Exhibit A

CONSTRUCTION EXCISE TAX GRANT
INTERGOVERNMENTAL AGREEMENT
Metro – City of Portland
Barbur Corridor Concept Plan Project

This Construction Excise Tax Grant Intergovernmental Agreement ("CET Grant IGA") is effective on the last date of signature below, and is entered into by and between Metro, a metropolitan service district organized under the laws of the state of Oregon and the Metro Charter, located at 600 Northeast Grand Avenue, Portland, OR, 97232-2736 ("Metro"), and the City of Portland ("the City"), located at 1221 SW Fourth Ave., Portland OR 97204, collectively referred to as "Parties."

WHEREAS, Metro has established a Construction Excise Tax ("CET"), Metro Code Chapter 7.04, which imposes an excise tax throughout the Metro regional jurisdiction to fund regional and local planning that is required to make land ready for development after inclusion in the Urban Growth Boundary; and

WHEREAS, the CET is collected by local jurisdictions when issuing building permits, which the local jurisdictions then remit to Metro pursuant to Construction Excise Tax Intergovernmental Agreements to Collect and Remit Tax ("CET Collection IGAs") entered into separately between Metro and the local collecting jurisdictions; and

WHEREAS, the Metro CET is the subject of a legal challenge filed in Oregon ("HBA Lawsuit"); Metro prevailed in the Oregon Circuit Court action *Homebuilders Association of Metropolitan Portland, Eastview Development Inc., and Matrix Development Corp. dba Legend Homes v Metro*, Case No. 0908-11067 and the plaintiffs' lawsuit against Metro was dismissed; however plaintiffs have appealed that dismissal to the Court of Appeals, Appeal No. A146059, which appeal is currently pending; and

WHEREAS, the City has submitted a CET Grant Request ("Grant Request") to Metro for the Barbur Corridor Concept Plan Project ("Project"), and the parties wish to set forth the funding amounts, timing, procedures and conditions for receiving grant funding from the CET fund for the Project.

NOW THEREFORE, the Parties hereto agree as follows:

1. Metro Grant Award . Metro shall provide CET grant funding to the City for the Project as described in the City's CET Grant Request, attached hereto as Exhibit B and incorporated herein ("Grant Request"), in the amounts and at the times and milestones set forth in Exhibit A attached hereto and incorporated herein ("Milestone Schedule"), subject to the terms and conditions in this Agreement.

2. City Responsibilities. The City shall perform the Project described in the Grant Request and as specified in this Agreement and in Exhibit A, subject to the terms and conditions specified in this Agreement. The City shall obtain all applicable permits and licenses from local, state or federal agencies or governing bodies related to the Project, and the City shall use the CET funds it receives under this Agreement only for the purposes specified in the Grant Request and to achieve the milestones set forth in Exhibit A.

3. Payment Procedures. Within 30 days after the completion of each milestone as set forth in Exhibit A, the City shall submit to Metro an invoice describing in detail its expenditures as may be needed to satisfy fiscal requirements. Within 30 days of receiving the City's invoice and supporting documents, and subject to the terms and conditions in this Agreement, Metro shall reimburse the City for its eligible expenditures for the applicable milestone as set forth in Exhibit A. Metro shall send CET payments to:

The City of Portland
Bureau of Planning and Sustainability

Attention: Jay Sugnet
1900 SW 4th Avenue, Suite 7100
Portland, OR 97201

4. Funding Conditions.

(a) CET Funds. Metro's funding commitment set forth in this Agreement shall be fulfilled solely through the programming of CET funds; no other funds or revenues of Metro shall be used to satisfy or pay any CET Grant funding commitments. The parties recognize and agree that if the CET is ever held to be unenforceable or invalid, or if a court orders that CET funds may no longer be collected or disbursed, that this Agreement shall terminate as of the effective date of that court order, and that Metro shall not be liable in any way for funding any further CET grant amounts beyond those already disbursed to the City as of the effective date of the court order. In such case the City shall not be liable to Metro for completing any further Project milestones as of the date of the court order.

(b) Risk Sharing. The parties agree that if a court orders that CET funds collected prior to the effective date of the court order must also be reimbursed or that restitution payments must be made, then the City shall repay Metro fifty per cent (50%) of any CET Grant payments Metro has made to the City prior to the court's order.

(c) Limitation of Liability and Waiver. The parties hereby agree that their liability to one another under this section 4 is limited to a maximum City liability of Three Hundred Fifty Thousand Dollars ($350,000), which is 50% of the CET Grant Award amount, and a maximum Metro liability of Three Hundred Fifty Thousand Dollars ($350,000), which is 50% of the CET Grant Award amount. The parties hereby waive and release one another for and from any and all claims, liabilities, or damages of any kind in excess of the liability limitations set forth herein.

5. Project Records. The City shall maintain all records and documentation relating to the expenditure of CET Grant funds disbursed by Metro under this Agreement. The City shall provide Metro with such information and documentation as Metro requires for implementation of the CET grant process. The City shall establish and maintain books, records, documents, and other evidence in accordance with generally accepted accounting principles, in sufficient detail to permit Metro or its auditor to verify how the CET Grant funds were expended. Metro and its auditor shall have access to the books, documents, papers and records of the City that are directly related to this Agreement, the CET grant moneys provided hereunder, or the Project for the purpose of making audits and examinations.

6. Audits, Inspections and Retention of Records. Metro and its representatives shall have full access to and the right to examine, during normal business hours and as often as they deem necessary, all City records with respect to all matters covered by this Agreement and Exhibit A. Such representatives shall be permitted to audit, examine, and make excerpts or transcripts from such records, and to make audits of all contracts, invoices, materials, payrolls and other matters covered by this Agreement. All documents, papers, time sheets, accounting records, and other materials pertaining to costs incurred in connection with the project shall be retained by the City and all of their contractors for three years from the date of completion of the project, or expiration of the Agreement, whichever is later, to facilitate any audits or inspection.

8. Term. This Agreement shall be effective on the date it is executed by both parties, and shall be in effect until all milestones have been achieved, all required documentation has been delivered, and all payments have been made as set forth in Exhibit A, unless terminated earlier pursuant to this Agreement.

