

Memo

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To: Sandra Hikari – ODOT

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Project: Oregon City-West Linn Pedestrian and Bicycle Bridge Concept Plan

Subject: Final Equity Report

This report will outline the equity findings of phase one, two and three of the Oregon City-West Linn Pedestrian-Bicycle Bridge Concept Plan. The aim of the concept plan is to identify the preferred alignment for a safer, more comfortable biking and walking bridge across the Willamette River between the communities of Oregon City and West Linn. The projected timeline for the creation of the concept plan is November 2020 to June 2021

The concept plan has the following objectives:

- *Identify a safe, separated option for a crossing between West Linn and Oregon City.*
- *Connect important regional bicycle and pedestrian routes.*
- *Provide opportunities for investment in West Linn and Oregon City, including the Old City Hall District, Industrial Heritage District, Willamette Falls Downtown District and downtown Oregon City.*

The project team recognizes the significance of community engagement in public projects and is dedicated to honoring the cultural significance of the area. Phases of the concept plan have included direct communication with historically excluded communities and interest groups through focus groups, and open meetings to identify potential crossing issues, barriers, needs, opportunities and ideas.

Table of Contents

| | |
|--|-----------|
| Section 1: Introduction and Methodology | 4 |
| Social Equity Engagement Framework | 4 |
| Benefit-Burden Analysis | 4 |
| Outcome Equity and Process Equity | 5 |
| Equity Consultants: Role and Responsibilities | 5 |
| A Systems Approach to Equity | 6 |
| Equity Visionalization Nexus | 7 |
| Demographic Mapping | 8 |
| Course Correction | 9 |
| Section 2: Towards A Social Equity Framework in Active Transportation Projects | 9 |
| Equity | 9 |
| Storytelling and Cultural Connections | 10 |
| Representation, Inclusion, and Accessibility | 10 |
| Environmental Health | 11 |
| Human Health | 11 |
| Community Engagement | 11 |
| Historical Preservation | 11 |
| Cultural Preservation | 12 |
| Modern Transportation Systems | 12 |
| Transportation Demand Management | 12 |
| Regional Connectivity | 12 |
| Transportation Safety | 13 |
| User Experience | 13 |
| Planning and Environmental Linkage | 13 |
| Sustainable and Reliable Funding Sources | 13 |
| Multi-Agency Project Coordination | 14 |
| Equitable Economic Development | 14 |
| Grant Opportunities | 14 |
| Section 3: Observations, Recommendations, and Course Correcting: Concepts to Consider | 15 |
| Equity | 15 |
| Inclusionary and Culturally Relevant Design | 15 |
| Recommendation: | 16 |
| Diverse Representation | 16 |
| Recommendation: | 17 |
| Data Sharing | 17 |
| Recommendation: | 18 |
| Modern Transportation | 18 |
| Recommendation: | 19 |

| | |
|---|-----------|
| Sustainable and Reliable Funding Sources | 19 |
| Recommendation: | 20 |
| Section 4: Key Improvements, Highlighted Work, and Future Applications | 20 |
| Key Improvements | 21 |
| Focus Groups | 21 |
| Highlighted Work | 22 |
| Environmental Linkage | 22 |
| Materials and Notification | 22 |
| Future Applications | 22 |
| Stakeholder Mapping and Course Correcting | 22 |
| DEIA, Equity Visualization Nexus, and the Equity Consultant | 23 |
| Towards a Social Equity Framework | 23 |

Section 1: Introduction and Methodology

The Oregon Department of Transportation's 2021-2023 Strategic Plan outlines three strategic priorities: Equity, Modern Transportation Systems, and Sufficient and Reliable Funding. While aspects of this project undoubtedly incorporate elements of the other strategic priorities, this project has placed heavy emphasis on the equity priority. This is particularly observable in the dedication to engaging the community in order to develop a Oregon Department of Transportation (ODOT) Social Equity Engagement Framework. ODOT has committed themselves to implementing a social equity engagement framework on ten ODOT projects throughout the state in 2021 and to adjust frameworks to enable agency-wide scaling; this project is the first of the ten implementing social equity engagement frameworks.

Social Equity Engagement Framework

A social equity framework is a frame of reference that can be used to ensure just and fair inclusion in society where all are able to participate, prosper and reach their full potential. Within the context of planning, particularly transportation planning, social equity frameworks identify and actively mitigate the disproportionate burden that has been placed on historically marginalized communities by engaging with communities. A social equity engagement frame recognizes that prioritizing social equity also means prioritizing community and stakeholder engagement in which communities and community voices in planning projects are both actively involved and empowered through engagement. A social equity engagement framework emphasizes community outreach as a central component of better transportation planning, and incorporates and "course corrects" the project in response to the gathered data.

A comprehensive Social Equity Framework is critical to equitable transportation planning. Historically, transportation planning, like many other forms of public planning, has played a role in perpetuating inequity through exclusion, disinvestment and disproportionate burdening; a social equity engagement framework can be used to ensure that this does not continue. Alongside a comprehensive Social Equity Engagement Framework, tools such as an equity visualization nexuses, behavioral analysis principles, behavioral economics principles, incorporation of environmental justice, and benefits and burdens analysis, historic and contemporary inequity can be eliminated from the systematic processes of transportation planning.

Benefit-Burden Analysis

As mentioned above, benefit-burden analysis can be a critical tool in evaluating equity of social, financial and environmental burdens in a project. The application of benefit-cost analysis within transportation projects to understand the economic advantages and disadvantages (safety cost, maintenance cost, monetizing of travel time) within public transit projects is not a new concept; however, this base-alternative comparison can also be used to evaluate equity within transportation projects. By applying the process of benefits-cost analysis within a transportation project, we can evaluate the negative and positive externalities for a public transportation project. It is important to utilize a Social Equity Framework when creating the process, methodology, and data aggregation in a benefit-cost analysis. Externalities such as environmental pollution, noise pollution, capacity strain, cultural incompatibility, emotional, physical or psychological safety, disproportionate financial strain, and many more can be identified and weighed. In this process, the positive and negative effects of the project alternatives on surrounding communities can be weighted and compared.

