

SHARED INVESTMENT STRATEGY RECOMMENDATION

Making investments in the Southwest corridor

The Southwest Corridor Plan is an outcomes-oriented effort focused on supporting community-based development and placemaking that targets, coordinates and leverages public investments to make efficient use of public and private resources. The plan was developed to support achieving four balanced goals:

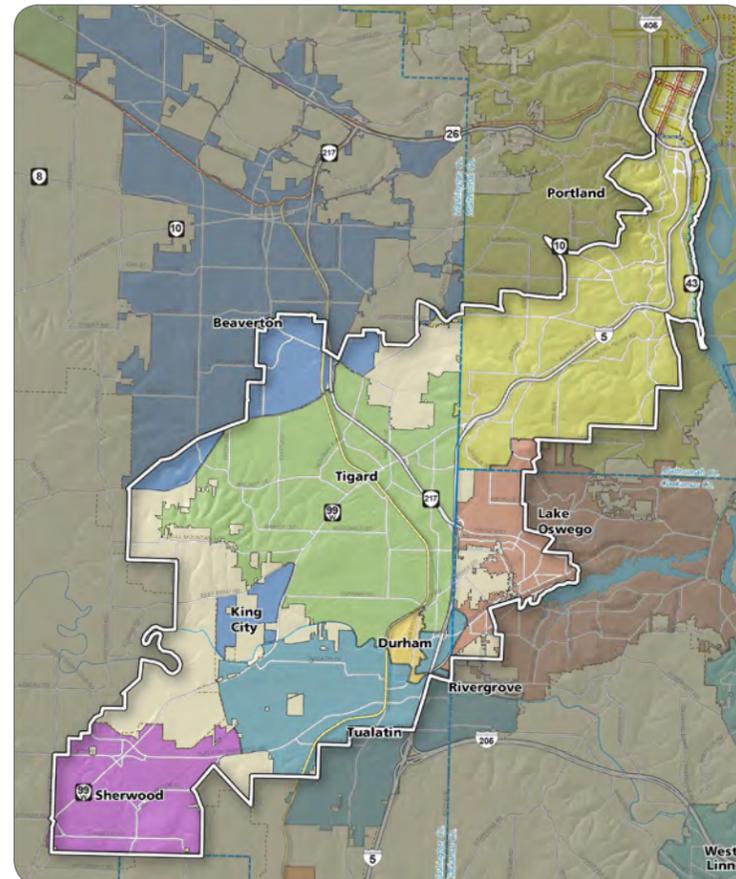
Accountability and partnership

Partners manage resources responsibly, foster collaborative investments, implement strategies effectively and fairly, and reflect community support.

Prosperity People can live, work, play and learn in thriving and economically vibrant communities where everyday needs are easily met.

Health People live in an environment that supports the health of the community and ecosystems.

Access and mobility People have a safe, efficient and reliable transportation network that enhances economic vitality and quality of life.



Steering committee members

- Metro Councilor Craig Dirksen, co-chair
- Metro Councilor Bob Stacey, co-chair
- Tigard Mayor John Cook
- Beaverton Mayor Denny Doyle
- Portland Mayor Charlie Hales
- Lake Oswego Councilor Skip O'Neill
- TriMet general manager Neil McFarlane
- Sherwood Mayor Bill Middleton
- Tualatin Mayor Lou Ogden
- Washington County Commissioner Roy Rogers
- Durham Mayor Gery Schirado
- Multnomah County Commissioner Loretta Smith
- ODOT Region 1 manager Jason Tell
- King City Commissioner Suzan Turley

As people and employers seek to locate in the Southwest corridor, worsening traffic congestion will impact economic development and livability in the area. In light of this and local redevelopment and revitalization goals, the Southwest corridor was selected by regional leaders as the next priority area to study for a potential set of investments, including high capacity transit, to address accessibility and enhance the great places envisioned by communities in the corridor. In combination with other investments to support transportation choices (driving, biking, walking and transit), a new bus rapid transit or light rail line would provide better access to jobs in the corridor and encourage development in key places while protecting the character of single-family neighborhoods.

In July 2013, the Southwest Corridor Plan Steering Committee gave direction on three main questions to further narrow the options for a potential high capacity transit investment to serve the corridor land use vision. These questions include: 1) modes (bus rapid transit and/or light rail) for further study, 2) percentage of bus rapid transit in a dedicated transitway, and 3) the destination of a potential high capacity transit investment. In the year following this recommendation, a refinement phase will give more information and help the project partners define a possible project for analysis under the National Environmental Policy Act (NEPA) and explore implementation strategies for other elements of the Southwest Corridor Plan and Shared Investment Strategy.

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Vision and context

The work has been guided by a steering committee that includes representatives from Southwest corridor cities, counties and agencies.

Six major planning efforts are coordinated with this effort:

- Portland Barbur Concept Plan
- Sherwood Town Center Plan
- Tigard High Capacity Transit Land Use Plan
- Linking Tualatin
- Southwest Corridor Transit Alternatives Analysis
- Southwest Corridor Transportation Plan, focused on supporting transit and land use.



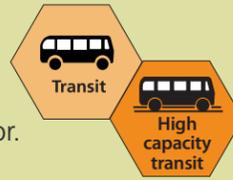
The project partners have defined a set of potential investments that support land use, transportation, and community-building goals in the corridor – a shared investment strategy – to implement the shared Southwest corridor vision. The policies and projects are aimed at supporting development that is consistent with the local communities' aspirations for key places in the corridor.



Summary of the Southwest Corridor Shared Investment Strategy recommendation, July 22, 2013

Recommendation: Invest in transit (page 6)

Transit is a key element to help communities in the Southwest corridor achieve their development visions. This recommendation gives direction on both local bus service improvements and future high capacity transit (light rail or bus rapid transit) in the corridor.



Local service

To improve local bus service, this recommendation directs TriMet to develop and implement the Southwest Service Enhancement Plan to:

- ensure key corridor locations are connected by efficient and reliable local service – to one another, to the Westside Express Service (WES) and to a potential new high capacity transit line
- make on-the-ground improvements to the transit system
- identify how cities and counties can create better access to transit (both to local service and to a potential bus rapid transit or light rail line).

High capacity transit

An investment in high capacity transit in the corridor would help achieve the local visions for development, revitalizing and encouraging private investment in future station areas. It would also create the ability to move people efficiently, which is especially important in a corridor where:

- it is difficult to build or expand roads due to hills, natural resources, established businesses and existing neighborhoods that would make new roads expensive and disruptive
- significant growth in jobs and population is anticipated.

To better understand the options for high capacity transit in the corridor, the Southwest Corridor Plan Steering Committee directs staff to study in more detail:

- two potential modes: light rail and bus rapid transit
- for the bus rapid transit, between 50 to 100 percent of the alignment in exclusive right of way
- a line that connects Portland to downtown Tualatin, via Tigard.

Recommendation: Invest in roadways and active transportation (page 8)

Potential projects were gathered from the Regional Transportation Plan and other regional plans, transportation system plans and other local plans, and suggestions from the public. This list was narrowed from more than 500 projects to a list of 81 priority projects. See *Attachment A* for the list of priority projects.



The 81 projects are recommended because they either:

- leverage and support the potential high capacity transit line, including:
 - walking and biking projects within one-quarter mile of potential station areas
 - trails within one mile of potential station areas
- highly support the community land use vision, including projects that:
 - leverage future development in places local communities have defined as “essential” or “priority”
 - are important to meet freight and capacity needs in employment and industrial districts
 - improve pedestrian connectivity, provide safe crossings or create high-demand bike connections.

The projects identified as highly supportive of high capacity transit will be included in further study of the high capacity transit project. Those projects that support the land use vision will move forward as the local jurisdictions develop and fund them, either individually or in collaboration with other project partners.

Recommendation: Invest in parks, trails and nature (page 9)

Parks, greenspaces, trails and natural areas are consistently cited as some of the Southwest corridor’s most important and attractive features. To strengthen “green” elements, support community visions and leverage future transportation investments, the steering committee recommends that project partners work collaboratively and seize opportunities to implement projects included on the list contained in *Attachment A* as corridor development plans move forward.



Recommendation: Consider new regulations and policies, and develop incentives to promote private investment consistent with community vision (page 10)

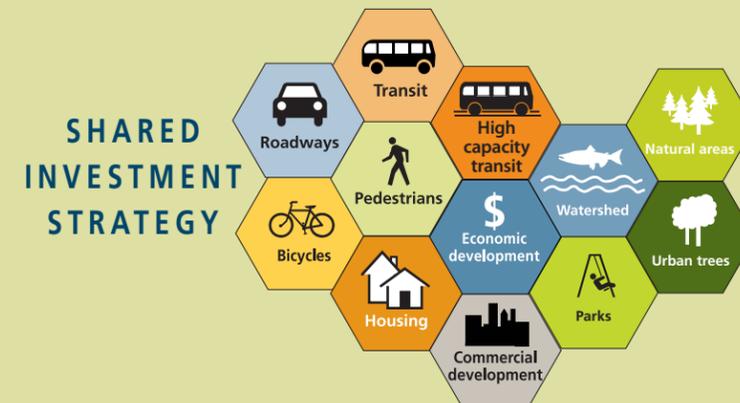
The public sector can help set the stage for development consistent with community goals through regulations, policies and development incentives that encourage private investment. *Attachment B* contains a variety of proposed policies and incentive programs for communities to consider as they advance Southwest Corridor Plan projects and community development goals.