9. Amendment. This CET Grant IGA may be amended only by mutual written agreement of the Parties.

10. Other Agreements. This CET Grant IGA does not affect or alter any other agreements between Metro and the City.

Metro		The City of Portland	
By:	Michael Jordan	By:	Sam Adams
Title:	Metro Chief Operating Officer	Title:	Mayor
Date:	_____	Date:	_____
		By:	LaVonne Griffin-Valade
		Title:	Auditor
		Date:	_____

Attachments:

Exhibit A – Milestone Schedule for Release of Funds
Exhibit B - City's Grant Request

Exhibit A

CET Grant IGA
Portland Barbur Corridor Concept Plan
Milestone Schedule for Release of Funds

Milestone #:	Deliverable	Date Due*	Grant Payment
1.	**Community forum to review/discuss draft Existing Conditions Report and the Needs, Opportunities, and Constraints Analysis**	November 30, 2011	$175,000

1. Detailed work program, schedule and budget.
2. Consultant Request for Proposals and Consultant Scope of Work.
3. Public Outreach Approach and Program.
4. Community Advisory Group, Technical Advisory Group, and Agency Coordination Committee Rosters.
5. Agendas and minutes from the community and technical advisory group meetings.
6. Copies of public outreach materials.
7. Progress report for milestone.

2.	**Community forum to discuss goals, criteria and alternative concepts**	June 30, 2012	$175,000

1. Existing conditions report including project area boundaries, tables, maps, and descriptions of current land use, market conditions, demographic trends, and summaries of policies and previous planning efforts.
2. Retail and office market analysis.
3. Sub-basin analysis and opportunities analysis.
4. Needs, Opportunities, and Constraints report including results from the online survey and community walks.
5. Urban Design Diagram.
6. Goals for the corridor and transit stations.
7. Criteria for selecting the location of transit stations.
8. Agendas and minutes from the community and technical advisory group meetings.
9. Copies of public outreach materials.
10. Progress report for milestone.

3.	**Community forum to discuss outcomes of Alternative Concept Analysis**	November 30, 2012	$175,000

1. Alternative transit station descriptions and drawings with accompanying data tables.
2. Agendas and minutes from the community and technical advisory group meetings.
3. Copies of public outreach materials.
4. Progress report for milestone.

4.	**Present and discuss Barbur Corridor Concept Plan with Portland Planning Commission, Portland City Council, Metro Council, and TriMet Board of Directors**	February 30, 2013	$175,000

1. Summary report of the Envision modeling results.
2. Transportation access and impact analysis for redevelopment scenarios.
3. Agendas and minutes from the community and technical advisory group meetings.
4. Copies of public outreach materials.
5. Draft and final report.
6. Completion report including summary of cost, location of records, and list of final deliverables.

TOTAL REIMBURSABLE AMOUNT **$ 700,000**

* Due dates are intended by the parties to be hard estimates of expected milestone completion dates. If the City anticipates that a due date cannot be met due to circumstances beyond its control, it shall inform Metro in writing no later than ten (10) days prior to the due date set forth above and provide a revised estimated due date; and Metro and the City shall mutually agree upon a revision to the milestone due dates set forth in this Agreement.

Metro

Construction Excise Tax (CET) Planning Grants Cover Sheet

Check one:
- [ ] Letter of Intent
- [x] Full Application

Project Name	Barbur Corridor Concept Plan	Applicant Organization	Portland Bureau of Planning and Sustainability
Contact Name	Joe Zehnder	Address	1900 SW 4th Ave, Suite 7100 Portland, OR 97201
Phone	503-823-7815	Fax	503-823-7800
Email	jzehnder@ci.portland.or.us	Fed. Tax ID #	93-6002236

Fiscal Agent Organization (if different from applicant)			
Contact Name		Address	
Phone		Fax	
Email			

Project Location Description (25 words or less)

Southwest Barbur Boulevard/Pacific Highway corridor from Portland's Central City to the Tigard city boundary.
Metro Council Districts: 2 and 6.

Project Summary (50 words or less)

Engage the community to create a Concept Plan for the corridor that:
1. Identifies potential transit station areas with the greatest development and placemaking opportunities;
2. Develops a vision for Barbur Boulevard, a highway 'orphaned' when I-5 was built;
3. Evaluates alternative transit station areas against watershed health goals and existing investment strategies.

Construction Excise Tax Grant funding request $ 700,000

Total project cost $ 1,030,516

If submitting more than one proposal, please rank this proposal in order of priority 2

Metro Council District of Project 2

We, the undersigned, attest that to the best of our knowledge the information in this application is true and that all signatories have authorization to submit this grant application to Metro's Construction Excise Tax Planning Grants Program.

Applicant

Organization Name: City of Portland Bureau of Planning and Sustainability

Printed Name: Joe Zehnder, Chief Planner

Signature: _____ Date: 01/29/2010

Fiscal Agent

Organization Name: City of Portland Bureau of Planning and Sustainability

Printed Name: Celia Heron, Business Operations Manager

Signature: _____ Date: 01/29/2010

To ensure complete letter of intent or full application, please see SECTION 2 of the CET Application Handbook for a complete list of necessary documents for submittal.

Print Form

3. PROJECT NARRATIVE

a. Project Description

This grant proposal will develop a Concept Plan for the Barbur Corridor from Portland's Central City to the Tigard city boundary. The focus of the Concept Plan is threefold:

1. Identify potential transit station areas with the greatest development and placemaking opportunities;
2. Develop a vision for Barbur Boulevard, a highway 'orphaned' when I-5 was built; and
3. Evaluate alternative transit station areas against watershed health goals and existing investment strategies.

The grant proposal will evaluate existing land use, circulation, urban watershed and accessibility patterns within a public-involvement framework to determine the locations of potential station areas with the greatest capacity for development, connectivity, ridership and responsiveness to watershed health. The purpose is to optimize urban land use patterns and engage the community within a multi-agency long-term planning process. Commencing the Concept Plan project prior to the multi-modal transportation and transit infrastructure planning is crucial in ensuring the success of two concurrent projects: the I-5/Barbur Corridor Refinement Plan and the Southwest Corridor High Capacity Transit (HCT) Alternatives Analysis. The corridor refinement plan is tentatively scheduled to begin in mid 2010 and the Alternatives Analysis in late 2010/early 2011. The Concept Plan will sets the framework for future comprehensive and zoning map amendments, transportation infrastructure improvements, and watershed management strategies.

b. Project Site Description

The Highway 99W corridor runs from Portland city center to Tigard and beyond. It is administered by the Oregon Department of Transportation (ODOT). Within the Portland's city limits, it is 6.5 miles long and carries about 16,200 motor vehicles a day. Buses along the corridor carry approximately 8,000 passengers on a typical weekday.