The benefits-burdens analysis evaluates who would be affected and how, evaluates if the distribution of benefits or burdens would disproportionately affect a particular group of stakeholders (particularly

historically marginalized communities), and anticipates other inequity externalities before alternatives get elevated to the next level of consideration. By engaging in the benefit-burden analysis in project development, the burden (cost metric when evaluating equity) is baked into the process just like economic and environmental cost. In order to gather data to do this level of analysis, significant and meaningful community engagement and empowerment is needed and the Social Equity Engagement Framework ensures this. Equity is multifaceted, complex and intersectional but the use of a Social Equity Engagement Framework to do benefit-burden analysis provides a way to engage communities in a way that centers equity throughout transportation processes.

Outcome Equity and Process Equity

Equity cannot simply be an end outcome of planning projects, but must be maintained throughout the entire process. When it comes to equity, the means do not justify the end, and if the processes in which equity is reached at the end of the project are not equitable, the end result is not ultimately equitable; this can be defined as Outcome Equity vs. Process Equity. Outcome Equity refers to the end result of the project. Outcome Equity is determined by evaluating the equity of the completed planning product. Process Equity on the other hand refers to the entire process that led up to the completion of the planning project. Process Equity includes equity in a series of components such as but is not limited to procurement, contracting, environmental justice, decision making processes and engagement. If the processes that were used throughout the project were not equitable, the end result cannot be equitable and this is particularly true within community engagement.

As highlighted in the Social Equity Engagement Plan, a key component of equity is community engagement. In order for community engagement to be done with integrity, not only do diverse cross-section of the community and key stakeholders need to be engaged, but the community must be provided with accurate, digestible, and clear information regarding the project, the decisions being made, and the options available. When informing stakeholders and communities about the project, relying on highly technical or project specific language does not allow communities to make informed decisions. Ensuring community comprehension and accessibility of information regarding the project is a key and preliminary step in community engagement. This can include distribution of materials in a variety of forms (i.e. via the project website, paper pamphlets, reader accessible versions), in addition to a variety of languages tailored to the community outreach is focused on. If large sections of the community were either not engaged or engagement was not accessible due to technical language, vague descriptions, language barriers, inaccessible due to disability, financial constraints (regarding digital materials specifically), or inadequate project information, engagement was not done equitably therefore the project outcome cannot be considered truly equitable. The equity of methodology is equally important as the equity of the final product.

Equity Consultants: Role and Responsibilities

The process of achieving equity does not occur in a void. In other words, it is impossible to isolate equity into a separate discipline and it is not an end in itself. Instead, equity is a lens through which professionals can envision more inclusive planning and infrastructure. Equity consultants must therefore have a broad understanding of the projects and industries they consult for. If this is not the case, recommendations and interventions made in the name of equity are unlikely to hold any water. In this project, for example, it is critical to understand how engineering concepts such as grade impact accessibility for disabled individuals, thereby potentially engendering a less equitable design. Equity consultants must also be able

to translate project-specific vocabulary into layman's terms to ensure a more equitable outreach process, a task that also requires extensive knowledge of the field in question.

In the context of this project, it is essential that equity consultants grasp the range of legal and sociocultural factors that impact or contribute to process and outcome equity. In particular, consultants must be skilled planners and project managers. This includes having knowledge of the technical, programmatic, and community-oriented aspects of project planning in order that equity consultants may correctly evaluate the process and provide realistic recommendations relevant to each of the project's components. Equity consultants must also have a thorough grasp of the laws that govern the project. These include foundational legal frameworks such as the National Environmental Policy Act (NEPA), Title VI (prohibits discrimination in programs receiving federal funds on the basis of race, color, or national origin), and Title VII (prohibits employment discrimination based on race, color, religion, sex and national origin) as well as other civil, historical, and environmental protections applicable to this project. For example, it is important to note the Tribal ceremonial fishing rights at Willamette Falls as these cannot be impeded by the new bridge's construction.

As indicated by the laws that help guide the equity consultant's work, equity extends far beyond racial equity. While the bridge needs to reflect the needs of and uplift racially diverse community members, it also needs to be physically accessible and support economic development and access for individuals from different economic backgrounds. Upholding social equity is a holistic practice, and every effort should be made to carry out a process and design a bridge that provides the most benefits for the greatest number of people. To ensure all relevant stakeholders are given the opportunity to contribute to the project, equity consultants are responsible for researching and identifying all community groups, and especially traditionally underserved communities, in the area to avoid misrepresenting the community's voice.

A Systems Approach to Equity

There are a number of theories and concepts that ground the work in equitable processes and outcomes, support the engagement and attention to stakeholders' contributions and concerns, and facilitate the project team's ability to course correct and design a process that achieves a net positive outcome. These include behavioral economics, complex systems analysis, and environmental analysis.

Behavioral economics is the study of psychology as it relates to decision-making processes, and provides a lens through which one can analyze irrational behavior. Essentially, individuals cannot provide a rationale, or logical, response when they lack sufficient information. They are instead more likely to waver and provide inconsistent or emotionally-charged feedback. Public choice represents a range of informational inputs, and individuals are more likely to voice support for a project when they are privy to critical information. This is especially important with regards to an active transportation bridge, which is likely to garner a fair amount of negative feedback given car dependence. When stakeholders are presented with data representing the economic, public health-related, and traffic impacts of a project, they are more likely to develop a consistent opinion and ultimately provide consent as their feedback is integrated into the project. This allows for a more secure investment in high-value infrastructure. In short, the application of behavioral economics necessitates thorough community outreach and engagement to guarantee the advancement of a project with broad public support.

Complex system analysis amounts to a recognition of transportation systems' inherent complexity; there are a multitude of interconnected parts that cannot be considered in isolation. Within this project's scope, a complex systems approach encourages the project team to zoom out to the regional level to understand how the bridge fits into existing transportation networks. In regards to outcome equity, the complex systems approach is important because it informs the potential usage of the bridge by different demographic groups, many of whom will not use a bike bridge if it does not connect to other designated bike paths.

Environmental analysis, largely shaped by the National Environmental Policy act (NEPA) of 1969, seeks to understand and mitigate the impacts of transportation projects on communities and the natural and cultural resources in the vicinity. This framework requires an assessment of a project's potential impacts on the environment and local communities. It is important, for example, to select an alignment that doesn't have a negative impact on river flow or the Willamette Falls.