In the next phase of the Southwest Corridor Plan, project partners will explore specific tools to advance the corridor land use vision and enable the region to compete nationally for scarce federal dollars to help fund a possible high capacity transit investment. Additionally, partners will collaboratively work to develop a coordinated set of multimodal performance measures reflecting state, regional and local goals.

Recommendation: Develop a collaborative funding strategy for the Southwest Corridor Plan

Project partners should work together to develop a funding strategy that includes local, regional, state and federal sources. This could include innovative financing tools and non-transportation funding for parks and natural areas.



The Southwest Corridor Land Use Vision – a community vision for places throughout the corridor

Each city in the Southwest corridor began this collaborative effort by looking at its downtown, main streets, corridors and employment areas to define a vision for these places that reflects their unique characteristics and local aspirations. The area contains a wealth of opportunities for jobs and stable neighborhoods and is expected to grow significantly in the future. The corridor includes important regional retail and employment destinations as well as many major trails and one of the nation’s few urban national wildlife refuges.

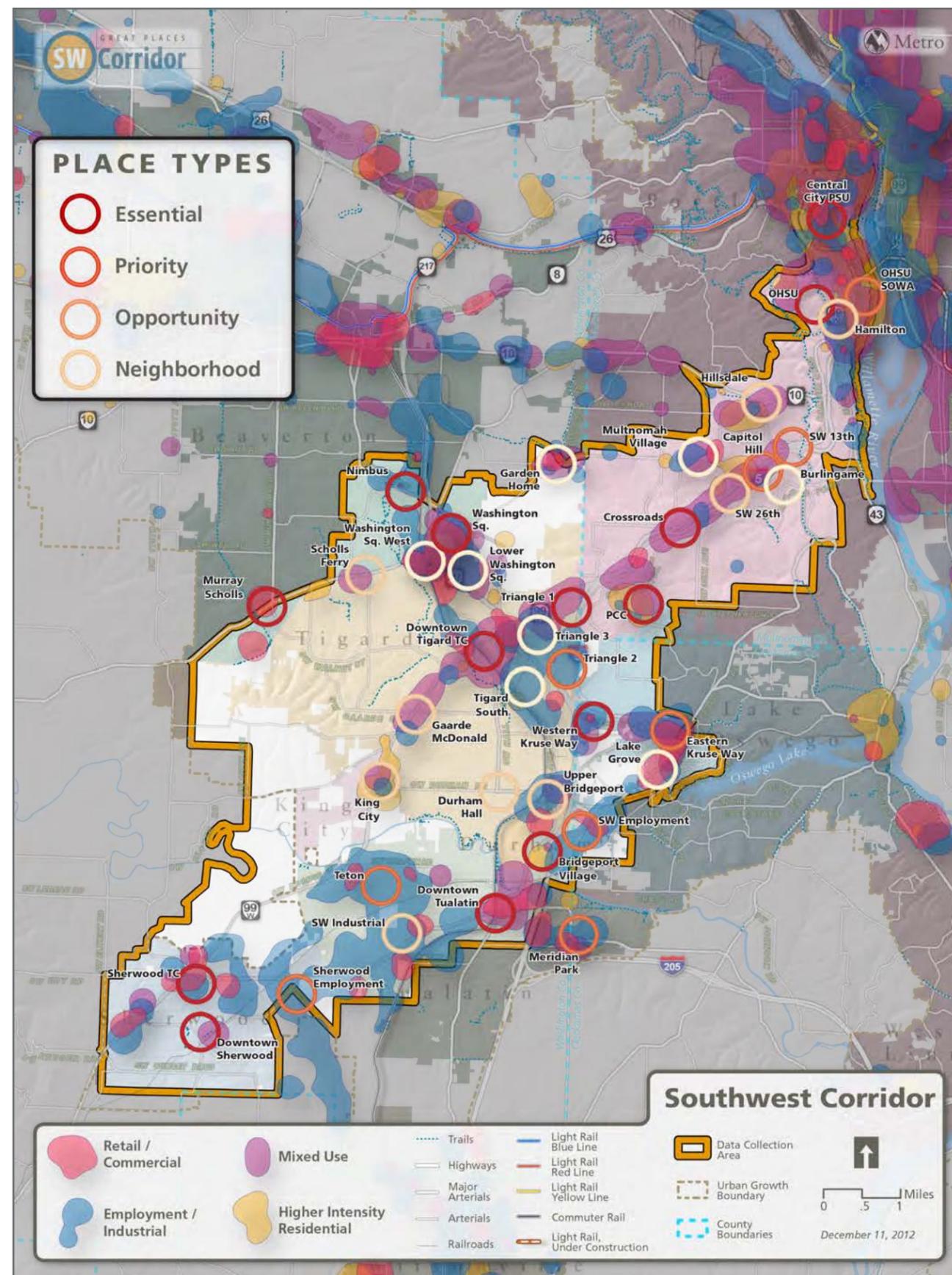
	Households	Jobs
2010	78,800	187,900
2035	111,900	259,200

The Southwest Corridor Land Use Vision compiles local land use plans and puts them into a common language, creating a foundation for the many projects (ranging from transportation to parks) to be categorized and prioritized based on how well they support the shared corridor land use vision.

The corridor vision emphasizes maintaining and enhancing the many stable single-family neighborhoods, while allowing for growth in certain places that creates more services for existing residents as well as more housing, employment and transportation choices in the future. The areas of change are described in four categories:

- **Retail/commercial** The corridor is a destination for retail with prominent shopping destinations in Washington Square and Bridgeport Village. These retail destinations will continue to generate substantial demand and will need accommodation through enhanced transit, active transportation and roadway investments.
- **Employment/industrial** The Southwest corridor includes a regional employment district with significant current employment and anticipated growth as new jobs move into the Tigard Triangle and the industrial areas of Tualatin and Sherwood.
- **Mixed use** The corridor includes opportunities for areas with a mix of housing, employment and services in a walkable environment. Good access to transit with high quality pedestrian and bike facilities are critical elements for these mixed use areas to help leverage infill and redevelopment.
- **Higher intensity residential** Infill and redevelopment is likely to be the primary generator for new development in the corridor. The majority of new residential development that does occur will be found in the mixed-use areas, and these areas will need to integrate natural features into development to ensure a high quality of life and connections to nature.

To develop the land use vision, each city identified key places and categorized them based on the importance of a high capacity transit investment to connect them (see map at right). These key places were used to draw the draft high capacity transit alternatives, thus ensuring that the transportation solution supports the community’s vision for growth. The prioritized key places also help focus investments for other types of transportation as well as parks and natural resources.



Public involvement for Phase I

September 2011 to February 2012: What should be the focus of the plan?

The first public engagement stage aimed to determine the scope, evaluation framework and goals of the overall plan. In that process, project partners focused on announcing the integrated planning effort, informing the public about the background and elements of the plan, and asking residents what they value about their communities. Residents and business people were asked about challenges and opportunities in the corridor and their visions for the future of the area. The information and ideas offered informed decision-makers as they determined the scope and goals of the plan.

During the public comment period of Sept. 28 through Oct. 28, 2011, respondents posted their thoughts on boards at an open house and community events and submitted 98 public comments via the online questionnaire, mail and email.

February to August 2012: How should the wide range of potential projects be narrowed?

The second public engagement stage aimed to demonstrate and validate the screening process of narrowing the wide range of ideas to a narrowed list of potential projects.

From June 22 through July 31, 2012, project partners hosted an online, virtual open house. Participants viewed video feeds that explained the purpose and process of the overall plan. Participants were then directed to a related questionnaire that asked whether the sources of projects for the corridor were considered comprehensive and if the process for narrowing that list to move forward reflected the values of the communities in the corridor. The questionnaire received 543 responses.

An existing conditions summary, an executive summary and technical reports were produced during this time. Outlining the unique physical, economic and demographic elements of the corridor, the reports identified existing challenges and potential opportunities in economic development, housing choices, natural areas, trails and health for the corridor.

August to December 2012: How should investments be prioritized?

The third public engagement stage aimed to set the framework for shared investment strategies based on potential projects that were identified in the previous stage.

From Nov. 14, 2012 to Jan. 1, 2013, project partners hosted the online interactive Shape Southwest game and associated questionnaire. A paper version of the questionnaire was distributed in English, Spanish and Vietnamese to libraries and agencies serving environmental justice communities to engage residents without computer access. Community planning forums were convened on Oct. 9 and Dec. 3, 2012. During this time, project staff hosted booths at community events and briefed community groups, specifically to engage environmental justice communities. Additionally, community group briefings were held by project partner staff focusing on the local land use plans but also highlighting the Southwest Corridor Plan.

Public engagement at this stage of the plan focused on discussions of the benefits and tradeoffs of different types of investments, beginning with the premise that we cannot afford everything. Benefits and tradeoffs were framed by the Southwest Corridor Plan goals of health, access and mobility, and prosperity in the Southwest corridor.