The study area for this project is schematically a 1/2 mile-wide swath centered on SW Barbur Boulevard from the Portland city center to the Tigard border. From Terwilliger to the Tigard boundary, most of the properties are zoned General Commercial (CG), which allows a mix of commercial and residential uses, FARs of 3:1, 45' height limits, 85% building coverage, and because of the frequent bus service, there is no minimum parking requirement.

The majority of Barbur Boulevard is characterized by post-war auto-oriented commercial development that lacks distinct centers or a sense of place. Barbur parallels I-5 within the Portland city limits before crossing it at the Tigard/Portland boundary. Its close proximity to I-5 will be key to ODOT discussions and understanding what influence HCT would have on mobility patterns in the corridor and how the design of the HCT infrastructure can take advantage of the transit ridership demand through Southwest Portland and City of Tigard neighborhoods.

Portland Community College (PCC) is at the terminus of the corridor in the city of Portland. The campus currently serves over 26,000 students over the course of a year and is expected to grow in the future. PCC's plans include a pledge to reduce carbon emissions by 80 percent below 1990 levels by 2050 and sustainable transit and transportation are part of that plan.

The corridor traverses the Willamette River, Tyron Creek, and Fanno Creek watersheds and is crossed by numerous streams, most of which are in stormwater pipes or culverts. Significant natural resource areas exist along the corridor.

Portland's *Transportation System Plan (TSP)* designates the corridor as a Major City Traffic Street, Regional Transitway & Major Transit Priority Street, City Bikeway, City Walkway, Regional Truckway, and Major Emergency Response Route. In other words, the plan is to have the highest quality facilities for every mode of transportation concentrated into the corridor.

The street design designation toggles between Regional Corridor and Regional Main Street, indicative of the fact that the desired outcome for Barbur varies throughout its length. The TSP also shows six transit stops at approximately the following locations: Bancroft, Burlingame, Multnomah, Spring Garden, Barbur Transit Center, and Portland Community College on Lesser Rd.

c. Project Background

Project Need

In July 2009, Metro Council selected Highway 99W Regional High Capacity Transit Corridor as a priority for near-term investment in its *Regional High Capacity Transit System Plan.* Highway 99/I-5 Corridor was also identified as one of the eight Mobility Corridors recommended for future Corridor Refinement Plans in the *Draft 2035 Regional Transportation Plan (RTP).* Barbur Boulevard is poised to become the recipient of significant federal and regional transportation dollars. The Portland region has a deep understanding that an investment of this magnitude is only in small part about our transportation goals; and largely about spurring and leveraging development potential to create great places. This understanding also acknowledges that the location of HCT combined with strategic local land use actions and investments will influence future capacity for residential development and employment in the region.

Historically, residents and agencies have been working toward a vision for Barbur since outreach for the Southwest Community Plan (SWCP) began in 1994. Barbur was originally included in the SWCP study area, but was eventually excluded due to lack of consensus from adjacent property owners. The SWCP was adopted in 2001. Several changes have occurred since then that increase the need for a new look at the Barbur Corridor:

- Since 2001, the region has seen numerous HCT expansion projects (Red Line, Interstate, Green Line and Portland Mall MAX), none of which were located in southwest Portland beyond the Central City
- Traffic has continued to increase in the southwest Metro area. With no parallel transportation network to spread out the mobility demand into the Central City, AM and PM congestion occurs more frequently and for longer periods of time
- The general public has grown more supportive of a regional HCT network
- In 2009, Metro Council adopted the Regional High Capacity Transit Plan which identified the Barbur corridor as the most pressing regional priority for HCT expansion
- The Regional RTP update's Mobility Corridor Atlas identified the I-5/Hwy 99 corridor as a top priority for a Refinement Plan study to analyze the mobility demands of that corridor

In summary, the need for this project is part unfinished business from the SWCP effort and part regional strategy. Combine those parts with currently more receptive and interested southwest

Portland neighborhoods, and the result is a prime opportunity to initiate a constructive dialogue to create a Barbur Corridor Concept Plan.

Past efforts

Chronology of Past Land Use, Transportation, and Watershed Planning work:

1991 Southwest Hills Resource Protection Plan (BPS)
1991 Barbur Corridor Study (PBOT)
1994 West Portland given Town Center designation on Metro 2040 Concept Plan
1996 "West Portland Town Center: Developing Partnerships for Planning and Implementation" (AGS Associates)
1997 "West Portland Town Center Study: Final Report" (PBOT and ODOT)
1999 Barbur Boulevard Streetscape Plan (PBOT)
2000 Southwest Community Plan (Visions, Policies and Objectives) (BPS)
2001 Southwest Community Plan Comp Plan Map and Zoning Map Changes (BPS)
2002 TSP effective (amendments in 2004 and 2007) (PBOT)
2005 Portland Watershed Management Plan (BES)
2009 Metro's Regional High Capacity Transit System Plan: Barbur is selected as a Near-Term Regional Priority Corridor.

As the chronology of past planning work indicates, some previous plans have expressly focused on the study area while other related studies have had a broader Portland focus.

In 1991, Parsons Brinkerhoff conducted a study for the City of Portland's Office of Transportation. The purpose of the study was to identify feasible alignments for further study of light rail transit (LRT) in the Barbur Corridor. A general assessment of the potential impacts and opportunities of two alignment options was conducted, including the potential location of transit stations.

The most recent comprehensive effort, the **Southwest Community Plan** (SWCP), which concluded in 2001, omitted new Comprehensive Plan designations and zoning for the Barbur Boulevard corridor. Because of community concerns and the large area that the SWCP covered, City Council deferred further land use and transportation planning to a future effort.

Development along the Barbur Boulevard corridor has continued since the adoption of the SWCP, but fundamental elements of the vision, specifically the pedestrian-oriented nodes and transit improvements, have not materialized. This is partly due to the complexity of the needed solutions, the costs associated with them and the needed cross-organization coordination. It is also due to the fact that the planning work to develop a regulatory foundation for development that would support this vision was never completed.