Behavioral economics, complex system analysis, and environmental analysis are useful on their own for transportation planners, yet they must be accompanied by a constructive community engagement process informed by their application.

Equity Visualization Nexus

An equity visualization nexus is a tool that practitioners use to understand the multitude of levels that make up a single issue or conflict. When equity practitioners use a visualization nexus, it can help identify a tangible process to interview, code, and recommend future actions. Diversity, Equity, Inclusion, and Accessibility (DEIA) refer to the nexus of language used to empower underrepresented communities and provide funding, resources, and time for programs related to empowerment. When looking at a conflict, issue or problem, it is important to first understand the nexus of language that is utilized to empower and then create a nexus that positions the specific work. Diversity refers to the people who define a community. Equity refers to the conditions that make life just for all community members. Inclusion refers to the vibrancy of the community when nobody is excluded from public life. Accessibility refers to the ability of all community members to take advantage of diverse opportunities. Bringing these ideas together helps ensure empowerment of individuals protected under Title VI.

While DEIA provides a great starting point, it's important that DEIA practitioners further contextualize their work into an Equity Visualization Nexus. This takes DEIA principles and helps visualize them within the context of a program, project, or an audit. Below is an explanation of project needs which create a nexus framework that informs the creation of our recommendations and overall methodology.

- **Address Historic Arch Bridge deficiencies for people walking, biking, and rolling**—The historic Arch Bridge lacks facilities for people biking and presents issues related to the Americans with Disabilities Act of 1990 (ADA) due to grade (approximately 6 percent) issues and substandard sidewalk widths.

- **Identify a new low-stress, comfortable, and designated connection across the Willamette River to increase experience for people walking, biking, and rolling**—A new low-stress connection between Oregon City and West Linn will provide a key linkage within the southeastern portion of the Portland metropolitan area and will be accessible for all ages and abilities.
- **Connect existing and planned walking, biking, and rolling networks**—A new connection for people walking, biking, and rolling across the Willamette River will connect the existing and planned regionally significant active transportation routes on the east (I-205 multi use path, Willamette Terrace, Riverwalk) and west (Willamette Falls Drive and OR 43 cycle tracks) sides of the Willamette River. A new connection will also increase access to existing destinations and the future Riverwalk as part of the Willamette Falls Legacy Project.
- **Enhance accessibility and cultural experience of the Historic Willamette Falls**— A connection for people walking and biking will provide new access and the opportunity to experience and visually imagine the historic significance of the river, falls, and adjacent lands. Special attention will be given to the indigenous connections to the land, honoring active approaches to transportation across the river, and acknowledging traditional ways of movement across waterways.
- **Create opportunities for economic and community development** – An adopted connection for people walking and biking provides certainty and may facilitate investment opportunities in the Old City Hall District, Industrial Heritage District, Willamette Falls Legacy Project, and downtown Oregon City.
- **Mitigate environmental externalities** – A bridge designated for people walking, biking, and rolling will serve as an unprecedented opportunity for transportation mode shifts, lowering local and regional carbon footprints. There will be opportunities to use the bridge as a hub for critical air and water quality measurements, while its physical design will adhere strictly to standards that negate localized environmental externalities and do not inflict harm on the river or nearby communities.

Demographic Mapping

Demographic Mapping is the process of identifying and uplifting historically underserved community members. It can be challenging to adequately engage with stakeholders protected by federal law. Many of these stakeholder groups deal with logistical challenges which make it hard for them to volunteer, attend public meetings, take surveys, and participate in planning initiatives. For this, it is important to find innovative ways of inviting these communities into the process. The 2018 American Community Survey (ACS) data at the block group level was analyzed to identify areas with high numbers of residents who historically face transportation barriers and environmental justice communities that have been traditionally underserved. It is important to understand the density of underserved communities in a given site area and create meaningful engagement strategies to authentically involve and co-create with them. When understanding which communities are within a given site area, engagement can be tailored to specific stakeholder needs. For example, if a mapping activity found that 20 percent of the population in a given site area spoke Spanish as their first language, conducting engagement in Spanish would ensure that this particular stakeholder group had access to the project.

Course Correction

When designing public outreach processes and incorporating public feedback in project design, there is no silver bullet. It is precisely for this reason that public engagement is so important. When planning public infrastructure projects, project teams cannot know how the local community will be impacted or whether they will support the project. Project teams must be ready to challenge their assumptions and change integral components of the project plan if the existing plan does not agree with community aspirations. Prescriptive processes are never the solution. While it is certainly a quicker process to plan a project without significant public input, this approach risks public outcry and/or little to no public use of the project under study upon implementation. To ensure that the final plan and finished product enjoy broad support and are worth the investment, it is essential to carry out a profoundly collaborative process that incorporates public feedback and involvement as an integral component in the planning process of equal importance to the role of paid staff. To further emphasize the value of public input, honorariums can be provided to community members to compensate them for their time.

Section 2: Towards A Social Equity Framework in Active Transportation Projects

Below are important variables that make up a social equity framework. These variables must be considered in the context of active transportation planning and have been integrated into this project. This framework acts as a matrix to identify the holistic approach needed to achieve social equity. While an equity visualization nexus was utilized to begin to create the framework, this framework represents a detailed application of the nexus. ¹The matrix is organized based on the Oregon Department of Transportation's Strategic Action Plan where Equity, Modern Transportation Systems, and Sustainable and Reliable Funding Sources were articulated as focal areas.

Equity

Oregon Department of Transportation provided the following statement on Equity in their Strategic Action Plan:

ODOT is committed to serving all Oregonians equitably. The voices of our customers matter and influence the work we do. A focus on equity ensures we look beyond merely improving the system to improving the quality of life of every Oregonian. We must be mindful of the benefits and burdens created by our work and ensure they are distributed equitably. Equity goals focus ODOT on workforce diversity and opportunities for advancement, expanding economic opportunities for minority groups, climate equity, and creating more representative public engagement processes.

¹It is important to note that a systematic approach was utilized to develop this matrix. This framework was developed to ensure that projects are completed with integrity and with the intent of promoting equal outcomes for all stakeholders.

