTRAQ alternative. To account for land use, two models were integrated into the Metro transportation modeling process: EMPAL (Employment Allocation Model) and DRAM (Disaggregated Residential Allocation Model). LUTRAQ gave Metro an opportunity they were eager to take to further develop their land use modeling and it provided the funding for diverse and proactive modeling. Metro made important modeling advances in making their travel demand model more sensitive to transit-oriented development patterns, particularly with the Pedestrian Environmental Factor.

III. AUTHORITY

Legal Authority and Legislative Requirements of the Scenarios

The LUTRAQ alternative was approved for consideration in the EIS by the FHWA, ODOT, and Metro, and was presented throughout the EIS' public engagement process. Although, none of the five scenarios were adopted and given legal authority in their entirety, several critical components of the LUTRAQ alternative, and the methodologies utilized to analyze it, have been incorporated into the Portland region's land use and transportation planning

practice. For example, much of the work of LUTRAQ formed the foundation for the region's 2040 Growth Concept. Though the Western Bypass Draft Environmental Impact Statement was certified by FHWA, the corridor concepts in total have not been implemented because the project lost support.

Legal Authority of the MPOs

LUTRAQ differs from other scenario case studies in Oregon in that it was not part of an MPO planning process. Metro, the MPO, did come to agreement about developing and advancing the LUTRAQ alternative. Metro's involvement in the project included passing a resolution for ODOT to include LUTRAQ as one of the alternative scenarios studied within the NEPA process. Additionally, in April 1997, the Metro Council adopted the recommendation that had been developed by the Western Bypass Study to make limited improvements to area arterials and support the land use/transit components contained in the LUTRAQ alternative. That action also amended the Regional Transportation Plan to remove the Western Bypass corridor from the plan.

How did this Relate to the Regional Transportation Planning Process in Context of LRTP?

The RTP that followed the development of the LUTRAQ alternative was formed around a new foundation called the 2040 Growth Concept, which contained many of LUTRAQ's features, namely a set of regional centers that couple higher densities with enhanced urban design and transit services. The 2040 Growth Concept further tested land use scenarios and achieved credibility and regional support for how the region should not only develop, but how we should integrate land use and transportation planning. Metro was eager to work on the LUTRAQ scenario process to create a better model that they knew would help them with the 2040 planning process that was on the horizon at the time. This is a good example of a policy/analysis symbiosis.

The Oregon Transportation Planning Rule incorporates elements of LUTRAQ by requiring local and regional governments in the Portland area to promote compact, pedestrian, and transit-friendly development, reduce per capita vehicle miles traveled, and evaluate potential land use changes as part of their transportation planning process.

IV. POLICY FRAMEWORK / ENVIRONMENT

Range of Land Use Alternatives Analyzed

The five alternatives considered within the ODOT environmental impact statement for the Western Bypass are described below:

1. **No Build Alternative** - Every ODOT project required to go through the NEPA process must have a no build alternative. This alternative combined

the 1988 existing conditions and committed improvements based on secured funding. This scenario comprised the base transportation system for the year 2010. All of the elements of the No Build Alternative were included in all of the build alternatives.

2. **Bypass Alternative –** Included a new four-lane, limited-access expressway between Interstate 5 and Highway 26 from the Tualatin area in the south to the Hillsboro area in the north with interchanges outside the urban growth boundary. The Bypass Alternative includes all transportation improvements (roadway and transit) in the No Build and TSM Alternatives.

3. **Transportation System Management (TSM) Alternative –** This alternative included only improvements to the existing and committed system without construction of a new bypass. All transportation improvements included in the No Build Alternative are included in the TSM Alternative. Also included in the TSM Alternative are transportation projects and transit service improvements located within the study area that are in current planning by existing jurisdictions, Tri-Met and ODOT. The projects were likely to be implemented by the year 2010, but did not have secured funding.

4. **Arterial Expansion/High Occupancy Vehicle (HOV) Express Alternative –** This alternative would have completed or expanded certain elements of the existing north-south and circumferential roadway system. All transportation improvements (roadway and transit) included in the No Build and TSM Alternatives were included in the Arterial Expansion/HOV Express Alternative.