The SWCP did, however, adopt a vision and objectives that speak to the community's desires for thriving commercial nodes along Barbur from Terwilliger to the Tigard city boundary: *"By 2020, these commercial nodes have evolved further into vital focal points for community activities and commercial and retail services, while retaining elements of their valued historical community character…The Barbur corridor is becoming a successful center for business and housing. With transit service and streetscape improvements, the area has attracted growing numbers of pedestrian-oriented retail and commercial services, as well as a variety of housing opportunities for people of all ages and income levels*." Further, the Plan lays out objectives that describe that corridors *"are linear, but contain nodes - usually intersections - which are most appropriate for locating concentrated development".*

Although the majority of Barbur was omitted from the SWCP, the City did implement the Plan for the remainder of Southwest Portland. Implementation included new comprehensive plan and zoning designations that allowed for greater density in targeted areas.

Notably, the transportation related elements of the plan have not experienced the same impetus as other elements, although there are also examples throughout the plan area that reflect the vision in the Plan. An example is the Phase I streetscape improvements on SW Capitol Highway from Hillsdale to Multnomah Boulevard.

The SWCP also deferred planning for the only Town Center designation along the corridor that is within the Portland city limits – West Portland Town Center. In 1995, the City and ODOT were awarded a TGM grant to develop a land use and transportation concept plan for the town center. The study evaluated three alternatives for future development and transportation infrastructure investments. The study recommends a town center that contains two nodes about a half mile apart – one located near the transit center on Barbur Boulevard and one centered on SW Capitol Highway at SW Alfred Street. Again, due to the complexities of the needed solutions, the lack of further dedicated planning efforts and neighborhood consensus, the improvements discussed in this 1995 Study have not been realized. A Barbur Corridor Concept Plan would incorporate this Town Center area and would build on the previous work to update and refine the vision and potential for this center.

The project will also capitalize on watershed data contained in the Portland Watershed Management Plan (2005). At the subwatershed level, the project will benefit from the Fanno and Tryon Creeks Watershed Management Plan – this will be useful when identifying nodal development concepts and their relationship to watershed health. The Fanno-Tryon Water Quality and TMDL CIP Pre-design project will help the project team to understand the opportunities/constraints of planned capital investments within proximity of alternative development concepts. This information will be extremely valuable during the Alternative Concept Analysis phase of the project.

The project team's experience with HCT corridor planning will benefit this project. Interstate MAX provides lessons for the Barbur corridor. Interstate Avenue, like Barbur Boulevard, was an "orphaned highway" as a result the I-5 freeway. After years of disinvestment, Portland City Council adopted the Albina Community Plan in 1993. It provided a framework of neighborhood plans anticipating a future HCT investment within a broader community vision for the Interstate Corridor. When the Interstate MAX project occurred, the station areas were integrated with the HCT-oriented neighborhood plans. A follow-up TGM project called the Station Area Refinement Study recommended neighborhood zoning and Comprehensive Plan changes to better accommodate potential station area development in a thriving real estate market. The City was not able to respond fast enough and some developments took over a year to get through the entitlement process. The lessons for Barbur are obvious – a corridor wide development strategy, created with an inclusive public engagement process, can provide the framework for successful implementation of HCT. Comprehensive Plan amendments and zoning changes that can spur station area development will need to be strategically implemented when the pending transit planning process reaches a point where the City is assured the HCT project will move forward.

In conclusion, this grant proposal will benefit from the past planning efforts by capitalizing on data and experience that is still relevant and valid. The proposal will also benefit from having a concurrent timeline as the I-5/Hwy 99 Corridor Refinement Plan and the Southwest Corridor HCT Alternatives Analysis project. The Refinement Plan aims to make the best use of the existing

roadway capacity, taking into account changes in land use and transit. And finally, the Alternatives Analysis will evaluate HCT alignment alternatives that best meet the purpose and need of the transit investment and corridor land uses. Both projects will greatly inform the Barbur Corridor Concept Plan. Metro, TriMet, ODOT and City staff have already begun meeting to coordinate the scopes of each project, including the public engagement, traffic analysis and transportation modeling components.

Approach

A key barrier to development taking place along Barbur is the lack of synergy and commitment about creating nodes along the corridor. This project aims to determine a hierarchy of nodes based on placemaking ability and transit service suitability. This analysis will inform the logical station area locations based on development potential, ridership potential, and responsiveness to watershed health. By citing transit station area locations early in the overall multi-agency planning process, both public agencies and private developers can plan their future investments. Significant public involvement is integrated within the project approach:

1. **Project Management**: Develop detailed work plan, schedule and budget
2. **Public Involvement and Agency Cooperation**: Develop public outreach approach and program, use social media (e.g. twitter, facebook) to engage the community in the planning process
3. **Existing Conditions**: Compile existing land uses, local economic conditions, market trends, zoning, stream corridors and crossings, bus ridership, traffic conditions, transit service, road and pedestrian infrastructure that connect to the corridor. Review public policies and plans previously completed for the corridor.
4. **Needs, Opportunities, and Constraints Analysis**: Conduct survey of "users", community walks, identify sites with greatest development potential, and identify environmental, land use, engineering, traffic, transportation, transit, economic, and urban design issues.

Major Milestone – community forum to review/discuss draft products from #1 through #4.

5. **Goal and Criteria Development**: Review and evaluate Metro's Station Area Typologies. Develop goals for identifying nodal development sites, neighborhood placemaking opportunities, and potential transit station areas. Determine the criteria that will be used to select neighborhood nodes and transit station areas.
6. **Alternative Concept Development**: Identify alternative urban nodal development concepts, explore alternative station area locations, build scenarios for each with the Envision* planning tool.

Major Milestone – community forum to discuss goals, criteria and alternative concepts

7. **Alternative Concept Analysis**: Analyze nodal concepts and potential station areas against the goals and criteria identified in #5 and use Envision to evaluate alternative concept performance.

Major Milestone – community forum to discuss outcomes of Alternative Concept Analysis

8. **Concept Plan Development**: Adopt a Barbur Corridor Concept Plan that identifies preferred transit station area locations, taking into consideration the potential development, ridership, connectivity, and responsiveness to watershed health.

Major Milestone – Present and discuss Barbur Corridor Concept Plan with Portland Planning Commission, Portland City Council, Metro Council, and TriMet Board of Directors

*Envision is a computer simulation tool for land use and transportation planning developed by Fregonese and Associates.