The following variables should be considered when attempting to apply a Social Equity Framework to achieve the goals articulated in the Strategic Action Plan. These variables are specific to the Equity goals and represent means of promoting an equitable approach to planning that considers cultural patrimony, equality of access and opportunity, public health, and community needs. When an individual feels represented, supported, and heard within the context of an infrastructure project, it supports cohesion and improves outcomes for community members who might otherwise avoid or feel rejected by a public project.

Storytelling and Cultural Connections

Great planning initiatives uplift and celebrate community identity through storytelling. There are many historical districts, landmarks, cultural assets, and natural sites around the Metro area. Due to the car-centric design of the region's cities, our history is often inaccessible for individuals who cannot or choose not to drive. Infrastructure projects present new ways to highlight and further develop opportunities for street-based storytelling that all individuals, regardless of their ability to avoid a personal vehicle, can witness and enjoy. Understanding the unique history and lived experiences of residents in the site area can ensure that all communities feel connected and uplifted in the process. Leading with storytelling will promote better knowledge of the site area for stakeholders. Including these stories in engagement material, design, and final construction will ensure that any new facility fits into the unique community it will serve. Communities will feel a better sense that this facility is well integrated into their "story".

Representation, Inclusion, and Accessibility

While these three terms can often be variables on their own, the intersection of representation, inclusion, and accessibility are at the heart of equity. Be it the recruitment of individuals on the project advisory committees, individuals surveyed or interviewed, or those participating in focus groups it is important to ensure that everyone has a seat at the table. Many stakeholder groups have traditionally been left out of transportation planning processes. In return many of these underrepresented groups do not have the same level of access to the facilities, an ability to influence the planning process, or benefit from built projects. It is important to realize that many communities do not have the knowledge to advocate for themselves. Any planning project should look to first redress these challenges surrounding accessibility. Be it honorariums or incentives to compensate people for their time, it is important to respect and honor the input of these groups. Information sharing should look to teach stakeholders about technical terms and new transportation concepts. It is important that project advisory committees include a diverse stakeholder groups including commuters, service workers and essential workers, people with disabilities, youth, women, LGBTQ+ , minorities, immigrants, and other groups that have not benefited equitably from public projects.²

² It is important to note that a site analysis is needed to understand which groups need to be uplifted in a particular project. Utilizing a demographic mapping process, the project team can ensure they redress historical challenges by authentically including a diverse group of stakeholders.

Environmental Health

When taking an holistic approach to equity it is important to uplift the natural resources, plants, and animals that exist in the region. Active transportation projects represent a transportation choice that is far more sustainable than the car. Car centric planning programs have created negative externalities on air quality, water quality, and overall ecosystem health. Traditional transportation projects have polluted water systems and negatively impacted air quality. It is important to uplift projects that will look to mitigate or provide a regenerative benefit to the environment. Projects should also minimize impacts to natural resources. For example, a new pedestrian and bike bridge should be designed to have a minimal impact on water quality and fish habitat. Humans exist in relation to the environment, and the relative health of the environment represents the relative health of humans.

Human Health

Current transportation systems also create negative externalities on human health. Traditional highway development projects have resulted in greenhouse gases and road pollution. Highways have cut through marginalized communities who lacked the political power to stop the development. In return these developments have created adverse health situations in these communities. Any transportation planning project should realize the vast inequities done to marginalized communities and look to mitigate these. Active transportation projects provide not only more sustainable and healthy commuting options, but can also address some of the negative human health externalities created by inequitable planning and design.

Community Engagement

A community-oriented engagement process is necessary to empower the public to guide the agenda setting process and lead the project team on the type of projects, alignments, site locations, designs, etc. A collaborative approach to the process will ensure that engagement does not feel inauthentic or solely executed to check a box. It is important that the community feels like equity is part of the project. Ensuring there are multiple ways and times to engage is important. Community members who join late in the process should be directed on how to catch up. Engagement should be done with the goal to rebuild harmed or strained relationships within stakeholder groups. Engagement should authentically look to redress the historical wrongs and provide a public service by enhancing, implementing, or developing facilities that better serve the community.

Historical Preservation

There are many different historical sites, assets, and resources of our region. Active transportation projects, which provide the greatest degree of accessibility to transportation networks for all stakeholders, can be the catalyst to improve access to these historical spaces. Is important that the active transportation projects look to minimize the impacts on historical sites and locations and provide an opportunity to better celebrate and understand them. As development continues to change the makeup of our cities, many aspects that made our region special are at risk.

Cultural Preservation

There are many different cultural assets in the region which hold special significance for various stakeholders including (not limited to) Native American populations, veterans, minority groups, religious groups, and others. It is important to ensure that any facility development provides opportunities for everyone to enjoy their cultural resources and use public infrastructure. Neither should contradict the utility of the other. Large-scale and major infrastructure projects have the potential to uplift the cultural assets that exist at the site area by drawing attention and traffic to specific locations. Infrastructure projects should look to improve accessibility to these locations for all stakeholder groups while mitigating the potential for their degradation.

Modern Transportation Systems

Oregon Department of Transportation provided the following statement on Modern Transportation Systems in their Strategic Action Plan:

A modern transportation system ensures all Oregonians can travel safely and efficiently. Focusing on preserving state highways, while important, is not enough. In order to meet the needs of the future, we must be relentlessly committed to creating a truly multimodal transportation system where we invest in and integrate all major modes of transportation. We will focus not only on improving safety and preserving the existing system, but on improving mobility for all users, addressing climate change, investing in innovative technologies, and implementing a comprehensive congestion management plan to keep Oregonians and our economy moving.

The following variables should be considered when attempting to apply a Social Equity Framework to achieve the goals articulated in the Strategic Action Plan. These variables are specific to the category of Modern Transportation Systems.

Transportation Demand Management

Transportation Demand Management strategies are necessary to ensure effective modern transportation systems. Transportation Demand Management (TDM) allows for the application of complex management strategies to reduce road congestion and redistribute travel to diverse modes of transportation. Active Transportation projects present a new way of redistribution. Increasing mode-shifts to more active transportation will reduce road congestion and pollution. Understanding how projects can increase transportation choice will be imperative to the modernization of our facilities.