During the public comment period, 2,098 people visited the project website to learn about the Southwest Corridor Plan, 695 submissions to Shape Southwest were made, 471 electronic questionnaires were submitted, and 20 paper-version questionnaires were received. Two Spanish-language questionnaires and no Vietnamese-language questionnaires were received.

January to July 2013: Are these the right things to move forward?

During this stage of public involvement, project staff provided briefings to community groups and municipal committees and sponsored public events to gather feedback to inform decision-making. Events included an open house hosted by SW Neighborhoods, Inc. on April 25, participation in the Tigard Town Hall on April 30, an economic summit on May 21 and a community planning forum on May 23 to gather feedback on potential projects and the draft high capacity transit alternatives. This opportunity for input was replicated through an online questionnaire that was open between May 23 and June 26. The public reviewed the Southwest Corridor Plan staff draft recommendation and gave feedback in an additional online questionnaire from June 11 to 26. The draft recommendation was also the focus of the final community planning forum on June 26.

Together, the questionnaires received 2,669 responses.

What are people saying about the transit alternatives and staff draft recommendation?

- There is strong support for high capacity transit in the Southwest corridor.
- Citing the need for better local transit service and more transit connections, coupled with the anticipated growth in the corridor, many people prioritize extending high capacity transit to the furthest extent possible, with Sherwood as the destination.
- While the individual responses are mixed, taken as a whole there is support for carrying forward both bus rapid transit and light rail transit for further study in the next phase of the plan.
- People overwhelmingly support studying a bus rapid transit that runs mostly or exclusively in a dedicated transitway.
- There is overall support for the other elements of the recommendation that call for:
 - enhanced local transit service
 - transit related roadway, biking and walking projects
 - roadway, biking and walking projects related to local aspirations
 - parks and natural resources projects
 - development strategy that stimulates private investment.
- The three highest priorities for Southwest Corridor Plan outcomes were:
 1. better transit (quicker trips, more local service and easier walk to a MAX or bus rapid transit station)
 2. access and mobility (more and better sidewalks and bikeways, reduced time in traffic or at lights)
 3. feasibility (cost, funding potential and support).
- Environmental justice organizations' representatives prioritized the plan outcomes differently than the majority of the public who provided input; their three highest priorities were:
 1. equity (fair distribution of benefits and burdens)
 2. healthy communities (access to parks, trails, and natural areas, more walking and biking opportunities)
 3. a tie between prosperity (more jobs, development, housing) and access and mobility (more and better sidewalks and bikeways, reduced time in traffic or at lights).

Getting to the plan

To create the Southwest Corridor Plan, representatives of cities and counties throughout corridor looked to local land use plans and policies to identify areas where the community wanted to focus new development. Four plans in particular helped identify the local vision in key areas of the corridor: Portland’s Barbur Concept Plan, Tigard’s High Capacity Transit Land Use Plan, the Linking Tualatin plan and Sherwood’s Town Center Plan. Building on these local visions, the project partners worked together to identify a potential high capacity transit alternative that could catalyze the corridor land use vision, and developed and narrowed a list of roadway, bicycle and pedestrian improvements that would support high capacity transit and make it work better for the corridor. This work led to the recommendations in this Southwest Corridor Shared Investment Strategy. The strategy will help guide funding collaboration and coordinated implementation of opportunities throughout the Southwest corridor.

Barbur Concept Plan Creating a long-term vision for the six-mile Barbur Boulevard corridor from downtown Portland to the Tigard city limit, the Barbur Concept Plan recommends key transportation investments, stormwater solutions and changes to city policy and zoning.

Tigard High Capacity Transit Land Use Plan In this plan, Tigard developed land use concepts for vibrant station area communities and neighborhood centers that could support transit investments in a way that fits Tigard, helping to decide what growth will look like and where it should be located.

Linking Tualatin With this work, Tualatin investigated locally preferred station areas and development typologies as well as policy, investment and code changes necessary to support high capacity transit and local transit service.

Sherwood Town Center Plan Sherwood redefined the boundaries of the town center to support activity and development in both the old town area and the Six Corners commercial center.



Southwest Corridor Plan Phase I milestones

September 2011



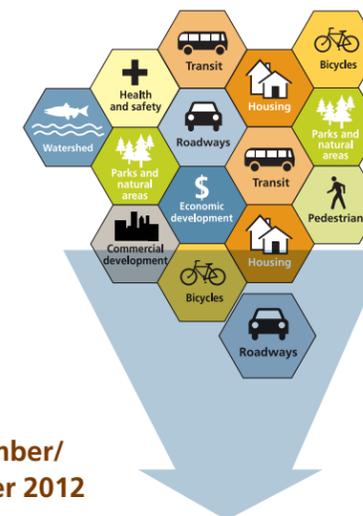
1 Identify policy framework and existing conditions



- Opportunities and challenges
- Goals and objectives
- Evaluation criteria

July 2012

2 Develop wide range of alternatives



September/October 2012

3 Narrow range of alternatives

January 2013

4 Define bundles to test transit, roadway and active transportation project performance

Example A

Example B

Example C

Example D



Spring/summer 2013

5 Develop shared investment strategy

6 Identify commitments and implementation strategy



Integrating public investments to support great places

The Southwest Corridor Plan aims to use limited public resources wisely by targeting them in identified “key places” to support the local land use vision. It also sets the stage to look at how investments in transportation projects, parks and habitat improvements can be made together. This allows for efficiencies in planning and the ability to achieve multiple goals in targeted areas. The Southwest Corridor Plan goals direct partners to collaborate, target resources and search for opportunities to leverage dollars.

Collaborate

The project partners agree to work together to implement common prioritized projects that support the corridor land use vision. The private sector can bring investment in buildings, retail businesses, and jobs that help make great places. Nonprofit partners and other public agencies play an essential role in ensuring that the Southwest corridor continues to equitably and sustainably provide opportunities for a diverse range of people and maintains the connection to nature so important to current and future residents. In future phases, project partners should identify best practices and proven implementation strategies to help private, public and non-profit agencies work together to make the Southwest corridor vision a reality.

Target resources

Focusing on the Southwest Corridor Land Use Vision has enabled project partners to limit the number of projects included in the shared investment strategy. A smaller prioritized list makes it easier to work together to fund and implement a set of common priorities.

By working together and listening to the public, the project partners narrowed a wide ranging list of roadway and active transportation projects from almost \$4 billion worth of projects to about \$500 million for a 15-year time frame. The list includes projects that would be highly supportive of a future high capacity transit investment, and a strategic list of roadway and active transportation projects that support the land use vision in the corridor.

In future phases, project partners should identify best practices and proven implementation strategies to help private, public and non-profit agencies work together to make the Southwest corridor vision a reality.



The Southwest Corridor Plan also includes the region’s first coordinated list of parks, trails and natural resource projects for implementation in tandem with transportation projects to support the community vision. The project partners created a list of nearly 450 projects gathered from local parks master plans, habitat improvement lists, and other sources. This was narrowed to the smaller list of parks, trails and natural resource projects included in the shared investment strategy. The list serves as a strategic resource to help project partners identify projects that leverage the benefits of – and funding for – transportation projects in the shared investment strategy.

Leverage

Great places are defined by a mix of elements that come together in one location to meet a range of community needs. Investing in a road improvement might not create a great place by itself – but combining it with a trail, a culvert replacement and bus stop improvements could help that public investment catalyze the market and attract private investment to build the community vision.

As a shared strategy, the narrowed lists of projects contained in this recommendation can serve as a tool for agencies when making future investment decisions. Continued communication is critical, both within agencies and with other community stakeholders.

Great places are defined by a variety of elements that come together in one location to meet a range of community needs.



Recommendation: Shared investment strategy

The Southwest Corridor Plan and Shared Investment Strategy includes a strategic project list for transit, roadway, active transportation and parks and natural resources as well as ideas for policy change and development strategies. The Southwest Corridor Plan evaluation, project partner priorities and public input provided the foundation for the Southwest Corridor Shared Investment Strategy.

It is understood that many Southwest corridor communities have transportation and other needs outside the boundaries of this plan, and will likely consider significant investments in other corridors during the time frame covered by the Southwest Corridor Plan. The Southwest Corridor Shared Investment Strategy is not intended to be a comprehensive listing of all priority projects in the area. Rather, it is a list of projects and policies that best meet the land use goals and objectives approved by the Southwest Corridor Plan Steering Committee in this early phase of the project. As project partners consider development and transportation needs in a variety of locations and corridors in their communities, the shared investment strategy defines actions that are critical to supporting the Southwest Corridor Land Use Vision.

Investments in the public realm

Public actions can influence development in three main ways: by regulations and policies, by investments in the public realm, and by development incentives that catalyze private investment. The Southwest Corridor Plan and Shared Investment Strategy address all three of these areas.