See the budget narrative for a detailed description of tasks and responsibilities.

d. CET Grant Evaluation Criteria

Expected Development Outcomes
The proposed planning grant will increase the ability to achieve on-the-ground development outcomes by identifying neighborhood commercial nodes and potential transit station area locations. These locations and identified infrastructure improvements necessary to serve them will set the groundwork for future regional and local investments.

Specifically,

a) *The expected probability that due to this planning grant development permits will be issued within two years from the date the planning work is completed*: It is unlikely that development permits will be issued within two years from the date the planning work is completed. This type of planning effort is designed to "shine a spotlight" on the area and help property owners realize the full potential of the corridor and incent redevelopment opportunities. Unfortunately, the current economic climate and the time it takes to implement a major HCT project conspire to make likely timelines somewhat longer than two years. A planning effort of this magnitude will take at least 24 months to complete.

b) *The expected probability that due to this planning grant, development permits will be issued within five years from the date the planning work is completed*: By engaging the community and property owners before alternatives for HCT are discussed, the City aims to provide the certainty that private developers seek and to facilitate future development projects. The products of this grant proposal set the framework for land use and transportation investments in the near future.

   Within five years, major decisions on the HCT alignment, station area locations, and perhaps most importantly, timing, will have been made providing the certainty for the development community to begin investing and building. Also within five years after conclusion of the efforts under this grant, the economic environment for development should have recovered to the point where all sectors (commercial, rental, and owner-occupied housing) should be seeking construction opportunities.

c) *The level of community readiness and local commitment to the predicted development outcomes*: The community immediately surrounding the corridor recognizes that the development along Barbur Boulevard could improve and intensify. The City has recently been approached by the Southwest Neighborhoods, Inc. (SWNI), the district coalition office, to discuss the future of Barbur Boulevard and the "West Portland Crossroads" area (designated a Town Center in Metro's 2040 Concept Plan) ahead of a potential regional HCT investment. We anticipate working closely with SWNI to build upon the neighborhoods interest in the transit corridor. This project, the coordinated process with our regional partners, and the end product - the Barbur Corridor Concept Plan – adopted by City Council – is the commitment to the future development in the corridor.

Regionally Significant
The Barbur Boulevard corridor is the primary access from Portland's Central City to neighborhoods and commercial areas in the inner southwest quadrant of the region. It is a regional mobility corridor and a priority HCT expansion corridor. A major transit investment that can significantly influence corridor land uses would solidify and improve its role as the spine for activity and mobility for the entire southwest quadrant of the region. It is also envisioned to function as a high quality bicycle, pedestrian, truck, and motor vehicle corridor.

The proposed grant would identify areas where transit-oriented development should be located so that it can best support the regional investment in transportation and provide HCT access to the I-5 corridor's employment base. Barbur Boulevard continues through the City of Tigard and beyond, so a successful Portland Central Business District – Southwest Neighborhood – City of Tigard segment is critical for the rest of the corridor's success.

Best Practices Model
The approach and products proposed for this project could be replicated along other auto-oriented or environmentally sensitive corridors in the region or nationwide, whether high-capacity transit was proposed or not:

- *Development-Oriented Transit*: This effort, by focusing on neighborhood placemaking first, will help to build a steady and broad-based consensus for the transit discussions later. By first identifying the key transit-supportive neighborhood nodes along a corridor, where pedestrian-oriented development would be concentrated, we enable the transit alignment discussions that follow to be more informed and responsive to the community.

- *3 Projects, 1 Process*: If the cooperative effort to produce this proposal is evidence, than we have the potential to initiate a multi-modal, multi-agency planning effort that truly defines regional collaboration. With this project, the I-5/Hwy 99 Refinement Plan and the Southwest Corridor HCT Alternatives Analysis all occurring simultaneously, the City will initiate the public engagement process that will incorporate the sequential planning projects into one contiguous and efficient planning effort. The concept is called "Corridor Choreography" – and will be a project management best practice model for Metropolitan Planning Organizations (MPO), Cities and transit agencies nationwide.

- *Integrated Watershed Investments*: Portland's Bureau of Environmental Services (BES) has a well established framework of environmental planning policies citywide. The Barbur Corridor is the most environmentally sensitive corridor HCT has been aimed at. By integrating BES watershed planning into the project approach, we have the opportunity to plan and build transportation improvements – and associated neighborhood development in the corridor – to respond to and improve watershed health.

Leverage/Matching Potential
The proposed planning grant will leverage in-kind contributions from the City of Portland Bureau of Planning and Sustainability, Bureau of Environmental Services, and Tri-Met.

Equity
If awarded, the proposed planning grant represents an equal distribution of Metro's grant funds. Even though approximately 40% of the CET funds are generated within Portland, none of these funds have been allocated to Portland in previous grant cycles. In particular, this project is

concentrated in the southwest quadrant of the city, an area that has not been the recipient of any CET grants in the past.

e. Collaborations

This grant proposal is a collaborative effort between the City of Portland's Bureau of Planning and Sustainability (BPS), Bureau of Transportation (PBOT), Bureau of Environmental Services (BES), and TriMet. Primary responsibilities for tasks are assigned as follows:

BPS	Overall project management, public involvement, land use analysis, economic analysis, and final plan development.
PBOT	Transportation analysis and public involvement.
BES	Watershed analysis.
TriMet	Transit and station area analysis.

In addition, we are relying on Metro to continue their role of coordinating project managers from the City of Portland, TriMet, and Metro to complete their plans and analysis for the corridor within the same time frame. Specifically, the Corridor Refinement Plan and the Transit Alternatives Analysis will commence nearly simultaneously or soon after the Barbur Corridor Concept Plan project begins. Those project's public involvement strategies will build upon the groundwork set and relationships built during this grant proposal. The City of Portland will also be looking to Metro to coordinate with The City of Tigard and it's TGM grant to develop land use alternatives, identify opportunities for TOD, and create zoning recommendations for Hwy 99/Pacific Highway.

We anticipate coordinating with ODOT, SWNI, City of Tigard, and Metro. Letters of support from partners and supporting organizations are attached.