Regional Connectivity

Regional Connectivity should drive the development of modernized transportation facilities. Many active transportation facilities exist in silos or are missing necessary links to key destination locations. Looking towards connecting facilities to already existing ones will maximize the general return on investments.

Projects should address already existing gaps and uplifting diverse transportation options through the region.

Transportation Safety

Safety should be a part of developing new facilities and improving old ones. Good lighting, safe entrances, good way finding signs, programming, and ways to ensure community members feel safe on transportation facilities. Safety is a multidimensional concept. Considering the physical, social, emotional, and psychological aspects of safety when making decisions about alignments, designs, or other aspects of the project can promote a safer environment for everyone upon completion of the final product. It is also important to consider the unique individual experiences of communities of color and transportation safety. Underrepresented community members may have a different relationship with site areas and a different level of comfort using facilities.

User Experience

Understanding the overall user experience of a new facility is important to realizing the overall impact that facility will have to the multitude of stakeholders involved in the process. User Experience looks to measure the comfort for users as it relates to sense of place. It is important to understand how each stakeholder group might have a unique experience when engaging with new facilities. Usage of a facility by diverse user groups helps improve the implementation of modern transportation infrastructure reflective of the greater community's needs.

Planning and Environmental Linkage

The National Environmental Policy Act (NEPA) requires federal agencies to consider the environmental impacts of their actions before making a decision about whether or how to take action. Planning and Environmental Linkage (PEL) is an approach to decision-making in transportation projects that directly links planning activities and information to the NEPA processes, allows for shortened timelines due to lack of duplication of work, reduced cost, more informed decision-making, and supports environmental stewardship.

Sustainable and Reliable Funding Sources

Oregon Department of Transportation provided the following statement on Sustainable Reliable Funding Sources in their Strategic Action Plan:

Oregon's current transportation funding structure is not designed to finance a modern, multimodal transportation network. We recognize the need to diversify our revenue sources and adopt new funding options. We must change today's funding model to one that invests more money in alternative transportation options, including bikeways, pedestrian routes, and public transportation. The goals under this priority highlight the need for new revenue sources like tolling and road usage charges as well as adapting our approach to existing funding mechanisms

to provide a wider range of mobility choices. As a responsible steward of public funds, we are also taking steps to ensure ODOT's long-term fiscal health.

The following variables should be considered when attempting to apply a Social Equity Framework to achieve the goals articulated in the Strategic Action Plan. These variables are specific to the category of Sustainable and Reliable Funding Sources.

Multi-Agency Project Coordination

Multi-Agency Project coordination ensures a collaborative approach to achieve regional goals can be applied. As federal, state, and local funding becomes more nuanced in the types, structure, and partnership potential for infrastructure projects, it will be imperative to coordinate across agencies to develop and improve facilities. Agency coordination can ensure budget facilitation, collaboration fundraising, holistic visioning, and provide an opportunity for the community to understand how each agency works apart and together. Coordination can also influence resource sharing, shared educational opportunities, and collective relationship building.

Equitable Economic Development

Equitable economic development ensures that new and improved facilities provide opportunities for diverse stakeholders to benefit from the development. Facility improvements can support and spur regional economic development. It is important to consider the economic impacts or increases that could happen with new facilities or facility improvements. Some increase in economic development could have a negative impact on diverse stakeholders. Understanding how facilities could create developmental opportunities that might displace communities or increase local cost of living should be at the forefront of an equitable development process.

Grant Opportunities

There are a number of federal, state and third-party grant opportunities that could fund this project as well as future infrastructure and development projects. Federal programs include the Rebuilding American Infrastructure with Sustainability and Equity program (RAISE), the Infrastructure for Rebuilding America (INFRA) discretionary grant program, the Highway Safety Improvement Program (HSIP), the National Highway Performance Program (NHPP), and the Surface Transportation Block Grant Program (STBG). State programs include the Statewide Transportation Improvement Program (STIP), the Sidewalk Improvement Program (SWIP), the Safe Routes to School Program (SRTS), and the All Roads Transportation Safety (ARTS) program. There is also the opportunity to leverage funding through private investment. These grant opportunities are described in more detail in Technical Memo #6.

Section 3: Observations, Recommendations, and Course Correcting: Concepts to Consider

The Oregon Department of Transportation's 2021-2023 Strategic Action Plan lays out three overarching priorities to guide the agency's work: equity, modern transportation, and sufficient and reliable funding. Within the scope of these priorities, there are a number of steps ODOT can take to advance its mission to provide transportation for all Oregonians while uplifting historically marginalized communities, prioritizing sustainable development, and ensuring sufficient funding that does not burden at-risk individuals.

Equity

This assessment documents how processes can be made more equitable and inclusive. Fundamentally, equity arises from projects that make efforts to be inclusionary in both the planning process and intended outcomes. For this project, equity is rooted in the feasibility and technical design, representation in the Public Advisory Committee (PAC), and the sharing of information.

Inclusionary and Culturally Relevant Design

The principal concern in any project, in addition to serving a technical purpose, should be to uplift the community it will serve. One of the tools that should be leveraged at every juncture in the planning process is a benefits and burdens analysis. This lens examines the potential impacts of a project and its alternatives and highlights its potential positive and negative externalities in the communities it will serve. This analysis provides a basis for weighing the inequitable externalities of a project as well as the distribution of burdens among different stakeholder groups, thereby centering potential inequities as a fundamental component of the project team's decision-making process. The National Environmental Policy Act (NEPA) provides further impetus to center equity in planning processes. To do so is a central tenet of environmental justice work. Undeniably, historically marginalized communities suffer disproportionately from the impacts of climate change and environmentally degrading infrastructure. As such, the environmental impacts of a project must be considered as an integral piece of the project planning process. In addition to considering the potential impacts of a project on a community, inclusionary and equitable design can be further emphasized through project intent. Specifically, the project can create a welcoming space and celebrate community identity through storytelling. The study area is situated in a culturally and historically rich area, and there is an opportunity to further develop cultural resources. Partnering with local partners such as the Oregon Museum of Science and Industry the Oregon Historical Society would allow the project to highlight the colonial, tribal, and development-oriented history of the area.