5. **LUTRAQ Alternative –** Transportation improvements included in the LUTRAQ Alternative included all transportation improvements in the No Build Alternative and a select set of improvements in the TSM Alternative, as well as extensive additions of feeder and express bus service, light rail transit, ramp metering, and improvements to pedestrian facilities. Most importantly, the LUTRAQ alternative looked at land-use and included shifts in the location of expected household and employment growth to transit-oriented developments located along new transit lines.

No single alternative was implemented. Rather, a selection of projects from the LUTRAQ alternative was implemented.

Public Outreach Component

ODOT conducted a public outreach process that included a citizen advisory committee, open houses, and public meetings. Additionally, there was also a policy advisory committee that was comprised of many of the policy makers around the region. The West Side bypass changed how ODOT did public involvement. At each public meeting and open house there were several staff around available to talk as well as a tape recorder in the corner to take testimony.

Designing the public process in this way gave people the opportunity to talk without having to speak at a large public hearing. The process was structured so that it wasn't contentious but instead provided opportunities to review issues at people's leisure. They were able to give thoughtful input on flipcharts located around the room for people to record thoughts and notes.

Summary of Project Objectives Met

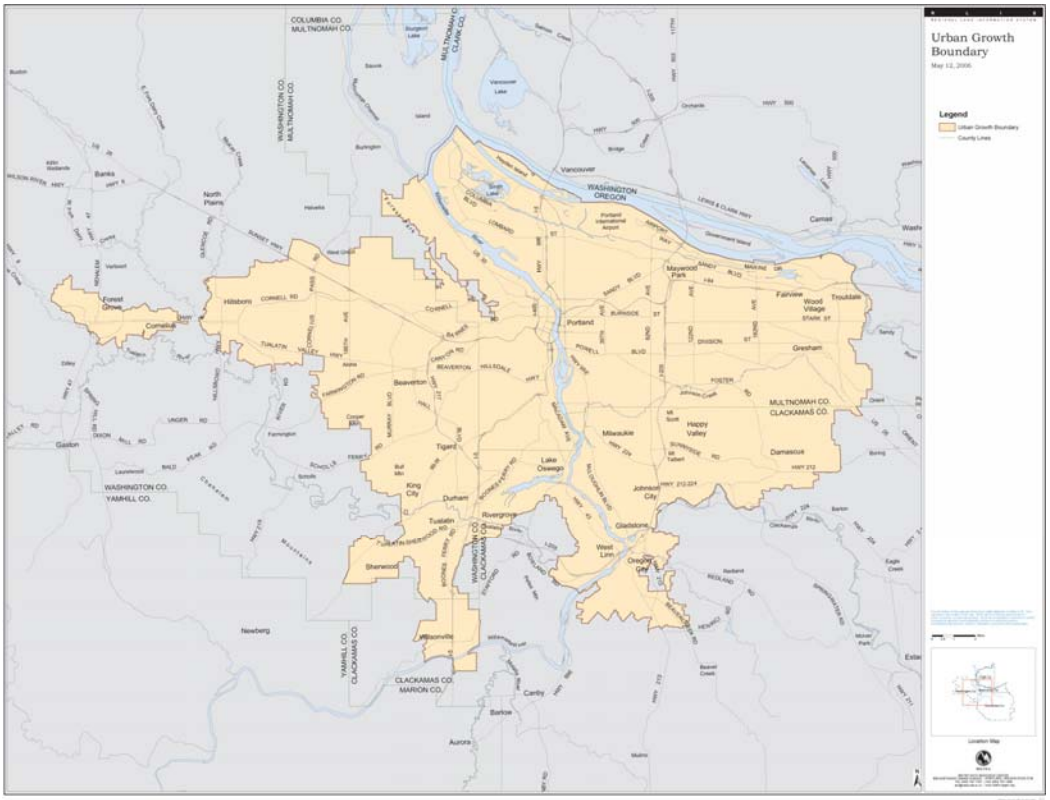
LUTRAQ provided a case study in identifying alternative land use patterns that rely less on the automobile while also developing transportation modeling procedures to forecast travel behavior associated with the land use patterns. LUTRAQ was the first time a land use alternative was looked at in an ODOT environmental impact statement or a NEPA environmental document for a proposed new highway. Understanding that hanges in land-use and other policies affect the transportation system was a new approach that grew out of LUTRAQ and was adopted as part of the region's vision for the future.

