

# Scenario Planning Guidelines: Technical Appendix

*Resources for Developing and Evaluating  
Alternative Land Use and Transportation Scenarios*

Oregon Sustainable Transportation Initiative (OSTI)





# Scenario Planning Guidelines

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Alternative Land Use and Transportation Scenarios*

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Technical Appendix  
Step 1

# Scenario Planning Guidelines:

## Resources for Developing and Evaluating Alternative Land Use and Transportation Scenarios

**This section introduces the Technical Appendix and describes the format. The appendix will follow the chronology found in 7-step process described by the manual for convenience and ease of use. Some appendix items may be more or less associated with a step than others. The entry in the Appendix will be noted with the first occurrence or reference within the guidelines document.**

### *Intended Audience*

The technical appendix is aimed at practitioners of the scenario planning process, namely planners, modelers and GIS experts.

### *Purpose of this document*

This document will provide technical guidance through suggestions, technical explanations and examples.

- Data: Starting place for inputs to analysis (building prototypes, building blocks)
- Documents: Sample IGA, Agendas, etc.
- Suggestions: Effective Techniques, Public Engagement

### *Structure of Document*

The structure of this document follows the 7-step process in the Guidelines, with sections appearing in chronological, or page order with their references from the primary SPG document.

# Sample Intergovernmental Agreement from Metro, Southwest Corridor Plan

## BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF CREATING AND	)	RESOLUTION NO. 11-4278
APPOINTING MEMBERS OF THE SW	)	
CORRIDOR PLAN STEERING COMMITTEE	)	Introduced by Acting Chief Operating Officer Dan Cooper with the concurrence of Council President Tom Hughes

WHEREAS, the Metro Council has made a commitment to Making a Great Place through its work with local leaders and residents throughout the region to create prosperous and sustainable communities for present and future generations; and

WHEREAS, the adopted long-range blueprint for the future, the 2040 Growth Concept, reflects that commitment and guides the region’s land use and transportation development in alignment with it; and

WHEREAS, the Metropolitan Policy Advisory Committee and Metro Council have adopted the following Six Desired Outcomes to guide its efforts in the region:

- Vibrant communities - People live, work and play in vibrant communities where their everyday needs are easily accessible.
- Economic prosperity - Current and future residents benefit from the region’s sustained economic competitiveness and prosperity.
- Safe and reliable transportation - People have safe and reliable transportation choices that enhance their quality of life.
- Leadership on climate change - The region is a leader in minimizing contributions to global warming.
- Clean air and water - Current and future generations enjoy clean air, clean water, and healthy ecosystems.
- Equity - The benefits and burdens of growth and change are distributed equitably.

WHEREAS, the Regional Transportation Plan (RTP) is a central tool for implementing the 2040 Growth Concept and emphasizes outcomes, system completeness and measurable performance in order to realize adopted land use plans, and hold the region accountable for making progress toward regional and State goals to reduce vehicle miles traveled and greenhouse gas emissions; and

WHEREAS, the Metro Council accepted the Regional High Capacity Transit System Plan by Resolution No. 09-4052 (For the Purpose of Accepting the Regional High Capacity Transit System Tiers and Corridors, System Expansion Policy Framework and Policy Amendments for Addition to the 2035 Regional Transportation Plan, State Component) on July 9, 2009, for addition to the 2035 Regional Transportation Plan; and

WHEREAS, the Southwest Corridor Refinement Plan was adopted by Metro Council Resolution No. 10-4119 (“For the Purpose of Updating the Work Program for Corridor Refinement Planning through 2020 and Proceeding with the Next Two Corridor Refinement Plans in the 2010-2013 Regional Transportation Plan Cycle”) as one of the next regional priorities for Corridor Refinement Plans on February 25, 2010; and

WHEREAS, the 2035 Regional Transportation Plan and its components were adopted as the state and federally-recognized metropolitan transportation plan by Ordinance No. 10-1241B (“For the Purpose of Amending the 2035 Regional Transportation Plan (Federal Component) and the 2004 Regional Transportation Plan to Comply with Federal and State Law; To Add the Regional Transportation Systems Management and Operations Action Plan, the Regional Freight Plan and the High Capacity Transit System Plan; To Amend the Regional Transportation Functional Plan and Add it to the Metro Code; To Amend the Regional Framework Plan; and To Amend the Urban Growth Management Functional Plan”); and

WHEREAS, the establishment of a Steering Committee will contribute valuable guidance toward completion and adoption of the Southwest Corridor Plan, which will include an implementation strategy for the plan area; and

WHEREAS, Steering Committee membership should include elected officials and representatives of project partner agencies; and

WHEREAS, the Metro Councilors from District 3 and District 6 will serve as the Steering Committee co-Chairs; and

WHEREAS, it is expected that the Steering Committee will be needed for approximately 24 months; now therefore

BE IT RESOLVED that the Metro Council, in order to fulfill adopted goals through development of a transportation system that furthers said goals:

1. Hereby establishes the Southwest Corridor Plan Steering Committee to fulfill the charge set forth in Exhibit A.
2. Hereby appoints the represented positions listed in Exhibit B, attached and incorporated into this resolution, to be members of the Southwest Corridor Plan Steering Committee.
3. Directs the Southwest Corridor Plan Steering Committee to meet at project milestones, with administrative and technical support from Metro staff, and to submit recommendations to the Council at project milestones.
4. Appoints Steering Committee members for a one-year term, which shall be automatically renewed for an additional term unless explicitly terminated, but not to exceed three years.

ADOPTED by the Metro Council this 4<sup>th</sup> day of August, 2011.

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Tom Hughes, Council President

Approved as to Form:

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Alison Kean Campbell, Metro Attorney

## **EXHIBIT A TO RESOLUTION NO. 11-4278**

### **Southwest Corridor Plan Steering Committee Charge**

The Steering Committee makes decisions on project milestones and recommends action on the Southwest Corridor Plan and Implementation Strategy to the adopting bodies. This committee, to be chaired by Metro, will be made up of elected officials from each jurisdiction with a decision-making role in developing the components of the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy. The Metro Council will establish the Steering Committee and criteria for membership, and each jurisdiction will appoint an individual who meets the criteria. The group is anticipated to meet quarterly, or as needed, from September 2011 through the development of the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy.

The Southwest Corridor Plan Steering Committee is charged with working toward the successful creation of the Southwest Corridor Plan and Implementation Strategy. The Steering Committee members are specifically tasked with the following responsibilities.

- Follow decision-making protocols as established by the committee.
- Provide information to and from constituents and the Southwest Corridor Implementation Partners regarding the process, substance, and implementation of the Southwest Corridor Plan.
- Represent constituents' perspectives, concerns and priorities.
- Receive input from, and provide guidance to, the Project Management Group and the Project Team Leaders (described in Appendix 1) at project milestones, which may include:
  - Project goals;
  - A problem statement based on desired outcomes for the plan area;
  - A methodology for assessing the effectiveness of strategies in meeting the plan goals and objectives;
  - A wide range of alternative strategies for testing;
  - Prioritized strategies;
  - Identified commitments to support the strategies; and
  - An Implementation Strategy for the Southwest Corridor.
- Recommend a Plan and Implementation Strategy (including phasing and funding for physical improvements and commitments and timeframe for implementing land use and related policy changes) for the plan area to the project participants, as appropriate.
- Provide leadership, foster the creation of partnerships, and encourage local actions to implement the plan.

**EXHIBIT B TO RESOLUTION NO. 11-4278**

**Members of the Southwest Corridor Plan Steering Committee**

Metro District 3 Councilor and District 6 Councilor

Elected officials from cities of Portland, Tigard, Tualatin, Sherwood and King City

Multnomah County Commissioner

Washington County Commissioner

ODOT, Region 1 Manager

TriMet, General Manager

## STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 11-4278, FOR THE PURPOSE OF CREATING AND APPOINTING MEMBERS OF THE SOUTHWEST CORRIDOR PLAN STEERING COMMITTEE

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Date: August 4, 2011

Prepared by: Malu Wilkinson

## BACKGROUND

The Southwest Corridor Plan is intended to collaboratively integrate land use and transportation planning efforts to create an implementation strategy that includes investments, policy changes and partnerships. The Southwest Corridor Plan process is intended to result in the following products, which may be refined due to the iterative nature of the project and the inter-connectedness of the products. The Steering Committee may identify additional or complementary plans or planning processes through the course of the project.

1. *Southwest Corridor Plan* (Metro);
2. *Southwest Corridor Implementation Strategy* (Metro); and
3. Six individual plans:
  - a. *Southwest Transportation Plan* (Metro, ODOT)
  - b. *Southwest Corridor Transit Alternatives Analysis* (Metro)
  - c. *Barbur Concept Plan* (City of Portland)
  - d. *Tigard High Capacity Transit (HCT) Land Use Plan* (City of Tigard)
  - e. *Tualatin HCT Land Use Plan* (City of Tualatin)
  - f. *Sherwood Town Center Plan* (City of Sherwood)

The work will be guided by a Steering Committee that includes the agencies which will be engaged in implementing an implementation strategy for the Southwest Corridor. The process will be documented in a charter to be adopted by each jurisdiction (a draft of the charter is included with this staff report as Attachment A). Project partners include the cities of King City, Portland, Sherwood, Tigard, Tualatin, Multnomah County, Washington County, TriMet, ODOT and Metro.

Metro will work with local partners to define a set of land use and transportation investments and strategies that best achieve local and regional goals and develop an action plan for local and regional agreements to actualize the vision. Components of the strategy may include:

- Intergovernmental agreements that describe an investment plan that may address land use, transportation, habitat, parks, equity, housing choice, job growth, etc.
- Proposal for alternative mobility standards within the Southwest Corridor
- Transit Alternatives Analysis to be submitted to the Federal Transit Administration
- Recommended revisions to the Regional Transportation Plan, Regional Framework Plan, and/or the Urban Growth Management Functional Plan, local Transportation System Plans (TSPs) and Comprehensive Plans
- Recommended priorities and investments in the Oregon Department of Transportation (ODOT) Facility Plan and TriMet Transit Investment Plan
- National Environmental Policy Analysis (NEPA) alternatives for transit investments

Local partners, agency partners, and Metro will implement the actions and investments described in the SW Corridor Implementation Strategy.

The composition of the Steering Committee as described in Exhibit B ensures that members are in a position to work with their representative organizations to move forward on the actions, agreements and partnerships to be developed through this process and described in the Southwest Corridor Implementation Strategy. The Southwest Corridor Plan effort recognizes the mutual benefit from sharing information, views and aligning resources to produce an integrated implementation strategy for transportation, land use and other associated investments to support great communities within the corridor. The makeup of the proposed Steering Committee and supporting groups has been defined through a collaborative process with active engagement from all project partners.

### ANALYSIS/INFORMATION

1. **Known Opposition** No known opposition exists.
2. **Legal Antecedents** The creation and appointment of members to the Southwest Corridor Plan Steering Committee is consistent with Metro Code 2.19.030 (Membership of the Advisory Committees) and 2.19.040 (Advisory Committee Purpose and Authority Resolution), as well as Resolution No. 10-4119 that established the Southwest Corridor Plan as a priority mobility corridor refinement plan in the 2010-2013 Regional Transportation Plan cycle.
3. **Anticipated Effects** The Southwest Corridor Plan Steering Committee will contribute valuable guidance toward completion and adoption of the Southwest Corridor Plan. The Steering Committee will meet throughout the project's life at key milestones and may offer recommendations to Metro Council.
4. **Budget Impacts** Costs associated with convening and supporting the Southwest Corridor Plan Steering Committee are accounted for in the project's scope of work and budget.

### RECOMMENDED ACTION

Metro staff recommends the adoption of Resolution No. 11-4278.

**Attachment 1 to Resolution No. 11-4278 Staff Report  
Southwest Corridor Plan Charter**

*July 25, 2011 Draft*

**Table of Contents**

- A) Desired outcomes**
- B) Goals**
- C) Products**
- D) Steering Committee Charge**
- E) Timeline and milestones**
- F) Roles and responsibilities**
- G) Signed agreement**

**Appendix 1: Decision-making structure and process**

**Appendix 2: Geographic Area**

**Appendix 3: Six Outcomes**

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## Attachment 1

This charter establishes the Southwest Corridor Plan steering committee, which will review major milestones for the component plans and recommend an implementation strategy for the Southwest Corridor. (The Southwest Corridor Plan Area is shown in Appendix 2.) The signatories to this charter will use a collaborative approach to develop the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy, to align local, regional, and state policies and investments to create great places. This work will benefit from partnerships and collaboration to make the most of simultaneous planning projects to help achieve local, regional, state and federal goals. Involved jurisdictions and agencies will use the forum created by this charter to discuss individual work efforts and determine how local, regional, and state actions fit into a cohesive strategy.

The purpose of this Charter is to set forth those undertakings expected of each Southwest Corridor Plan partner. By signing this Charter and adopting it by resolution, the participants agree to work together in good faith toward achieving the goals, creating the plans, and implementing the strategies created by this process.<sup>1</sup>

**A) Desired outcomes**

The charter signatories agree that the six desired outcomes and characteristics of a successful region guide the creation of the Southwest Corridor Plan, the Southwest Corridor Implementation Strategy, and inform the entire planning process. These six desired outcomes are:

- Vibrant communities;
- Economic prosperity;
- Safe and reliable transportation;
- Leadership on climate change;
- Clean air and water; and
- Equity.

**B) Goal**

The goal of the Southwest Corridor Plan process is to create a framework intended to improve the land use and transportation conditions in the Southwest Corridor, which will in turn stimulate community and economic development, leverage private investments and make efficient use of available resources. The process should provide a transparent, objective and consensus-based framework, as agreed to and further defined by the steering committee, to help define, refine, evaluate, screen and select land use and transportation alternatives.

By working together, the charter participants will develop a Southwest Corridor Plan. In addition, they will simultaneously develop a Southwest Corridor Implementation Strategy that identifies and prioritizes needed projects to support local aspirations, and regional and state goals. The Southwest Corridor Implementation Strategy will create a framework for establishing agreements on local, regional and state actions that will support implementation. The structure will include a robust public engagement process that actively engages citizens in defining community visions and priorities for investment.

The Southwest Corridor Plan will identify policies and investments that are intended to:

- Improve access to regionally significant employment, educational and commercial centers;
- Improve mobility throughout the Southwest Corridor for all transportation modes;

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<sup>1</sup> This Charter constitutes a project-specific agreement required by the ODOT/MPO/Transit Operator Agreement (ODOT Agreement # 24682; Metro Contract # 928512), Appendix A, Section 4.

- Improve access to affordable living, considering the combined housing, transportation and utility costs;
- Improve watershed health and habitat function, and enhance the natural environment;
- Equitably distribute the benefits and burdens of growth;
- Improve the quality of the region’s air, water and land resources;
- Support active lifestyles;
- Integrate health strategies; and
- Integrate trails and parks plans and improvements.

### C) Products

The Southwest Corridor Plan process is intended to result in the following products, which may be refined due to the iterative nature of the project and the inter-connectedness of the products. The Steering Committee may identify additional or complementary plans or planning processes through the course of the project.

4. *Southwest Corridor Plan* (Metro);
5. *Southwest Corridor Implementation Strategy* (Metro); and
6. Six individual plans:
  - a. *Southwest Transportation Plan* (Metro, ODOT)
  - b. *Southwest Corridor Transit Alternatives Analysis* (Metro)
  - c. *Barbur Concept Plan* (City of Portland)
  - d. *Tigard High Capacity Transit (HCT) Land Use Plan* (City of Tigard)
  - e. *Tualatin HCT Land Use Plan* (City of Tualatin)
  - f. *Sherwood Town Center Plan* (City of Sherwood)

#### (1) Southwest Corridor Plan and (2) Implementation Strategy

The *Southwest Corridor Plan* will summarize the results of the six individual plans listed above and identify areas for continued coordination, to be included in the *Implementation Strategy*. The project partners will work together to integrate different disciplines beyond land use and transportation, leveraging current efforts where possible, encompassing topics such as workforce housing, parks and green infrastructure, economic development, and impacts on public health.

The *Southwest Corridor Implementation Strategy* will include a summary of the future actions and agreements among the partner agencies and jurisdictions on a set of coordinated policies and investments to implement a shared vision. The *Implementation Strategy* becomes a guide for pursuing opportunities and investments throughout the Southwest Corridor.

The *Southwest Corridor Plan* and the *Implementation Strategy* should be endorsed by the Southwest Corridor Steering Committee, and is intended to be adopted and implemented by the appropriate agencies and jurisdictions.

#### (3a) Southwest Transportation Plan

The Southwest Transportation Plan and the Southwest Corridor Transit Alternatives Analysis are complementary projects that have typically been done sequentially, and, in the context of the Southwest Corridor Plan, are now being done simultaneously. The two products will be iterative, consistent, and leverage analysis and public engagement. The Southwest Corridor Transit Alternatives Analysis, a subset of the Southwest Transportation Plan, will be led by Metro while the Southwest Transportation Plan will be co-led by ODOT and Metro. There will be two products, as described in this charter. Development of the Southwest Transportation Plan will include, as appropriate:

## Attachment 1

- Identification of local, regional, and state transportation needs;
- A process and criteria, including performance standards, to evaluate and compare alternatives that balance the identified needs;
- Decisions regarding need, mode, function, general location, general cross-sections, and alternative mobility and/or performance standards for future management of transportation facilities within the corridor;
- Integration of the Southwest Corridor Transit Alternatives Analysis; and
- A list of prioritized transportation projects and strategies to meet and incorporate into the Regional Transportation Plan, local transportation plans, and a state highway facility plan. The list will contain short, medium, and long-term projects and strategies.

The Southwest Transportation Plan will result in the following products:

- Transportation plan for the Southwest Corridor, including amendments to the Regional Transportation Plan (adopted by Metro);
- An I-5, OR43 and 99W Highway Facility Plan, which may include alternative mobility standards to those currently adopted in the Oregon Highway Plan. This would be an amendment to the Oregon Highway Plan (adopted by the Oregon Transportation Commission); and
- Potential amendments to partner agency plans, such as Transportation System Plans and/or Comprehensive Plans, as appropriate. (The amendments would be adopted by City of Portland, City of Tigard, City of King City, City of Tualatin, City of Sherwood, TriMet, Multnomah County and Washington County).

### **(3b) Southwest Corridor Transit Alternatives Analysis**

The Southwest Corridor Transit Alternatives Analysis (AA), a subset of the Southwest Transportation Plan, will evaluate the function, mode and potential alignment of a high capacity transit (HCT) improvement. The AA is the first step in the federal process to determine the most efficient public investment in transit for the Southwest Corridor. The analysis will be informed by the land use and transportation plans that make up the overall Southwest Corridor Plan. The Alternatives Analysis will result in a Narrowed Transit Solutions Report. At the end of this process, Metro and regional partners would determine whether to move further into project development. At that time, a choice would also be made whether to enter into the National Environmental Policy Act (NEPA) process of environmental impact statement, environmental assessment, or categorical exclusion.

### **(3c) Portland Barbur Concept Plan**

The Barbur Concept Plan is a collaborative effort involving the community, City of Portland, Metro, TriMet, and ODOT to create a long term vision for the Barbur Boulevard corridor. Beginning in summer of 2011, an 18-month public process will explore alternative future land use and transportation concepts for the corridor between Portland's Central City and the Tigard city limit. The concept plan will identify future transportation investments, stormwater solutions, and changes to City policy and zoning. Most importantly, the public process will inform regional decisions for future High Capacity Transit in the Southwest Corridor.

### **(3d) Tigard HCT Land Use Plan**

The Tigard HCT Land Use Plan will identify potential station communities and preferred development typologies as well as policy, investment and code changes necessary to support HCT in Tigard. Action to be taken by the city council will include acceptance of the land use plan for the potential station communities, including changes to the comprehensive plan, zone map, and coordinated amendments to the TSP. Future considerations will include:

- Amendments to the Tigard Comprehensive Plan, related text and Zoning Map
- Coordinated amendments to the Tigard TSP (with associated RTP amendments)

- Identification of local, regional, and state transportation needs;
- A process and criteria, including performance standards, to evaluate and compare alternatives that balance the identified needs;
- Decisions regarding need, mode, function, general location, general cross-sections, and alternative mobility and/or performance standards for future management of transportation facilities within the corridor;
- Integration of the Southwest Corridor Transit Alternatives Analysis; and
- A list of prioritized transportation projects and strategies to meet and incorporate into the Regional Transportation Plan, local transportation plans, and a state highway facility plan. The list will contain short, medium, and long-term projects and strategies.

The Southwest Transportation Plan will result in the following products:

- Transportation plan for the Southwest Corridor, including amendments to the Regional Transportation Plan (adopted by Metro);
- An I-5, OR43 and 99W Highway Facility Plan, which may include alternative mobility standards to those currently adopted in the Oregon Highway Plan. This would be an amendment to the Oregon Highway Plan (adopted by the Oregon Transportation Commission); and
- Potential amendments to partner agency plans, such as Transportation System Plans and/or Comprehensive Plans, as appropriate. (The amendments would be adopted by City of Portland, City of Tigard, City of King City, City of Tualatin, City of Sherwood, TriMet, Multnomah County and Washington County).

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The Southwest Corridor Transit Alternatives Analysis (AA), a subset of the Southwest Transportation Plan, will evaluate the function, mode and potential alignment of a high capacity transit (HCT) improvement. The AA is the first step in the federal process to determine the most efficient public investment in transit for the Southwest Corridor. The analysis will be informed by the land use and transportation plans that make up the overall Southwest Corridor Plan. The Alternatives Analysis will result in a Narrowed Transit Solutions Report. At the end of this process, Metro and regional partners would determine whether to move further into project development. At that time, a choice would also be made whether to enter into the National Environmental Policy Act (NEPA) process of environmental impact statement, environmental assessment, or categorical exclusion.

### **(3c) Portland Barbur Concept Plan**

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### **(3d) Tigard HCT Land Use Plan**

The Tigard HCT Land Use Plan will identify potential station communities and preferred development typologies as well as policy, investment and code changes necessary to support HCT in Tigard. Action to be taken by the city council will include acceptance of the land use plan for the potential station communities, including changes to the comprehensive plan, zone map, and coordinated amendments to the TSP. Future considerations will include:

- Amendments to the Tigard Comprehensive Plan, related text and Zoning Map
- Coordinated amendments to the Tigard TSP (with associated RTP amendments)

## Attachment 1

- Amendments to the Public Facilities Plan and Implementing Capital Improvement Plan

**(3e) Tualatin HCT Land Use Plan**

The Tualatin HCT Land Use Plan may identify locally preferred station areas and development typologies as well as policy, investment and code changes necessary to support HCT in Tualatin. Action items to be adopted by the city council may include:

- Land Use Plan
- Comprehensive plan changes
- Local zoning changes
- Amendments to CIP and other investment strategies.

**(3d) Sherwood Town Center Plan**

The project will result in a Town Center Plan for Sherwood. The project will determine the appropriate boundary of the Town Center, identify opportunities and constraints for the successful development of the town center and create a strategy for development and re-development of the area. The project would be completed to comply with the Metro functional plan policies and guidelines to be eligible for regional investments.