The Project Management Team (PMT) took a number of steps to ensure an inclusionary and uplifting process and design for the project. These include the provision of an in-depth analysis on the impacts of the project on private property, the illustration of associated environmental, economic, social, and historical burdens, consultation with diverse focus groups likely to be impacted by the project,

collaboration with different agencies, and an effort to course correct as needed. The PMT proved its commitment to an environmentally sound process by including environmental selection criteria and multimodal shifts analysis, educating members of the Public Advisory Committee (PAC) on the implications of NEPA and screening preliminary alignments in an environmental review, and uplifting potential environmental impacts while remaining transparent that further funding would be needed to fully understand them. Finally, the PMT uplifted the cultural significance of the study area by including a historical narrative about the site area which centered the Native American Community in its outreach, including relevant cultural and active transportation-related history specific to the site area, and conducting government-to-government consultations with multiple Tribes with historic connections to the area.

Recommendation:

To ensure that equity is centered in the planning process and project impacts are fully considered in the future, the PMT should continue to involve the community at every stage of planning processes and ensure a community-oriented approach to rendering important project decisions. The PMT should also strive to ensure that community members understand and link the benefits and burdens to environmental and cultural resources in the site area to community wellbeing. Lastly, the PMT should celebrate the cultural patrimony of study areas, increase collaboration with cultural partners and museums, and look to address critical transportation-related issues such as first and last mile transit connectivity.

Diverse Representation

This crossing will be most impactful if it is fully integrated into regional transportation networks. To ensure that the bridge enjoys broad support and usage, it is important to engage with regional community members who passively or actively interact with the service area. The Project Advisory Committee (PAC) lacked representation from surrounding cities, agencies as well as commuters and recreational and environmental enthusiasts. These stakeholders should be engaged because they may be developing new active transport networks nearby, could consider shifting their travel mode, or might see the bridge as a new recreational opportunity. People of color are historically less likely to use active transportation infrastructure due to emotional, physical, and psychological safety concerns including a lack of safe facilities, over policing, racial profiling, and stigmatization. Engaging a broader cross-section of individuals introduces hesitant community-members to the project, helps develop trust between the community and the project team, and encourages use of active transportation infrastructure by the greater community. There are barriers to this engagement, however. Many individuals do not have the time or resources to attend meetings during the work day. Therefore, it is important to provide remuneration to PAC members who would otherwise be unable to participate. The engagement of indigenous Americans is especially important given their cultural, historic and economic connections to the land.

The PMT included diverse community members in its outreach. The PMT successfully recruited individuals from historically underrepresented groups and disabled individuals, invited representatives from bike and active transportation advocacy groups, included churches, youth groups, elderly centers, and community centers in its outreach, and invited all Tribal groups to participate in the PAC. There was

also an effort to uplift youth, people with disabilities, and multicultural groups through a discussion of which bridge alignments scored best based on diversity, equity, inclusion, and access. Compensation for youth and Spanish-speaking individuals, outreach to the local business community, multilingual social media posts, and mailers within the site area also created a more inclusive process. Indigenous groups were supported through efforts to understand the various opinions and goals of the diverse Native American communities with interest in the site area, the commitment to selecting an alignment that minimizes the impacts on potential archaeological assets, cultural heritage sites, and other sites deemed important by the community, and including multiple opportunities for tribal liaisons to participate in the PAC, survey, public meetings, and decision making process. Of note was that while increased access to Willamette Falls may be seen as a benefit by some individuals, others see this project as another iteration of harmful industrialization.

Recommendation:

Diverse representation is essential in any outreach process. Future outreach processes should make efforts to include more youth and elderly participants, increase representation from communities of color, address barriers to “volunteership” in underserved communities through adequate and equitable compensation, attempt to “meet the community at their tables” by attending already existing advocacy groups, neighborhood associations, and non-profit meetings, provide enhanced presentations, and use marketing and social media advertising to better engage with targeted equity communities. Virtual engagement carries many benefits, but outreach processes also need to recognize that not everyone has access to digital mediums. Virtual presentations need to include closed captioning and interpretations for visually and/or hearing-impaired individuals. There also need to be multiple engagement points at different points of the project. Each phase of a project should reengage focus groups, stakeholders, and the community at large. To ensure continued Tribal involvement, projects should support the Native American community through targeted focus groups with missing tribal members and compensate them for their efforts. Respect is paramount when working with Tribes, and there needs to be a strategy to ensure that respectful relationships are maintained.

Data Sharing

The PMT collects data to inform the successful implementation of a project, but it also serves the community. Public engagement should always happen before any decisions have been made by the project team. Successful engagement is also contingent on stakeholders’ comprehension of shared information. Engineering concepts are important, but need to be explained to community members before requesting feedback. Stakeholders also need to be provided with more context before providing feedback. For example, stakeholders should be acquainted with ODOT’s congestion pricing strategy, any relative improvements in a 5–10-mile radius of area, and how the bridge will be connected to other multi-use crossing bridges located throughout the Metro Area. The reality is that many individuals will not use active transport unless they have access to grade-separated bike paths or multi-use paths. Finally, there needs to be extensive collaboration between regional partners including local government partners. Each partner group has their own programs and initiatives they are working on and have a special relationship

with the groups they serve. Leveraging these relationships not only makes it easier to reach more stakeholders, but also encourages transparency in information sharing.

A diverse group of stakeholders was represented in the outreach process, partner agencies roles' were explained to stakeholder groups, PAC members were made to feel welcome during outreach sessions, and that there was an emphasis on collaborative discussion. The PMT was also fairly transparent. The project overview included historical context, site specific challenges, the process of selecting alignments, the public engagement plan, and discussions about equity. The PMT also provided a detailed overview of each alignment and allowed the public to participate in the generation of new alignments. During outreach, the PMT represented agency partners from the study area and illustrated the collaborative effort needed to complete a regional transportation project.

Recommendation:

Future outreach should implement a collaborative approach with agencies and stakeholders that includes compensation and continuous, full transparency. PAC members also need to be given ample time to provide updates from their own lives and work that are relevant to the project. Outreach and engagement should be consistent throughout planning and implementation processes, and accessible language is necessary to ensure that people outside professional spaces can access the material. Finally, there should be more collaboration between members of project teams. PMT members need to work with each other to ensure that "Best Practices" related to engagement, community empowerment, and equity are utilized. If one agency has a particular method of engagement that is more equitable than the one being applied by the PMT, that particular agency should speak up and ensure an equitable approach.