V. OBSERVATIONS

- The project was successful in analyzing the five alternatives that included different development patterns and evaluating a variety of metrics then based on transportation modeling.
- LUTRAQ studies also assisted in the planning and evaluation of Westside light rail.
- LUTRAQ modeling innovations led to the 2040 project, and were used and expanded by that process.
- LUTRAQ has encouraged the development of land-use transportation scenario analysis places throughout the country.

6.0 Metro 2040 Growth Concept

The 2040 Growth Concept is the Portland metropolitan region's 50-year strategy for managing growth. The 50 year planning period extends from 1990-2040. In the early 1990's growth on the fringe of urban growth boundary resembled typical auto oriented development seen in many cities in the United States. Modeling revealed that continuing such development trends would require the addition of 120,000 acres of land to absorb expected growth, a 50 percent increase. Metro decided to hold a public conversation about what the region valued and what conscious choices it wanted to make on where growth should go. The result was the successful adoption and implementation of the 2040 Growth Concept, a blueprint for the region's future growth and development, based on the participation of thousands of area residents.



I. MPO CHARACTERISTICS

An elected regional government, Metro serves more than 1.5 million residents in Clackamas, Multnomah and Washington counties and the 25 cities in the Portland region. The Metro Council includes a council president elected regionwide and six councilors elected by district. Metro also has an auditor who is elected regionwide.

Metro Regional Government is responsible for the regional aspects of transportation and land use planning; regional parks and greenspaces; solid waste management; operation of the Metro Washington Park Zoo, Convention Center, and technical services to local governments in the region. As such, Metro manages the Portland metropolitan region's urban growth boundary (UGB).

- **Population (1990):** 1.4 million people;
- **Land area (1990):** 234,000 acres within UGB (Source: Metro);
- **Density (1990):** 3,021 persons per sq. mile (Source: Demographia);
- **Median household income (1990):** $30,930;
- **Persons under 18 years old**: 26.36 percent;
- **Persons 65 years old and over:** 12.2 percent;
- **Daily vehicle miles traveled per capita (1990):** 18.8 miles;
- **Daily transit boardings:** 280,000.

Source: Concepts for Growth, Report to Metro Council, June 1994, Metro Regional Government, U.S. Census Bureau

II. SYNOPSIS OF LAND-USE TRANSPORTATION SCENARIO PLANNING

Primary Reason(s) for the Project

The primary reason of the project was to establish a growth management strategy and vision for the region's future with wide scale public support to implement the region's newly adopted "Urban Growth Goals and Objectives." Additionally, the state requirement to review the urban growth boundary spurred the need for public discussion regarding how much vacant land the region had, what to do with it, and how much the region would need in the future to accommodate the state mandated 20 years of forecasted housing and economic development. The LUTRAQ planning process provided further impetus to look at how land use and transportation planning could be conducted simultaneously as well how land uses could be rearranged to make efficient use of land within the boundary.

Schedule and Timeline for Implementation

- In 1991 Metro adopted the Regional Urban Growth Goals and Objectives as a guide for long-range planning process. The goals and objectives described what the region wanted to achieve, not just where the urban growth boundary should be, but what aspirations the region held for the future.

- November 1992 voters approved a home-rule charter making growth management Metro's priority and requiring a comprehensive set of regional policies on land use, transportation, water quality, natural areas, and other issues of "regional significance." The charter required adoption of the framework plan by the end of 1997.
- In 1992-1994 Metro pursued an initial public outreach effort, conducted technical analysis of base case conditions, developed a series of land use and transportation scenarios for evaluation, and in the spring-summer of 1994 engaged in an innovative and extensive public involvement effort.
- In 1995 a $135 million bond passed to acquire open space.
- In December 1995 there was unanimous adoption of 2040 by Metro Council.
- In November 1996, Metro approved the Urban Growth Management Functional Plan, a toolbox of planning policies for local governments to implement the 2040 Growth Concept.
- In 1997, Metro distributed a survey to engage people in finalizing the Regional Framework Plan.
- In December 1997 Metro Council adopted the Regional Framework Plan.
- In the summer of 2000, Metro updated the Regional Transportation Plan to incorporate the principles of the 2040 Growth Concept.