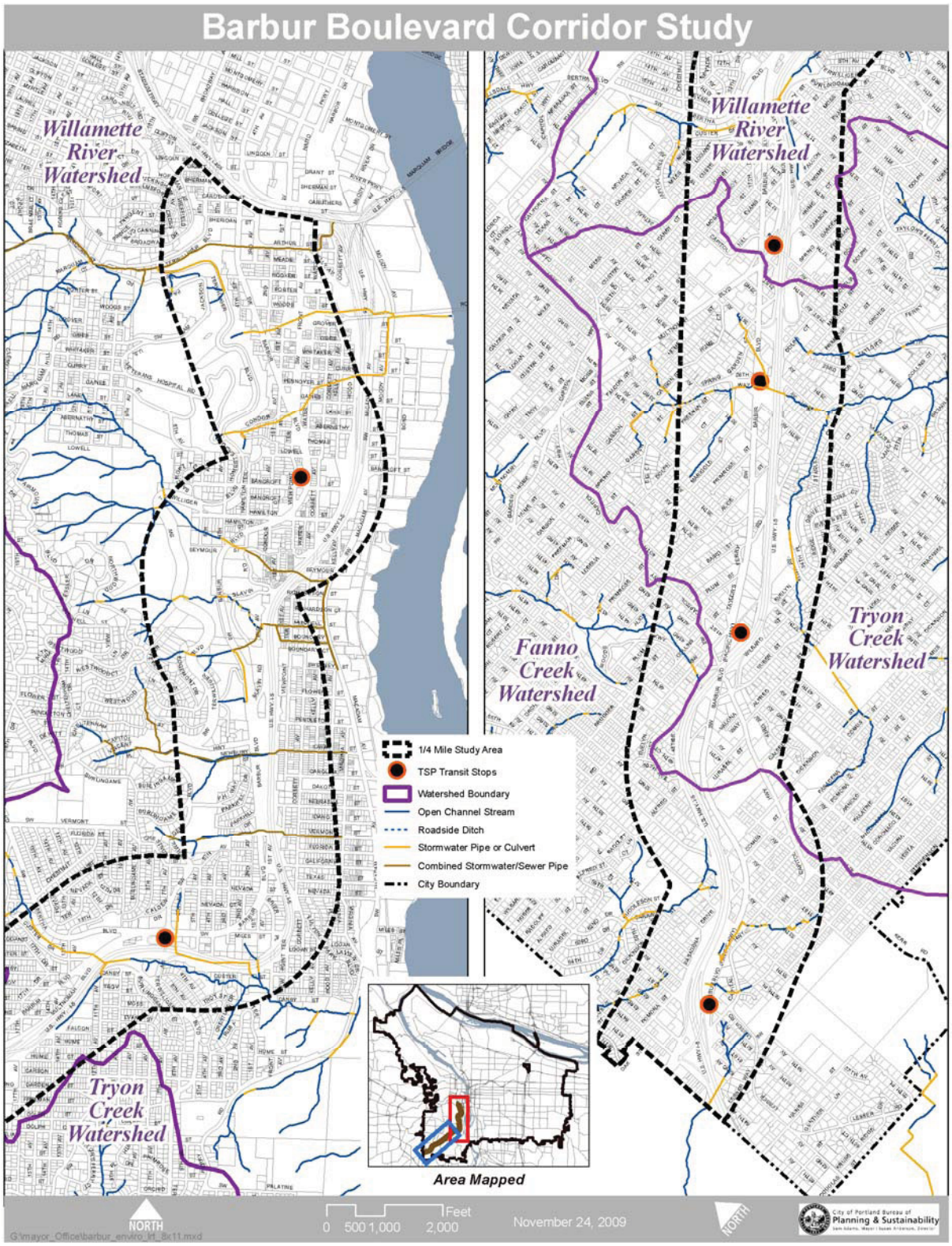
f. Proposed Milestones

See page 5 to learn how proposed milestones are integral to the project approach.

g. Project Team

Project Management	**City of Portland** Sandra P. Wood, Senior Planning Manager Bureau of Planning and Sustainability 1900 SW 4th Ave, Suite 7100 Portland, OR 97201 phone: 503-823-7949 sandra.wood@ci.portland.or.us	**TriMet** Alan Lehto, Director of Project Planning 710 NE Holladay St Portland, OR 97232 phone: 503-962-2136 e-mail: lehtoa@trimet.org
Project Staff	Joan Frederiksen, BPS Patrick Sweeney, Bureau of Transportation Amin Wahab, Bureau of Environmental Services	

Project Map


Barbur Boulevard Corridor Study
Willamette River Watershed
Willamette River Watershed
Fanno Creek Watershed
Tryon Creek Watershed
Tryon Creek Watershed
1/4 Mile Study Area
TSP Transit Stops
Watershed Boundary
Open Channel Stream
Roadside Ditch
Stormwater Pipe or Culvert
Combined Stormwater/Sewer Pipe
City Boundary
Area Mapped
NORTH
Feet
0 500 1,000 2,000
November 24, 2009
NORTH
City of Portland Bureau of Planning & Sustainability

Construction Excise Tax Planning Grant Program
Project Budget Form

4. Barbur Corridor Concept Plan

PROJECT COSTS

Personnel Costs	Financial Match	In-Kind Match	CET Grant Request	TOTAL
Agency staff				
BPS Program Manager			$ 185,328	$ 185,328
BPS City Planner			$ 185,328	$ 185,328
BPS District Planner		$ 74,131		$ 74,131
BPS Urban Designer		$ 42,582		$ 42,582
PBOT Transportation Planner			$ 122,054	$ 122,054
PBOT Transportation Engineer			$ 15,600	$ 15,600
BES Watershed Manager		$ 120,620		$ 120,620
Trimet Corridor Designer			$ 54,768	$ 54,768
Trimet Planner		$ 93,184		$ 93,184
Consultants			$ 136,921	$ 136,921
Other, please list				
Total for Planning Services				$ 1,030,516

Other Costs				
Overhead/Indirect costs - these can only be used as match				
Total for Other Costs		$ 330,517		$ 330,517

TOTAL PROJECT COSTS		$ 330,517	$ 700,000	$ 1,030,516

4. BUDGET NARRATIVE

Task 1 Project Management

Objectives:
- Efficient management and coordination of all tasks.

Methodology:
- Provide detailed work program, schedule, and budget to be developed at the beginning of the study.
- Attend project management team meetings, coordinate and correspondence with project management team members and project administration.
- Develop a consultant Request for Proposals, form consultant selection committee (with representatives from the community and project partners), and negotiate final consultant scope of work. Monitor consultant work.
- Provide bi-monthly progress updates to grant administrator.
- Submit cost reports and reimbursement requests on a quarterly basis.
- Submit work products.