Modern Transportation

It is critical to promote the development of a modern transportation system to address existing inequities resulting from poor connectivity and create infrastructure that addresses climate change. Creating an equitable and useful modern transportation system, however, is contingent on engaging the community effectively. Behavior analysis and the application of behavioral economics are important to ensure the development of a high-impact project and that the community will give consent to its implementation. Behavior analysis looks at macro and micro-dynamics of travel including demographics, journey type, and emerging trends in travel behavior. Data collection allows for traffic modeling and the calibration and validation of travel models. In this project, the alignment that maximizes the potential for modes-shift will have the biggest impact on increasing active transportation trips in the site area. Meanwhile, behavioral economics demonstrates how presenting the economic, public health, and traffic impacts of a project can get people to understand its benefits. It ensures that a project investment actually achieves the impact it intends by examining how people currently use a system and the potential economic impacts of a behavioral change. Sharing this information openly with the PAC ensures that they feel more comfortable with the project, comfortable with their opinions, and more likely to provide consent. Sharing as much information as possible is important. This is an active transportation project, and community members are unlikely to value the project without a comprehensive understanding of its connectivity to regional transportation networks. Without a comprehensive understanding, community members might make

decisions that have a negative impact on key equity goals in the region. Community members may then blame agencies for the negative impacts.

The PMT made efforts to ensure alignments were well thought out and that community members were provided with sufficient information to make sound decisions. The PMT studied the potential mode-shift for each alignment, connected the concept of “active transportation mode-shift” to transit demand management concerns in the area, illustrated gaps in current infrastructure and which alignments would best fit in with current active transportation facilities, and illustrated the programming potential for active transportation-related activities that promote ridership and mode-shift. The PMT also uplifted user experience as an essential component of the project plan. During outreach, the PMT provided an overview of active transportation terms and concepts, illustrated how this particular bridge fits into other aspects of active transportation planning, and provided historical context related to active transportation in the site area including a focus on the Historical Arch Bridge and Municipal Elevator. The team also detailed other projects located in the site area.

Recommendation:

In the future, the PMT should analyze the potential for projects to address transportation gaps earlier in the planning process. During this process, the public lacked an understanding of how each new facility factored into existing facilities which rendered it difficult for stakeholders to provide informed feedback. It would also be useful to incorporate behavioral economics more thoroughly into the project. This could include creating interactive QR codes at the project site, providing walking tours for the general public, working with local institutions and schools, holding public listening sessions to address misconceived notions surrounding active transportation projects, and ensuring future facilities have ways to monitor engagement and feedback. The engagement process can also be improved by providing stakeholders with maps detailing regional connectivity, increasing internal collaboration at ODOT, and including more regional partners including transit agencies in the planning process. Finally, projects should apply the Center for Disease Control’s Social Determinants of Health³ and factor them into all mode-shift analyses.

Sustainable and Reliable Funding Sources

A reliable, modern, and equitable transportation system cannot be built without sufficient funding. There are a number of contemporary, high-tech funding mechanisms that are worth considering into the future. Circular financing is a means of reducing waste within the economic system. If materials and infrastructure is designed in such a way that they endure less damage or are easier to repair, there is a diminished need for further financial inputs. This model also encourages the reuse of materials as much as possible to avoid consumption of excessive raw materials. Congestion pricing is another tool that would guarantee more funding for transportation infrastructure. There is no question that clogged highways and excessive car use diminishes quality of life. A congestion charge, perhaps one tied to income, encourages

³For more information on the Center for Disease Control’s Social Determinants of Health Visit: <https://www.cdc.gov/socialdeterminants/index.htm>

carpooling, use of active transportation and public transit, thereby improving air quality, diminishing wear and tear on roads, and raising more funds for public projects.

Regardless of the funding mechanism, it is important to not create further negative impacts for historically disadvantaged communities. Often, communities underserved by public investment see climate change mitigation projects as similar in nature to redlining. Before proposing tax increases or changing zoning, or bringing more traffic into a particular area, it is critical to conduct considerable outreach. Otherwise, communities may feel that their communities are changing in spite of their own interests. To ensure that we do not “Greenline” residences, it will be important to ensure any active transportation development at the site and around the site promotes and enhances already existing community resources. Furthermore, as climate change continues to challenge our region, we will need to look for more nuanced ways to evaluate our success. The region will need to invest in infrastructure that facilitates and supports active travel and mode-shifts to more active transportation. Infrastructure needs to minimize and avoid harm to human health, ecosystem health, water, air, cultural assets, and historical sites. To fund innovative infrastructure, proof-of-concept data is essential. The behavioral economic model, which helps model and promote usage of public infrastructure, can aid in the creation of indicators that monitor the benefit of a particular concept, thereby influencing investment that ensures benefits to the community.

During outreach, the PMT provided a general overview of the project’s environmental, health, and economic potential. It also introduced other economic development projects in the region and related their economic impact to this particular project. The PMT also connected the economic, social, environmental, cultural, psychological benefits to promote a complex systems analysis approach. This allowed for the PAC, the public, and other stakeholders to connect this project to its likely socioeconomic benefits.

Recommendation:

Before investing in any public project, it is important to understand how public investment has harmed and/or impacted historically disadvantaged communities. In particular, project team members should understand the potential impacts of Greenlining, or the practice of investing energy, products, and services in low-income, minority, and disabled communities, and cultural and historical displacement. Greenlining, when done without care, can cause further displacement as lower-income residents are no longer able to afford rent. New investment models including circular financing and congestion charging also promise to generate and conserve funds for future projects. Ultimately, project financing should both consider the impact of investment in communities and not have outside financial impacts on the community-members funding the projects.

Section 4: Key Improvements, Highlighted Work, and Future Applications

ODOT Archaeologist and Tribal Liaison Roy Watters, has been integral in working to conduct government-to-government consultation with six federally recognized Tribes (Grand Ronde, Siletz, Warm Springs, Umatilla, Nez Perce and Yakama) who have historic and contemporary connections to the project area. Willamette Falls and the river itself in the vicinity of the falls is one of the most important

places for Tribes in western Oregon. The connection to this land are, in part, evidenced in Tribal histories, family histories, the existence of cultural and archaeological sites, land ownership, and fishing.