Transportation Modeling

Transportation modeling was conducted by Metro using the EMME/2 model with many specific alterations made to reflect local conditions. The modeling used GIS data and included descriptions of land use characteristics but occurred before the era of integrated transportation and land use modeling.

Each land use and transportation scenario was analyzed for their effects on land consumption, travel times, highway and transit volumes and distances, congestion, open spaces and air quality, and various urban landscapes.

MPO, Other Agency and Consultant Hours and Costs

- Metro Council authorized $280,000 in 1990 to the consultant team of ECONorthwest, Cogan Sharpe Cogan, Cambridge Systematics, CH2M Hill, Pacific Rim Resources, Decision Sciences, Walker Macy, Saluddin Khan and Ernie Munch for the completion of Phase 1.
- Metro paid approximately $1.5 million for a public outreach campaign effort that involved workshops, a household survey, published materials, media spots, and a video. This figure includes a Calthorpe Associates contract to conduct a community process in eight regional centers to develop a series of illustrative concepts of what growth could look like.
- Metro dedicated approximately 12 staff to the project including six individuals working full time for three years.

Funding

Metro 2040 was funded by Metro, ODOT, and Tri-Met, with some funding provided by dues paid to Metro by the cities and counties of the region. MPO planning funds provided through the Federal Highway Administration and Federal Transit Administration were supplemented by regionally allocated "Surface Transportation Program" funds made available for a variety of highway, transit and bike/pedestrian improvements. These were, in turn, matched by ODOT and TriMet.

III. AUTHORITY

Legal Authority and Legislative Requirements of the Scenarios

The Metro 2040 Growth Concept was codified in the adoption of the Regional Framework Plan and the Urban Growth Management Functional Plan in 1997.

- The Framework Plan, a requirement of Metro's charter, directs Metro's efforts to manage the impacts of growth through policies on land use, transportation, parks and greenspaces, water and air quality, natural hazards planning and management and implementation issues. The Framework Plan does not have statutory authority over local plans.
- The Urban Growth Management Functional Plan establishes specific requirements and tools for local governments to help the region meet the growth management goals established in the 2040 Growth Concept. The functional plan contains standards that local plans must meet by law. Local governments continue to work with Metro to revise their local plans and zoning laws.

Legal Authority of the MPO

Metro exhibits legal authority through the Urban Growth Management Functional Plan, which includes 13 titles that recommend and require changes to city and county comprehensive plans and implementing ordinances.

The functional plan states:

> *"The purpose of this functional plan is to implement regional goals and objectives adopted by the Metro Council as the Regional Urban Growth Goals and Objectives (RUGGO), including the Metro 2040 Growth Concept and the Regional Framework Plan. The comprehensive plan changes and related actions, including implementing regulations, required by this functional plan as a component of the Regional Framework Plan, shall be complied with by cities and counties as required by Section 5(e)(2) of the Metro Charter. Any city or county determination not to incorporate all required functional plan policies into comprehensive plans shall be subject to the conflict resolution and mediation processes included within the RUGGO, Goal I provisions, prior to the final adoption of inconsistent policies or actions."*

How did this Relate to the Regional Transportation Planning Process in Context of LRTP?

The Metro Regional Transportation Plan includes both a framework and functional plan to improve the region's transportation system during the next 20 years. The plan incorporates the goals of the 2040 Growth Concept in its specific strategies to improve the movement and mobility of all forms of travel including cars, buses, light rail, walking, bicycling and freight. It meets both the state requirements as defined in the LCDC Transportation Planning Rule and federal requirements for MPOs.