**D) Southwest Corridor Plan Steering Committee Charge**

The Steering Committee makes decisions on project milestones and recommends action on the Southwest Corridor Plan and Implementation Strategy to the adopting bodies. This committee, to be chaired by Metro, will be made up of elected officials from each jurisdiction with a decision-making role in developing the components of the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy. The Metro Council will establish the Steering Committee and criteria for membership, and each jurisdiction will appoint an individual who meets the criteria. The group is anticipated to meet quarterly, or as needed, from September 2011 through the development of the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy.

The Southwest Corridor Plan Steering Committee is charged with working toward the successful creation of the Southwest Corridor Plan and Implementation Strategy. The Steering Committee members are specifically tasked with the following responsibilities.

- Follow decision-making protocols as established by the committee.
- Provide information to and from constituents and the Southwest Corridor Implementation Partners regarding the process, substance, and implementation of the Southwest Corridor Plan.
- Represent constituents' perspectives, concerns and priorities.
- Receive input from, and provide guidance to, the Project Management Group and the Project Team Leaders (described in Appendix 1) at project milestones, which may include:
  - Project goals;
  - A problem statement based on desired outcomes for the plan area;
  - A methodology for assessing the effectiveness of strategies in meeting the plan goals and objectives;
  - A wide range of alternative strategies for testing;
  - Prioritized strategies;
  - Identified commitments to support the strategies; and
  - An Implementation Strategy for the Southwest Corridor.
- Recommend a Plan and Implementation Strategy (including phasing and funding for physical improvements and commitments and timeframe for implementing land use and related policy changes) for the plan area to the project participants, as appropriate.

Attachment 1

- Provide leadership, foster the creation of partnerships, and encourage local actions to implement the plan.

The Steering Committee will be convened by Metro and meet at project milestones. The decision-making process and expected relationships among project partners are described in Appendix 1.

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## Attachment 1

## E) Anticipated timeline and key milestones

Table 1: SW Corridor Plan Phases, Milestones, and Anticipated Timeline

Phase	Milestone	Approximate date
Define problems, opportunities & constraints	1. Charter adopted by Southwest Corridor partners	Fall 2011
	2. Steering Committee defines goals <i>The goals will lay the foundation for determining the strategies to address land use and transportation needs.</i>	November 2011
Identify wide range of solutions and integrated strategies	3. Steering Committee approves an outcomes-based evaluation framework and criteria <i>The criteria may define how transportation and land use investment, strategies, and policies work together to achieve goals.</i>	January 2012
	4. Steering Committee identifies alternative strategies to support achieving local and regional goals <i>Alternative strategies include packages of transportation investments (including transit options), land use changes and other investments that can be evaluated against the criteria.</i>	May 2012
Narrow solutions and draft Southwest Corridor Plan and Implementation Strategy	5. Steering Committee prioritizes alternative strategies <i>Priority strategies may identify efficient use of public resources including local, regional, state and federal investments and policy changes to achieve goals.</i>	October 2012
	6. Steering Committee approves draft Southwest Corridor Plan and Implementation Strategy <i>The Southwest Corridor Plan will summarize each of the component plans and the Implementation Strategy will describe appropriate agreements and actions that need to be taken in the corridor.</i>	December 2012
Agree on action plan to implement the Southwest Corridor Plan and Implementation Strategy	7. Partners adopt Southwest Corridor Implementation Strategy and agree to implement components as appropriate	January – June 2013
	8. Metro Council/JPACT recommend alternative transportation investments for NEPA process	June 2013

## F) Roles & Responsibilities

Table 2 (on the following page) delineates the roles and responsibilities of the signing parties for each project included in the Southwest Corridor Plan area.

### Definitions:

**Convener:** Agency responsible for making sure the planning process is completed and implemented. The convener is expected to consult with the other parties to gain efficiencies and avoid conflicts and is responsible for leading a public process.

**Co-convener:** Two agencies in an agreement to work together to ensure the planning process is completed and implemented.

**Collaborate:** To work together to achieve a common goal or objective. Collaboration is often employed where multiple parties have authority or control over the outcome and may involve a shared project or policy outcome. Parties may share expertise, resources, etc., to accomplish the goal or complete the project.

**Coordinate:** To develop, plan, program and schedule projects in consultation with other parties such that conflicts among projects are avoided. Coordinated projects are usually those over which not all parties, other than the convener, have control or authority.

**Grant funder:** An agency providing grant funding for a project. Responsibilities include contract management.

**Grantee:** The recipient of a grant for a specific planning project.

**Owner:** The agency that formally selects and pursues implementation of projects, strategies or policies, and that maintains the final plan or product. There may be multiple owners in a planning process that is completed inter-jurisdictionally.

**Technical support:** May include a wide range of services such as data analysis, mapping, policy analysis, and public engagement support and coordination.

**IGA:** Intergovernmental Agreement

**MOU:** Memorandum of Understanding

**ODOT:** Oregon Department of Transportation

**RTP:** Regional Transportation Plan

**TIP:** Transportation Investment Plan

**TSP:** Transportation System Plan

Attachment 1

Table 2: SW Corridor Plan Charter Signatories Roles and Responsibilities\*

Plan	Southwest Corridor Implementation Strategy		Component Plans					
	Southwest Corridor Plan	Southwest Corridor Implementation Strategy	Southwest Transportation Plan	Southwest Corridor Transit Alternatives Analysis	Portland Barbur Concept Plan	Tigard HCT Land Use Plan	Tualatin HCT Land Use Plan	Sherwood Town Center Plan
Metro	Owner	Owner	Owner – RTP	Owner	Grant funder	Grantee	Grant funder	Technical support
	Co-convener	Co-convener	Co-convener	Co-convener	Technical support	Technical support	Technical support	Technical support
ODOT	Owner	Owner	Owner – ODOT Facility Plan	Collaborate	Collaborate	Grant funder	Collaborate	Grant funder
	Co-convener	Co-convener	Co-convener	Co-convener	Technical support	Technical support	Technical support	Technical support
TriMet	Owner	Owner	Owner – TIP	Collaborate	Collaborate	Collaborate	Collaborate	Collaborate
King City	Owner	Owner	Owner – TSP	Collaborate	Collaborate	Collaborate	Collaborate	Collaborate
Portland	Owner	Owner	Owner – TSP	Coordinate with land use analysis	Owner	Collaborate	Collaborate	Collaborate
	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener
Sherwood	Owner	Owner	Owner – TSP	Collaborate	Collaborate	Collaborate	Collaborate	Owner
	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener
Tigard	Owner	Owner	Owner – TSP	Collaborate	Collaborate	Owner	Collaborate	Collaborate
	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener
Tualatin	Owner	Owner	Owner – TSP	Collaborate	Collaborate	Collaborate	Owner	Collaborate
	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener	Co-convener
Washington County	Owner	Owner	Owner – TSP	Collaborate	Coordinate	Collaborate	Collaborate	Collaborate
Multnomah County	Owner	Owner	Coordinate	Coordinate	Coordinate	Coordinate	Coordinate	Coordinate

\* This chart does not preclude other plans and processes from being included in the Southwest Corridor Plan and/or Implementation Strategy.

**G) Agreement**

\_\_\_\_\_  
City of Portland Date

\_\_\_\_\_  
ODOT Date

\_\_\_\_\_  
City of Tigard Date

\_\_\_\_\_  
Metro Date

\_\_\_\_\_  
TriMet Date

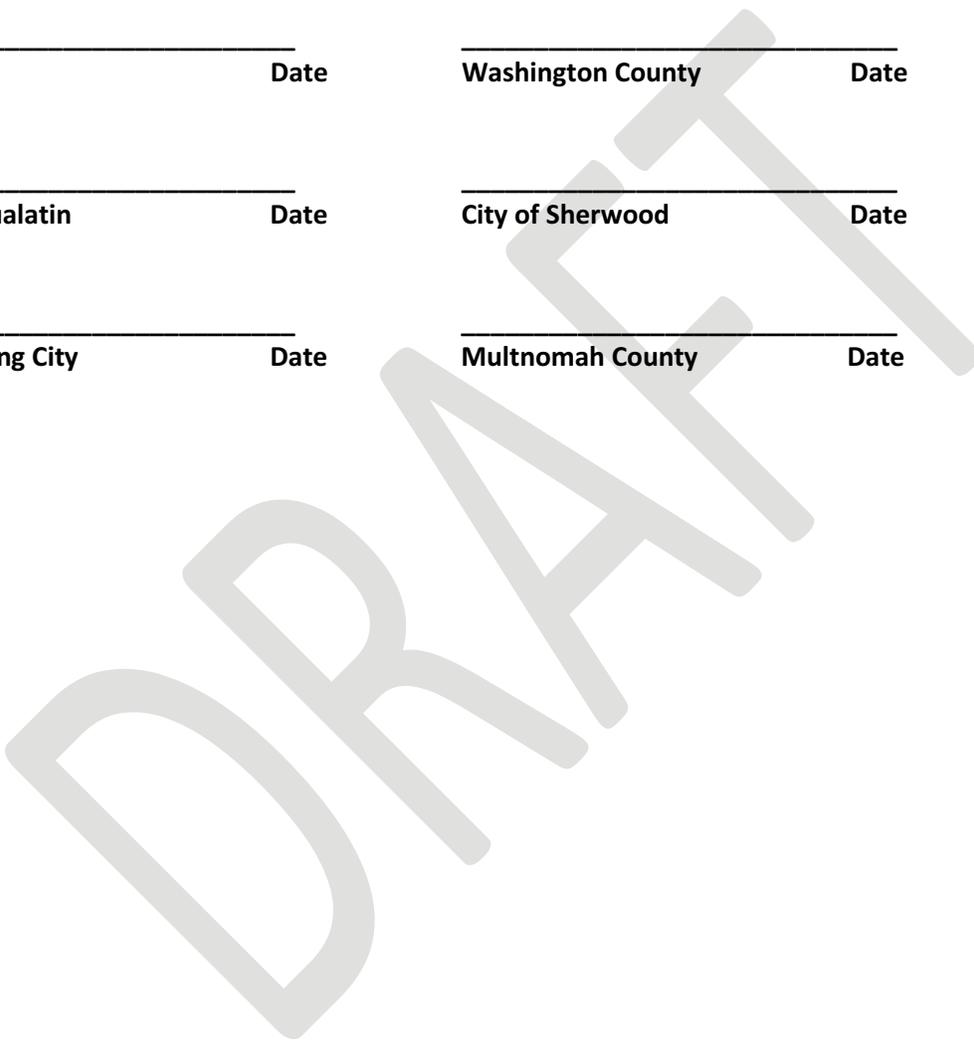
\_\_\_\_\_  
Washington County Date

\_\_\_\_\_  
City of Tualatin Date

\_\_\_\_\_  
City of Sherwood Date

\_\_\_\_\_  
City of King City Date

\_\_\_\_\_  
Multnomah County Date



## Attachment 1

**Appendix 1: Decision-making structure & Process**

The text and chart below describe the decision process and expected relationships among the project partners. Three groups will support the Southwest Corridor Steering Committee in the development of the Southwest Corridor Plan and Implementation Strategy.

- **Southwest Corridor Project Management Group.** The PMG serves as a bridge between the Project Team Leaders (PTL) and the Steering Committee to help develop a coordinated set of agreements, investments and policy changes that together make up the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy. This group, convened by Metro and comprised of senior staff from each of the jurisdictions with a decision making role, serves to advise the Steering Committee.
- **Southwest Corridor Project Team Leaders.** The PTL is responsible for ensuring the component parts of the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy are completed in a coordinated fashion. This group, convened by Metro, is made up of technical staff from each of the jurisdictions that are working to develop components of the Southwest Corridor Plan and the Southwest Corridor Implementation Strategy.
- **Southwest Corridor Implementation Partners.** The Implementation Partners will advise the Steering Committee at key milestones on strategy and the impact of potential decisions and alternatives on a wide range of interest groups. This group will meet approximately four times (or as needed), help to identify complementary strategies to be implemented by private and/or non-profit organizations, and provide a foundation for partnerships to implement strategies.

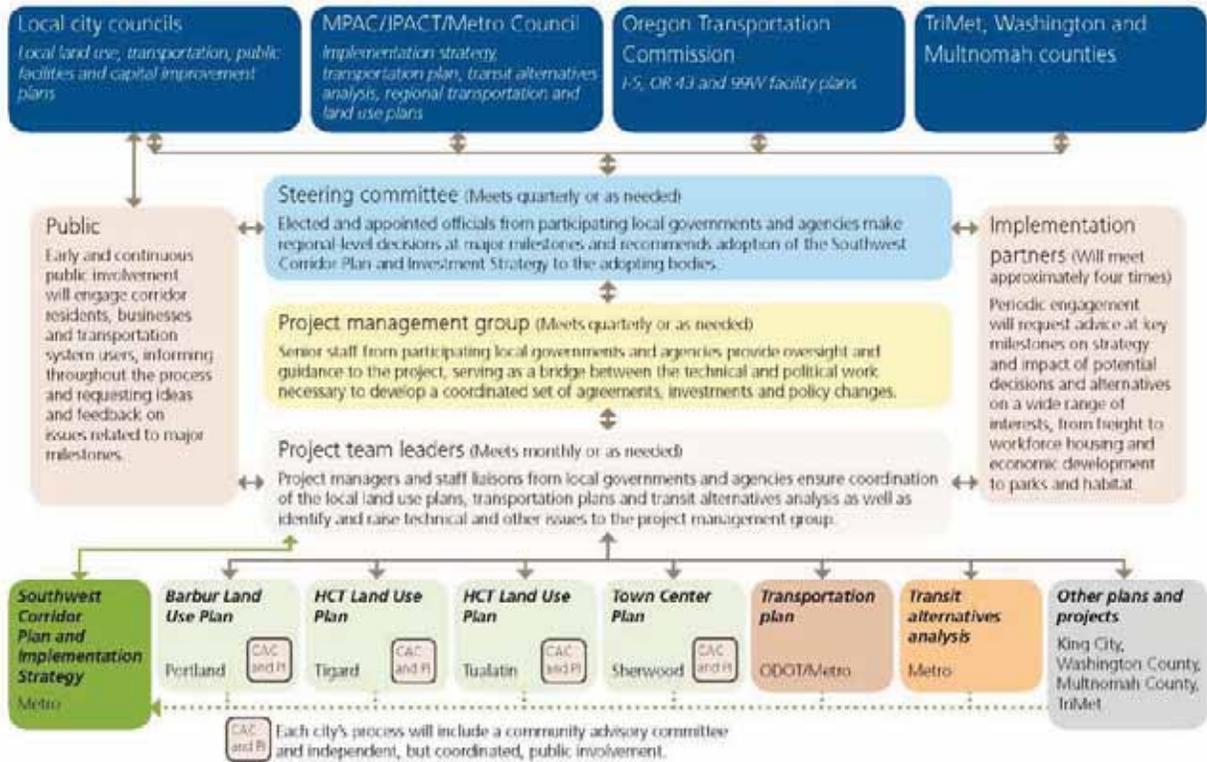
Chart 1 depicts the decision-making process, including which bodies decide on components of the Southwest Corridor Plan, as also described in Section (C) of the Charter.

**SOUTHWEST CORRIDOR PLAN**

**Decision-making structure**

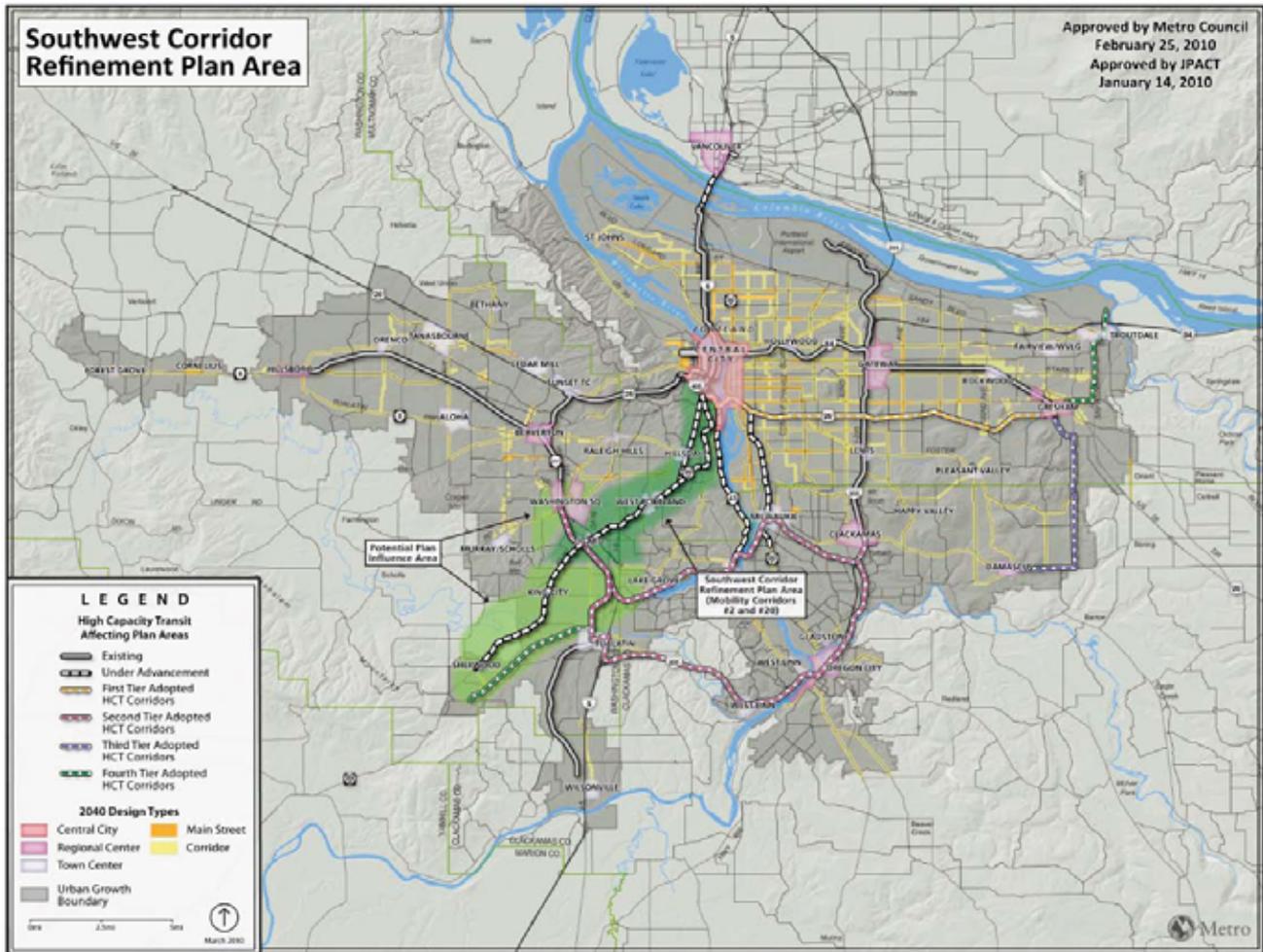
**with summary of plans and agreements adopted by local governments, Metro and the Oregon Transportation Commission**

The Southwest Corridor Plan will develop a coordinated set of component plans and an implementation strategy that identifies and prioritizes needed projects to support local aspirations consistent with regional and state goals and stimulate community and economic development, leveraging private investments and making efficient use of available resources. It will include changes to local, regional and state policies to support the strategy.



Attachment 1

Appendix 2: Geographic Area



### **Appendix 3: Six Outcomes**

As adopted in the Regional Framework Plan by Metro Council Ordinance #10-1244B, the six characteristics that define a successful region are:

1. People live, work and play in vibrant communities where their everyday needs are easily accessible.
2. Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
3. People have safe and reliable transportation choices that enhance their quality of life.
4. The region is a leader in minimizing contributions to global warming.
5. Current and future generations enjoy clean air, clean water and healthy ecosystems.
6. The benefits and burdens of growth and change are distributed equitably.

DRAFT



problem; the mechanisms for achieving those goals; and the system for monitoring the implementation and effectiveness of those goals; and

3           WHEREAS various entities were identified as potential stakeholders within the  
regional planning process, and invitations were extended to every incorporated jurisdiction  
6 (Jackson County, Eagle Point, Medford, Jacksonville, Central Point, Phoenix, Talent, and Ash-  
land), school district (Ashland School District No. 5, Central Point School District No. 6, Jack-  
9 son County School District No. 9, Medford School District 549C, and Phoenix-Talent School  
District No. 4), and irrigation district (Eagle Point, Medford, Rogue River, and Talent Irriga-  
12 tion Districts) in the Region, plus the Medford Water Commission, the Rogue Valley Metro-  
politan Planning Organization, Rogue Valley Sewer Services, Rogue Valley Transportation  
District, and the appropriate state agencies (DLCD, ODOT, ODA, ODHCS, OECCD, and DEQ);  
and

15           WHEREAS the stakeholders mentioned above chose to exercise different levels  
of participation and responsibility within the planning process, the “participants” (as the  
term is employed in ORS 197.656(2)(b)), are those jurisdictions and agencies that elect, by  
signing this Agreement, to implement the regional solutions to the regional problems identi-  
fied hereinafter; and

18           WHEREAS signatory participants (Signatories) have chosen to exercise different  
levels of activity and responsibility within the implementation phase of the adopted Plan,  
21 Implementing Signatories are those participants which will amend their comprehensive  
plans per Section VI (3) of this Agreement to implement the adopted Plan, and Supporting  
Signatories are those participants which will otherwise support the implementation of the  
adopted Plan; and

24           WHEREAS the Implementing Signatories are Jackson County and the cities of  
Eagle Point, Medford, Central Point, Phoenix, Talent, Jacksonville, and Ashland; and Sup-  
27 porting Signatories are the Rogue Valley Sewer Services (RVS), the Rogue Valley Metro-  
politan Planning Organization (RVMPO), the Land Conservation and Development Commission  
(LCDC), and signatory state agencies; and

30           WHEREAS this Agreement is intended to serve as the basis for amendments to  
the comprehensive plans and land use regulations of the Implementing Signatories in com-  
pliance with ORS 197.656.

## AGREEMENT

33           NOW, THEREFORE, the parties to this Agreement agree to propose comprehen-  
sive plan and land use regulation amendment processes based on the attached draft Plan  
36 (Exhibit A). With this agreement, participants acknowledge that, notwithstanding the fact  
that the draft Plan is the result of eight years of collaborative and jurisdiction-specific plan-  
ning, it may become necessary to make adjustments to the draft Plan as a result of the com-  
prehensive plan amendment process.

**I. Recitals**

The recitals set forth above are true and correct and are incorporated herein by this reference.