Deliverables:
1. Detailed work program, schedule and budget.
2. Cost reports and reimbursement requests.
3. Quarterly progress reports.
4. Consultant Request for Proposals and Consultant Scope of Work.
5. Copies of preliminary work products and final report.
6. Completion report including summary of cost, location of records, and list of final deliverables.

Schedule: Detailed work program--Months 1-2 of project timeline
Project status Reports—ongoing through out Months 1-26 of the project timeline.

Time Allotment

Personnel	Hours
BPS Program Manager	800
BPS City Planner	200
BPS District Planner	80
BPS Urban Designer	40
PBOT Transportation Planner	385
PBOT Transportation Engineer	0
BES Watershed Manager	20
Trimet Designer	10
Trimet Planner	15
Contractor	$5,000

Task 2 Public Involvement and Agency Coordination

Objectives:

- Design a broad-based public participation program reaching residents, businesses, the development community, and others.
- Establish an agency coordination committee comprised of the project managers for the following projects: I-5/Hwy 99 Corridor Refinement Plan, Tigard HCT Corridor Land Use Plan, Southwest Corridor Transit Alternatives Analysis, and Portland's Comprehensive Plan Update.
- Coordinate public agency participation through a technical advisory group.
- Coordinate public involvement through a community advisory group.

Methodology:

- Design a comprehensive public outreach program in conjunction with a 15-20 member community advisory group. The group will likely meet 15-20 times to provide input and advice on the planning process and project deliverables.
- Coordinate a technical advisory group to engage key technical stakeholders from City Bureaus, ODOT, Trimet, Metro, City of Tigard, and technically focused advocacy groups not represented on the community advisory group.
- Participate in a monthly agency coordination committee meeting with Metro, City of Tigard, Trimet, and ODOT. This meeting should be convened and facilitated by Metro.
- Include contractor as necessary for technical support at public meetings, technical advisory group meetings, community advisory group meetings, and agency coordination meetings.

Deliverables:

1. Public Outreach Approach and Program.
2. Convene Community Advisory Group, Technical Advisory Group, and Agency Coordination Committee.
3. Provide agendas and minutes from the community and technical advisory group meetings.
4. Provide copies of public outreach materials.

Schedule: Months 1-26

Time Allotment

Personnel	Hours
BPS Program Manager	680
BPS City Planner	1040
BPS District Planner	416
BPS Urban Designer	208
PBOT Transportation Planner	268
PBOT Transportation Engineer	0
BES Watershed Manager	100
Trimet Designer	0

Trimet Planner	90
Contractor	$10,000

Task 3 Existing Conditions

Objectives:
- Compile a comprehensive inventory of existing land use, local economic conditions, market trends, sub-basin watershed health, traffic patterns and transportation infrastructure for each station area.
- Define project study area.
- Establish a framework for planning through the review of public policies and plans previously completed for the Barbur Boulevard corridor.

Methodology:
- Compile an existing land use and zoning inventory including but not limited to vacant and underutilized lands, bus ridership, existing transit facilities, sidewalks, bicycle facilities, traffic, stream corridors / crossings and parking.
- Compile area demographics.
- Analyze current market conditions for retail and office. The retail market analysis will include a demographic profile highlighting market potential, supply and demand related to market leakage (money spent outside the general market area), surveys of existing businesses and customers to determine demand. The office market analysis will include, at a minimum, the supply of existing office, focus groups to determine current expansion needs of existing users, site analysis, and office development trends.
- Update the BES sub-basin analysis related to the ecological health of the watershed.
- Analyze opportunities for stormwater management retrofits along the corridor, resource protection opportunities, and opportunities to form future Local Improvement Districts (LID).
- Evaluate the geographic extent of the existing conditions data and determine a feasible project study area.
- Review and summarize public policies, plans, and previously completed studies and describe their impact on project study area.

Deliverables:
1. Existing conditions report including tables, maps, and descriptions of current land use, market conditions, demographic trends, and summaries of policies and previous planning efforts.
2. Retail and office market analysis.
3. Sub-basin analysis and opportunities analysis.

Schedule: Months 2-4

Time Allotment

Personnel	Hours
BPS Program Manager	320
BPS City Planner	365
BPS District Planner	146
BPS Urban Designer	73
PBOT Transportation Planner	105
PBOT Transportation Engineer	0
BES Watershed Manager	245
Trimet Designer	20
Trimet Planner	85
Contractor	$5,000

Task 4 Needs, Opportunities, and Constraints Analysis

Objectives:
- Indentify the Needs, Opportunities, and Constraints of the corridor study area.

Methodology:
- Staff and consultant will conduct a needs, opportunities, and constraints analysis for the transit corridor and station areas.
- Identify Trimet transit engineering constraints for the corridor.
- Identify sites with greatest development potential, and identify environmental, economic, and social/design issues.
- Conduct outreach designed to inform the analysis using:
  - An online survey of the community and "users."
  - Two community walks for each segment of the corridor.
- Create an urban design diagram that identifies key conclusions from the existing conditions report and the needs, opportunities, constraints analysis as a communication tool for project partners and the community.

Deliverables:
1. Needs, Opportunities, and Constraints report including results from the online survey and community walks.
2. Urban Design Diagram.

Schedule: Months 3-6

Time Allotment

Personnel	Hours
BPS Program Manager	400
BPS City Planner	580
BPS District Planner	232
BPS Urban Designer	116

PBOT Transportation Planner	160
PBOT Transportation Engineer	0
BES Watershed Manager	102
Trimet Designer	50
Trimet Planner	70
Contractor	$15,000

Task 5 Goal and Criteria Development

Objectives:
- Develop project goals for nodal development pattern, defining neighborhood "placemaking" opportunities, the transit corridor and potential station areas.
- Develop criteria for selecting nodes and potential station area locations.

Methodology:
- Review Metro's *State of the Centers* and *Station Area Typologies* reports.
- Review Metro's Green Streets handbook for possible roadway typologies.
- Review the City's goals for watershed enhancement, land use, and transportation.
- Research and identify key characteristics of successful station areas (both local and national).
- Identify a set of common characteristics for successful station area locations specific to the Barbur corridor.
- Develop high level corridor and station area goals that optimally balance the economic, social/design, and environmental values of the community.
- Analyze the needs, opportunities, and constraints analysis to identify opportunities for creating places.
- Develop detailed criteria needed to evaluate station area location alternatives. The criteria will at a minimum address issues related to watershed health, stormwater, urban design specific to density and transitions between station areas and single family neighborhoods, pedestrian safety, mobility, congestion, commercial vitality, infrastructure availability and connectivity across and along the transit corridor.