IV. POLICY FRAMEWORK / ENVIRONMENT

Range of Land Use Alternatives Analyzed

1. Base Case: Continuing Pattern—expansion of the UGB based on continuing the patterns of development seen from 1985-1990; 121,000 acres added to the UGB, three new highways: the Sunrise Corridor, the Mt. Hood Parkway, and the Western Bypass.
2. Concept A: Growing Out—significant expansion of UGB at urban edge, mostly housing; 51,000 acres added looked at expansion of only residential.
3. Concept B: Growing Up—no UGB expansion; use existing land of 234,000 acres to accommodate future growth.
4. Concept C: Neighboring Cities—shift approximately one-third of growth to next cities with moderate expansion of boundary to include 22,000 acres.
5. Recommended Alternative: The Metro 2040 Growth Concept—a hybrid scenario that included elements of all the scenarios. The recommended alternative focuses growth in centers and along major corridors with an increased emphasis on redevelopment within the urban growth boundary. The alternative will result in 15,000 to 19,000 acres being added to the UGB over 50 years.

Public Outreach Component

The extensive and innovative outreach effort included the following elements:

- Large-scale media exposure including television advertisements, local and community newspaper ads, and an educational video distributed free at Blockbuster to 4,000 customers.
- Interactive public events to solicit feedback including youth activities, open houses, dozens of workshops and forums; presentations throughout the

region to civic and community organizations. Metro also hosted an information comment line.

- Distribution of a series of surveys including a questionnaire on livability mailed to 500,000 households in the region with a return rate of 17,000; a survey on growth management strategies mailed to 70,000 households, available on line, and distributed around the region; and a survey to residents regarding the Regional Framework Plan.
- Dissemination of educational materials including maps and reports at coffee shops, libraries, bookstores, and other community places around the region, and a series of newsletters to a mailing list that grew to over 65,000 recipients. To gain attention and help people imagine the future Metro created 3-D maps and provided 3-D glasses to present regional growth issues.
- A six-month visioning process conducted by Calthorpe Associates at eight regional centers to gauge public support of development concepts and to learn what residents would like to see under each of the four scenarios. The community process resulted in a clear understanding of the type of redevelopment and infill each regional center would support.

Summary of Project Objectives Met

The original request for proposal (RFP) for phase 1 of Metro 2040 stated the following key objectives:

> *The work effort is intended to provide a better understanding of community attitudes and afford the public numerous and meaningful opportunities to express their preferences about transportation system and land use pattern futures to accommodate the growth of the region. This will be facilitated by the completion of a "base case" scenario, which will describe how the region would likely look given current plans and trends. In addition, a set of design/evaluation criteria and alternative concept maps depicting up to five future regional transportation/land use development alternatives would be completed. Each concept will articulate a unique policy choice and will provide a transportation system and land use pattern which are consistent and integrated with each other.*

Accordingly, the project successfully achieved all stated objectives and led to the adoption of policies in a timely manner that have shaped the eventual growth pattern of the Portland metropolitan region. In addition, the large scale public outreach effort defined the values and preferences of the public and informed a growth management program that is publicly endorsed and respected. The work with Calthorpe Associates in particular helped develop a collaborative and productive format for working with communities to envision and define the type of density, growth, redevelopment and investment that the community wants and will support. The illustrations that resulted from this process closely resemble the look and feel of these communities today.

V. OBSERVATIONS

Metro achieved a high level of success in engaging the public in a discussion about how to manage the regional urban growth boundary and how to balance the development of vacant land with the pursuit of redevelopment opportunities. The public involvement effort brought growth management issues and debates into the forefront of the consciousness of the community. Words like "UGB" and "infill" are now part of the general lexicon and residents attribute growth management policies with the high quality of life the region offers.