**II. General Agreement**

Signatories to this Agreement agree to abide by a Plan developed under Regional Problem Solving, as adopted by Implementing Signatories into their comprehensive plans, and acknowledged by the State of Oregon. Implementing Signatories agree to maintain internal consistency with the adopted Plan on an ongoing basis, and when necessary and appropriate, either to amend their comprehensive plans and related policies, codes, and regulations to be consistent with the adopted Plan, or to pursue amendments to the adopted Plan. The Land Conservation and Development Commission (LCDC) agrees to review the Implementing Signatories' comprehensive plan and land use regulation amendments under ORS 197.656(2), and agrees that this Agreement contains the elements required by ORS 197.656(2)(b). Notwithstanding the generality of the foregoing provision and any other provision of this Agreement, however, LCDC retains its full discretion and authority with respect to its review of the adopted Plan, or any amendments to the adopted Plan, and with respect to its review of the amendments to comprehensive plans and land use regulations that the Implementing Signatory Jurisdictions adopt to implement the adopted Plan. The adopted Plan shall be what is adopted as a result of Jackson County's comprehensive plan amendment process.

The process for amending the comprehensive plans of Jackson County and Implementing Signatories is described in the attached work program (Exhibit B), which details the tasks and timing necessary to coordinate the initial comprehensive plan amendments necessary to adopt the Plan.

Per ORS 197.656, all amendments to the adopted Plan will be subject to review by LCDC in the manner of periodic review or as set forth in ORS 197.251.

**III. Statement of Problems to be Addressed** [ORS 197.656]

The parties to the Greater Bear Creek Valley RPS process (the "Project") identified three problems to be addressed by the Project:

**Problem No. 1***Lack of a Mechanism for Coordinated Regional Growth Planning*

The Region will continue to be subjected in the future to growth pressures that will require the active collaboration of jurisdictions within the Greater Bear Creek Valley. A mechanism is needed that accomplishes this without infringing on individual jurisdictional authority and/or autonomy. This Problem No. 1 shall be referred to hereinafter as "Coordinated Growth Management."

**Problem No. 2***Loss of Valuable Farm and Forest Land Caused by Urban Expansion*

3 As our communities have expanded incrementally, there has been a ten-  
 6 dency to convert important farm and forest lands to urban uses while bypassing  
 9 lands with significantly less value as resource lands. This has been exacerbated  
 by the Region's special characteristics and historic settlement patterns, which  
 can cause some state regulations governing urban growth to have unintended  
 consequences, some of them contrary to the intent of Oregon's Statewide Plan-  
 ning Goals. This Problem No. 2 shall be referred to hereinafter as the "Preserva-  
 tion of Valuable Resource Lands."

**Problem No. 3***Loss of Community Identity*

12 Urban growth boundary expansions have contributed to a decreasing  
 15 separation between some of the communities in the Region, which jeopardizes  
 important aspects of these jurisdictions' sense of community and identity. This  
 Problem No. 3 shall be referred to hereinafter as the "Preservation of Communi-  
 ty Identity."

18 **IV. Project Goals** [ORS 197.656(2)(A)]

The parties to this Agreement have adopted the following Goals with respect to  
 the Problems:

21 **Goal No. 1**

*Manage future regional growth for the greater public good.*

24 **Goal No. 2**

*Conserve resource and open space lands for their important economic, cul-  
 tural, and livability benefits.*

27 **Goal No. 3**

*Recognize and emphasize the individual identity, unique features, and rel-  
 ative comparative advantages and disadvantages of each community with-  
 in the Region.*

30

## V. **Optional Techniques for Implementation**<sup>1</sup> [ORS 197.656(2)(B)]

These optional techniques for implementation are those identified as appropriate for implementation of the draft Plan. As stated in the Recitals, it may become necessary to make adjustments to the draft Plan, and potentially these optional techniques for implementation, as a result of the public comprehensive plan amendment process.

**A. Problem No. 1** *Lack of a Mechanism for Coordinated Regional Growth Planning*

**Goal No. 1** *Manage future regional growth for the greater public good.*

### Optional Implementation Techniques

#### (1) **Coordinated Periodic Review**

Implementing Signatories may engage in a coordinated schedule of regular Periodic Reviews following the adoption of the Plan. This regionally coordinated Periodic Review will begin in 2012, will take place every 10 years, and will coincide with the ten-year regular review of the adopted Plan. This coordinated Periodic Review will provide an opportunity to take advantage of an economy of scale in generating technical information, and to incorporate a regional perspective in the Periodic Review process, but it does not mandate a simultaneous or linked process among jurisdictions.

#### (2) **Ten-year RPS Review**

Implementing Signatories will abide by the review process described in Section VI of this Agreement. The review process complies with the monitoring requirement in the RPS statute, and affords participating jurisdictions flexibility in responding to changing regional and local circumstances by establishing a process and venue for amending the adopted Plan.

#### (3) **Coordinated Population Allocation**

Jackson County's allocation of future population growth, a state-mandated responsibility of the County, will reflect the Implementing Signatories' proportional allocation of future population within the adopted Plan and its future amendments consistent with statute.

#### (4) **Greater Coordination with the RVMPO**

As a proven mechanism of regional collaborative planning in the study area, the RVMPO, as the federally designated transportation planning entity, will plan and coordinate the regionally significant transportation strategies critical to the success of the adopted Plan. Of special focus will

<sup>1</sup> Where "optional techniques for implementation" refers to strategies and mechanisms to implement regional solutions that are in compliance with the statewide goals and statutes, but which may not strictly adhere to Oregon Administrative Rules.

be the development of mechanisms to preserve rights-of-way for major transportation infrastructure, and a means of creating supplemental funding for regionally significant transportation projects.

**B. Problem No. 2** *Loss of Valuable Farm and Forest Land Caused by Urban Expansion*

**Goal No. 2** *Conserve resource and open space lands for their important economic, cultural, and livability benefits.*

Optional Implementation Techniques

(1) **Long-Range Urban Reserves**

The establishment of Urban Reserves sufficient to serve a doubling of the Region’s urban population will allow long-term production decisions to be made on agricultural land not included in urban reserves.

(2) **Regional Agricultural Buffering Standards**

Implementing Signatories will apply the adopted Plan’s set of agricultural buffering standards as a means of mitigating negative impacts arising from the rural/urban interface.

(3) **Critical Open Space Area (COSA) Preservation**

The COSA strategies outlined in Appendix IX of the draft Plan are available as an option to Signatory jurisdictions interested in further accentuating or more permanently preserving areas of separation between communities (community buffers). These COSA strategies are not mandatory for any jurisdiction, and may be refined or expanded as individual jurisdictions see fit.

**C. Problem No. 3** *Loss of Community Identity*

**Goal No. 3** *Recognize and emphasize the individual identity, unique features, and relative comparative advantages and disadvantages of each community within the Region.*

Optional Implementation Techniques

(1) **Community Buffers**

The establishment of Urban Reserves outside of recommended areas of critical open space provides for a basic level of preservation for the Region’s important areas of community separation.

(2) **Allocating to Comparative Advantages**

The Region agrees to a distribution of the calculated need of residential and employment lands among Implementing Signatories necessary to support a regional doubling of the population. This distribution, which depends on a number of factors that relate to the comparative strengths

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and weaknesses of Implementing Signatories, will allow each community to develop its own balance of viability and individuality within the larger regional matrix.

(3) **Critical Open Space Area (COSA) Preservation**

The COSA strategies outlined in Appendix IX of the draft Plan are available as an option to Signatory jurisdictions interested in further accentuating or more permanently preserving areas of separation between communities (community buffers). These COSA strategies are not mandatory for any jurisdiction, and may be refined or expanded as individual jurisdictions see fit.

**VI. Measurable Performance Indicators** [ORS 197.656(2)(C)]

These measurable performance indicators are those identified as appropriate for monitoring purposes of the adopted Plan. As stated in prior sections, it may become necessary to make adjustments to the draft Plan, and potentially these measurable performance indicators, as a result of the comprehensive plan amendment process.

The following are measurable performance indicators:

- 1) On a regular basis, every 10 years starting in 2012, the Implementing Signatories may participate in a process of coordinated Periodic Review.
- 2) On a regular basis, every 10 years starting in 2012, Implementing Signatories to this Agreement will be subject to the regular RPS review process. Jackson County shall initiate the RPS review process by providing notice of the RPS review to Signatories to this Agreement and requiring that each Implementing Signatory submit a self-evaluation monitoring report addressing compliance with the performance indicators set out in this Section to the County within 60 days after the date of the notice. Jackson County will distribute these monitoring reports to all Signatories.
- 3) Implementing Signatory cities will incorporate the portions of the RPS adopted Plan that are applicable to each individual Implementing Signatory city into that city's comprehensive plan and implementing ordinances, and will reference the larger regional Plan as an adopted element of Jackson County's comprehensive plan. To incorporate applicable portions of the RPS adopted Plan into their comprehensive plans and implementing ordinances, Implementing Signatory cities will adopt at least the following:
  - a) RPS Plan policies adopted to comply with Section X(2) of this Agreement;
  - b) 10-year mandated review period;
  - c) urban reserve areas (if appropriate);

- d) target residential densities (for the urban reserve areas);
- e) agricultural buffering standards (for the urban reserve areas);
- f) implementing ordinances (for the urban reserve areas).

4) Implementing Signatories will comply with the general conditions as listed in Section X of this Agreement, and, as appropriate, the specific conditions of approval for selected urban reserves, as described in the adopted Plan.

5) Implementing Signatory jurisdictions serving or projected to serve a designated urban reserve will adopt an Urban Reserve Management Agreement (URMA) jointly with Jackson County.

6) Urban reserves identified in the adopted Plan are the *first-priority* lands used for UGB expansions by Implementing Signatories.

7) Implementing Signatory cities, when applying urban designations and zones to urban reserve land included in UGB expansions, will achieve, on average over a 20-year planning horizon, at least the “higher land need” residential densities in the adopted RPS Plan for buildable land as defined by OAR 660-008-0005(2). The density offset strategy outlined in the draft Plan is an acceptable mechanism to assist in meeting density targets.

8) Implementing Signatory cities, when applying urban designations and zones to urban reserve land included in a UGB expansion, will be guided by the general distribution of land uses proposed in the adopted RPS Plan, especially where a specific set of land uses were part of a compelling urban-based rationale for designating RLRC land as part of a city’s set of urban reserves.

9) Conceptual plans for urban reserves will be developed in sufficient detail to allow the Region to determine the sizing and location of regionally significant transportation infrastructure. This information should be determined early enough in the planning and development cycle that the identified regionally significant transportation corridors can be protected as cost-effectively as possible by available strategies and funding. Conceptual plans for an urban reserve in the RPS Plan are not required to be completed at the time of adoption of a comprehensive plan amendment incorporating urban reserves into a city or county comprehensive plan.

10) The county’s population element is updated per statute to be consistent with the gradual implementation of the adopted Plan.

## VII. Incentives and Disincentives to Achieving Goals

[ORS 197.656(2)(D)]

3            These incentives and disincentives are those identified as appropriate to the  
draft Plan. As stated in prior sections, it may become necessary to make adjustments to the  
draft Plan, and potentially these incentives and disincentives, as a result of the public com-  
6            prehensive plan amendment process.

### Incentives

- 9            1)        Continued regional cooperation through the 10-year review process and  
coordinated Periodic Review may improve the Region's ability to re-  
spond to challenges and opportunities more effectively than it does pre-  
sently.
- 12          2)        Adherence to the adopted Plan may provide the Region with a competi-  
tive advantage, increase the attractiveness of the Region to long-term in-  
vestment, and improve southern Oregon's profile in the state.
- 15          3)        Adherence to the adopted Plan may produce significant reductions in  
transportation infrastructure costs by minimizing future right-of-way  
acquisition costs and by improving the overall long-range coordination  
18          of transportation and land use planning.
- 21          4)        Adherence to the adopted Plan will provide Signatory jurisdictions with  
population allocations that are predictable, transparent, and based on  
the relative strengths of the different participating jurisdictions.
- 24          5)        The adopted Plan will offer compelling regional justifications and state  
agency support for Tolo and the South Valley Employment Center that  
may not have been available to an individual city's proposal.
- 27          6)        Adherence to the adopted Plan will permit Implementing Signatories to  
implement the flexibility provided by the concept of the "Regional Com-  
munity", in which cities, in the role of "regional neighborhoods", enjoy a  
wide latitude in their particular mix, concentration, and intensity of land  
uses, as long as the sum of the regional parts contributes to a viable bal-  
30          ance of land uses that is functional and attractive to residents and em-  
ployers and in compliance with statewide goals.

### Disincentives

- 33          1)        Implementing Signatories that choose to expand their UGBs into land not  
designated as urban reserve will be required to go through the RPS Plan  
minor or major amendment process prior to or concurrent with any oth-  
36          er process.

## RPS Plan Amendments

3 Processing amendments to the adopted Plan will be the responsibility of Jackson  
County, and can only be proposed by the governing authority of an Implement-  
6 ing Signatory jurisdiction. In acknowledgement of the collaborative process by  
which the adopted Plan was created, Jackson County will have available the as-  
sistance of the signatories to this Agreement through a Technical Advisory  
Committee and Policy Committee. Both committees serve on an as-needed basis,  
and both serve in an advisory capacity to Jackson County.

### 9 (a) Technical Advisory Committee

12 The TAC will comprise planners and senior-level staff from signatory jurisdic-  
tions and agencies, and each signatory will have one vote, irrespective of the  
number of participating representatives. Recommendations to the Policy Com-  
mittee or directly to Jackson County will be made by at least a supermajority  
vote (simple majority plus one) of attending signatory jurisdictions and agencies.

### 15 (b) Policy Committee

18 The Policy Committee will comprise elected officials or executive staff from sig-  
natory jurisdictions and agencies. Each Implementing Signatory jurisdiction will  
designate a voting and alternate voting member, and each Implementing Signa-  
21 tory jurisdiction will have one vote. Recommendations to Jackson County will be  
made by at least a supermajority vote (simple majority plus one) of attending  
Implementing Signatories. Attending jurisdictions must constitute a quorum of  
24 Implementing Signatories. Supporting Signatories (State agencies, the RVMPO,  
LCDC, and Rogue Valley Sewer Services), while Signatories, will not be voting  
members of the Policy Committee.

27 When an amendment to the adopted RPS Plan is proposed, Jackson County will  
make a preliminary determination regarding whether the proposed amendment  
is a Minor Amendment or Major Amendment, as defined below, and will notify  
30 signatory jurisdictions of the County's preliminary determination. Based on its  
preliminary determination, Jackson County will review the proposed amend-  
ment according to the procedures for Minor Amendments or Major Amend-  
ments set out below.

33 Per ORS 197.656, all amendments to the adopted Plan will be subject to review  
by LCDC in the manner of periodic review or as set forth in ORS 197.251.

Proposed amendments to the adopted Plan will adhere to the following provi-  
sions:

#### 36 1) Minor Amendment

A minor amendment is defined as any request for an amendment to the  
adopted Plan that:

- 39 a) does not conflict with the general conditions listed in Section X of  
this Agreement or specific conditions of approval described in the  
adopted RPS Plan; and
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b) does not propose an addition of more than 50 acres to a city's urban reserves established for a city in the adopted RPS Plan or more than a 50-acre expansion of the UGB into non-urban reserve rural land.

In the case of Ashland, which did not establish urban reserves during the development of the Plan process, a proposal to establish an urban reserve or expand its UGB of not more than 50 acres will be considered a minor amendment.

Should a city exceed its limit of 50 acres for adding *to its urban reserves* during the term of the Agreement, it may not use the minor amendment process for further alterations to its urban reserves. Should a city exceed its limit of 50 acres for expanding its UGB into non-urban reserve rural land during the planning horizon, it may not use the minor amendment process for further expansions of its UGB into non-urban reserve land.

Any Implementing Signatory may initiate a minor amendment to the adopted Plan. The Implementing Signatory must clearly identify the nature of the minor amendment, and specify whether the minor amendment would require any other Implementing Signatory to amend its comprehensive plan. Should any Implementing Signatory other than the proposing jurisdiction and Jackson County be required to amend their comprehensive plans as a result of the proposed minor amendment, the affected Implementing Signatory will be a party to the minor amendment proceeding.

Jackson County's process for a minor amendment to the Plan will be equivalent to the state and local required processes for a comprehensive plan amendment.

Signatory jurisdictions and agencies shall be provided with notice of the County's final decision on each minor amendment request within five working days of the adoption of the final decision.

## 2) Major Amendment

A major amendment is defined as any requested amendment to the adopted Plan that does not meet the definition of a Minor Amendment.

a) If multiple signatory jurisdictions are involved in a single request for a major amendment, a lead jurisdiction will be selected by the affected jurisdictions;

b) notice containing a detailed description of the proposed change will be forwarded by Jackson County to all signatory jurisdictions and agencies;

c) staff from signatory jurisdictions and agencies will be noticed, and will meet as a Technical Advisory Committee and generate a recommendation to the Policy Committee by vote of at least a supermajority of those present (simple majority plus one);

- 3 d) decision-makers from signatory jurisdictions and agencies will be noticed, and will meet as a Policy Committee and consider the proposal and the Technical Advisory Committee recommendation. Attending jurisdictions will constitute a quorum; and
  - 6 e) the Policy Committee will generate a recommendation to Jackson County by vote of at least a supermajority of those present (simple majority plus one).
- 9 Jackson County’s process for a major amendment to the Plan will be equivalent to the state and local required process for a comprehensive plan amendment in addition to the above provisions. Noticing will be in compliance with State statutes.
- 12 All parties to this agreement and any additional affected agencies shall be provided with notice of the County’s final decision on each major amendment request within five working days of the adoption of the final
- 15 decision.

**IX. Newly Incorporated City**

18 Should White City or some other area of Jackson County within the area of the adopted Plan incorporate while the adopted Plan is in effect, and should the newly incorporated city desire to become a signatory to the Agreement, increased population will be added to the regional target population adequate to accommodate the projected population

21 growth of the newly incorporated city for the remainder of the adopted Plan’s planning horizon. The addition of a newly incorporated city to the adopted Plan, the establishment of urban reserves, and other such actions shall be accomplished through the major amendment

24 process.

**X. Conditions to Agreement**

General Conditions

27 The Signatories agree that the adopted Plan shall comply with the general conditions listed below, which apply to all Implementing Signatories. These general conditions are those which have been identified as appropriate to the adopted

30 Plan. As stated in prior sections, it may become necessary to make adjustments to the draft Plan, and potentially these general conditions, as a result of the public comprehensive plan amendment process.

- 33 1) Agricultural Buffering
- 36 Where appropriate, Implementing Signatories shall apply the agricultural buffering guidelines developed through the Regional Problem Solving process.

2) Transportation

The adopted Plan shall include policies to:

- 3 a) Identify a general network of locally owned regionally significant north-south and east-west arterials and associated projects to provide mobility throughout the Region.
- 6 b) Designate and protect corridors for locally owned regionally significant arterials and associated projects within the RVMPO to ensure adequate transportation connectivity, multimodal use, and minimize right of way costs.
- 9 c) Establish a means of providing supplemental transportation funding to mitigate impacts arising from future growth.

12 These policies shall be implemented by ordinance upon the adoption of the latest update of the Rogue Valley Metropolitan Planning Organization's Regional Transportation Plan and the local adoption of the RPS Plan through individual city and county Comprehensive Plan amendments. Implementing Signatory cities will incorporate the portions of the RPS Plan relative to transportation that are applicable to each individual city into that city's comprehensive plan and implementing ordinances, and will reference the larger regional plan as an adopted element of Jackson County's comprehensive plan.

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21 **Conditions of Approval**

24 Specific conditions of approval apply to selected urban reserve areas, and are described in the adopted Plan. The Implementing Signatories agree to abide by these conditions. As stated in prior sections, it may become necessary to make adjustments to the draft Plan, and potentially the conditions of approval, as a result of the public comprehensive plan amendment process.

27 **XI. Amendments to the Agreement**

30 For the purpose of maintaining consistency with the RPS Statue (ORS 197.656) amendments to the Agreement can be made at any time by consensus (all parties in agreement) of the Signatories to the Agreement.

33 Under this section, "signatories" refers to all signatories to the Agreement except the Land Conservation and Development Commission (LCDC). In addition, nothing in this section, or this Agreement, is intended to affect the authority of LCDC to review an amendment to this Agreement as required under ORS 197.656.

## **XII. Termination of Participation**

3 A signatory to the Agreement may petition Jackson County for termination of its  
 participation in the Agreement. Jackson County will convene a meeting of the Policy Com-  
 6 mittee to consider such a petition. A signatory's petition may be granted by a supermajority  
 (simple majority plus one) of the Signatories to the Agreement. A signatory that has termi-  
 nated its participation with the consent of a supermajority of the signatories to the Agree-  
 ment shall not be considered to have failed to adhere to the adopted Plan.

9 Should an Implementing Signatory terminate its participation in the Agreement without  
 approval of the supermajority of signatories to the Agreement, it will be considered to have  
 failed to adhere to the adopted Plan, and may be subject to the Disincentives in Section VII  
 12 and applicable legal and legislative repercussions. For remaining signatories, the validity of  
 this Agreement will not be adversely impacted by an Implementing Signatory's termination  
 of participation, by supermajority decision or otherwise.

15 Under this section, "signatories" refers to all signatories to the Agreement except the Land  
 Conservation and Development Commission (LCDC).

## **XIII. Termination of the Agreement**

This agreement may be terminated when one or more of the following occur(s):

- 18 1) A supermajority (simple majority plus one) of Signatories agree that the  
 Agreement is terminated;
- 2) LCDC denies acknowledgment of the Plan;
- 21 3) The doubled regional population is reached;
- 4) 50 years have passed since the Agreement was signed.

24 No signatory will be penalized under the conditions of this Agreement due to a supermajori-  
 ty decision to terminate.

Under this section, "signatories" refers to all signatories to the Agreement except the Land  
 Conservation and Development Commission (LCDC).

## **XIV. Applicability**

27 Implementing Signatories to this agreement agree that necessary amendments  
 to their comprehensive plans will occur as required by the Plan, and that the Plan is in effect  
 30 for each jurisdiction at the time that its and Jackson County's implementing comprehensive  
 plan amendments and land use regulations are adopted and acknowledged.

33 Once the RPS plan is implemented by the appropriate comprehensive plan amendments and  
 land use regulations, an Implementing Signatory's failure to adhere to the Plan as adopted

or subsequently amended will expose that jurisdiction to the usual legal and legislative repercussions from non-compliance with acknowledged comprehensive plans.

3 Signatories to this agreement acknowledge that statutory authority over land use regulation  
ultimately resides with the Oregon legislature. Additionally, signatories to this agreement  
6 recognize that the provisions of the Plan may be determined in the future to be in conflict  
with existing or yet to be adopted statutes or administrative rules.

Signatories to this agreement expressly recognize that land use regulations and actions  
9 must otherwise comport with the statutes and other applicable regulations of the State of  
Oregon other than those LCDC regulations for which the adopted RPS Plan authorizes less  
than full compliance.

12 Therefore, Signatories agree that, when conflicts between statute and other applicable regu-  
lations of the State of Oregon (other than those LCDC regulations for which the adopted  
Plan authorizes less than full compliance) and the Plan arise, Oregon statute shall prevail.

## **XV. Severability**

15 Any provision or part of the Agreement held to be void or unenforceable under  
any Law or Regulation shall be deemed stricken and all remaining provisions shall continue  
18 to be valid and binding upon the parties. The Agreement shall be reformed to replace such  
stricken provision or part thereof with a valid and enforceable provision that comes as close  
as possible to expressing the intention of the stricken provision.