Tribal engagement in a project with ties to the project area is necessary in order to select equitable project outcomes particularly considering the Tribes historic disclusion and discrimination in Oregon and the greater United States. Tribal engagement and formal consultation for this project was implemented in the beginnings of this project and this model should be carried out in other projects as well as incorporated into the Social Equity Engagement Framework. Additionally, the selection and utilization of a tribal liaison lend itself well to equity. Utilizing a liaison already connected to the Tribes with an understanding of the cultural and historic implications of a project such as this was important in uplifting equity.

Engagement for this project has included virtual project information meetings, Tribal participation in the Project Advisory Committee (PAC) meetings, meetings with Tribal cultural resource staff, and multiple calls and correspondence over the last several months. In all these communications Tribes have asserted the ongoing importance of this place and the need to protect cultural resources. Engagement on future projects through a tribal liaison could include support of the Native American community through targeted focus groups with missing tribal members with compensation and identification of ways to ensure respectful relationships are maintained.

Key Improvements

Focus Groups

Focus groups are an integral part of community engagement. A total of 5 focus groups were done within the scope of this project. There are two recommendations within this category, offering compensation to all focus group participants and additions to focus groups available as needed.

Compensation for effort, expertise and intellectual property within the context of focus groups for ODOT projects should be expanded in other projects. Within the scope of this project, Youth and Spanish-speaking participants were compensated for participation in focus groups through stipends; however, offering stipends for participating in focus groups should be implemented for all participants.

Compensation for focus groups demonstrates to stakeholders that community input is not simply done as a courtesy, but is valued information. When community members feel as if their information is valued, they not only are more willing to participate, but they generally will give more thoughtful input and feedback, and will more meaningfully contribute.

Compensation for focus groups also allows for a wider range of participants. Many community members that would like to participate in focus groups or provide input on public projects are unable to do so as they work during times that focus groups are held and it would create a financial hardship to lose those wages. By compensating participants for their time, those that are in that situation are able to forgo those wages as the compensation for the focus group can fill the gap.

The need for a flexible number of focus groups has been identified as a recommendation. As with all public projects, an engagement plan is created within the scope of the project outline, however, it is recommended that there is room in the engagement plan for additional focus groups throughout the processes if holes in engagement are discovered. It is almost inevitable that within the process of community engagement, it will be discovered that a particular stakeholder group was either not accounted for or is proving difficult to reach. Allowing for additional focus groups to be planned and executed throughout the project will help allow for equitable community engagement.

Highlighted Work

Environmental Linkage

The National Environmental Policy Act (NEPA) assures adequate consideration is given to the environment prior to constructing public projects by requiring environmental review and documentation in a Categorical Exclusion, Environmental Assessment (EA) or Environmental Impact Statement (EIS).

In order to prioritize equity in a transportation project, environmental impact must also be prioritized as environmental justice and equity are fundamentally linked. It is important to note that the effects of climate change and other environmental negative effects often disproportionately affect communities of color and low income communities. By streamlining and integrating environmental impact into project planning, elements of equity are also being uplifted.

The integration of a Planning and Environmental Linkages (PEL) process in this and future projects would promote a more equitable planning process by linking the planning process to the NEPA process. Taxpayers save money when the two processes are linked as it becomes possible to move seamlessly into the development of an EA or EIS without having to revisit/redo previous efforts.

Materials and Notification

There were a variety of methods for distribution of project materials including the website, postcards, print and digital ads, stakeholder emails and partner agency notification. By distributing materials in a variety of ways, the project team provided equitable notification as barriers to notification were mitigated.

Future Applications

Stakeholder Mapping and Course Correcting

The demographic and stakeholder mapping activity and course correcting process should be applied to projects moving forward. Working with Project Management Teams (PMTs) to identify strategies to uplift and support underrepresented stakeholders will ensure that all stakeholders benefit from facility updates or developments. The stakeholder mapping process empowers both equity consultants and PMTs to identify ways to work with stakeholders at an early stage. Targeted focus groups, messaging, notifications, and interviews are some of the ways the PMT uplifted these stakeholders identified in the mapping process for the Oregon City-West Linn Pedestrian and Bicycle Bridge Concept Plan. This process helped mitigate the barriers to enter for diverse stakeholders.

Stakeholders identified by the stakeholder mapping activity continued to be contacted as part of the outreach process and involved throughout. Course correcting will allow projects to mitigate potential impacts on demand. The course correcting process allowed for increased notifications, increased targeted focused groups, incentives for underserved community members to participate in the process, and overall embedded equity into public facing meetings and project material. This process will ensure projects will continue to maximize the benefits for each stakeholder group while equitably distributing the burdens.

In the future course correcting should have a budget allocation which allows the PMT to address needs that come up during the project. This would streamline the budget amendment process and ensure that the PMT can address any concerns that come up on demand.

DEIA, Equity Visualization Nexus, and the Equity Consultant

Diversity, Equity, Inclusion, and Access (DEIA) are complex topics that require a holistic approach to ensure both process and outcome equity. Future application of an equity visualization nexus will ensure that a systems approach to “Social Equity” can be achieved. Projects exist in unique locations with a unique set of challenges and stakeholders. While DEIA provides a great starting point, it’s important that DEIA practitioners further contextualize their work into a site specific equity plan. This nexus takes DEIA principles and helps visualize them within the context of a program, project, or an audit. Applying an equity visualization nexus helps identify the unique barriers to entry for marginalized stakeholders. These groups are also groups historically underrepresented in engagement strategies. An equity consultant's role is to identify ways to contextualize DEIA concepts into the larger context of a project. In some cases, a racial equity framework needs to be applied to mitigate historical burdens felt by the community.

Towards a Social Equity Framework

A Social Equity Framework is referenced in ODOT’s Strategic Action Plan. Continued research on an effective way to monitor the real-time project benefits and burdens as well as, the long term and short benefits and burdens will be needed to create a finalized framework. As projects continue to evolve within this action plan, a more defined framework for active transportation projects will be developed. This project acts as a case study and catalyst to develop a holistic framework for examining the overall impact of all future infrastructure projects.