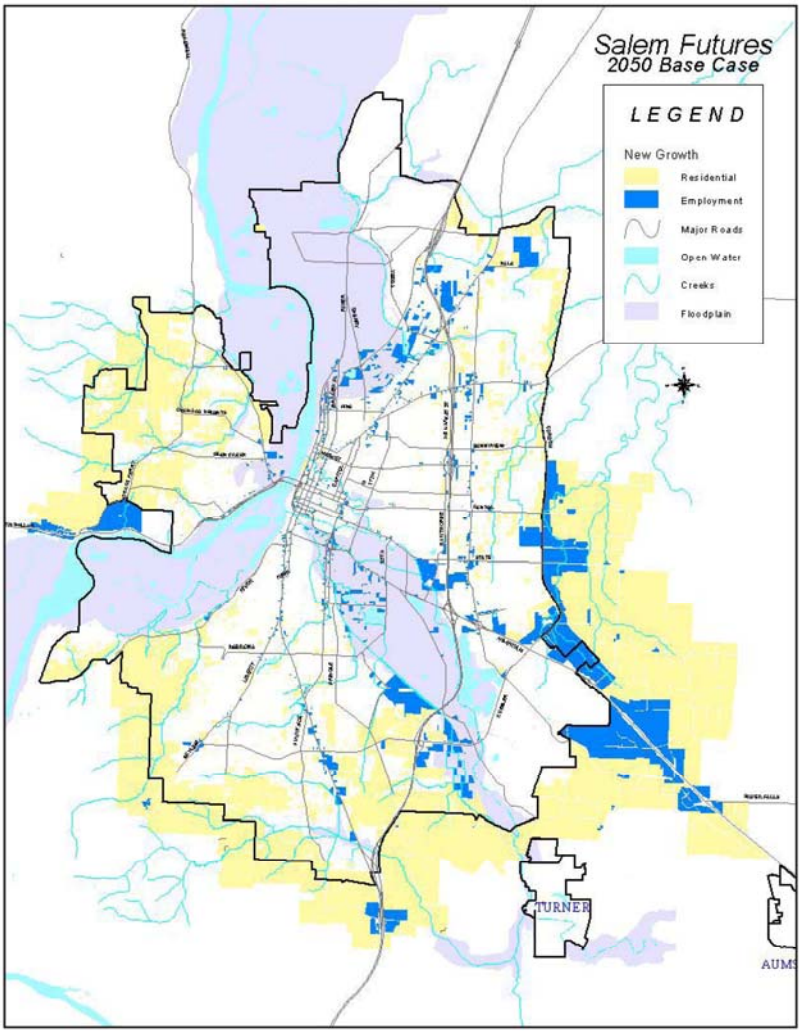
The 2040 Growth Concept formed a policy foundation that helped land become more efficient. The 2040 Growth Concept supported growth in a land use pattern that supports transit use. The Metro region now has the seventh highest per capita transit ridership in the country and declining VMT per capita while the national metropolitan trend continues to climb.

However, the level of growth anticipated and intended for regional centers and certain corridors has not met expectations and Metro is now pursuing new policies to encourage investment in these areas.

The successful implementation of the 2040 Growth Concept was directly aided by the need to comply with state land use law that requires a 20 year supply of land for employment and housing within the urban growth boundary. In addition, the home-rule charter of Metro allowed the regional government to effectively direct, fund, and mandate growth management policies. The regulatory authority of Metro is unique and allowed the planning effort to stay focused, on schedule for adoption, and capable of developing a toolkit for implementation.

7.0 Salem Futures

Salem Futures was a long-range planning effort to develop an integrated land use and transportation plan to guide future development in Salem. The project was conducted by the City of Salem with support from the Mid-Willamette Valley Council of Governments (MVCOG). The planning effort started in late 1998 and extended through 2002. The city staff selected a preferred alternative land use and transportation scenario and recommended its adoption. The preferred scenario never became the articulated vision for Salem's growth management strategy due to a failure to adopt the vision. Ultimately, Salem Futures resulted in the adoption of policies most like the base case scenario when the City of Salem updated its comprehensive plan in 2009.



I. MPO CHARACTERISTICS

Salem Futures was conducted by the City of Salem Community Development Department with participation and support from the Mid-Willamette Valley Council of Governments (MVCOG). MVCOG is a voluntary association of over 40 local governments including Marion, Polk, and Yamhill counties, 31 cities, 7 special districts, and the Confederated Tribes of Grand Ronde.

The City of Salem shares an urban growth boundary with the City of Keizer. Although Salem Futures was concerned with the future of Salem, they included the joint Salem-Keizer urban growth boundary as their study area.