## **XVI. Entire Agreement**

21 This Agreement contains the entire agreement between the parties and super-  
sedes all prior negotiations, discussions, obligations, and rights of the parties regarding the  
subject matter of this agreement. There is no other written or oral understanding between  
24 the parties. No modification, amendment or alteration of this Agreement shall be valid un-  
less it is in writing and signed by the parties hereto.

## **XVII. Counterparts**

27 This Agreement may be signed in counterpart by the parties, each of which shall  
be deemed original, but all of which together shall constitute one and the same instrument,  
binding on all parties hereto.

## **XVIII. Authority to Execute Agreement**

30 Each person signing of behalf of a governmental entity hereby declares that he  
or she, or it has the authority to sign on behalf of his or her or its respective entity and  
33 agrees to hold the other party or parties hereto harmless if he or she or it does not have  
such authority.

### Implementing Signatories

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Chairman,  
Jackson County Board of Commissioners

---

Mayor, City of Ashland

---

Mayor, City of Talent

---

Mayor, City of Phoenix

---

Mayor, City of Medford

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Mayor, City of Jacksonville

---

Mayor, City of Central Point

---

Mayor, City of Eagle Point

### Supporting Signatories

---

Director, Oregon Department of Land  
Conservation and Development

---

Director, Oregon Department of  
Transportation

---

Director, Oregon Department of  
Environmental Quality

---

Director, Oregon Economic and  
Community Development Department

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Director, Oregon Department of  
Agriculture

---

Director, Oregon Housing and Community  
Development Department

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Chair, Rogue Valley Metropolitan  
Planning Organization

---

Chair, Rogue Valley Sewer Services

---

Chair, Land Conservation and  
Development Commission

---

General Manager, Rogue Valley Sewer  
Services

# Sample Memorandum of Understanding, Greater Bear Creek Valley: Regional Problem Solving

## RESOLUTION NO. 00-01 One Valley Regional Problem Solving Project

A resolution of the Policy Committee (hereinafter “Committee”) of the Greater Bear Creek Area Regional Problem Solving Process (hereinafter “RPS” or “RPS project”) affirming policies and procedures relating to RPS:

### WHEREAS:

1. The jurisdictions of Jackson County, Medford, Eagle Point, White City, Jacksonville, Central Point, Phoenix, Talent and Ashland; local agencies BCVSA (Bear Creek Valley Sanitary Authority) and MWC (Medford Water Commission); and state agencies such as DLCD (Department of Land Conservation and Development), ODOT (Oregon Department of Transportation), OECDD (Oregon Economic and Community Development Department), DEQ (Department of Environmental Quality), HCS (Housing and Community Services), ODA (Oregon Department of Agriculture), and ODF (Oregon Department of Forestry) have entered into a regional land use planning process the purpose of which is to collaboratively identify areas of Jackson County in which future growth at urban levels of density is and is not desirable or appropriate; and
2. The Committee anticipates the process will result in agreements by and between participants upon where urban levels of growth will eventually occur, how such lands will be governed and managed by participants prior to annexation and urbanization, and what lands should be protected against development at urban densities; and
3. The Committee understands that this resolution applies to the project’s time period as presented in the “**One Valley** Regional Problem Solving Work Plan and Timeline”, and that the Committee assumes this RPS project will be of the scope and duration as presented therein (within a range of flexibility as granted by the Policy Committee );

### NOW, THEREFORE, THE COMMITTEE RESOLVES:

Responsibility for completing and overseeing work tasks, for public participation, for project management, and for establishing and implementing policies are distributed among the project’s committees, jurisdictions, and state and local agencies as follows:

Participating Jurisdictions and Agencies  
 Policy Committee  
 Technical Committee  
 Resource Lands Review Committee (RLRC)  
 Project Citizen Involvement Committee (pCIC)  
 Jurisdiction-specific Citizen Involvement Committee (jic)  
 Rogue Valley Council of Governments

The role of each of these shall be:

**Participating Jurisdictions and Agencies**

Lead Responsibilities

Provide timely feedback of concerns, issues, or recommendations to the project through the corresponding Policy or Technical Committee members.

Facilitate the project's approval/adoption process.

Keep informed of the project's process and products.

**Policy Committee**

Lead Responsibilities

As individual members of the Policy Committee, serve as the project's advocate in the community at large and before each participating jurisdiction or agency's decision makers.

Establish and/or approve project policies and processes.

Review work products and recommendations from Technical Committee, and either approve or recommend adjustments.

Direct the process of garnering on-going support and final plan approval of participating jurisdictions and state and local agencies.

Make recommendations to RVCOG on project and budget management issues as appropriate.

Direct the process of seeking funding to continue project to completion and implementation following June 2001, providing participating jurisdictions are satisfied with progress to date.

Monitor the useful involvement of each jurisdiction's own citizen involvement committee (jcic).

**Technical Committee**

Lead Responsibilities

As individual members of the Technical Committee, serve as the project's advocate in the community at large and before each participating jurisdiction or agency's decision makers.

Prepare, or direct RVCOG to prepare when appropriate, final work products or recommendations for Policy Committee approval.

Serve as the principle implementor and conduit of project work between the Policy Committee and the pCIC and RLRC, and between Policy Committee and State.

Implement project-related policies of the Policy Committee.

Take the lead on coordinating work on all RLRC and pCIC work tasks, and other tasks as specified in the project scope of work.

Provide on-going feedback to the RLRC and pCIC on the use to which their recommendations are being put during the development of the project.

Make recommendations to RVCOG on project management issues as necessary.

### **Resource Lands Review Committee (RLRC)**

#### Lead Responsibilities

As per state statute, make expert recommendations concerning any contemplated changes to the commercial resource land base (resource lands put to other uses).

Forward a recommendation to the Technical Committee identifying the study area's most valuable farmland (and other resource land if applicable).

#### Coordinated Task Responsibilities

Make recommendations concerning the need and nature of a protective overlay for the identified valuable agricultural lands.

#### Task Review Responsibilities

Review the draft growth and non-growth plans.

### **Project Citizen Involvement Committee (pCIC)**

#### Lead Responsibilities

Provide a significant opportunity for broad-based public input.

Forward a recommendation to the Technical Committee identifying the study area's most valuable open space.

#### Coordinated Responsibilities

Recommend viable means of financing public open space if appropriate.

Identify the need and nature of a protective overlay or zone for the identified valuable open space lands.

Make recommendations concerning a future best case jobs/housing balance.

Examine the study area's population potential after 2050, and possible limiting factors.

Examine future in-fill and redevelopment potentials.

Establish buffer area design standards.

Task Review Responsibilities

Regionally coordinated periodic review proposal

Major infrastructure sequential growth plan.

Preliminary allocations of future growth areas to jurisdictions;

Draft growth and non-growth plans

**Jurisdiction-specific Citizen Involvement Committee (jciC)**

Lead Responsibilities

To the extent appropriate for, and determined by, each jurisdiction:

Review the progress of the project work tasks, and provide feedback to the project through the appropriate Policy or Technical Committee member.

Focus on jurisdiction-specific issues, and provide feedback as above.

Provide the opportunity for the local public to become informed about, and have input in, the project and its process.

**Rogue Valley Council of Governments (RVCOG)**

Lead Responsibilities

Contract management with DLCD.

Daily project and individual task management.

Budget management, including expenditure reports and budget changes.

Coordination between all committees, and between the project and all participating jurisdictions and agencies.

Unanimously approved by voting members of the Committee this seventh day of November, 2000.

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Recording Secretary



## Step 2 – Community Outcomes and Evaluation Criteria

### Sample Guiding Principles

**Sample Guiding Principles** Guiding principles for scenario planning are typically established in collaboration with an advisory committee that has been convened to support the planning process or are drawn from existing plans of local jurisdictions. Guiding principles are developed to ensure that planning recommendations and strategies reflect and support the core values of the community. Having a clear understanding and consensus of the public’s values ensures that the recommendations and strategies within the plan are consistent with these values.

Scenario planning as it relates to HB 2001 and SB 1059 has a clear goal to explore how to reduce greenhouse gas (GHG) emissions of light vehicles using a variety of land use and transportation strategies. A broader discussion of community priorities can yield better overall project clarity and direction for the scenario process.

Guiding principles for a scenario planning project will likely vary among metropolitan areas. However, there are some common themes that tend to emerge. Included is a sample selection of guiding principles that have been used successfully in plans throughout Oregon and in other states. The following example guiding principles are listed under six themes:

- Land Use
- Transportation
- Community and Housing
- Economy
- Equity and Opportunity
- Environment

## LAND USE

- Use urban, rural lands and the lands that have the potential to become urban, efficiently.
- Encourage orderly and efficient conversion of land from rural to urban uses in response to urban needs, taking into account metropolitan area and statewide goals.
- Protect rural lands best suited for non-urban uses from incompatible urban encroachment.

## TRANSPORTATION

- The transportation network ensures safe and efficient travel.
- Neighborhoods should be served by a variety of transportation options, walking, biking, and public transit in addition to the use of the automobile.
- Navigation is simplified through signage, lighting and pathways.
- Neighborhoods should be walkable with safe and continuous sidewalks, a variety of routes, and good access to transit corridors.

## COMMUNITY & HOUSING

- The metropolitan area is the kind of place where newcomers can move, find a home, and join the community.
- New development should respect and be compatible with the quality of life already enjoyed.
- Future development should protect historic buildings, neighborhoods and resources while allowing for continued use and enhancement of urban areas and the creation of new mixed use centers.
- New development should be designed to complement and enhance existing neighborhoods; it should add new and diverse choices, both in style and cost, for housing, shopping, entertainment, and other amenities.
- New neighborhoods on previously undeveloped land should be planned to provide a range of housing, employment, and shopping choices.
- There should be opportunities for all residents to shop for basic needs, such as grocery stores and pharmacies.
- Government policy should be clear and result in predictable development. Regulations should provide for the type of development residents want to see built and should be implemented consistently and fairly.
- New and existing employment centers should include shopping and after-hours activities as well as housing, so they become richer more vibrant places throughout the day and night.

## ECONOMY

- Economic development efforts recognize the important role that the quality of life, natural beauty, diversity and uniqueness of the region play in attracting and keeping businesses and employees.
- Economic success requires long-range planning to anticipate the infrastructure investment necessary to attract and keep companies in the region, including transportation, water, electric power and telecommunications.
- New centers of employment should be located so as to make efficient use of existing transportation and other infrastructure and minimize the travel time and distance for employees.
- Residents have an opportunity to obtain affordable housing that is conveniently located near their places of employment.
- A quality of life and financial climate is fostered to encourage businesses to start up or expand.

## EQUITY AND OPPORTUNITY

- Communities shall strive for inclusivity, a variety of income levels, and be accessible to all races, cultures, and ethnicities.
- Access to quality childcare, housing, jobs, healthcare, education, and basic needs shall be available to all.
- Everyone should have access to parks and open spaces.
- Ensure there is opportunity for small, medium-sized and minority owned businesses.
- A range of housing, employment, transportation, education and health care available across incomes, ethnicities, and cultures.
- All people and places should benefit from the regional prosperity while preserving a sense of place in Oregon's many unique cities, town and rural places.

## ENVIRONMENT

- Development patterns should preserve important environmentally sensitive and plentiful scenic lands.
- New buildings should meet high standards for energy, water, and carbon efficiency while delivering high quality spaces for people.
- Growth should not significantly degrade, and should, if possible, enhance the quality of the region's air and water.
- Ensure that there are parks, trails and open spaces that are easily accessible to residents throughout the community.
- Consider open space as essential infrastructure just like sewer, water and roadways.
- Create and maintain a regional greenspace network, comprised of connected open spaces, trails, and extensive parks. Accommodate sustainable design in City works projects.

## Potential Evaluation Criteria

Evaluation criteria are used to measure the performance of various land use and transportation strategies through comparison of the scenarios. They can be grouped into thematic topics that link core community values (guiding principles) directly to the criteria by which scenarios will be evaluated. They show measures that can be calculated by the tools being utilized in the scenario planning process. The table below presents a list of criteria that exceeds what is required for GHG related scenario planning. However, there may be some measures that should be included to assess some of the co-benefits important to the region that can come from scenario planning.

<u>Evaluation Criteria</u>	<u>Unit of Measure</u>
<b><u>Growth and Land Consumption</u></b>	
<b>Urbanization Pattern</b>	
<ul style="list-style-type: none"> <li>• Urbanized acreage</li> </ul>	Acreage or square miles
<ul style="list-style-type: none"> <li>○ Per capita</li> </ul>	
<ul style="list-style-type: none"> <li>○ Per housing unit</li> </ul>	
<ul style="list-style-type: none"> <li>○ Per job</li> </ul>	
<ul style="list-style-type: none"> <li>• Proportion of development on vacant land</li> </ul>	Percentage and actual acreage
<ul style="list-style-type: none"> <li>• Proportion of development on redeveloped land</li> </ul>	Percentage and actual acreage
<ul style="list-style-type: none"> <li>• Density for the metropolitan area or sub-geographies</li> </ul>	People per square mile or units per acre for smaller areas
<u>Evaluation Criteria</u>	<u>Unit of Measure</u>
<b><u>Transportation</u></b>	
<b>Travel and Commuting</b>	
<ul style="list-style-type: none"> <li>• Vehicle Miles Traveled (total, per capita, etc.)</li> </ul>	Miles
<ul style="list-style-type: none"> <li>• Mode Split</li> </ul>	Percentages and number of trips
<ul style="list-style-type: none"> <li>○ walk</li> </ul>	
<ul style="list-style-type: none"> <li>○ bike</li> </ul>	
<ul style="list-style-type: none"> <li>○ transit</li> </ul>	
<ul style="list-style-type: none"> <li>○ passenger</li> </ul>	
<ul style="list-style-type: none"> <li>○ drive alone</li> </ul>	
<ul style="list-style-type: none"> <li>• Average trip time</li> </ul>	Minutes
<ul style="list-style-type: none"> <li>• Average trip distance</li> </ul>	Miles
<ul style="list-style-type: none"> <li>• Annual average transportation cost per household</li> </ul>	Dollars
<ul style="list-style-type: none"> <li>• % of households with access to Transit (rail and bus)</li> </ul>	Percentage
<ul style="list-style-type: none"> <li>• % of jobs with access to Transit (rail and bus)</li> </ul>	Percentage
<b>Active Transportation</b>	
<ul style="list-style-type: none"> <li>• Walkable areas</li> </ul>	
<ul style="list-style-type: none"> <li>○ Share of Households</li> </ul>	Percentage and total number

SCENARIO PLANNING GUIDELINES

Technical Appendix  
Step 2

○ Share of Jobs	Percentage and total number
● Complete Neighborhoods	
○ Share of Households	Percentage and total number
○ Share of Jobs	Percentage and total number
● Average minutes walking per person per day	Minutes
● Average minutes biking per person per day	Minutes
● Households within walking distance of:	
○ Parks	Percentage and total number
○ Schools	Percentage and total number
○ Cultural amenities	Percentage and total number
○ Parks and open space	Percentage and total number
○ Amenities (arts, museums, theaters, hospitals, etc)	Percentage and total number
<b>Transportation Impacts</b>	
● Greenhouse Gas Emissions	
○ % of target met	Percentage
<b><u>Housing</u></b>	
<b>Housing Mix</b>	
● Single Family	Percentage and total number
● Townhouse	Percentage and total number
● Multi-family	Percentage and total number
● % ground related	Percentage and total number
● Owner vs. renter	Percentage and total number
<b>Total Buildings</b>	
● Units by building type	Number of units
<b>Housing Affordability</b>	
● Housing match/gap	Ratio - units
● Housing Cost	Average rent and sales price
● Transportation plus housing cost	Dollars
<b>Shared Prosperity</b>	
● Average wage	Dollars
● Median household income	Dollars
● Low-income areas	
○ Households added	Percentage and total number
○ Employment added	Percentage and total number
○ Redevelopment rates	Percentage and total number
○ Accessibility to employment	Percentage and total number based on timed drive and walksheds
○ Accessibility to parks, open space, beaches,	Percentage and total number based

amenities	on timed drive and walksheds
<ul style="list-style-type: none"> <li>• Access to healthcare</li> </ul>	Percentage and total number based on timed drive and walksheds
<b><u>Natural Environment &amp; Sustainability</u></b>	
<b>Sensitive Lands</b>	
<ul style="list-style-type: none"> <li>• Amount of growth on environmentally sensitive lands</li> </ul>	Percentage and acreage
<ul style="list-style-type: none"> <li>• Amount of growth on agricultural land (inside and outside of UGB)</li> </ul>	Percentage and acreage
<b>Hazard Mitigation</b>	
<ul style="list-style-type: none"> <li>• Amount of growth in wildfire risk areas</li> </ul>	Percentage and acreage
<ul style="list-style-type: none"> <li>• Amount of growth in landslide risk areas</li> </ul>	Percentage and acreage
<ul style="list-style-type: none"> <li>• Amount of growth in earthquake hazards (as defined by Dogami)</li> </ul>	Percentage and acreage
<b>Built Environment &amp; Sustainability</b>	
<ul style="list-style-type: none"> <li>• Total urban water consumption <ul style="list-style-type: none"> <li>○ Per capita</li> <li>○ Per housing unit</li> <li>○ Internal and external</li> </ul> </li> </ul>	Acre feet or Gallons
<ul style="list-style-type: none"> <li>○ Per housing unit</li> </ul>	Acre feet or Gallons
<ul style="list-style-type: none"> <li>○ Internal and external</li> </ul>	Acre feet or Gallons
<ul style="list-style-type: none"> <li>• Total energy consumption <ul style="list-style-type: none"> <li>○ Per capita</li> <li>○ Per housing unit</li> <li>○ Per job</li> </ul> </li> </ul>	Kilowatts or BTUs
<ul style="list-style-type: none"> <li>○ Per capita</li> </ul>	Kilowatts or BTUs
<ul style="list-style-type: none"> <li>○ Per housing unit</li> </ul>	Kilowatts or BTUs
<ul style="list-style-type: none"> <li>○ Per job</li> </ul>	Kilowatts or BTUs
<ul style="list-style-type: none"> <li>• Impervious surface increase</li> </ul>	Acreage
<b><u>Economy and Prosperity</u></b>	
<ul style="list-style-type: none"> <li>• Employment by sector</li> </ul>	Number and percent
<ul style="list-style-type: none"> <li>• Housing and transportation costs</li> </ul>	Dollar amount and percent of average income
<ul style="list-style-type: none"> <li>• Development value</li> </ul>	\$/acre
<ul style="list-style-type: none"> <li>• Costs of providing parking spaces</li> </ul>	Dollar amount
<ul style="list-style-type: none"> <li>• Household auto ownership costs</li> </ul>	Dollar amount
<ul style="list-style-type: none"> <li>• Fuel and electricity costs per capita</li> </ul>	Dollar amount

## **Step 3 - Set Up For Scenario Planning and Evaluation Tools**

### **Building Prototypes**

Building prototypes include the range of building types currently in the region as well as buildings expected to be in the future. Example “one-sheets” are included of urban and suburban products. Details include, building scale and mass, uses, parking and site utilization. The building prototypes are assembled within a scenario spreadsheet to create the Building Blocks used in the scenario development.

Attached: City of Portland building prototype summary sheets.

# 1-Single Family- Low Density

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	43,560 <b>sf</b>
Lot area (acres)	1.00 <b>acre</b>
Height	3 <b>stories</b>
Usable FAR	0.64
Residential units/acre	7 <b>/acre</b>
Avg. unit size (sf)	3,200 <b>sf</b>
Employees/acre	- <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$848,000
Average cost/sf	\$265 <b>/sf</b>
Average unit rent	\$6,400 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$18.09 <b>/sf</b>
Estimated land value	\$788,000 <b>/acre</b>
Total project costs	\$5,482,070



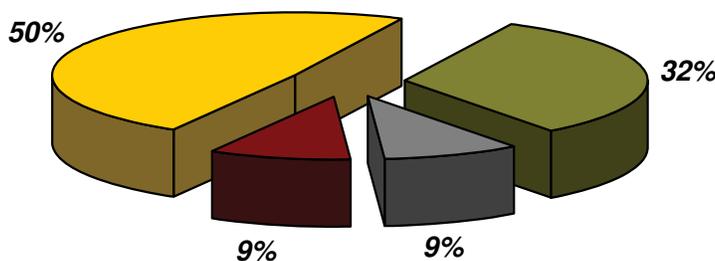
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.79
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	13
Open space (%)	40%



<b>Construction Costs *</b>	
Residential	\$125 <b>/sf</b>
Retail	\$125 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs

## % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

## 2-Single Family-Medium Density

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	4,000 sf
Lot area (acres)	0.09 acre
Height	2 stories
Usable FAR	0.55
Residential units/acre	11 /acre
Avg. unit size (sf)	1,700 sf
Employees/acre	- /acre

<b>Financial Summary</b>	
Average unit sale price	\$442,000
Average cost/sf	\$260 /sf
Average unit rent	\$3,400 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$19.03 /sf
Estimated land value	\$76,120 /acre
Total project costs	\$431,557

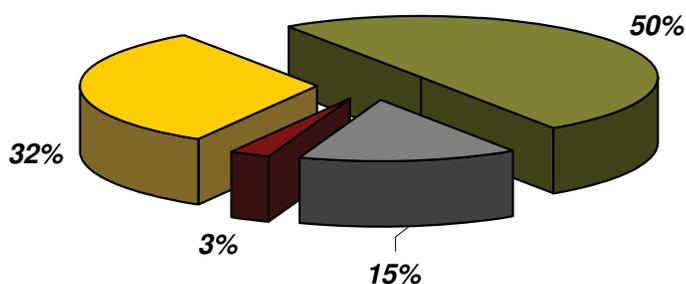
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.79
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	2
Open space (%)	50%

<b>Construction Costs *</b>	
Residential	\$115 /sf
Retail	\$0 /sf
Office	\$0 /sf

\* includes building costs with tenant improvements; does not include parking costs



### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

## 2-Skinny House

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	2,500 <b>sf</b>
Lot area (acres)	0.06 <b>acre</b>
Height	2 <b>stories</b>
Usable FAR	0.85
Residential units/acre	27 <b>/acre</b>
Avg. unit size (sf)	1,400 <b>sf</b>
Employees/acre	- <b>/acre</b>

<b>Financial Summary</b>	
Average unit sale price	\$343,000
Average cost/sf	\$245 <b>/sf</b>
Average unit rent	\$2,800 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$19.03 <b>/sf</b>
Estimated land value	\$47,575 <b>/acre</b>
Total project costs	\$326,340

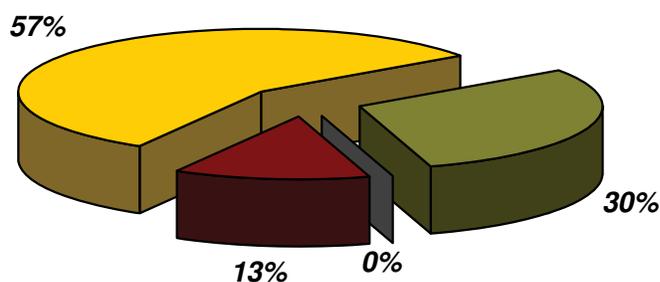
<b>Parking and Open Space Summary</b>	
Residential parking/unit	0.50
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	1
Open space (%)	30%