Deliverables:
1. Goals for the corridor and transit stations
2. Criteria for selecting the location of transit stations

Schedule: Months 7 - 10

Time Allotment

Personnel	Hours
BPS Program Manager	492
BPS City Planner	200
BPS District Planner	80
BPS Urban Designer	40

PBOT Transportation Planner	221
PBOT Transportation Engineer	0
BES Watershed Manager	80
Trimet Designer	20
Trimet Planner	91
Contractor	$15,000

Task 6 Alternative Concept Development

Objectives:
- Identify alternative nodal urban development concepts for the corridor.
- Explore alternative numbers and locations of transit stations.
- Build scenarios for each location using the Envision Tomorrow suite of planning tools.

Methodology:
- Staff and contractor will identify major and minor nodes based on the potential for concentrations of new development. Major nodes imply suitability for more intensive office/retail/housing around HCT while minor nodes imply suitability for local transit service with less intensive housing and local serving retail.
- Staff and contractor will consider the role of different nodes in terms of market area potential compared to other locations in the City and region.
- Contractor will create a typology of the corridor segments between the nodes that identifies similarities and distinguishing characteristics in terms of mix and intensity of uses.
- Staff and contractor will explore alternative numbers and locations of transit stations using the key characteristics, goals, and criteria developed in Task 5.
- Explore street classifications, potential change in traffic patterns from each nodal development alternative, and possible cross sections based on the urban development framework.
- Using Envision, identify building prototypes based on current entitlements and build development concepts for the corridor and individual nodes.
- Using Envision, explore future scenarios based on changes to current entitlements and build development concepts for the corridor and individual nodes.

Deliverables:
1. Alternative transit station descriptions and drawings with accompanying data tables.

Schedule: Months 11 – 16

Time Allotment

Personnel	Hours
BPS Program Manager	520
BPS City Planner	580
BPS District Planner	232

BPS Urban Designer	116
PBOT Transportation Planner	340
PBOT Transportation Engineer	0
BES Watershed Manager	10
Trimet Designer	180
Trimet Planner	140
Contractor	$50,921

Task 7: Alternative Concept Analysis

Objectives:
- Evaluate the performance of the alternative nodal concepts using Envision.
- Analyze the nodal station area location alternatives to explore where station areas would make the most difference.
- Analyze the mix and quantity of development types for each station area
- Select preferred station area locations.
- Evaluate the potential traffic impacts of each nodal alternative with the transportation access and circulation data from the I-5/Hwy 99 Corridor Refinement Plan.

Methodology:
- Analyze the potential locations against the goals and criteria identified in Task 5 and use Envision modeling to evaluate scenario performance by each mode.
- Using economic and market analyses, the contractor and staff will assess the mix and quantity of possible development types in each station area.
- Staff and contractor will review the transportation analysis to assess access and circulation needs for potential redevelopment scenarios in station areas.
- Staff and contractor will review the transportation analysis of impacts to transportation system to assess mobility impacts of the redevelopment scenarios.

Deliverables:
1. Summary report of the Envision modeling results.
2. Transportation access and impact analysis for redevelopment scenarios.

Schedule: Months 17 - 23

Time Allotment

Personnel	Hours
BPS Program Manager	440
BPS City Planner	420
BPS District Planner	168
BPS Urban Designer	84
PBOT Transportation Planner	320
PBOT Transportation Engineer	280
BES Watershed Manager	40

Trimet Designer	260
Trimet Planner	220
Contractor	$30,000

Task 8: Concept Plan Development

Objectives:
- Consolidate data and analyses into a comprehensive report that recommends a long-term development strategy for the corridor and the location and number of transit stations.
- Identify stormwater management needs for the nodes and corridor, including best management practices.

Methodology:
- Prepare draft report for public review and comments.
- Tie stormwater management needs to future transportation investments indentified in the Alternative Concept Analysis (e.g. managing stormwater at the source using vegetated facilities).
- Conduct presentations to public, Metro Council, Portland Planning Commission, Portland City Council, and Trimet Board of Directors.

Deliverables:
1. Draft and final report.

Schedule: Months 23 - 26

Time Allotment

Personnel	Hours
BPS Program Manager	520
BPS City Planner	780
BPS District Planner	312
BPS Urban Designer	156
PBOT Transportation Planner	300
PBOT Transportation Engineer	0
BES Watershed Manager	160
Trimet Designer	50
Trimet Planner	50
Contractor	$6,000

BUDGET SUMMARY

Personnel	Hourly Rate*	Hours
BPS Program Manager	$44.55	4160
BPS City Planner	$44.55	4160
BPS District Planner	$44.55	1666
BPS Urban Designer	$51.18	833
PBOT Transportation Planner	$58.68	2099
PBOT Transportation Engineer	$50.00	280
BES Watershed Manager	$57.99	832
Trimet Designer	$87.77	610
Trimet Planner	$112.00	836

*includes fringe benefits

Construction Excise Tax Planning Grants Program
F2 - Match Form

Instructions: If your "Match Source" is a professional or technical service received as "In Kind," use the market average or actual salary or bid for that individual or service. Use the "Notes" field to document methodology.

Match Source	Choose One		Choose One		Amount	Notes
City of Portland Bureau of Planning and Sustainabiilty	○ Financial	◉ In Kind	○ Pending	◉ Secured	$ 116,713.00	salary plus fringe benefits, no overhead
City of Portland Bureau of Environmental Services	○ Financial	◉ In Kind	○ Pending	◉ Secured	$ 120,620.00	salary plus fringe benefits, no overhead
Trimet	◉ Financial	○ In Kind	○ Pending	◉ Secured	$ 93,184.00	salary plus fringe benefits, no overhead
	○ Financial	○ In Kind	○ Pending	○ Secured	$	
	○ Financial	○ In Kind	○ Pending	○ Secured	$	
	○ Financial	○ In Kind	○ Pending	○ Secured	$	
	○ Financial	○ In Kind	○ Pending	○ Secured	$	
	○ Financial	○ In Kind	○ Pending	○ Secured	$	
	○ Financial	○ In Kind	○ Pending	○ Secured	$	

Total $ 330,517.00