- **Population (2000):** 136,694;
- **Land area (2000):** 68 square miles;
- **Density (2000):** 939.5;
- **Median household income (2000):** $38,881;
- **Persons under 18 years old (2000):** 27 percent;
- **Persons 65 years old and over (2000):** 12.52 percent;
- **Daily vehicle miles traveled per capita:** 12.4 miles (Salem, FHWA);
- **Daily transit boardings (1999):** 3,941 (American Public Transportation Association).

Source: Salem Futures Thinking About Tomorrow Today 2001 pamphlet, U.S. Census Bureau

II. SYNOPSIS OF LAND-USE TRANSPORTATION SCENARIO PLANNING

Primary Reason(s) for the Project

The primary reason of the project was to establish a growth management strategy for Salem based on a comprehensive planning process that engaged the community in a discussion about how to manage growth, guide future development, and maintain the city's quality of life over the next 50 years. Salem Futures represented the city's response to Statewide Planning Goal 12 on Transportation and the Transportation Planning Rule (OAR 660-12). Both strive to improve the livability of urban areas by promoting changes in land use patterns and the transportation system that make it more convenient for people to walk, bicycle, use transit, and drive less to meet their daily needs. As such, the city wanted to use Salem Futures to reduce car dependence and car oriented development patterns and vehicle miles traveled. The interest in reducing

vehicle miles traveled was not due to a concern for climate change but interest in improving community livability and reducing the amount of requisite time people spent in the car.

Schedule and Timeline for Implementation

The Salem Futures planning effort started in late 1998 and extended through 2002. The project included three phases: 1) a growth visioning process; 2) the creation of a series of alternative land use and transportation scenarios; and 3) implementation. The project selected a preferred alternative to guide future development and recommended its adoption by the Salem City Council. From 2002-2005, there was no consensus on the acceptance of the preferred alternative and it remained mired in a city periodic review process for several years.

Ultimately, the City of Salem submitted a demonstration of meeting the Transportation Planning Rule based on a dramatically different version of the preferred alternative as the basis for Salem's growth management strategy. The future vision submitted to the State Department of Land and Conservation (DLCD) resembled more closely the Salem Futures base case scenario with some small adjustments.

The City of Salem amended the Salem Area Comprehensive Plan in 2009 and met compliance with the periodic review order of DLCD. The comprehensive plan update process resulted in the adoption of an addendum map for reference and some minor language changes. The comprehensive plan update did not incorporate any of the alternatives examined in Salem Futures.

Transportation Modeling

During the neighborhood workshop process of phase two, the consultant team used a land use projection visualization tool, called I-PLACE3S, to conduct a real time evaluation of land use choices at neighborhood design charrette meetings. The consultant team used the PLACE3S model to generate immediate results on the impact of choices participants made when rearranging different conceptual land uses, such as mixed-use development or town homes, in each of the neighborhood study areas. At the end of the charrette, each table presented their conceptual neighborhood design based on the type of future development they wanted in their community. The input provided by the three neighborhood charrette meetings helped create the alternative land use and transportation scenarios that were evaluated in the transportation modeling process.

The transportation modeling was conducted by the Mid-Willamette Valley Council of Governments (MWVCOG) for the Salem-Keizer urban growth boundary study area using the EMME/2 model. The model generated results on the impacts of the different alternatives on transportation mobility, the environment, the economy, neighborhoods and the community.

MPO, Other Agency and Consultant Hours and Costs

- A joint program of ODOT and DLCD provided $500,000 in Transportation Growth Management (TGM) fund for phase two.

- The City of Salem hired McKeever Morris (a division of Parsons Brinckerhoff Quade and Douglas) as the lead consultant for phase two. McKeever Morris subcontracted Davis and Hibbits for $20,000 to conduct public involvement; Robert Foster Consultants for $5,000 to provide growth concept illustrations; ECO Northwest for $36,000 to provide cost analysis of the scenarios; Urban Design Collaborative for $42,000 to conduct design charrettes and develop illustrations; and Fregonese Calthorpe Associates for $96,000 to evaluate the base case scenario, conduct a land use analysis of the alternatives, develop graphics, and illustrate the preferred alternative scenario.
- The City of Salem dedicated 2.5 full time employees (FTE) to the project for one year. The City spent another three years with 1 FTE working through the attempt at implementation.
- During phase two, the McKeever Morris consultant team dedicated approximately five half-time employees for approximately one year. The subconsultants to the consultant team likely spent the equivalent of 2 FTE for one year on the project.