<b>Construction Costs *</b>	
Residential	\$115 <b>/sf</b>
Retail	\$0 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs



### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**3- Single Family Housing w Accessory Dwelling Unit**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	4,000 sf
Lot area (acres)	0.09 acre
Height	2 stories
Usable FAR	0.91
Residential units/acre	21 /acre
Avg. unit size (sf)	2,000 sf
Employees/acre	- /acre

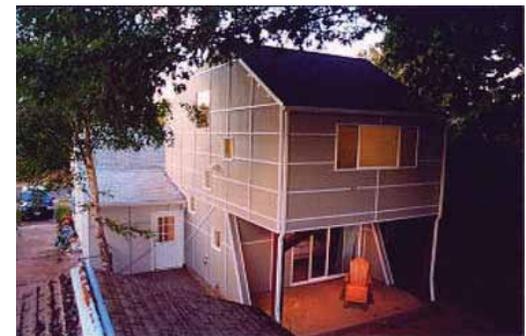


<b>Financial Summary</b>	
Average unit sale price	\$530,000
Average cost/sf	\$265 /sf
Average unit rent	\$4,000 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$12.30 /sf
Estimated land value	\$49,200 /acre
Total project costs	\$445,660



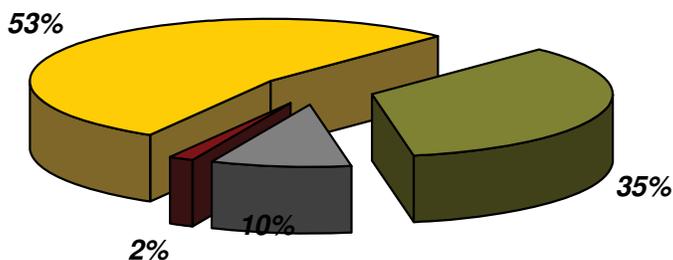
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	1
Open space (%)	35%

<b>Construction Costs *</b>	
Residential	\$115 /sf
Retail	\$125 /sf
Office	\$0 /sf



\* includes building costs with tenant improvements; does not include parking costs

**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**5a- Multi-Family Residential (Structured)**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	5,000 sf
Lot area (acres)	0.11 acre
Height	3 stories
Usable FAR	1.60
Residential units/acre	56 /acre
Avg. unit size (sf)	1,000 sf
Employees/acre	- /acre

<b>Financial Summary</b>	
Average unit sale price	\$265,000
Average cost/sf	\$265 /sf
Average unit rent	\$2,000 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$20.50 /sf
Estimated land value	\$102,500 /acre
Total project costs	\$1,341,904

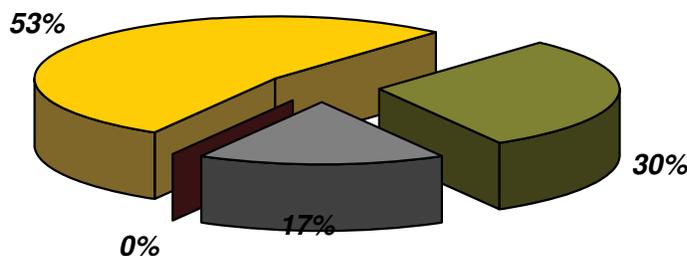
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	6
Open space (%)	30%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$0 /sf
Office	\$0 /sf

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**5b- MF Residential (Surface)**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	5,000 sf
Lot area (acres)	0.11 acre
Height	3 stories
Usable FAR	1.35
Residential units/acre	47 /acre
Avg. unit size (sf)	1,000 sf
Employees/acre	- /acre



<b>Financial Summary</b>	
Average unit sale price	\$225,000
Average cost/sf	\$225 /sf
Average unit rent	\$2,000 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$26.70 /sf
Estimated land value	\$133,500 /acre
Total project costs	\$1,060,006



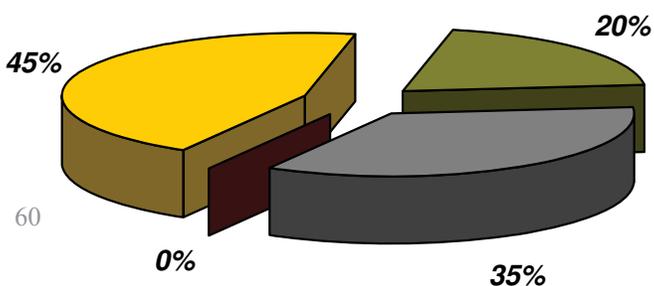
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	5
Open space (%)	20%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$0 /sf
Office	\$0 /sf



\* includes building costs with tenant improvements; does not include parking costs

**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**6b- Mixed Use Neighborhood Corridor Apartments (Surface)**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	20,000 sf
Lot area (acres)	0.46 acre
Height	4 stories
Usable FAR	1.67
Residential units/acre	58 /acre
Avg. unit size (sf)	1,000 sf
Employees/acre	- /acre



<b>Financial Summary</b>	
Average unit sale price	\$300,000
Average cost/sf	\$300 /sf
Average unit rent	\$2,250 /month
Average rent (sf/month)	\$ 2.25 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$42.17 /sf
Estimated land value	\$843,400 /acre
Total project costs	\$6,204,744



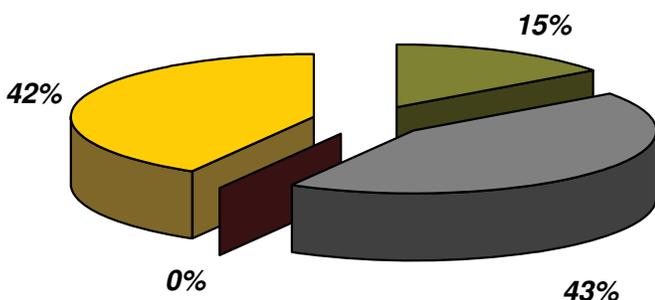
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	2.00
Office parking/ksf	-
Total parking spaces	27
Open space (%)	15%



<b>Construction Costs *</b>	
Residential	\$125 /sf
Retail	\$0 /sf
Office	\$0 /sf

\* includes building costs with tenant improvements; does not include parking costs

**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**6c-MU Neighborhood Corridor Apartments (tuck-U)**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	20,000 <b>sf</b>
Lot area (acres)	0.46 <b>acre</b>
Height	4 <b>stories</b>
Usable FAR	3.40
Residential units/acre	104 <b>/acre</b>
Avg. unit size (sf)	1,000 <b>sf</b>
Employees/acre	- <b>/acre</b>

<b>Financial Summary</b>	
Average unit sale price	\$300,000
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$2,000 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$25.14 <b>/sf</b>
Estimated land value	\$502,800 <b>/acre</b>
Total project costs	\$10,319,336

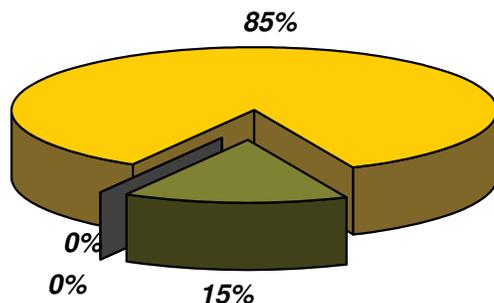
<b>Parking and Open Space Summary</b>	
Residential parking/unit	0.25
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	26
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$125 <b>/sf</b>
Retail	\$125 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

7-Attached Houses High Density

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 <b>sf</b>
Lot area (acres)	0.23 <b>acre</b>
Height	3 <b>stories</b>
Usable FAR	1.26
Residential units/acre	37 <b>/acre</b>
Avg. unit size (sf)	1,200 <b>sf</b>
Employees/acre	- <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$360,000
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$2,400 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$25.14 <b>/sf</b>
Estimated land value	\$251,400 <b>/acre</b>
Total project costs	\$2,042,918



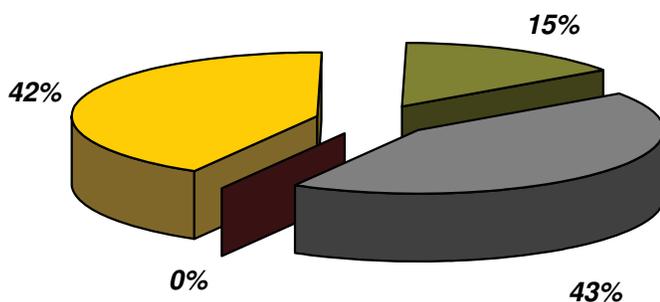
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.50
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	13
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$109 <b>/sf</b>
Retail	\$0 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

### 8-Attached Houses Medium Density

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 <b>sf</b>
Lot area (acres)	0.23 <b>acre</b>
Height	3 <b>stories</b>
Usable FAR	1.42
Residential units/acre	29 <b>/acre</b>
Avg. unit size (sf)	1,700 <b>sf</b>
Employees/acre	- <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$510,000
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$3,400 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$20.45 <b>/sf</b>
Estimated land value	\$204,500 <b>/acre</b>
Total project costs	\$2,028,510



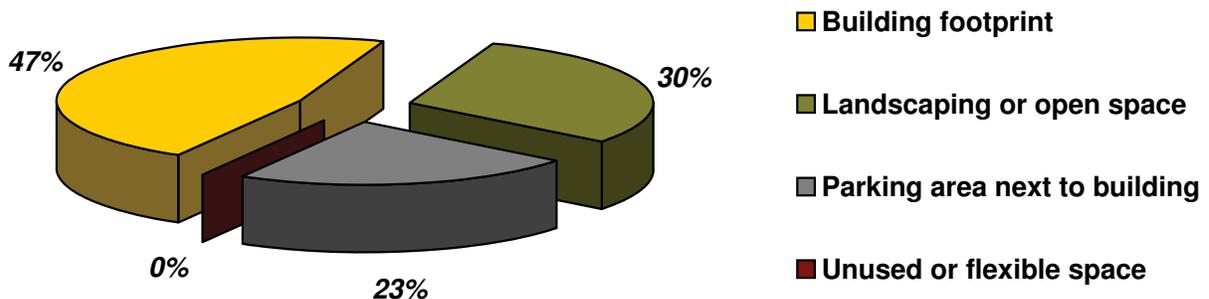
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	7
Open space (%)	30%



<b>Construction Costs *</b>	
Residential	\$109 <b>/sf</b>
Retail	\$0 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs

#### % of Total Lot Area



## 10- MU SRO Housing

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	15,000 <b>sf</b>
Lot area (acres)	0.34 <b>acre</b>
Height	5 <b>stories</b>
Usable FAR	3.32
Residential units/acre	202 <b>/acre</b>
Avg. unit size (sf)	400 <b>sf</b>
Employees/acre	72 <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$80,000
Average cost/sf	\$200 <b>/sf</b>
Average unit rent	\$400 <b>/month</b>
Average rent (sf/month)	\$ 1.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ 10.00 <b>/sf</b>
Estimated land value	\$62.15 <b>/sf</b>
Estimated land value	\$932,250 <b>/acre</b>
Total project costs	\$8,038,717



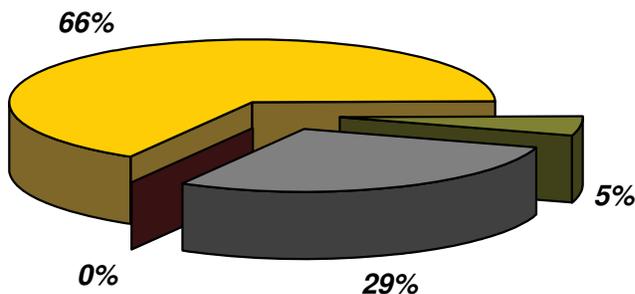
<b>Parking and Open Space Summary</b>	
Residential parking/unit	0.10
Retail parking/ksf	0.50
Office parking/ksf	0.25
Total parking spaces	13
Open space (%)	5%

<b>Construction Costs *</b>	
Residential	\$109 <b>/sf</b>
Retail	\$125 <b>/sf</b>
Office	\$0 <b>/sf</b>



\* includes building costs with tenant improvements; does not include parking costs

### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

### 13a-MU Apts (Family Housing)

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	40,000 <b>sf</b>
Lot area (acres)	0.92 <b>acre</b>
Height	6 <b>stories</b>
Usable FAR	4.80
Residential units/acre	112 <b>/acre</b>
Avg. unit size (sf)	1,200 <b>sf</b>
Employees/acre	74 <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$360,000
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$1,920 <b>/month</b>
Average rent (sf/month)	\$ 1.60 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$35.71 <b>/sf</b>
Estimated land value	\$1,428,400 <b>/acre</b>
Total project costs	\$37,435,438

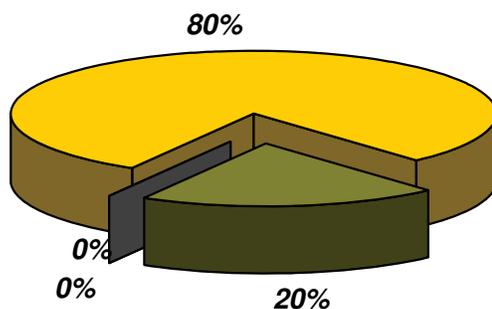


<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	0.50
Office parking/ksf	-
Total parking spaces	122
Open space (%)	20%

Residential	\$109 <b>/sf</b>
Retail	\$128 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs

#### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

### 13b- MU Apts (Small Household)

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	40,000 <b>sf</b>
Lot area (acres)	0.92 <b>acre</b>
Height	6 <b>stories</b>
Usable FAR	5.10
Residential units/acre	237 <b>/acre</b>
Avg. unit size (sf)	600 <b>sf</b>
Employees/acre	79 <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$180,000
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$1,200 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ - <b>/sf</b>
Estimated land value	\$35.71 <b>/sf</b>
Estimated land value	\$1,428,400 <b>/acre</b>
Total project costs	\$42,653,778

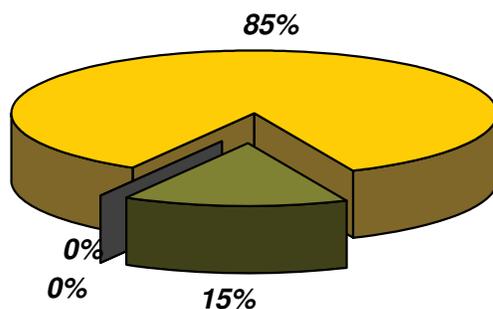


<b>Parking and Open Space Summary</b>	
Residential parking/unit	0.50
Retail parking/ksf	1.00
Office parking/ksf	-
Total parking spaces	150
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$109 <b>/sf</b>
Retail	\$128 <b>/sf</b>
Office	\$0 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs

#### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**14-MU Small Lot Condo**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 sf
Lot area (acres)	0.23 acre
Height	15 stories
Usable FAR	13.50
Residential units/acre	203 /acre
Avg. unit size (sf)	2,150 sf
Employees/acre	73 /acre

<b>Financial Summary</b>	
Average unit sale price	\$526,750
Average cost/sf	\$245 /sf
Average unit rent	\$2,688 /month
Average rent (sf/month)	\$ 1.25 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$69.01 /sf
Estimated land value	\$690,100 /acre
Total project costs	\$22,766,713

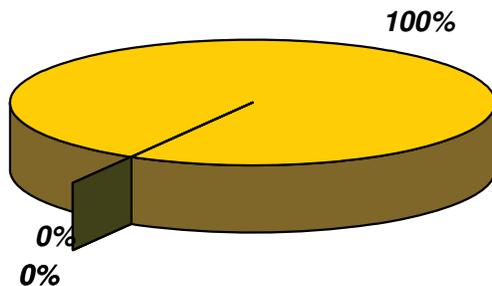
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	2.00
Office parking/ksf	-
Total parking spaces	66
Open space (%)	0%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$128 /sf
Office	\$93 /sf

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**16-Mixed Use Neighborhood Commercial/Housing**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 sf
Lot area (acres)	0.23 acre
Height	4 stories
Usable FAR	4.00
Residential units/acre	89 /acre
Avg. unit size (sf)	1,100 sf
Employees/acre	- /acre

<b>Financial Summary</b>	
Average unit sale price	\$291,500
Average cost/sf	\$265 /sf
Average unit rent	\$1,375 /month
Average rent (sf/month)	\$ 1.25 /sf
Retail rent (sf/year)	\$ 15.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$33.90 /sf
Estimated land value	\$339,000 /acre
Total project costs	\$5,703,724

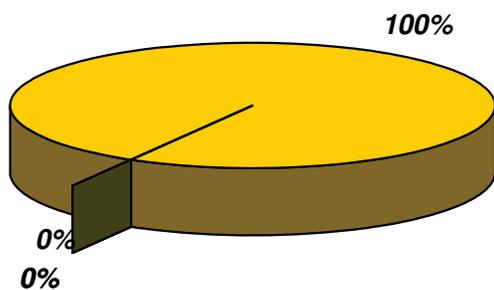
<b>Parking and Open Space Summary</b>	
Residential parking/unit	0.50
Retail parking/ksf	0.50
Office parking/ksf	-
Total parking spaces	15
Open space (%)	0%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$128 /sf
Office	\$93 /sf

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

## 17-MU Neighborhood Retail/Residential

Portland, OR

### Building Summary

Lot area (sf)	12,500 sf
Lot area (acres)	0.29 acre
Height	4 stories
Usable FAR	3.60
Residential units/acre	118 /acre
Avg. unit size (sf)	850 sf
Employees/acre	42 /acre

### Financial Summary

Average unit sale price	\$255,000
Average cost/sf	\$300 /sf
Average unit rent	\$1,700 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ - /sf
Estimated land value	\$38.24 /sf
Estimated land value	\$478,000 /acre
Total project costs	\$6,918,696

### Parking and Open Space Summary

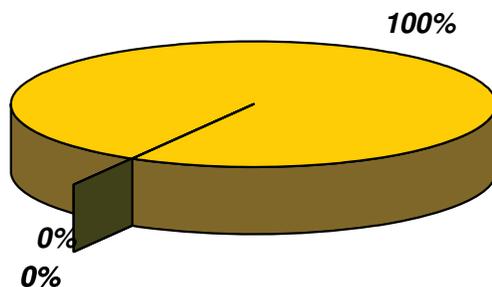
Residential parking/unit	1.79
Retail parking/ksf	-
Office parking/ksf	-
Total parking spaces	-
Open space (%)	0%

### Construction Costs \*

Residential	\$109 /sf
Retail	\$125 /sf
Office	\$0 /sf

\* includes building costs with tenant improvements; does not include parking costs

### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space



**18-Live/Work Townhouses**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	20,000 <b>sf</b>
Lot area (acres)	0.46 <b>acre</b>
Height	3 <b>stories</b>
Usable FAR	1.44
Residential units/acre	22 <b>/acre</b>
Avg. unit size (sf)	1,600 <b>sf</b>
Employees/acre	25 <b>/acre</b>



<b>Financial Summary</b>	
Average unit sale price	\$424,000
Average cost/sf	\$265 <b>/sf</b>
Average unit rent	\$2,000 <b>/month</b>
Average rent (sf/month)	\$ 1.25 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ 10.00 <b>/sf</b>
Estimated land value	\$25.14 <b>/sf</b>
Estimated land value	\$502,800 <b>/acre</b>
Total project costs	\$4,794,834



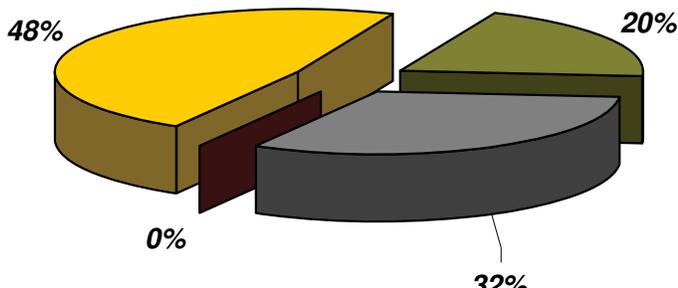
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	1.00
Office parking/ksf	1.00
Total parking spaces	19
Open space (%)	20%

<b>Construction Costs *</b>	
Residential	\$109 <b>/sf</b>
Retail	\$128 <b>/sf</b>
Office	\$93 <b>/sf</b>



\* includes building costs with tenant improvements; does not include parking costs

**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**20-Retail**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 sf
Lot area (acres)	0.23 acre
Height	1 stories
Usable FAR	0.33
Residential units/acre	- /acre
Avg. unit size (sf)	- sf
Employees/acre	14 /acre

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 /sf
Average unit rent	\$0 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 30.00 /sf
Office rent (sf/year)	\$ 20.00 /sf
Estimated land value	\$26.78 /sf
Estimated land value	\$267,800 /acre
Total project costs	\$1,041,421

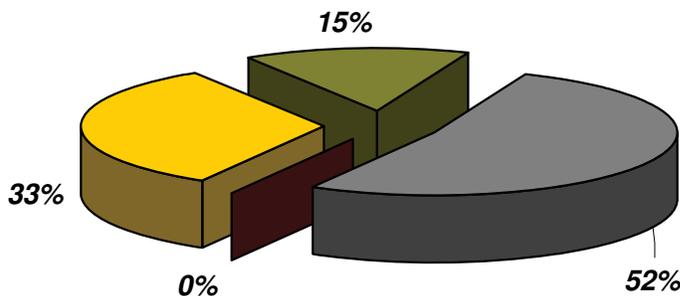
<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	4.00
Office parking/ksf	-
Total parking spaces	13
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$128 /sf
Office	\$93 /sf

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

## 21- Lifestyle Center

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	100,000 sf
Lot area (acres)	2.30 acre
Height	3 stories
Usable FAR	0.40
Residential units/acre	- /acre
Avg. unit size (sf)	- sf
Employees/acre	18 /acre

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 /sf
Average unit rent	\$0 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 28.00 /sf
Office rent (sf/year)	\$ 25.00 /sf
Estimated land value	\$25.14 /sf
Estimated land value	\$2,514,000 /acre
Total project costs	\$11,481,084

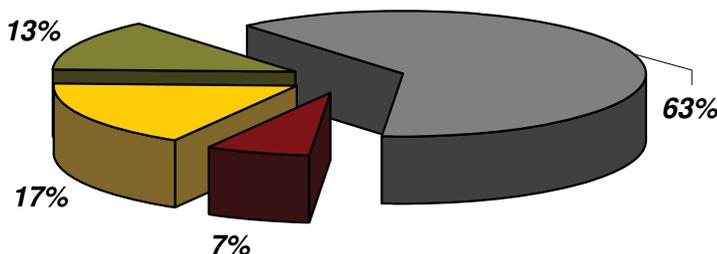
<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	4.00
Office parking/ksf	-
Total parking spaces	158
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$128 /sf
Office	\$93 /sf

\* includes building costs with tenant improvements; does not include parking costs



### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**23a-Office Mid-Rise w/Surface Parking**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	30,000 <b>sf</b>
Lot area (acres)	0.69 <b>acre</b>
Height	5 <b>stories</b>
Usable FAR	1.98
Residential units/acre	- <b>/acre</b>
Avg. unit size (sf)	- <b>sf</b>
Employees/acre	146 <b>/acre</b>

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$0 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ 20.00 <b>/sf</b>
Estimated land value	\$54.50 <b>/sf</b>
Estimated land value	\$1,635,000 <b>/acre</b>
Total project costs	\$10,257,259

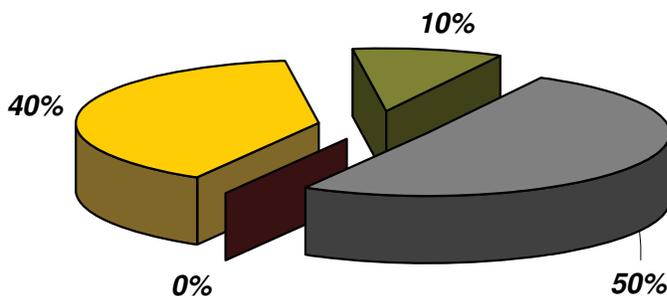
<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	1.00
Office parking/ksf	1.00
Total parking spaces	59
Open space (%)	10%

<b>Construction Costs *</b>	
Residential	\$125 <b>/sf</b>
Retail	\$125 <b>/sf</b>
Office	\$93 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**23b-Office Mid-Rise (Sandwich)**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	30,000 sf
Lot area (acres)	0.69 acre
Height	9 stories
Usable FAR	5.40
Residential units/acre	- /acre
Avg. unit size (sf)	- sf
Employees/acre	344 /acre

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 /sf
Average unit rent	\$0 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ 25.00 /sf
Estimated land value	\$54.50 /sf
Estimated land value	\$1,635,000 /acre
Total project costs	\$21,409,347

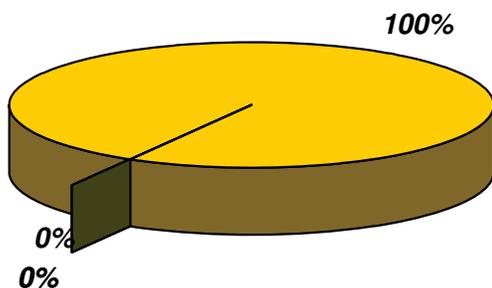


<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	2.00
Office parking/ksf	1.00
Total parking spaces	208
Open space (%)	0%

<b>Construction Costs *</b>	
Residential	\$109 /sf
Retail	\$128 /sf
Office	\$93 /sf

\* includes building costs with tenant improvements; does not include parking costs

**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**24-Office Low-Rise (Surface)**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 <b>sf</b>
Lot area (acres)	0.23 <b>acre</b>
Height	3 <b>stories</b>
Usable FAR	1.18
Residential units/acre	- <b>/acre</b>
Avg. unit size (sf)	- <b>sf</b>
Employees/acre	107 <b>/acre</b>

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 <b>/sf</b>
Average unit rent	\$0 <b>/month</b>
Average rent (sf/month)	\$ 2.00 <b>/sf</b>
Retail rent (sf/year)	\$ 25.00 <b>/sf</b>
Office rent (sf/year)	\$ 20.00 <b>/sf</b>
Estimated land value	\$26.78 <b>/sf</b>
Estimated land value	\$267,800 <b>/acre</b>
Total project costs	\$2,038,266

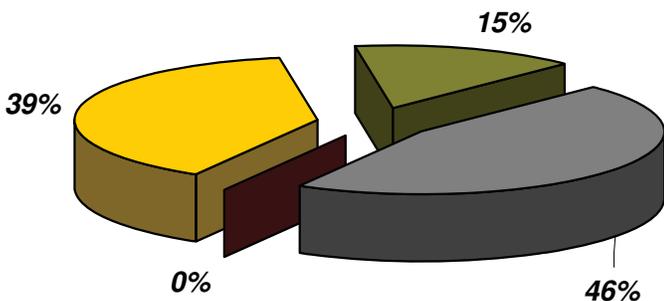
<b>Parking and Open Space Summary</b>	
Residential parking/unit	1.00
Retail parking/ksf	2.00
Office parking/ksf	1.00
Total parking spaces	14
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$109 <b>/sf</b>
Retail	\$128 <b>/sf</b>
Office	\$93 <b>/sf</b>

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**25-Office Rehab**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	30,000 sf
Lot area (acres)	0.69 acre
Height	3 stories
Usable FAR	1.15
Residential units/acre	- /acre
Avg. unit size (sf)	- sf
Employees/acre	67 /acre



<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 /sf
Average unit rent	\$0 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ 25.00 /sf
Office rent (sf/year)	\$ 15.00 /sf
Estimated land value	\$20.09 /sf
Estimated land value	\$602,700 /acre
Total project costs	\$6,604,746

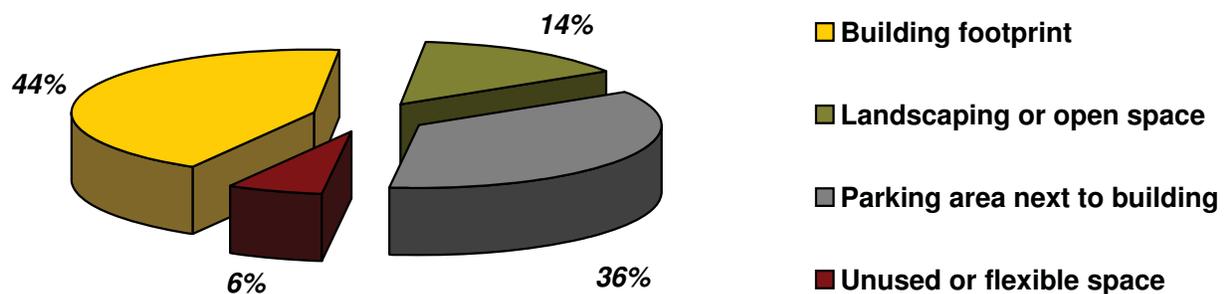
<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	1.00
Office parking/ksf	1.00
Total parking spaces	34
Open space (%)	20%

<b>Construction Costs *</b>	
Residential	\$0 /sf
Retail	\$93 /sf
Office	\$128 /sf

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



## 26-Multi Level Flexspace

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	10,000 sf
Lot area (acres)	0.23 acre
Height	4 stories
Usable FAR	2.65
Residential units/acre	- /acre
Avg. unit size (sf)	- sf
Employees/acre	113 /acre

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$300 /sf
Average unit rent	\$0 /month
Average rent (sf/month)	\$ 2.00 /sf
Retail rent (sf/year)	\$ - /sf
Office rent (sf/year)	\$ 15.00 /sf
Estimated land value	\$18.34 /sf
Estimated land value	\$183,400 /acre
Total project costs	\$4,844,425

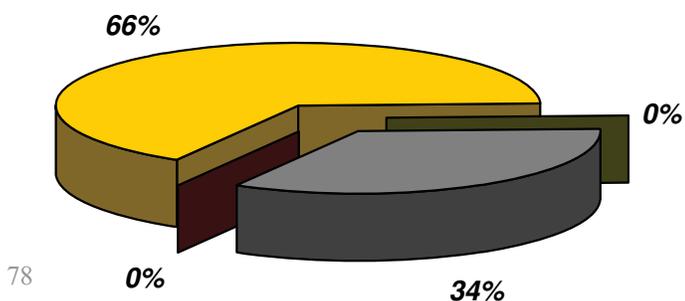
<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	-
Office parking/ksf	0.50
Total parking spaces	13
Open space (%)	0%

<b>Construction Costs *</b>	
Residential	\$0 /sf
Retail	\$0 /sf
Office	\$128 /sf

\* includes building costs with tenant improvements; does not include parking costs



### % of Total Lot Area



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

**27-Industrial**

Portland, OR

<b>Building Summary</b>	
Lot area (sf)	43,560 sf
Lot area (acres)	1.00 acre
Height	1 stories
Usable FAR	0.63
Residential units/acre	- /acre
Avg. unit size (sf)	- sf
Employees/acre	22 /acre

<b>Financial Summary</b>	
Average unit sale price	\$0
Average cost/sf	\$0 /sf
Average unit rent	\$0 /month
Average rent (sf/month)	\$ - /sf
Retail rent (sf/year)	\$ - /sf
Office rent (sf/year)	\$ 14.00 /sf
Estimated land value	\$14.06 /sf
Estimated land value	\$612,454 /acre
Total project costs	\$4,433,974

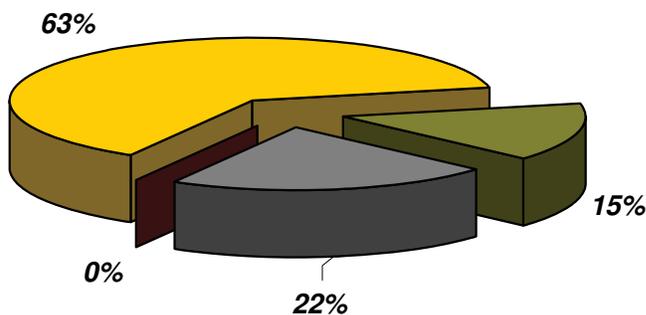
<b>Parking and Open Space Summary</b>	
Residential parking/unit	-
Retail parking/ksf	-
Office parking/ksf	1.00
Total parking spaces	28
Open space (%)	15%

<b>Construction Costs *</b>	
Residential	\$0 /sf
Retail	\$0 /sf
Office	\$120 /sf

\* includes building costs with tenant improvements; does not include parking costs



**% of Total Lot Area**



- Building footprint
- Landscaping or open space
- Parking area next to building
- Unused or flexible space

## Sample Building Blocks

The following is a description of example building blocks that can be used in the sketch planning tool. They each consist of a mix of building prototypes to define a specific place. Each building block as an associated housing and job density and housing and job split (e.g. MFR, SFR, Townhome and Office, Retail, Industrial).

Development Type	Dwelling Units/Acre	Jobs/Acre	Description
Downtown Center	10 - 30	75-300	Downtown Center incorporates office, retail, residential, and civic uses into a pedestrian-oriented and mixed-use environment. Modeled after downtown Portland, Downtown Centers serve as a commercial destination and employment center. Building ranges from mid-rise, mixed-use buildings to commercial towers. The interconnected street network and variety of amenities within walking distance make Downtown Centers accessible by automobile, transit, bicycle and foot. Civic and open spaces increase foot traffic and keep activity lively throughout the day and evening. These areas are appropriate for infill and redevelopment. This scale may not be needed by the non-Metro MPOs but it may prove useful in testing ideas.
Downtown Residential	50 - 100	5 - 20	Downtown Residential provides a concentration of housing units in buildings typically over four stories tall. Buildings include an array of multi-family homes and townhouses in mid-rise residential buildings to mixed-use residential high rises. Downtown Residential is appropriate in the downtown core and provides a significant amount of urban housing. The ground floor may include retail businesses such as a coffee shop or restaurant. As with Downtown Center, this development type may be too dense for some regions.

City Center	25 - 50	60 - 125	City Center incorporates a diverse mix of residential and employment uses, though at a lower density than Downtown Center. This development type serves as a significant source of employment, and like Corvallis has a pedestrian-oriented center at its core. It may require structured parking and is accessible via multiple modes of transportation.
City Residential	20 - 40	5 -15	City Residential includes a greater proportion and diversity of housing than Downtown Residential areas, such as multi-family homes, single-family homes on small lots and townhouses with communal yard space. These areas are often compact, pedestrian-friendly, and transit-oriented. They blend seamlessly with the city.
Town Center	20-45	20-50	Town Centers primarily function as a service destination near a central main street rather than an employment center. They feature a balanced share of housing and jobs including townhouses, apartments over storefronts and single-family homes near commercial districts. They are pedestrian-oriented because of their mix of residential, retail, and office uses and are located on a interconnected street network.
Town Neighborhood	15 - 25	0 - 2	Town Neighborhood includes townhomes, garden apartments, condominiums, and cottage homes on small lots. The development is oriented to the street and located near a main street, the heart of a smaller town, or on the fringe of downtown. Commercial uses can include small groceries, a coffee shop, or yoga studio.
Neighborhood Center	13 - 20	15 -20	Neighborhood Center a mix of small scale mixed use buildings, townhomes, and duplexes, offices and retail with a main street character. The types of businesses would likely be neighborhood serving,

Compact Neighborhood	8 - 10	0	Compact Neighborhood includes mid- to low-rise multi-family, townhouses and small lot single-family dwellings. Compact Neighborhoods are medium density residential areas near mixed use center, such as neighborhood centers or town centers. Street connectivity is favorable, allowing a high degree of foot traffic and access to transit.
Residential Subdivision	5 - 7	0	Residential Subdivisions include single-family, detached homes and duplexes. Street networks are typical of post World War II suburbs. Residential Subdivisions are designed for automobile travel. Due to the extensive use of cul-de-sacs, street connectivity and pedestrian travel are generally low.
Large Lot Subdivision	2 - 4	0	Large Lot Subdivisions consist entirely of single-family, detached homes. Large Lot Subdivisions are typically isolated from employment and retail services. Development includes large residences on expansive lots without sidewalks. Street connectivity is low and travel is dependent upon the automobile.
Activity Center	10 - 20	15 - 30	An Activity Center is an agglomeration of large-scale retail buildings, offices and multi-family housing. The Activity Center building block contains a relatively dense mix of uses, comparable to the Neighborhood or Town Center, but these types, it is not pedestrian-friendly. Land uses are separated from each other by parking areas, freeways or arterials. Activity Centers are usually positioned at intersections of highways or arterials, sometimes along major transit corridors.
Transit Corridor	20 - 50	8	Transit Corridors stretch along a single boulevard or street with either bus or rail transit service. Households, offices, and retail uses may be accommodated by a few high-rise towers, but mostly mid-rise buildings. Pedestrian access is adjacent neighborhoods is well connected, and on the corridor it is focused on accessing local transit.

Main Street	5 - 10	25 - 35	Main Streets include a mix of uses and an interconnected street network that encourage pedestrian travel. Main Streets primarily function as service destinations rather than centers of employment. Surface lots and on-street spaces provide parking. Buildings typically stand two to four stories tall and often include apartments above storefronts.
Office Park	0	39	Office Parks are comprised of low to medium density office buildings surrounded by surface parking. Generally located near highways for easy auto-access, transit and walking options are limited. Office Parks lack residential or retail uses, thus increasing the number of auto trips.
Industrial	0	14	Industrial is made up of a mix of low and medium density industrial buildings. They often consist of industrial yards and campuses separate from other uses due to the nature of industrial use. This development type is often near highways and accessible via automobiles with large surface parking for autos and trucks. Walking and transit options are severely limited.
Arterial Commercial	0	12 - 20	Arterial Commercial is modeled after highway-oriented development. Rather than being agglomerated at a highway intersection, Arterial Commercial takes a linear form along both sides of the highway. This is an auto-oriented building block.

## Step 4 – Create Current Base Year and Future Reference Case

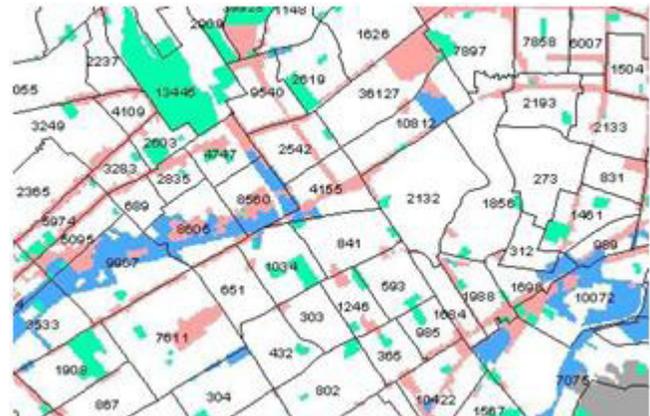
### Additional information on building current base conditions and reference case scenarios

#### Current Base Conditions or Base Year Scenario

Using GIS, the exiting jobs are mathematically assigned to developed land within each TAZ. The assignment only takes place on land considered developed for the same year as the TAZ data (in this suggested example, 2005). All of the land that is classified as housing would receive a proportioned share of the households within the TAZ. Subsequently, the same would apply to the land considered developed in employment uses. If the land use data is of fine enough resolution to quantify mixed use development, those parcels, or zones (as described under model setup) would receive both jobs and households. This level of precision is adequate for developing a base year scenario that can be used to, in conjunction with a future scenario, describe the 2035 or other horizon year condition.



TAZs with land use. The colors represent different uses.



Employment lands shown. The residential lands have been removed from the map

## The Reference Case

Scenario planning relies on the idea of a Reference Case Scenario (RCS) because it serves as a point of comparison for other alternatives.

The RCS must be developed using the same Building Blocks that were developed earlier and used in the creation of the base conditions or base year scenario.

The simplest form of RCS is built by using the prorating techniques described in the section above. Jobs and housing are assigned to the landscape based on the maximum densities allowed by the Building Blocks. This proration, easily done within GIS, will allocate all of the jobs and housing in one fell swoop. However, in almost no case will the density exactly match the density described by the Building Blocks. This is where the professional must intervene.

The first thing to do is to compare, at a TAZ or base geography zone level, the maximum allowed density with that which was assigned by the proration process. Zones where the amount of jobs or households is significantly different should then be adjusted using the sketch planning tool. Using the associated painting tool the operator can fine tune the RCS until it is a close match. Generally when summarized back to the TAZ level, the RCS should be within plus or minus five percent of the original TAZ allocation.

## Public Kickoff

A public kickoff event is one of several public involvement options presented in Step 4. There are various methods recommended to use the results from Step 4 to solicit excitement from the community to participate in the big workshop in Step 5. Below is an example of an agenda to host a public open house to share the results of the base case and reference case scenarios.

### **Kick-off Meeting Agenda Sample**

Following is a suggested description and timeline for a project kickoff event.

6:30 – 7:00 Welcome, Introduction and Overview of project & schedule

PowerPoint – project overview, team, and schedule

7:00 – 7:30 Present Scenario model & prototypes research

PowerPoint – Geography lesson – tells the story of:

- Geographic context
- Opportunities and constraints
- Sketch planning tool & scenario-based planning
- Relationship of prototypes to local plans and zoning
- Forecast & growth data

7:30 – 8:40 Describe modeling results

Virtual Present and Virtual Future: Presentation of the Base conditions and Reference case, comparison made using guiding principles and evaluation criteria

- Where we are today?
- Where we are likely headed?

Discussion – groups' reaction - purpose is to learn from attendees in order to set up future scenario planning, workshops/meetings and recruitment for participation. Options include:

- Live Polling
- Facilitated tables
- General Q&A

8:40 – 8:45 Wrap-up

## Getting the word out for a Public Kickoff

Example flyers for advertising public events.



### Upcoming Events

#### PARISHWIDE INPUT WORKSHOPS

**Tuesday, March 2, 6-8:30PM**

Redemptorist High School Cafeteria  
3800 St. Gerard Avenue

**Thursday, March 4, 6-8:30PM**

Woodlawn High School Cafeteria  
15755 Jefferson Hwy

**Get Involved!**

### The East Baton Rouge Comprehensive Master Plan

is a community-wide planning project that will examine current development and economic trends through an inclusive citizen engagement process. In addition, it will determine a vision for how East Baton Rouge residents want the city-parish to develop and grow during the next 30 years and put a plan in place for achieving the vision of East Baton Rouge's citizens. FUTUREBR embraces Mayor Holden's call to transform Baton Rouge into "America's Next Great City."

### Get Involved

For the FUTUREBR plan to be effective, it needs you, your coworkers, your neighbors, your family and your friends to get involved and stay involved. Here's how:

- **Parishwide Input Workshops (March 2010)**  
Participate personally and inform your contacts
- **Small Area Workshops (Fall 2010)**  
Participate personally and inform your contacts
- **[www.FUTUREBR.com](http://www.FUTUREBR.com)**  
Sign up to become a Citizen Planner  
Receive email updates on plan activities
- **Become a Fan**  
Follow us on Twitter and Facebook
- **Share Your Vision for FUTUREBR**  
Online, by mail, or with a YouTube video!
- **Be a FUTUREBR Organization**  
Meet quarterly with the planning team  
Support project by spreading awareness



# THE EAST BATON ROUGE PARISH MASTER PLAN

Mayor-President Melvin “Kip” Holden invites you to attend the kick-off!

Thursday, December 3rd  
5:30–7:30 p.m.

Louisiana State Museum  
660 North Fourth Street  
Baton Rouge, Louisiana

There will be a short presentation on the project at 6:00 p.m. by John Fregonese, national lead planner on the project.

This is your opportunity to help shape the growth of East Baton Rouge Parish for the next 20 years. Join us to learn how you can be involved in this important project for our future.

The East Baton Rouge Comprehensive Master Plan is a community-wide planning project that will examine current development and economic trends through an inclusive citizen engagement process. In addition, it will determine a vision for how East Baton Rouge residents want the city-parish to develop and grow during the next 30 years and put a plan in place for achieving the vision of East Baton Rouge’s citizens.



## Our hopes are...

A thriving economy that makes our young people want to stay and raise their families here

An economy that works equally well for all parts of the City

New possibilities for transportation alternatives and easier, more convenient connections all across town

A beautiful City that finds the right balance between development and preservation priorities



## Step 5 – Develop and Evaluate Alternative Scenarios

### Public Workshop Example Materials

#### Public Workshop Agenda Sample

Following is a suggested description and timeline for a public workshop. The event is designed to both educate the participants, and gather information to inform the scenario planning process, and provide the team with the public input necessary to begin crafting alternative scenarios.

This agenda is intended to work for a large meeting, up to two or three hundred people. It will work equally well with attendance as low as forty people.

The following time schedule lists the activities in reference to the beginning of the event.

#### Event Timing

0:00 – 1:00	Room Setup
1:00 – 1:30	Registration
1:30 – 1:45	Introductions by community leader or elected official
1:45 – 2:15	Presentation and workshop instructions
2:15 – 2:30	Group Goal Setting Conversation
2:30 – 3:30	Small Group Mapping Exercise Land Use and Transportation
3:30 – 4:00	Small Group Mapping of community improvements
4:00 – 4:30	Small group presentations of workshop results
4:30 – 5:00	Wrap-up and conclusion of common themes

The times preceding each step in the following descriptive agenda represent the duration of time suggested for each step.

#### *1:00 Room Setup*

1 to 1.5 hours prior to the beginning of the event, volunteers and project team members will set up the room. This includes distributing the maps and materials between tables, audio visual setup and any moving of furniture.

#### *0:30 Registration and check-in*

Participants will arrive, register, and find their seats. It is recommended to have a mechanism for people to sign up in advance so that you can have a better idea of the quantity of materials you will need to bring. The

recommendation is to encourage pre-registration, but not make it a requirement.

### *0:15 Introduction*

An elected official or recognized community leader will greet the participants and introduce the project and the person who will be leading the workshop exercise.