Moving from current conditions to community visions



Community vision Goals



Current development

Opportunities for public influence on community development

Investments in the public realm

- High capacity transit
- Roadway expansions and improvements
- Bike and pedestrian facilities improvements
- Parks, trails and natural resources improvements

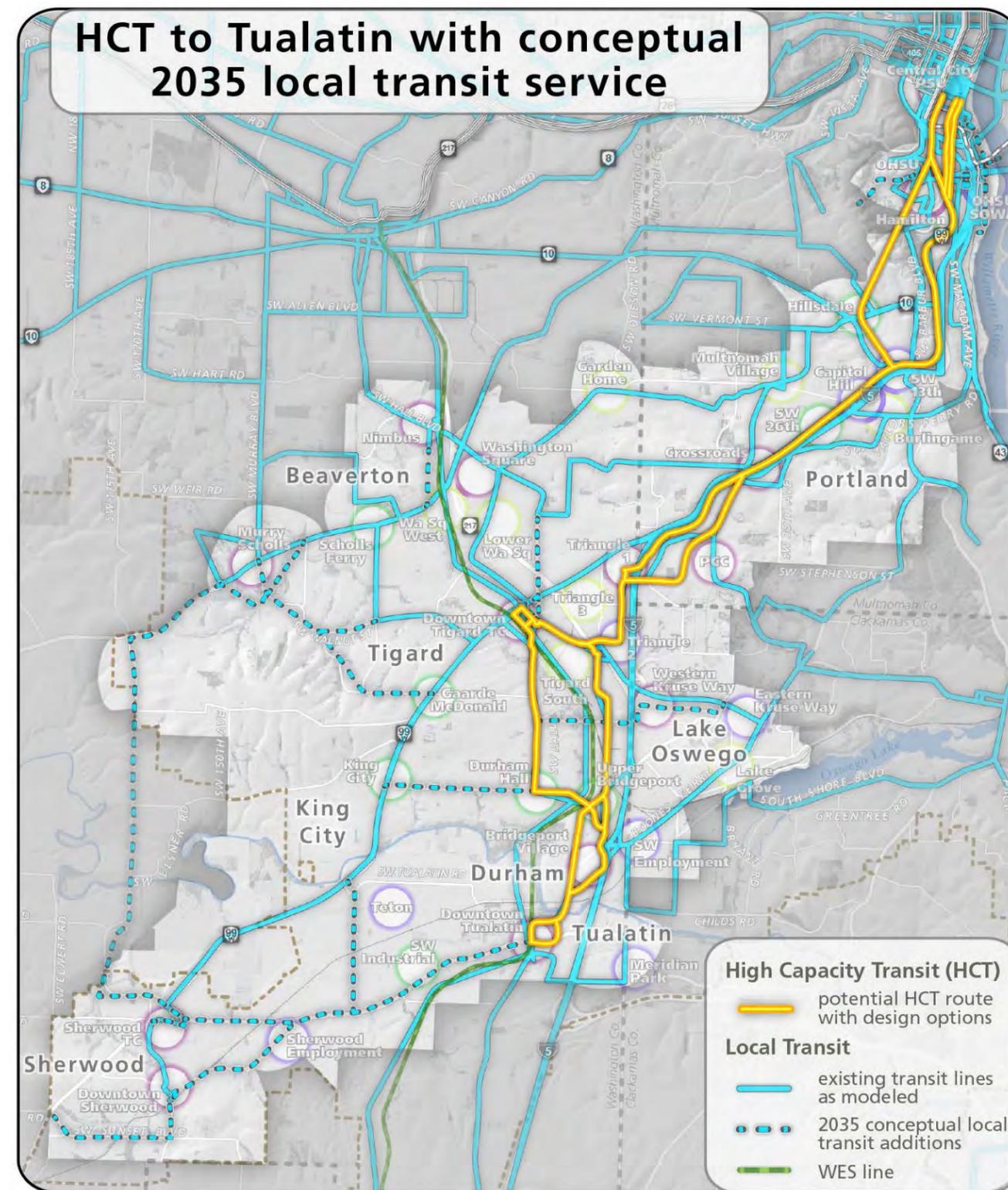


Regulations and policies

- Zoning changes
- Development requirements
- Policy coordination

Financial incentives that catalyze private investment

- Public development grants such as through Metro's Transit-Oriented Development Program
- Local tax incentives



Note: Potential local transit service additions are conceptual only at this point. TriMet will work with local jurisdictions to determine service needs and will match service increases to available funding. Service enhancements could include both route and frequency.

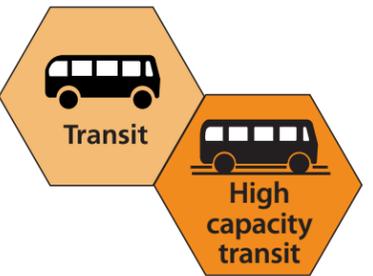
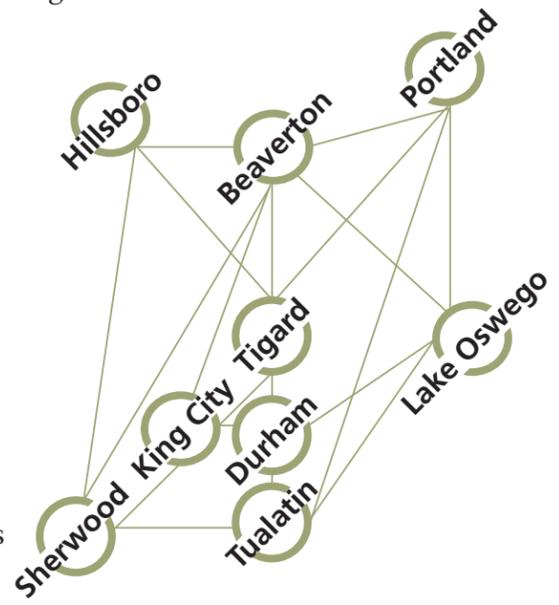
Transit recommendation

Local service/Southwest corridor service enhancement

Local transit connections will be essential to achieving the land use vision in the Southwest corridor, as well as to the success of a potential high capacity transit investment. In 2013-2014, TriMet will work with Southwest corridor jurisdictions and stakeholders to develop the Southwest Service Enhancement Plan.

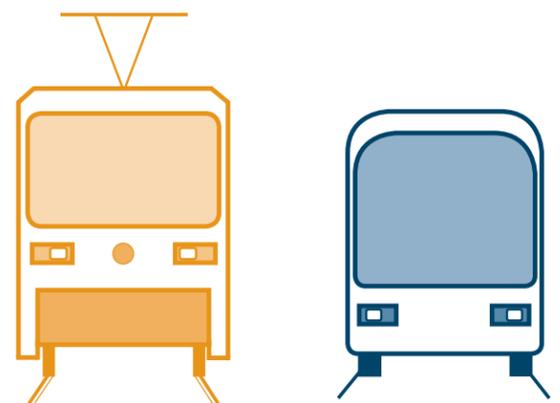
Southwest Service Enhancement Plan This recommendation directs TriMet to implement the Southwest Service Enhancement Plan to provide the following:

- transit service that connects key Southwest corridor locations quickly and reliably to one another and to a potential high capacity transit line
 - Locations include but are not limited to: Beaverton, Washington Square, Lake Oswego, King City, Durham, Tualatin industrial areas, and downtown Sherwood.
 - Service includes improved local transit circulation from the Southwest corridor throughout Washington County, including connections to northern Washington County.
- improved local transit connections to Westside Express Service
- capital improvements necessary to achieve higher transit system functioning, such as queue jumps and/or re-orientation of existing transit lines to better connect key corridor areas and a future high capacity transit system
- identification of improvements cities and counties can make for better transit access (e.g., sidewalks and safe pedestrian crossings).



High capacity transit

Mode Both light rail and bus rapid transit are recommended as modes for further study based on (1) the high ridership potential of both modes and (2) the need for additional design in order to produce more accurate capital cost estimates that clarify tradeoffs among cost, operating efficiency and ability to support the Southwest Corridor Land Use Vision.

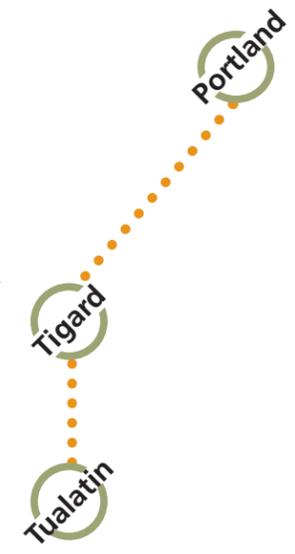


Quality of bus rapid transit As bus rapid transit is studied as a potential high capacity transit mode, it is recommended that between 50 and 100 percent of the route runs in exclusive right of way. Federal Transit Administration (FTA) New Starts funding is only available for bus rapid transit projects with 50 percent or more of the project in dedicated transitway, and experience around the U.S. and internationally suggests that bus rapid transit with a higher level of exclusive transitway would best support the Southwest Corridor Land Use Vision. The Institute for Transportation & Development Policy has developed a bus rapid transit certification system that rates project performance. As bus rapid transit advances for further study, it is recommended that project partners aim for a project that meets Institute for Transportation & Development Policy certification standards.

Destination The recommended destination for further study for a high capacity transit investment is Tualatin, via Tigard. This recommendation is based on ridership potential, operational efficiency, and plans for increased housing and employment in Tigard and Tualatin.