Funding

Salem Futures was funded, in part, through grants from:

- Oregon Transportation and Growth Management Program
- Portland General Electric
- NW Natural.

III. AUTHORITY

Legal Authority and Legislative Requirements of the Scenarios

The preferred alternative selected within the Salem Futures process was never implemented. Instead a different version of the scenario, most similar to the base case scenario, was adopted in the City of Salem Comprehensive Plan update in 2009.

Legal Authority of the MPO

The Mid-Willamette Valley Council of Governments (MVCOG) provided transportation modeling and analysis of the scenarios and participated in the process but had no legal authority in the implementation of the preferred alternative identified in Salem Futures.

How did this Relate to the Regional Transportation Planning Process in Context of LRTP?

The Salem-Keizer Area Transportation Study (SKATS) is the Metropolitan Planning Organization designated by the Governor to develop and implement a coordinated, comprehensive, and continuing planning process that addresses issues related to the transportation system of regional significance in the urban

area. When SKATS was updated in 2005 and again in 2009, the plan incorporated the City of Salem's existing comprehensive plan, ultimately implementing elements of the base case scenario.

IV. POLICY FRAMEWORK / ENVIRONMENT

Range of Land Use Alternatives Analyzed

1. **Base Case**—a projection of existing conditions that would result in an expansion of the Salem Urban Growth Boundary by 12,300 acres by 2050.
2. **Alternative 1A**— significant UGB expansion with growth in city centers and areas experiences historical growth.
3. **Alternative 1B**—less UGB expansion and a focus on growth in areas that could support new development.
4. **Preferred alternative**—the city developed a final scenario that was a hybrid of the others with a focus on growth in centers and corridors.

Public Outreach Component

The Salem Futures outreach process included the following components:

- The establishment of a large, diverse 35-member Citizen Advisory Committee.
- Selection of neighborhood study sites where workshops were hosted to solicit neighborhood input and develop concepts for the land use and transportation alternatives.
- The hosting of focus groups of randomly selected residents to examine how people felt about growth.
- Public surveys conducted by Davis Hibbits that asked participants their preferences on UGB expansion, opinions on current conditions, and their ideal travel time to reach critical services and resources.
- Presentations to neighborhood associations and civic organizations.
- A series of public hearings held by the Salem Planning Commission and the Salem City Council that included all-day works sessions.
- Numerous community-wide town hall meetings and the distribution of citywide newsletter providing updates on the process.

Summary of Project Objectives Met

The Salem Futures project objectives were to evaluate the base case, examine different land use and transportation alternatives, work with neighborhoods and the community to get their input, and develop a growth management vision for

the future. Ultimately, the project aimed to create a vision for how to manage growth in the future and implement that vision.

The project did evaluate the impact of projecting base case conditions into the future and developing a series of alternative growth, land use and transportation development scenarios for analysis and consideration. The project was successful in meeting with neighborhoods and providing the community with a discussion about the impacts of growth.

V. OBSERVATIONS

Salem Futures succeeded at engaging the Salem community in a planning process and bringing issues of growth management into the public spotlight. The project never implemented the preferred alternative. Despite the failure to adopt the preferred alternative, the city of Salem continues to experience a significant amount of infill and redevelopment. Although the base case called for a large expansion of the urban growth boundary, it has not moved since its inception. Currently the city is undergoing an economic opportunities analysis that may result in a recommendation to increase the UGB, however, existing policies in Salem seem to contribute toward new development and reinvestment within the central city area. This is due in part to the city's designation of an urban service area where the city has identified an area within town that has the infrastructure needed to support infill. Development proposals within the urban service area receive permits readily, while proposals outside this area must pay for additional infrastructure improvements as determined by the City before receiving permits. This powerful tool has been in place for 30 years.

Appendix

Maps of MPO areas, maps/illustration of scenario planning area.