### *0:30 Background Presentation and Workshop Instructions*

A presentation will describe:

- The purpose, and desired outcomes of the workshop
- Background on the base conditions and reference case scenarios, including land use, transportation, economics, and other quality of life factors as applicable.
- A detailed instruction on the Map Exercise portion of the event and the tools to be employed, including:
  - The basemap
  - Reference maps (Likely to include maps such as: Transportation Plan, Environmental Constraints, Land Use Plans, Social Equity)
  - The building block chips – stickers used to indicate future desired conditions
  - Pens – used for delineating ‘Areas of Stability’ or other areas that should not be locations for growth and transportation issues
  - The range of chipsets – the varying levels of growth and character

Participants will use combinations of the elements described above to build their vision of the metropolitan area and show the team the solutions that they would support in creating a future vision.

### *1:45 Goal Setting and the Small Group Mapping Exercise*

Participants will work in teams of 8- 10 that will likely represent a range of interests. They will have one neutral staff or volunteer facilitator to act as their graphic hand. The group will discuss the merits of the different elements and building blocks and additional background information shown in accompanying reference maps. Graphic icons and markers will be the tools that lead to the creation of the alternative future concepts. Participants will be encouraged to modify needed transportation elements, retail, housing, mixed-use and office focus locations, and locate key open spaces. This exercise simultaneously teaches the participants about the complex issues involved in planning their community while forcing them to make the difficult decisions.

### *0:30 Small Group Presentations*

After each group has created their ‘virtual future’ they will designate one person to present the map they have created to the rest of the participants. They will be encouraged to talk about the challenges they faced, the solutions for which they were unified in opinion, and the goals they were working toward. If there are more than 10 groups, it is recommended that a smaller subset is selected for presentation, either by drawing numbers,

or taking volunteers. This step may run long if you want to give more people time to present.

### *0:30 Wrap-up*

The workshop leader will thank the participants; describe some of the ideas that arose during the map exercise session. If you run long on the small group presentation, the wrap-up should be short. This will A. get people out on time and B. account for the fact that some will have left during the presentation section.

Following is a more detailed breakdown of the mapping exercise. Times described are to be used as a guide only. Groups will move at their own pace, with an occasional timing reminder coming from the project team.

## WORKSHOP EXERCISE

Next to each step number is an approximate duration of time. Please use these times as a guide only. Feel free to spend more or less time on a task, as needed, while keeping track of the overall schedule.

### *Step 1. (5 min.) Introductions.*

Everyone introduces themselves. Everyone should tell the group what he or she hopes to accomplish with this exercise. Each participant can write his/her name on the base map in the designated location and locate his/her home and workplace on the map to help them get oriented.

### *Step 2. (5 min.) Familiarize participants with the materials.*

You should familiarize the participants with the materials: the base map, pens, scissors, chips and chip menu, chip trading guide and building block packet (the chip materials will be discussed in Step 5, so don't go into too much detail now). Go through the map legend to make sure everyone understands what the different colors and symbols on the map represent. The base map shows the developed areas, its environmentally constrained areas, as well as undeveloped lands.

### *Step 3. (5 min.) Identify the group's goals for the workshop map.*

Goals can include anything that has to do with land use, development, housing and transportation in the area. Write the goals on the map. Near the end of the session, you should return to the goals to make sure that the group has met what they set out to do. If your group members are having difficulty identifying goals, simply move on to the next step.

### *Step 4. (10 min.) Discuss and draw in areas to preserve or create open space.*

Use the green marker to define the areas on the map that the group feels are important to protect from development or create new open space or parks.

### *Step 5. (10 min.) Introduce chip materials.*

Go over the Chip Menu briefly. The menu shows that different building blocks are represented by chips (game pieces or stickers). The "chip menu" handout summarizes the chip type information shown in the presentation. Understanding the trade-offs in intensity and style between these types is

fundamental to playing the workshop game. This will be discussed in the presentation, but you should have a good understanding of these types before facilitating the group.

You will also have transportation chips representing road improvements, new public transit lines and trail networks.

Explain the chipset envelopes. Three envelopes on your table will contain different chipsets that each accommodates the area's potential growth using a different combination of development chips.

**TIME CHECK** – within 30 minutes or so of starting, participants should be ready to start experimenting with placing the chips on the map. Steps 6 – 11 should take about 1 hour—this time is theirs to spend as they see fit. The groups are free to move back and forth between the steps.

*Step 6. (10 min) Choose a starter chipset.*

The chipsets are intended as a starting point only. The group should agree which set to begin with and move on to Step 7. As the exercise progresses, they may trade chips as they see fit.

Open the envelopes and spread the chips out on the table. This illustrates the differences in development patterns and land consumed. However, please do not spend too much time on choosing a chipset.

*Step 7. (30 min.) Place development chips on the map.*

The central task of the game is to place chips on the map representing the group's vision for land use and transportation in the parish. The group can also return to its previously-identified goals as a starting point. As they place the chips, the participants should think of transportation changes or improvements to support all this new development. They may draw these desired transportation changes on the maps now or later, in Step 7.

Encourage the participants to play with different ideas as the chips are moved around. This is the time to experiment with different themes. Don't stick the chips down yet!

Trade and cut chips. With your guidance and the chip menu, participants can trade chips as the group sees fit. Use one of the unused envelopes as a "chip bank" with which to trade. If the bank runs out of a particular chip which you need, you may pull chips from other chipsets.

Use the Chip menu to see the relative "values" of each chip based on the amounts of households it accommodates. We expect that participants will use the trading option to, as an example, convert residential subdivisions compact neighborhoods, or to increase the density of future development.

The participants can cut chips if they would like smaller increments of a particular chip type or for trading purposes.

*Step 8. (10 min.) Draw transportation infrastructure.*

The Red marker is used for transit, which can take several forms, and the Blue marker is used for roadways or roadway improvements. The Green marker is used for trails and paths. Encourage your group to think about how their land use plan works with the existing transportation network. Are new highways, roads, or transit lines needed? Should chips be moved around to fit into the existing network?

*Step 9. Place Community Improvements on the map.*

Use the colored dot stickers to located new community improvements in areas you think would benefit. Examples of these are daycare, adult education, parks, and police stations. Record comments on the associated worksheet by placing the same color sticker on the worksheet. Use the marker to put a number on both stickers, the one on the map and on the worksheet so the comments can be connected with a location on the map.

*Step 10. Review the map.*

Spend some time examining your new map. The group should make sure the previously-discussed goals have been met. Assess whether the group vision (the map) is consistent with these goals. Rearrange the chips if necessary.

*Step 11. (10 min.) Stick chips on map: A “ten-minute warning” will be called.*

Once the group has finished arranging the chips on the map, peel off the backing and stick them down. If the group has any additional points to make, you can annotate the map with the pens provided. As participants stick the chips, have them think of a map name that captures the spirit of their map and choose a group member to present the map to the larger group.

*Step 12. Name map and choose a presenter.*

*Step 13. (20 min.) Present maps to the group.*

The project team will tell you when it is time to stop the discussion and make presentations to the rest of the workshop participants. A few tables will be chosen at random to present their maps to the group. Remind your presenter to tell the group about any specific goals that you were working toward or problems you were trying to solve.

*Step 14. (5 min.) Thank you and next steps:*

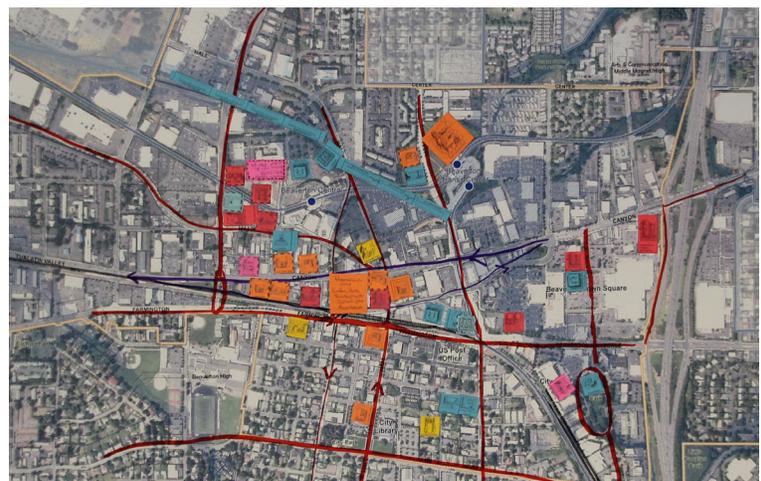
After the individual tables have presented their maps, the project team will discuss conclusions and briefly outline how these maps will help inform the themes developed to be tested in alternative scenarios.

## Incorporating public and stakeholder input

### Digitizing workshop input

At the public workshops described above, participants create paper maps with stickers indicating where they want growth and what types of growth. Fregonese Associates’s technique is to collect the maps and use a technique called “digitizing” to convert the maps from the workshops into GIS shapefiles for analysis. The process follows these steps:

1. Photograph each paper map produced at the workshop with the highest resolution possible.
2. Set up Excel scenario spreadsheet.
  - a. Open scenario spreadsheet, go to “Dev Types Attributes” tab
  - b. In column A, “Development Types,” add the names of all chip types used in the workshop.
  - c. Save and close file.
3. Add the images into an ArcMap project, .mxd file, after giving each map a distinct number.
4. Georeference each map images to match other layers on the workshop map.
5. Create a polygrid layer in ArcMap.
6. Use Envision Tomorrow to paint cells of the grid to match the chip location from the first workshop map.
  - a. Envision will record these results using the active polygrid layer (in the attribute table, the field called “DEV\_TYPE”).
  - b. For each map, transfer these results to a new field (name field after map number) in the attribute table to save them, and then clear out the active “DEV\_TYPE” field for the next map’s results.
  - c. Save results in a new field: calc [new field = “DEV\_TYPE”] and then clear out the DEV\_TYPE field: calc [DEV\_TYPE = “”]
7. Digitize subsequent workshop maps in the same way, always transferring results after each map and saving frequently.



Images of Beaverton Civic Plan workshop maps completed by participants.

## Developing themes for testing

Following completion of the workshop map digitization, the information of where participants placed chips on all maps is now stored in one GIS layer. With this information compiled, it's now possible to analyze the workshop results and look for emerging trends from the workshop input.

All workshop maps can now be compiled to visualize the collective thinking of the public that participated. In other words, imagine laying all the maps on top of each other to see which locations on the maps received the most chips and what type of development were most popular. For instance, with ArcGIS, Fregonese Associates organizes the shapefile to show where all civic, mixed-use, residential, employment or any other development type used, occurs on the map. The image of each of these distinct development types can be exported to see trends in where participants placed the chips. This process is described in detail below.

### How to analyze workshop results in Envision

1. Digitize all workshop maps.
2. Choose a common color set/symbology for all chips, and apply to the envision polygrid layer. If there are multiple MXD files, you can 'save as layer file' and add this layer to other project files so the colors match.
3. Copy/paste the envision polygrid layer multiple times – you will need a new layer for each map and element you'd like to illustrate (for example: map 1, 2, 3; all commercial chips; chip frequency, etc). If it helps, rename these new layers.
4. Import symbology from the envision grid layer:
  - a. Properties > Symbology > Import > Based on [select original envision layer] > Apply to [select field].
  - b. The map will show up, illustrating your chosen field.
5. For 'all chips placed' -- turn on multiple layers. Add layers such as municipal boundaries or major roads to help orient the map.
6. Layout View. Use a bookmark extent. Adjust legend, use guides so that each exported map will have the same appearance.
7. Export map as JPEG.

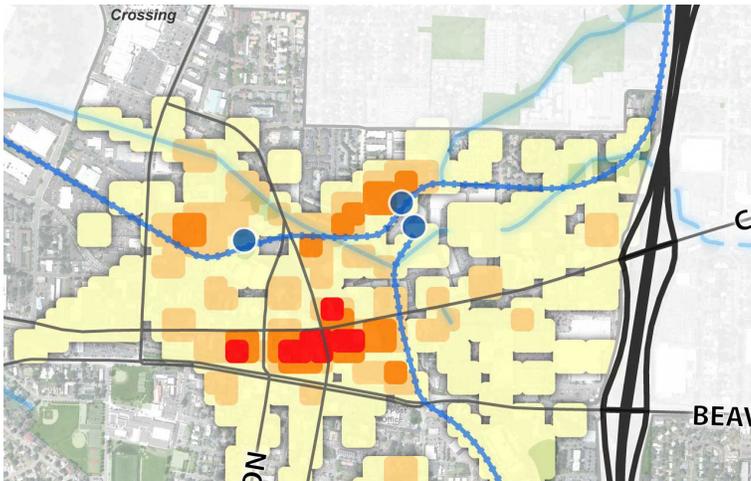


Images of Beaverton Civic Plan workshop maps digitized.

**How to display all chips of each kind (e.g. commercial, residential, civic)**

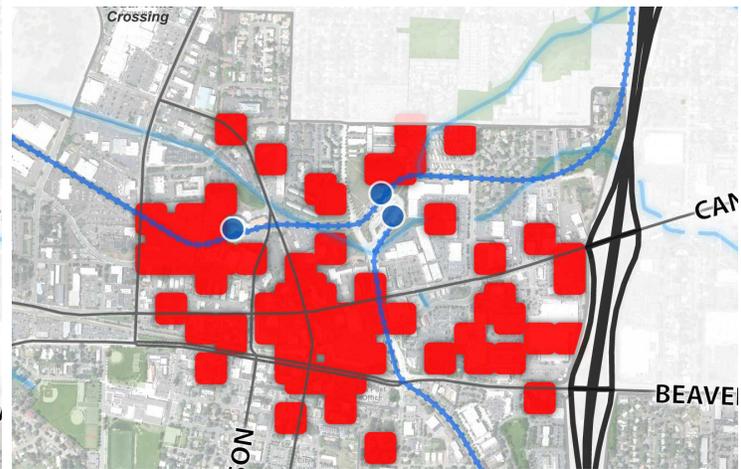
Themes emerge from the workshop maps by observing frequency of chip placement on the maps. Using ArcMap it is possible to view each development type separately or to view all chips placed on the maps at once. Examples from the Beaverton Civic Plan are below.

1. Copy/paste original polygrid to create a new layer and rename (“all commercial”).
2. Open attribute table of new layer.
  - a. Options > New Field > “Commercial” choose Short Integer > OK
  - b. Options > Select by Attribute > create formula to capture all commercial chips from all maps:
    - i. Use ‘get unique values’
    - ii. SELECTION = “Map 1 = Comm OR Map 2 = Comm OR Map 3 = Comm” to include all maps
  - c. With that selection active, select the new Commercial field in attribute table:
    - i. Hover over name and right click
    - ii. Field Calculator: 1 (this will give all selected grid cells a value of 1)
3. Commercial layer > Properties > Symbology > Get Unique Values:
  - a. Delete null, uncheck “all other values”
  - b. Label the “1” as “Commercial”
  - c. Choose the appropriate color for commercial chips (RGB value)
4. Export map as JPEG. Repeat for each chip type.



Highest frequency of chips placed on each polygrid.

The highest frequency of chips placed on each polygrid cell is shown in the Beaverton Civic Plan map above. The darker colors indicate a higher placement of chips. In analyzing this compilation of workshop results, attention can be directed to the areas where there appears to be consensus from the community participants that development is desired in the locations with red coloring. There appears to be a new center of gravity north of Beaverton-Hillsdale Hwy on Canyon and Broadway.

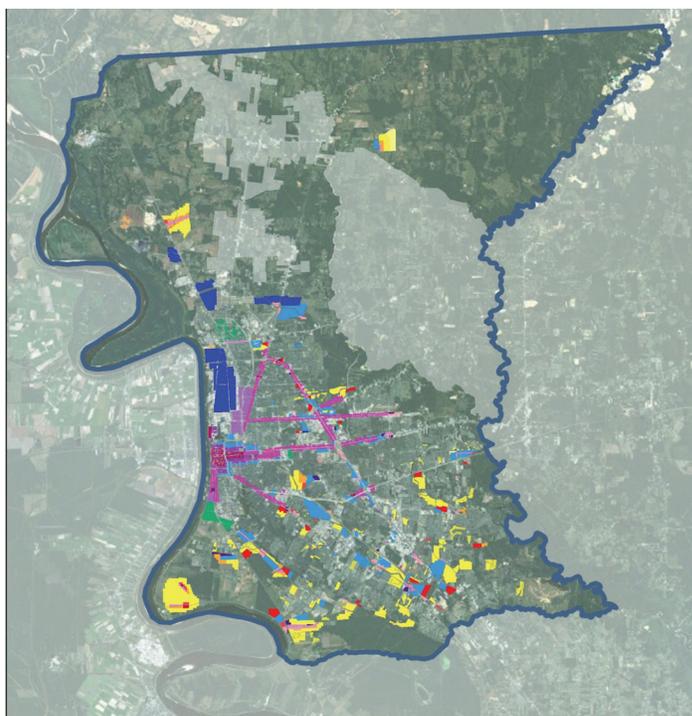
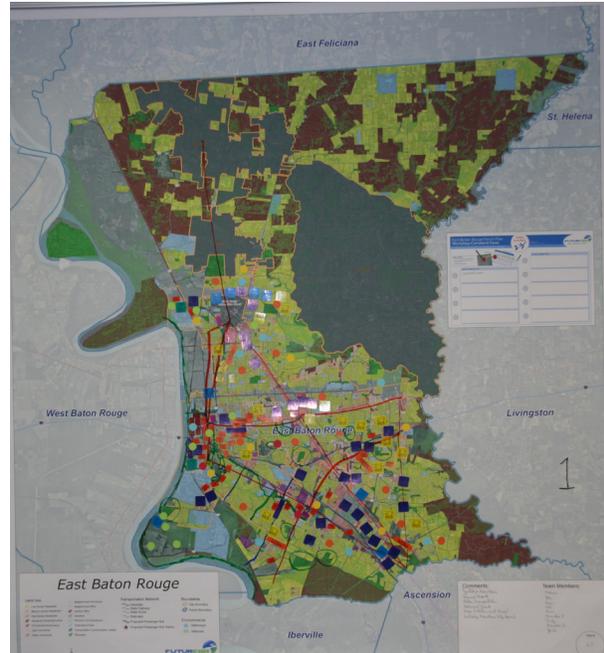
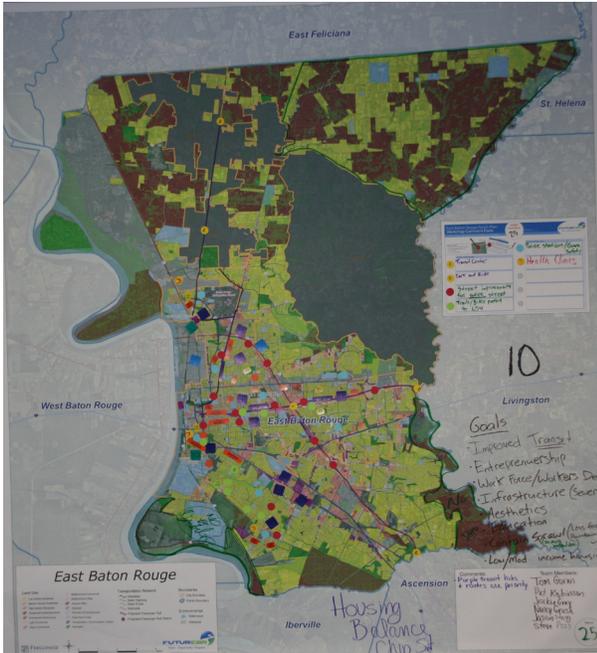


Mixed-use chips placed.

The map of red cells indicates where participants placed mixed use chips. Themes of central districts emerge where dark clusters of chips are located.

### Developing scenarios based on workshop input and emerging themes

One of the alternative scenarios may be based on the themes that emerge from digitizing the workshop maps. In the example below, maps from Baton Rouge public workshops were photographed, digitized, and then compiled to visualize themes. The “workshop” scenario was developed by building on the themes from the workshop.



## Workshop

- Development Type**
- Downtown Office
  - Downtown
  - Downtown Residential
  - Transit Oriented Development
  - Urban Corridor
  - Main Street
  - Neighborhood Renovation
  - Employment District
  - Industrial
  - Activity Center
  - Strip Commercial
  - Apartment
  - Compact Neighborhood
  - Residential Subdivision
  - Large Lot Subdivision
  - Rural Housing
  - Manufactured Homes
  - Shopping Mall
  - University District
  - Medical District
  - Abandoned Residential
  - Abandoned Commercial



## **Step 6 – Select a Preferred Scenario**

Examples included:

1. Tulsa, OK voting piece
2. Michigan's Grand Vision Scorecard
3. A selection of example comments sheets from the Grand Vision

When asking the public to weigh in on the alternative scenarios, ask about individual criteria or elements of the scenario. Use a graphically easy to read format. This example is from PlaniTulsa, Oklahoma.



## Which Way, Tulsa?

Which growth scenario best reflects your thoughts and dreams for the future of Tulsa?

You can also take the survey online, [www.planitulsa.org](http://www.planitulsa.org)

**What to do with this survey?**  
Mail it. Fax it. Or drop it off.



**mail survey to:**  
PLANiTULSA  
City of Tulsa  
Planning Department  
175 E. 2nd Street  
Tulsa, OK 74103

**fax survey to:**  
918.699.3966

**drop off locations:**  
City-County Libraries  
in the City of Tulsa

detach survey along perforation

# SURVEY

Please complete and return the survey no later than **June 18, 2009.**

Please read the following statements. How well do you think the scenarios address these topics? For each question, **choose the scenario** that you think does the **best job**. Please select **only one scenario per question**.

	<b>A</b> Trends Continue	<b>B</b> Main Streets	<b>C</b> New Centers	<b>D</b> Centered City
1. Provides me and my family with the range of transportation options we need	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Expands my access to good-paying jobs within the city	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Builds the kind of housing options that I need	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Invests transportation dollars in the things I care most about	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Creates a lively and interesting city that attracts and keeps young people here	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Makes it easy for me to access parks, the river, and open space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Results in a future for Tulsa that I am excited about and would help support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please read the following questions. Write your choice (A, B, C, D) in the space provided.

8. Which scenario do you like the best, overall?

9. Which scenario do you like second best?

10. What type of housing would you most want to live in? Please select your favorite.

- New single-family subdivision
- Existing single-family neighborhood
- Townhome or apartment on a main street
- Downtown condo or apartment

11. In what kind of place would you most like to work? Please select your favorite.

- Suburban retail/office development
- "Main street" building
- Downtown
- Industrial/office park

12. What kind of transportation investments are important to you? Please select your favorite.

- Widen existing roads
- Build new roads
- Improve/expand the bus system
- Build a light rail/streetcar system
- Improve bike/pedestrian paths

**CONTACT INFORMATION** (optional) **What is your gender?**  
 Female  Male

Name: \_\_\_\_\_

Email: \_\_\_\_\_

**Where do you live in Tulsa?**

- North  Midtown
- South  Southwest
- East  West

**What is your ethnicity or race?**

- African American
- Native American
- Asian
- Caucasian or White
- Hispanic
- Vietnamese
- Other (please specify) \_\_\_\_\_

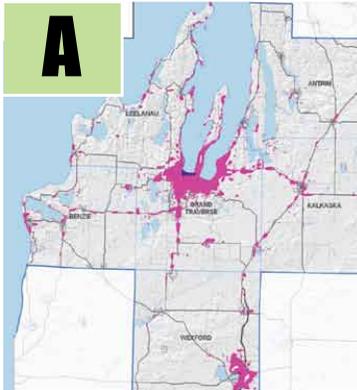
**What is your age?**

- Under 19  50 - 64
- 19 - 29  65 +
- 30 - 49

Please help us ensure that we're receiving input from residents throughout the city. No identifying information will be released, nor will this data be used for anything other than this survey.