Note: A high capacity transit alignment will not be on Interstate 5 or Highway 99W southwest of the I-5/99W intersection.

Funding The steering committee recommends that project partners work together to develop a funding strategy for the Southwest Corridor Plan that includes local, regional, state and



Bus rapid transit: Exclusive transitway or mixed traffic?

Bus rapid transit is a highly flexible and versatile transit mode. This means it can be difficult to define, and bus rapid transit projects are often under pressure to cut costs by reducing how much of the line runs in dedicated right of way.

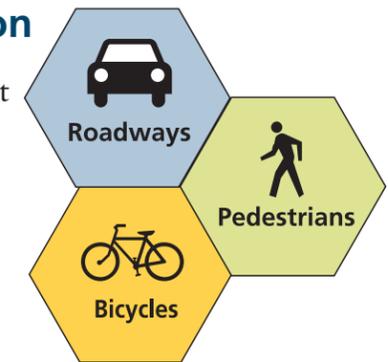
A bus rapid transit project that runs in mixed traffic is less expensive to construct – it is also more expensive to operate, is slower and offers less certainty about arrival and departure times. Bus rapid transit in mixed traffic can be an improvement over local buses without transit priority treatments, but it cannot attract as many riders as bus rapid transit in exclusive lanes.

The BRT Standard by the Institute for Transportation & Development Policy is one way of rating the value of an individual bus rapid transit project. Using such a rating system creates an inherent pressure to make a high-performing project, and creates a healthy tension against the tendency to lower cost, but lower benefit, solutions. The standard is very high – there are only 12 gold standard projects in the world, none of which is in the United States.



For more information on the BRT Standard by the Institute for Transportation & Development Policy, visit www.itdp.org/microsites/the-brt-standard-2013/.

federal sources. Capital funding for construction of major transit projects comes from a variety of sources, including competitive grants and federal, state and regional funds. Transit operations (both bus and high capacity transit) are funded by passenger fares and a regional payroll tax. Any high capacity transit project would likely seek competitive federal funding through the FTA which has contributed more than half the total funding for MAX projects to date. Even with a federal grant, high capacity transit will require a corridor-wide funding strategy that secures and leverages new resources. An FTA grant would most likely require a 50 percent match which could include local, regional, state and other non-FTA federal funds.



Roadway and active transportation recommendation

Over the past 18 months the project partners worked to narrow a large list of roadway and active transportation projects to a smaller list of projects that are most supportive of the high capacity transit recommendation and the Southwest Corridor Land Use Vision. Project partners narrowed from close to \$4 billion worth of projects to around \$500 million. This agreed-upon narrowed list of projects sets the stage for the project partners to cooperatively identify and leverage funding from a variety of sources. This will be critical, in light of the severe constraints on available transportation funding. Even the narrowed list of roadway and active transportation projects is more than five times greater than the projected \$60 million in state and regional funds anticipated to be available in the corridor over the next 15 years.

Projects on the narrowed list fall into one of two categories:

1. Projects to be studied further in the Southwest Corridor Plan refinement phase

This includes roadway and active transportation projects that could be highly supportive for the success of a high capacity transit investment. However, even if a high capacity transit investment advances, not all of these projects can be included in a future funding package. Which projects advance along with a potential high capacity transit investment will be a future decision based on judgments by project partners during refinement in an effort to best match Federal Transit Administration funding requirements. Those projects that are not included in a high capacity transit funding package will still be available to the partners for further project development, including the pursuit of other funding opportunities.

2. Narrowed list of projects that have been identified as highly supportive of the Southwest Corridor Land Use Vision

These projects include roadway and active transportation projects that are available for further project development by project sponsors. Each project has been identified as highly supportive of a particular land use type in the corridor: commercial, freight/employment, mixed use, or higher intensity residential. Projects were selected based on geographic factors, project characteristics, stakeholder input and/or evaluation results.

These lists are not intended to identify all projects that are important to communities in the Southwest corridor. Instead, they represent a set of projects that are highly supportive of corridor land use and high capacity transit goals based on the narrowing approach intended to target and leverage limited public dollars. The lists will inform local capital improvement plans and transportation system plan development, TriMet's Transit Investment Priorities, and the next update of the Regional Transportation Plan. Projects on local and regional transportation investment plans that are not included in the shared investment strategy will remain on those local and regional plans unless the jurisdiction chooses to remove them.

Attachment A includes maps, the project lists and narrowing criteria.

Steering committee decisions: High capacity transit

With this recommendation, the steering committee will have narrowed the potential high capacity transit alternatives/concepts from 10 to two.

Future decisions will include determining the alignment, lane treatments, specific funding strategies, mode, station locations and local transit connections to the potential high capacity transit line.

October 2012	July 2013	mid-2014	early 2017
Narrow from 10 alternatives concepts to five	<ul style="list-style-type: none"> Direction on Southwest (Transit) Service Enhancement Plan Policy direction on "level" of bus rapid transit for further study Which modes to carry forward for further study Destination 	<p><i>Refinement</i></p> <ul style="list-style-type: none"> Alignments <ul style="list-style-type: none"> Naito or Barbur? Surface or tunnel? Direct connection to PCC? Hall or 72nd? Add a lane or convert a lane? Potential station locations Funding strategies 	<p><i>Draft Environmental Impact Statement</i></p> <ul style="list-style-type: none"> Mode Station locations Transit system connections

Earlier decisions

The October 2012 narrowing decision removed several options from further consideration: 1) streetcar as a mode, 2) high capacity transit connection between Tigard and Sherwood on Highway 99W, and 3) the idea of adding or converting an Interstate 5 lane for high occupancy transit use. It also tabled consideration of WES improvements for another time and process.

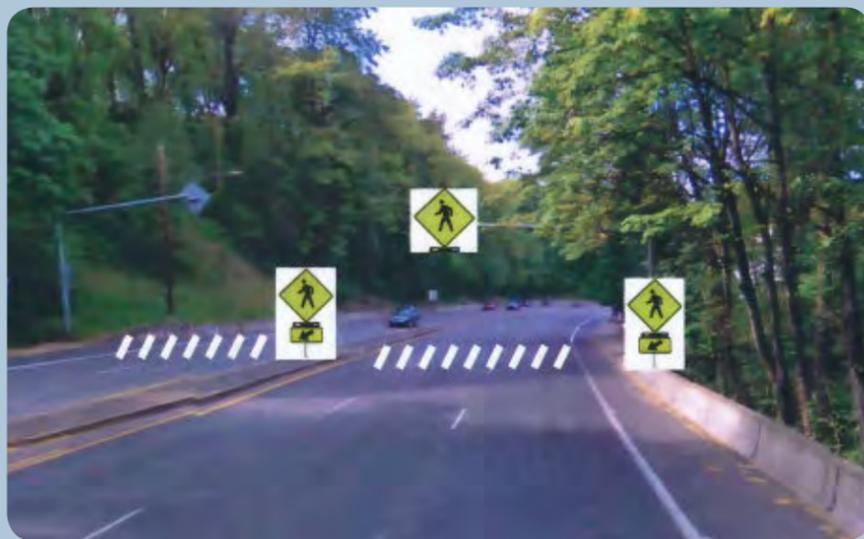
The steering committee looked at potential impacts to auto and freight movement as well as local community land use goals to guide its narrowing decision. For instance, all high capacity transit options were routed away from Highway 99W southwest of the Interstate 5/Highway 99W intersection to avoid impacts to auto and freight movement as well as to commercial activities. Equally important is the need to provide transit connections to potential station communities in Tigard and Tualatin, specifically the Tigard Triangle, downtown Tigard and downtown Tualatin.

Early project implementation

In locations throughout the corridor, project partners are already making investments that support the Southwest Corridor Plan Land Use Vision, both independently and in collaboration with other corridor partners. For example, in Sherwood, the Cedar Creek trail is funded and proceeding toward construction. In Portland, Multnomah Boulevard from Barbur to Southwest 45th Avenue is being reconstructed to urban standards, including curbs and sidewalks. When complete, it will improve bicycle and pedestrian safety and connect the potential Capitol Hill/Barbur Boulevard high capacity transit station with nearby Multnomah Village. In addition, ODOT and TriMet have identified a series of low-cost improvements that can be implemented quickly and are supported by the local jurisdictions and the public. These include projects on Barbur Boulevard/Highway 99W that improve access to transit, fill pedestrian gaps or fill bicycle gaps, such as:

- Southwest Barbur at Southwest Bertha Boulevard bike lane markings
- Southwest Barbur at Southwest 13th Avenue crossing improvements
- Southwest Barbur at Southwest Alice Street crossing improvements
- Barbur Transit Center access improvements
- OR 99W at Bull Mountain Road sidewalk/bus stop improvements
- OR 99W at Durham Road illumination improvements
- OR 99W at Hazelbrook Road sidewalk/bus stop improvements.

These projects are expected to be completed in the next two to three years.



Example of a proposed crosswalk warning light project on Southwest Barbur Boulevard. ODOT, March 2011.

Parks, trails and nature recommendation

People consistently point to the parks, trails, natural areas and urban tree canopy as essential elements of what draws them to live, work and play in the Southwest corridor. Gathering information from local plans, project partners compiled a list of nearly 450 “green” projects in the corridor including parks, trails and natural areas as well as water quality improvements and natural resource enhancements like improved wildlife habitat corridors and replacing or retrofitting culverts for fish passage. The projects on the list were screened based on how they would support the Southwest Corridor Land Use Vision, a potential high capacity transit investment, and important water resource and regional trail connections.



1. Work together to secure funding for and implementation of the highest priority parks, trail and natural area projects for people and places

As the high capacity transit alternative is refined, partners should continue to sort and prioritize this green project list, examine likely funding sources and develop a collective strategy for grant writing and strategic use of existing or new funds. The project list and related maps can be used to coordinate across jurisdictional boundaries and select park and trail projects that support transit and new land uses. Additionally, green street designs that incorporate tree planting, vegetated storm water facilities and other low impact development approaches are recommended, softening the landscape for residents and visitors to the area and increasing people’s access to nature.

2. Support habitat and water quality projects that deliver the greatest return on investment

Project partners should identify the highest value natural resource investments and work together to fund and implement those projects. This project list and approach offers an opportunity to focus on large projects that can achieve measurable ecological and financial benefits. Wherever possible, partners should work to avoid negative impacts to the highest quality areas while also enhancing those areas where water quality, wildlife habitat and recreation benefits are greatest.

Project implementation could be organized into broad strategies that include: stream and wetland enhancement, outfall and water quality facility retrofits, culvert replacements to improve fish passage and reduce risks to infrastructure, preservation of high quality fish and wildlife habitat, and enhancement of important but degraded habitats. Private land owners can also be involved through outreach and education efforts that improve stream function and water and habitat quality throughout the watersheds.

Attachment A includes maps, the narrowed list of projects and the parks and natural areas narrowing criteria.

Why the split between “trails” and “active transportation” projects?

People bike and walk on trails for recreation as well as a way to get to specific destinations, so trails are part of the overall active transportation network. For residents, there is no real division between the on-road bike lane or paved sidewalk portion of their route and the off-road trail portion of their route

Behind the scenes, there are differences that determine the best way to implement these “on-road” versus “off-road” active transportation improvements. Specific city, county or state requirements determine how bike or pedestrian facilities must be built or marked when they interact with auto traffic, while trail construction and maintenance through a park or natural area have different standards. Additionally, different potential funding sources may be pursued for trails than for on-road bike and pedestrian facilities.

This recommendation focuses on avenues for implementation, so it lists on-road bike and pedestrian improvements and selected off-road trails as active transportation and places all regional, local and community trails with parks and other nature improvements.

Achieving desired development: Regulatory environment and financial incentives

The public sector plays a key role in realizing a community's land use vision. Often, the development forms desired by communities are limited by the regulatory environment or not financially feasible. Two important tools can help the public sector set the stage for development consistent with community goals. Those tools are 1) changing the regulatory framework and 2) providing financial incentives. Together, these actions can catalyze market value and stimulate private investment.



Regulatory environment The regulatory framework is the area in which the public sector has the most control over development outcomes. This includes zoning codes and policies that relate to land development. Public sector policy changes can help local land use visions become a reality by making them the easiest thing to do. Southwest Corridor Plan partners should work together to create a regulatory framework that is predictable and efficient. This creates certainty in the private market and helps the community get high quality development in desired locations.

Financial incentives The public sector can also help catalyze development through the strategic application of financial incentives that support new development forms that may be “ahead of the market.” In particular, development forms that are mixed use or multi-story are often more risky and expensive. Through creative financing strategies and tools, the public sector can help offset these risks and higher costs, helping to build value in the market and, eventually, enabling private investments to be made without public support.

Illustrative project examples

As part of the Southwest Corridor Plan, Metro staff looked at several case studies, or project examples, throughout the corridor. These examples were specifically chosen to highlight redevelopment opportunities that could be catalyzed by a combination of public sector investments and policy changes to leverage that investment.

Case study: Tigard Triangle

The Tigard Triangle is identified as an essential place for the Southwest Corridor Plan. It is envisioned as a pedestrian-friendly area with a mix of uses and an increased residential presence. The case study project is located near the potential high capacity transit line.

Analysis of development readiness in the Tigard Triangle highlighted issues with the current regulatory framework and identified the need for key public investments to spur the market to support development forms consistent with the local land use vision. This project example found that the following actions could remove barriers and improve the financial feasibility of development consistent with the Southwest Corridor Land Use Vision.

- Ease parking minimums to enable top-quality office and retail development currently constrained by parking minimums. Strategies to address this include:
 - Parking reductions that are phased in over time, including reduced minimums for retail, office and housing. This could help achieve transit-supportive densities and increase leasable square footage.
 - As development begins to take place and there is an increase in transit access, a parking management strategy (combined with phased parking reductions) could provide significant benefits. (For example, shared parking between office and retail uses.)
- Use layered landscaping to maximize leasable square-footage, reduce operating costs, and increase habitat value in an urbanizing area.
- Make investments that increase transit access (such as connections to the Tigard Transit Center, increasing higher level of connectivity within the Triangle and enhancing walkability). This will help increase the area's attractiveness and value, directly impacting achievable rents and the project's potential return on investment.
- Consider land banking developable parcels, since land values are relatively low in the Tigard Triangle today, and public partners could aggregate land for more efficient development with a higher impact.

Case study: Capitol Hill (Portland)

In Portland, one project example is located in the Capitol Hill area. Envisioned as a transit-oriented residential neighborhood with a mix of supporting uses, the case study project is located along the potential high capacity transit line.

Analysis of development readiness in this portion of the corridor in Southwest Portland highlighted issues with the current commercial zoning and identified a catalytic investment opportunity that could leverage development to match the land use vision. The following actions could help remove barriers and improve the financial feasibility of development consistent with the Southwest Corridor Land Use Vision.

- Provide public sector support for new development forms. Strategies to address this include:
 - Public ownership of the land enables the value to be written down, which could provide a multi-million dollar savings to the developer.
 - Utilizing the Transit-Oriented Tax Exemption could provide a significant financial incentive to developers while resulting in additional community benefits such as workforce affordable housing units.
 - Investments that enhance pedestrian and bike facilities and provide access to local amenities help increase the area's attractiveness and value, raising achievable rents and the project's potential return on investment.
- Focus development codes on context appropriate design and transitions with existing uses:
 - Smaller building mass and stepbacks better fit the character of the neighborhood and intensity of nearby uses, while enabling improved connectivity in the street network.
 - Surface parking at low ratios does not occupy a majority of the site, supporting this design alternative and reducing construction costs significantly.
- Focus retail uses in nodes along the corridor and provide plenty of opportunities for employment and residential uses around and between these commercial nodes.

Transit orientation and development readiness

There is growing demand for more compact urban development centered around transit, and this desire is expressed repeatedly in the land use visions of Southwest corridor communities. Research has shown that a few key measures can predict the readiness of an area to support walkable, mixed-use development. In turn, this type of development increases transit ridership and reduces vehicle miles traveled. Metro's transit-oriented development strategic plan (Metro, 2011) identifies a transit orientation measure as a composite of the following physical/demographic characteristics:

People The number of residents and workers in an area has a direct correlation with reduced auto trips.

Places Areas with commercial urban amenities such as restaurants, grocers and specialty retail not only allow residents to complete daily activities without getting in a car, but they also improve the likelihood of higher density development by increased residential land value.

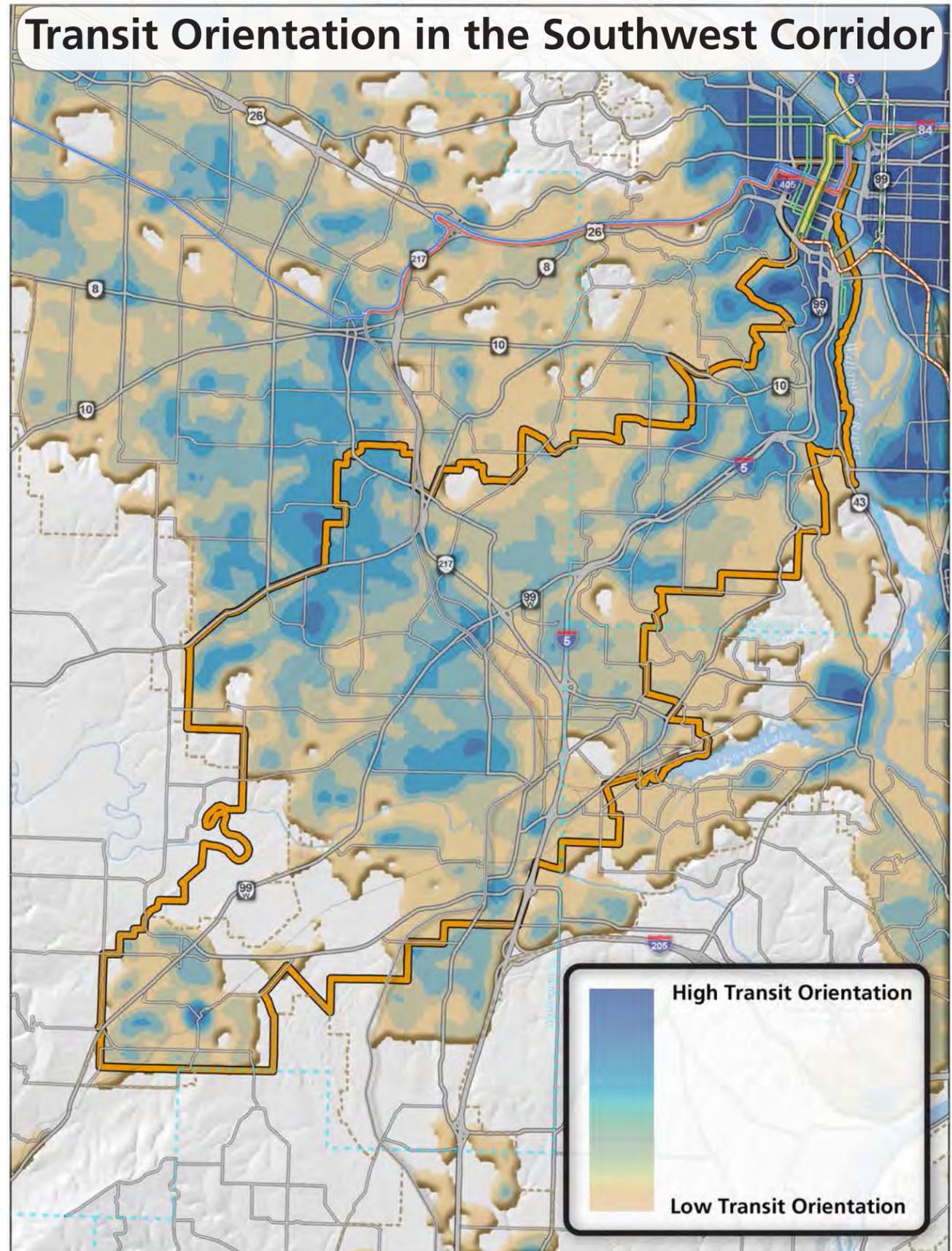
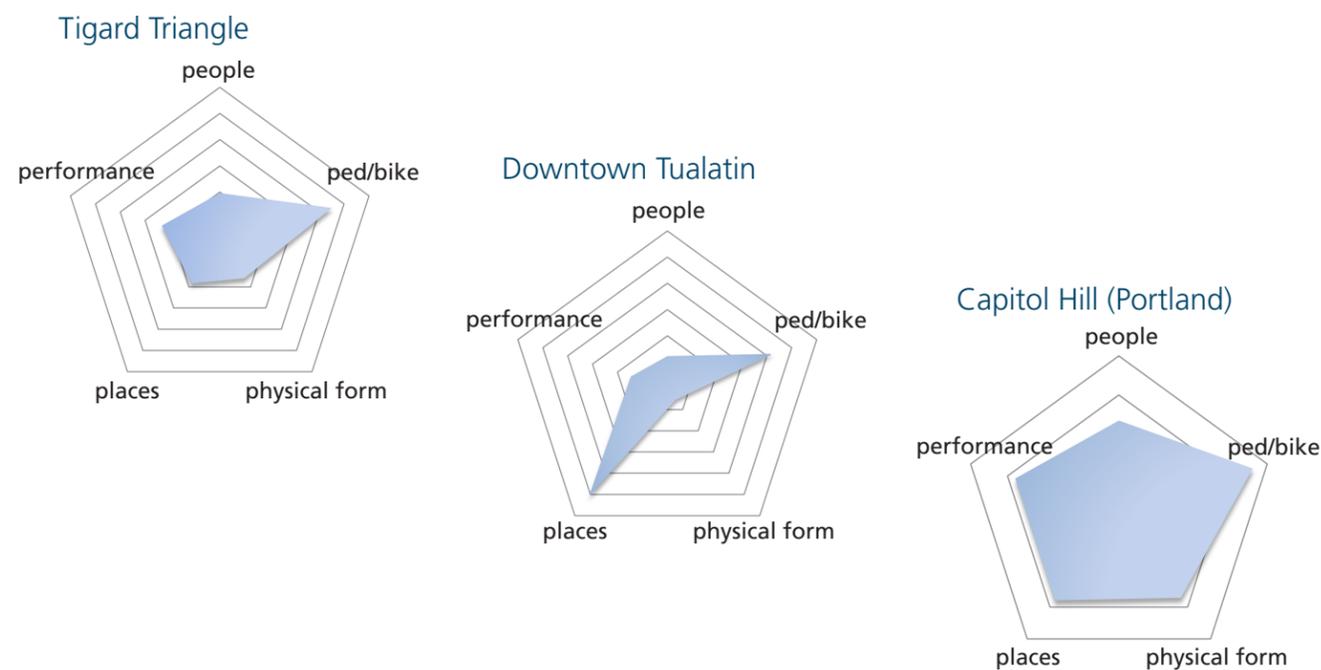
Physical form Small blocks promote more compact development and walkability.

Performance High quality, frequent bus and rail service make public transportation a more reliable means of getting around and can be correlated to less driving.

Pedestrian/bicycle connectivity Access to sidewalks and safe bikeways encourages many more people to walk or cycle to transit and neighborhood destinations.

The graphs below show how selected areas of the corridor perform against this transit orientation measure. The map to the right shows the relative transit orientation of areas in the Southwest corridor in 2011. This map and others like it help determine the highest value location for a potential high capacity transit investment.

Transit orientation measure graphs, selected corridor locations



New Starts funding competitive advantage

By setting the right regulatory and financial environment, the public sector can catalyze private development and, ideally, make the region more competitive for capital construction dollars from the Federal Transit Administration’s New Starts grant program, likely to be a key element of a high capacity transit funding strategy. The policy guidance for the New Starts program provides measures that will be used to evaluate projects, including a series of actions local governments can take to leverage a transit investment such as plans, policies and financial incentives to support the adjacent land use and bring more transit riders to the system. The guidance prioritizes actions that support these outcomes:

- additional, transit-supportive development and redevelopment
- preservation or increase in the affordable housing supply
- increased population and employment density.

The New Starts policy guidance gives higher rating to places that have adopted plans, policies and incentives in place to support transit. Locations with built “proof of concept” transit-oriented projects rate the highest. This means the more quickly the Southwest corridor establishes transit-supportive policies and initiates financial incentives, the better positioned it will be to compete for federal funds. These actions also prepare the corridor now for transit-oriented development, rather than waiting until after transit is built.

Public benefits

By aligning the regulatory framework, offering financial incentives to catalyze development, and prioritizing transit-supportive capital investments in the public realm, the public sector has a tremendous opportunity to create successful places that reflect the Southwest Corridor Land Use Vision.

These investments help ease traffic congestion and enhance the attractiveness and market appeal of the corridor. Through public-private partnerships, catalytic projects show what is possible for future development, setting the stage for more private investment in the area. Early development projects bring more people to specifically chosen locations in the corridor, which in turn attracts more amenities and private investment to the area.

Revitalizing and re-orienting properties in station areas can also strengthen the fabric of the local community, creating places where people want to be. Public investments that create beautiful public spaces and pedestrian streetscapes draw residents and visitors to spend time there. Projects that re-energize underperforming suburban office parks and commercial strip malls into housing choices and employment opportunities attract existing and new residents. With more people and

With more people and places to go in the corridor, these developments leverage additional ridership, creating greater efficiency in the transportation network and leveraging the corridor’s transit investment. At the same time, the character of existing neighborhoods remains intact.

places to go in the corridor, these developments leverage additional ridership, creating greater efficiency in the transportation network and leveraging the corridor’s transit investment. At the same time, the character of existing neighborhoods remains intact.

Locating more jobs and housing choices near transit – and attracting additional retail and services – not only spurs economic activity, but it also increases the overall market value in the corridor. As a result, the public sector sees a positive financial return on a high capacity transit investment – both from higher use and from the increase in tax revenue from redevelopment and its effect on the value of surrounding properties.

Parks can be key to economic development

Traditionally, parks have been developed to fill service gaps, and natural areas are purchased to protect resources. But a new perspective is emerging: Parks, trails and natural areas can be sited where development would benefit from their proximity. A growing body of evidence demonstrates how public amenities such as parks, natural areas, trails, street trees and other investments that add more nature to urban areas contribute to higher land values.

In 2012, Metro investigated the connection between access to nature and economic development within a community. The discovery: A strategy of investing in parks and open space is not contrary to a community’s economic health, but rather it is an integral part of it. Integrating natural features into development helps ensure a high quality of life and a connection to nature. Additionally, when people are drawn to public spaces, they interact as neighbors, and this interaction builds stronger, healthier, more prosperous and more engaged communities.

For the full report, see: A synthesis of the relationship between parks and economic development (Metro, 2012), at www.oregonmetro.gov/naturalareas.



Toolkit: Regulatory framework that sets the stage

The Southwest Corridor Land Use Vision expresses the collective aspirations of the communities in the Southwest corridor. High capacity transit has the potential to have a catalytic effect on adjacent land uses and help achieve this vision. This will work best if transit supportive regulations and policies are in place well in advance of the high capacity transit investment. These policies will both support the land use vision now and help to achieve the community's desired goals over time. There are a number of regulatory tools and strategies that can help foster transit ready communities; however, their application differs greatly depending on the context in which they are applied.

Attachment B describes in detail these key transit supportive policies and regulatory tools. Specific project examples of how these tools can be applied are included to illustrate how the changes can raise the development potential within the corridor. Policies for consideration include:

- zoning code changes
 - density maximums and building height
 - non-compliant use provisions
 - stepbacks
 - commercial corridor assessment
- parking requirements and parking management
 - trip generation reductions
 - responsive parking ratios
 - shared parking
 - unbundling parking
- design code changes
 - layered landscapes and active open space
 - ground floor active use provisions.

Attachment B includes the full policy toolkit, which includes a representative list of possible regulations.

Toolkit: Financial incentives that set the stage

In addition to regulatory and policy changes, the public sector can help stimulate investment in strategic locations. These tools can help bridge the financial gap between what is financially feasible today and what is desired by the community. In many cases the community's vision is above and beyond what the current market can provide. Investments in the public realm (such as streetscape enhancements and transit investments) are one way to send a message to the private sector that the public is committed to making the community vision a reality. Direct financial incentives provided to key catalytic projects offer a "proof of concept" – and through strategic investment in such projects, can lead to increased value in the market. Eventually, this can allow for private investment without public support.

Current market conditions in the Southwest corridor are not supportive of many development forms that are envisioned by the local communities. In particular this is true in areas the community would like to see more walkable, attractive and business-friendly neighborhoods than exist today. The financial incentives toolkit section of Attachment B highlights key financial tools that are available to public sector partners to leverage investment and new development in specific Southwest corridor locations. The project examples illustrate how these incentives can help fill the financial gap and achieve the desired development outcomes in the corridor. Tools recommended for consideration by public sector partners in areas of change throughout the Southwest corridor include:

- Transit Oriented Tax Exemption (TOTE)
- Vertical Housing Program
- brownfield cleanup
- System Development Charges strategies
- urban renewal
- Transit Oriented Development Program
- land acquisition and banking.

Attachment B includes the full financial incentives toolkit, which includes a representative list of possible incentives.

Alternative performance measures

In some circumstances, existing state transportation level of service performance measures function as a barrier to redevelopment or new development. This could make it difficult for local communities to achieve their land use goals as set out in the Southwest corridor land use vision. To address this challenge, the steering committee recommends that the Southwest Corridor Plan refinement process include collaborative work by Metro, the Southwest corridor cities, Washington County and ODOT to develop a coordinated set of multimodal performance measures reflecting state, regional and local goals.

These multimodal performance measures may vary across the corridor based on community objectives, and should provide the objectivity necessary for fair and consistent application. The measures would be intended to support both land use review and transportation evaluation. The alternative performance measures would likely address I-5 and 99W within the Southwest corridor and Tualatin-Sherwood Road in the Tualatin and Sherwood Town Center areas, although the boundaries of application could vary. The result would be a set of multimodal performance measures and associated evaluation process that could be considered for adoption by jurisdictions throughout the region, including Metro and the Oregon Transportation Commission.

Southwest Corridor Plan recommendation attachments

Attachment A: Roadway, active transportation, parks, trails and natural resources projects map book and project lists

Attachment B: Regulatory framework and financial incentives toolkit

Documents that support this action and provide key information for further phases

www.swcorridorplan.org/projectlibrary

Charter Dec. 12, 2011

Health assessment January 2012

Opportunity and housing report January 2012

Vision, goals and objectives May 14, 2012

Existing conditions summary report April 18, 2012

Southwest corridor economic development conditions, stakeholder perspectives and investment alternatives Jan. 24, 2013

Project bundles Feb. 5, 2013

Evaluation report, July 1, 2013

Public involvement report, July 1, 2013

Forward: What's next for the Southwest Corridor Plan?

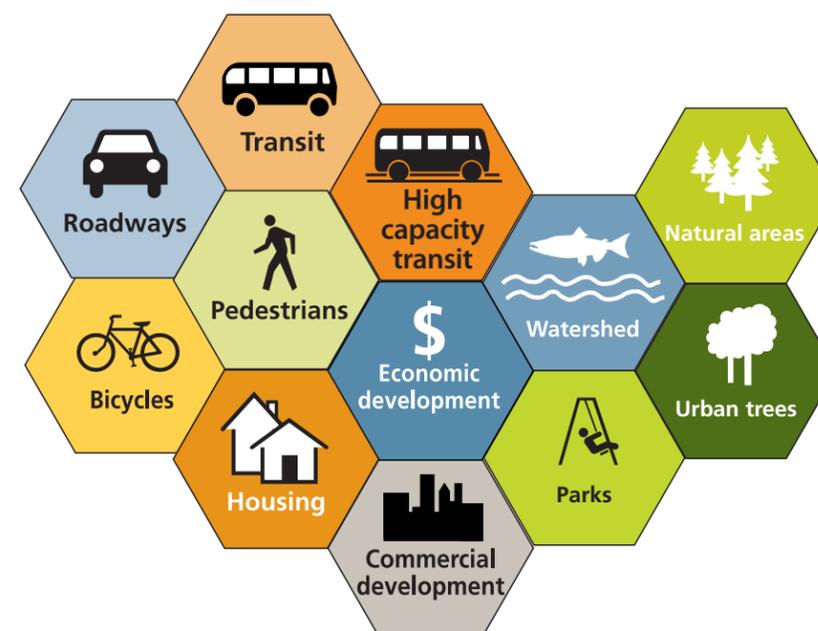
During the months following the steering committee recommendation, the boards and councils of plan partners (cities, counties and agencies) will take action on the Southwest Corridor Plan.

Project partners will continue to meet during the 2013-14 refinement period to consider high capacity transit options, guide transit Service Enhancement Plan decisions and move forward with strategic project development for priorities identified in the Southwest Corridor Shared Investment Strategy.

Project partners will collaborate to develop an implementation structure that maximizes the potential for project success. This structure will consider:

- community partners
- public/private/non-profit partnerships
- citizen engagement
- innovative and collaborative funding mechanisms.

As the partners work to advance projects in the Southwest Corridor Shared Investment Strategy, they should consider other regional plans such as the Regional Trails Plan and the Active Transportation Plan to identify the safest and most interconnected bicycling and walking network possible. At the end of the refinement period (in mid-2014), the Southwest Corridor Plan Steering Committee will decide whether to advance a high capacity transit project for further consideration in a Draft Environmental Impact Statement (DEIS) under the National Environmental Policy Act (NEPA).



Southwest Corridor Strategic Investment Strategy action chart

July steering committee recommendation	Responsibility for implementation					Target date for next steps (if applicable)
	Who implements		When	Funding for work	Notes	
	Lead	Partners				
Decision to refine high capacity transit alternatives for further study	Metro/TriMet	Cities, counties, ODOT	8/2013 – 6/2014	MTIP – Metro	Early 2014 SC agreement: 1. Refined high capacity transit project 2. Collaborative funding plan for DEIS 3. Preliminary funding strategy for high capacity transit project	Mid 2014: Begin Draft Environmental Impact Statement (DEIS) on high capacity transit alternative as refined by project partners Early 2017: Target end date for DEIS and Locally Preferred Alternative decision
Southwest Service Enhancement Plan	TriMet/Metro	Cities	8/2013 – 12/2014	TriMet with some Metro staff support	Vision for future transit service throughout the area, including connections to high capacity transit. Long-term enhancements will be guided by TriMet's financial capacity and by local jurisdiction access improvements	2015 and forward: Implement service enhancements and revisit over time based on local improvements
Southwest corridor Alternative Performance Measures	ODOT	Cities, Washington County, Metro	8/2013 – 6/2014	ODOT	Coordinate work during refinement of high capacity transit alternative	
Policies and incentives to address regulatory framework and financial incentives	Cities	Metro	Timing depends on jurisdiction needs and desires and direct connection to high capacity transit	Cities	Milestones for specific cities will be tied to progress on high capacity transit project with an aim to address FTA guidelines and help the region compete for federal transit funds	Spring 2014: Define specific policy considerations for project partners to pursue in coordination with DEIS and development of a Locally Preferred Alternative
Roadway and active transportation projects highly supportive of high capacity transit	Metro/TriMet	ODOT, cities, counties	8/2013 – 6/2014	Metro	During refinement, partners will determine which projects are integral to a high capacity transit investment	Mid 2014: Partners will define which projects are packaged with the high capacity transit alternative for NEPA
Roadway and active transportation projects highly supportive of corridor land use vision	Cities, counties, ODOT		As funding becomes available	Project sponsor	Project sponsors will take responsibility to implement their projects with some collaborative efforts to seek funding, particularly for projects identified for early implementation; project sponsors actions may include project design and engineering, public outreach and working with regional partners to include the project in the Regional Transportation Plan	
Parks and natural resource projects	Cities, counties, Metro	Parks, environmental agencies and non-profits	8/2013 – 6/2014 for projects related to high capacity transit	Project sponsor and Metro will look at projects that could be part of high capacity transit alternative	Project partners will take responsibility to implement their projects and work collaboratively to seek grant opportunities and other funding	Mid 2014: Identify projects that may be part of high capacity transit alternative for NEPA