Use visuals to share the results of the scenarios with the public. This example is from Grand Traverse Vision.

# Future Growth Scenarios



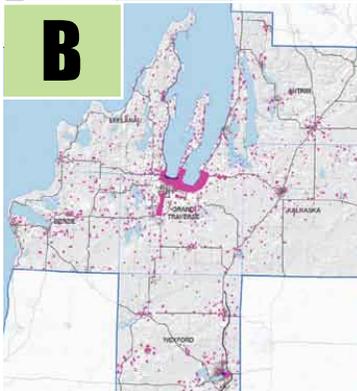
**Scenario A** - Future growth will follow the existing trend of low-density development in rural areas, with minimal growth in existing cities and villages.

Transportation investments will be largely in widened roadways for commuters, and include some multi-use trails, but minimal investments in bus service and walkability



Scenario A: Transportation Priorities

		
Additional Roads	Transit Availability	Ability to Bike or Walk



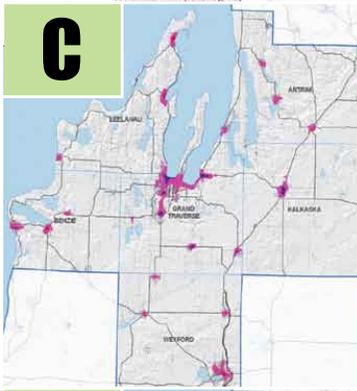
**Scenario B** - Future growth will occur in rural areas, but with new homes clustered to maximize open space, and minimal growth in existing cities and villages.

Transportation investments will be largely in new or widened roadways for commuters. This scenario includes some investment in walking and bicycling trails but the effectiveness of transit and walkability for commuting is limited by low densities



Scenario B: Transportation Priorities

		
Additional Roads	Transit Availability	Ability to Bike or Walk



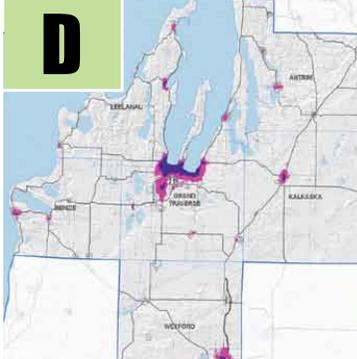
**Scenario C** - Future growth will occur primarily in the region's cities and villages, with additional growth in the main cities of Traverse City and Cadillac. Large amounts of rural open space are preserved.

This development pattern will require investments in regional bus service, sidewalks and bike trails in villages and cities, with some investments in new or widened roadways.



Scenario C: Transportation Priorities

		
Additional Roads	Transit Availability	Ability to Bike or Walk



**Scenario D** - Future housing development and job growth will occur primarily in the region's two main cities, Traverse City and Cadillac. Large amounts of rural open space are preserved.

This development pattern will require investment in urban bus circulators, sidewalks and biking paths in those two main cities. This scenario has limited investment in new or widened roadways.



Scenario D: Transportation Priorities

		
Additional Roads	Transit Availability	Ability to Bike or Walk

Use graphics to show how the scenarios compared to each other based on the evaluation criteria. This example is from Grand Traverse Vision.

# Scenario Tradeoffs

## Land Use

The amount of land the region develops over the next few decades is directly related to the future height of buildings, the size of backyards and the amount of single-family vs. multifamily housing. Creating future housing with smaller yards and taller buildings will allow the region to preserve more farm and forest land and open space, but will mean that new residents will not have as much opportunity to find a new home in the country.

Many participants in the Grand Vision have expressed a need for more affordable housing options for young people, working families, and the elderly. One of the most effective ways to increase affordable housing is to allow for more apartments, condominiums and townhouses.

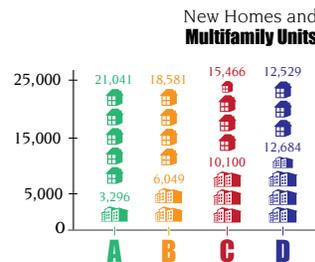
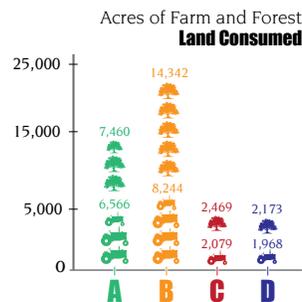
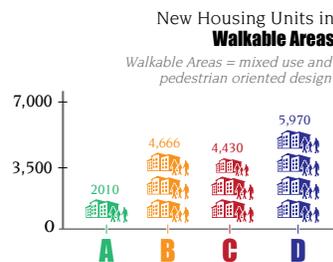
## Transportation

How we live, work and travel via car, bike, bus or on foot has a dramatic effect on our daily lives, what our cities and towns look like and the health of our environment. Spreading development around the region in subdivisions and small acreages will ensure that more people can live on a quiet street, but will also mean that we will drive farther to work, there will be more congestion in the region and people will use more fuel.

Focusing the majority of future housing into existing cities and villages can dramatically decrease the distances we drive, what we spend on gas, and create more options for walking, biking and riding the bus. However, living closer together also means that we will spend less time commuting and pave fewer roads and parking lots, but we will experience more congestion in neighborhoods.

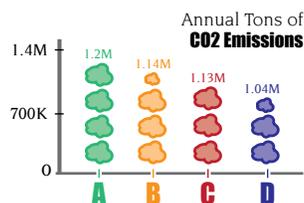
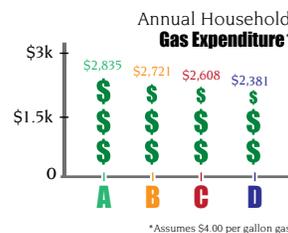
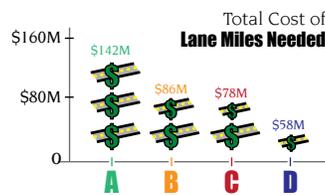
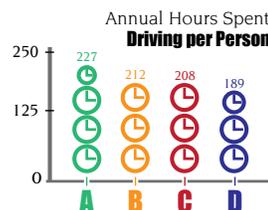
## Land Use and Housing Indicators

The following charts show each scenario's performance relating to land consumption, housing choices and walkable neighborhoods.



## Transportation Indicators

The following charts show each scenario's performance relating to getting around the region.



### What does this mean?

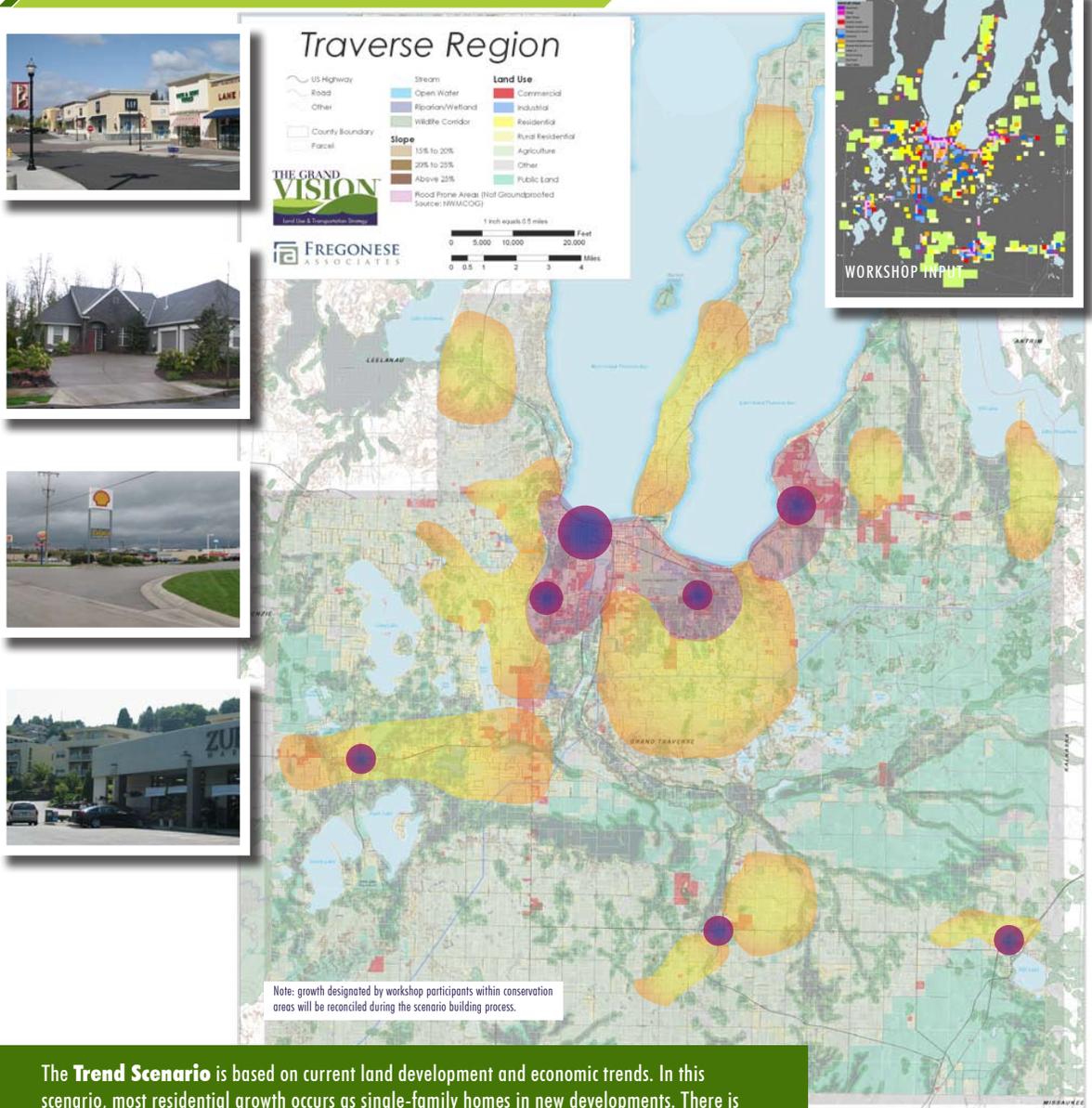
172,000 tons of CO2 (the difference between scenarios A and D) is equal to the CO2 in over 1.1 million tanks of gasoline.



For more detailed charts and graphs comparing the scenarios go to [theGrandVision.org](http://theGrandVision.org)

Comment sheets distributed to collect feedback on four scenarios for Grand Traverse

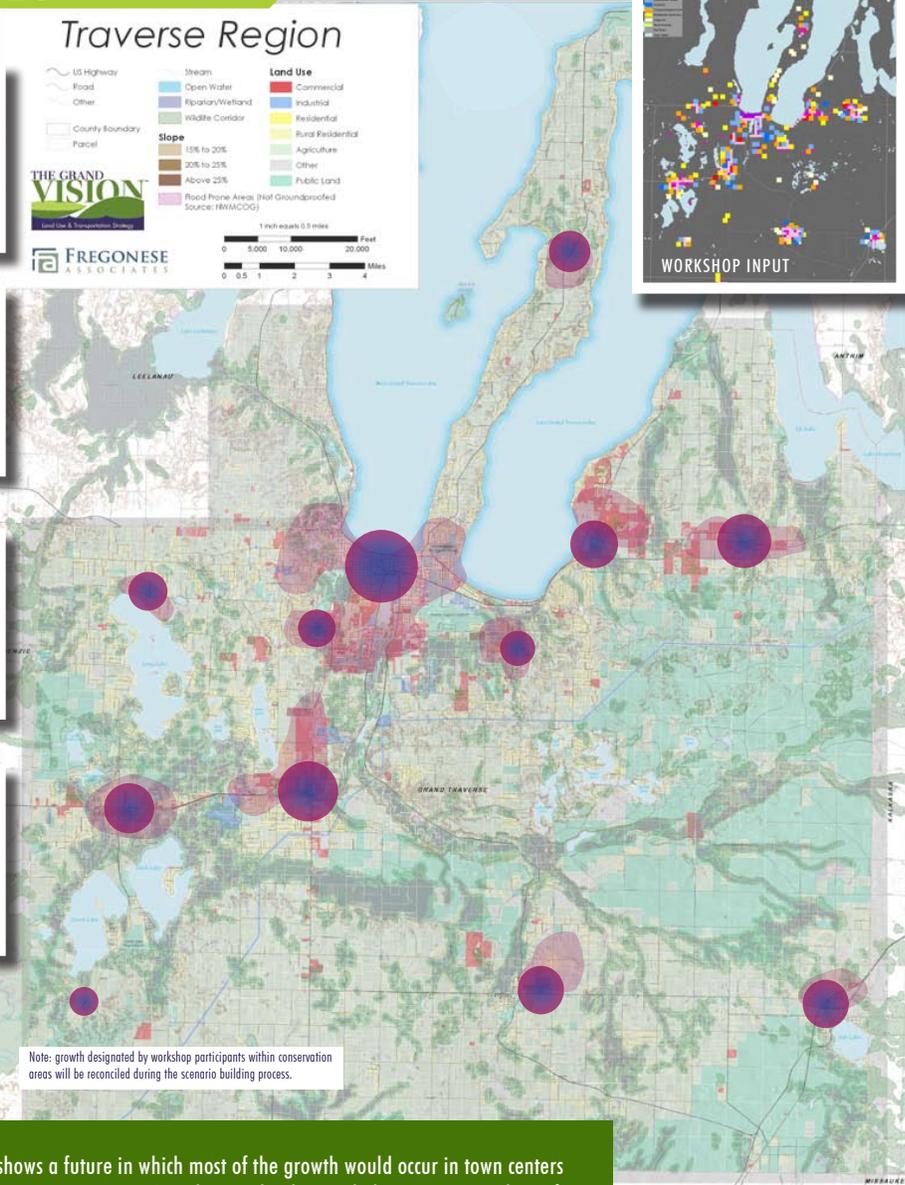
TREND



The **Trend Scenario** is based on current land development and economic trends. In this scenario, most residential growth occurs as single-family homes in new developments. There is little redevelopment of existing areas or infill development in the Trend scenario. Most of the job growth occurs in existing city and town centers. As the region's development spreads out, average automobile trips get longer and residents spend more time getting to their jobs, shopping and schools. Continuing the recent trends, development does occur on some land which is currently open space and used for agriculture. The transit system would consist largely of the current Cherriot bus system serving current Traverse City routes.

COMMENTS:

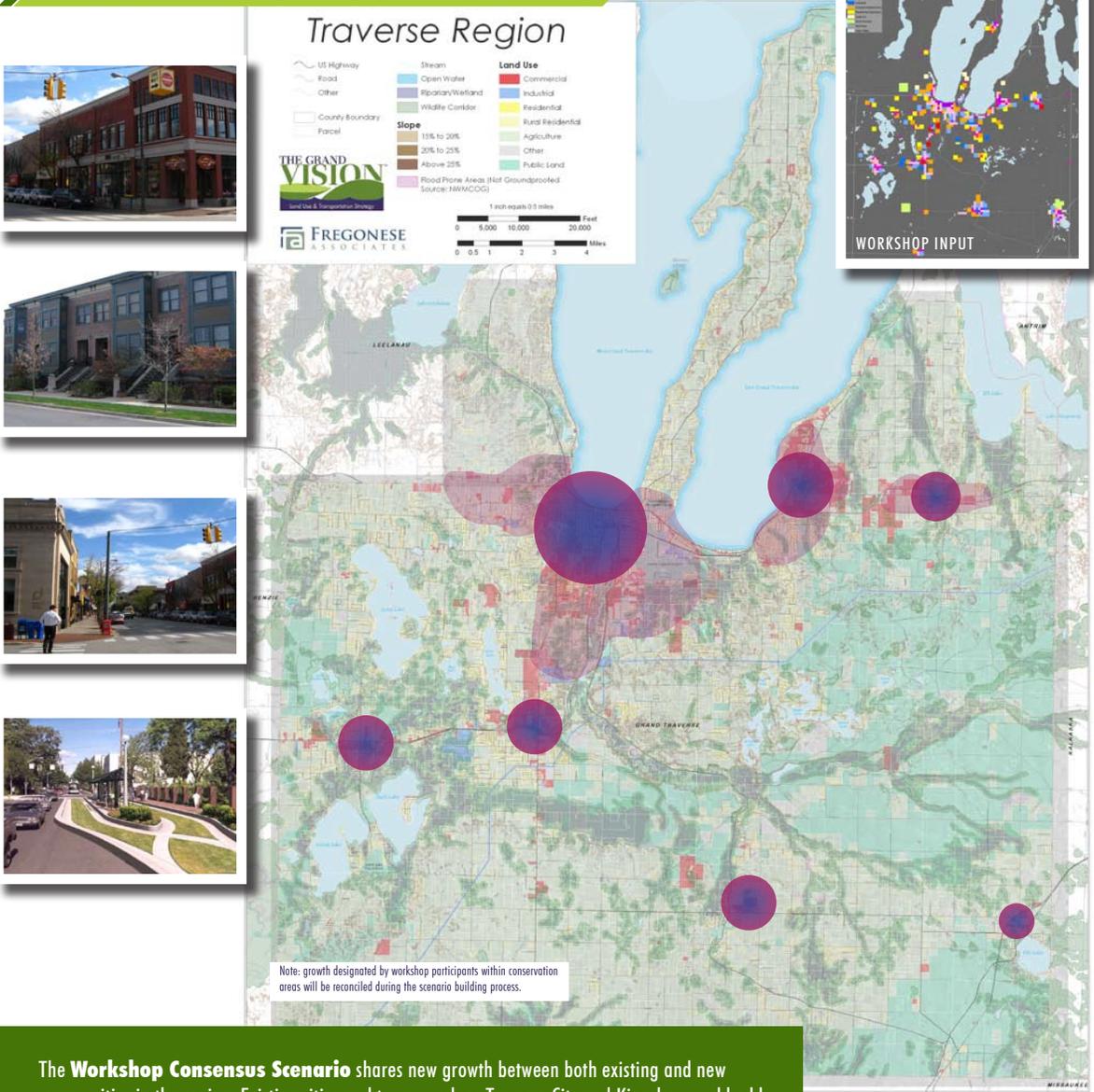
# VILLAGES



The **Villages Scenario** shows a future in which most of the growth would occur in town centers or villages throughout the region, in Traverse City along with others including Acme, Kingsley, Fife Lake and Interlochen. Significant amounts of this growth occur in mixed-use developments. New job growth and housing growth is fairly evenly spread throughout the region. Across the Grand Traverse region, average daily travel time is lower than in the Trend scenario, but congestion in each of the centers is significantly higher. Regional transit includes buses, commuter rail and a Bus Rapid Transit (BRT) system to connect the village centers.

**COMMENTS:**

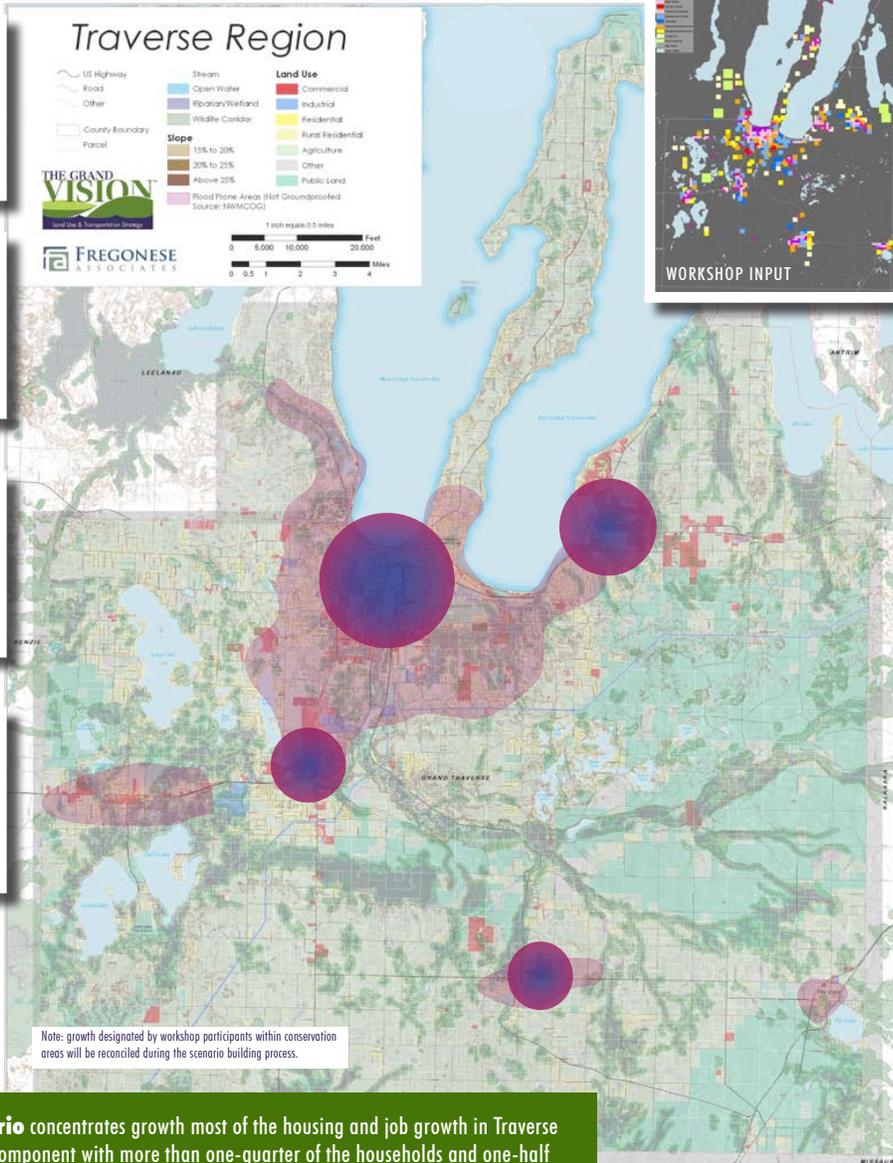
# WORKSHOP CONSENSUS



The **Workshop Consensus Scenario** shares new growth between both existing and new communities in the region. Existing cities and towns, such as Traverse City and Kingsley, would add jobs and people, primarily in mixed-use developments. In addition, some new town centers would be built along major transportation corridors or at key intersections. Open space would create separation between developed areas. Regional transit consists of a multi-modal bus system and Bus Rapid Transit (BRT).

**COMMENTS:**

# CENTRAL CITY



The **Central City Scenario** concentrates growth most of the housing and job growth in Traverse City. Infill is an important component with more than one-quarter of the households and one-half of the jobs accommodated on currently developed land. In the Central City scenario, the transit system would consist of an expanded Cherriot bus system designed to move residents to jobs primarily in the urban core. Along certain mixed-use corridors, the system includes Bus Rapid Transit (BRT).

COMMENTS: