Regional Planning for the 21st Century

Oregon Chapter of the American Planning Association

November 2010
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Courtesy Rogue Valley Council of Governments

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Executive Summary

Introduction

This report takes a comprehensive look at regional planning in Oregon and proposes a new framework to improve regional planning statewide. There are numerous policy issues, including but not limited to, climate change, transportation, and land use, that may be addressed more effectively and efficiently through regional coordination than could be achieved by individual jurisdictions acting independently. As governance becomes more complicated due to complex intergovernmental issues, increased regulation and litigation, funding constraints, better science and technical information, and other factors, the Oregon Chapter of the American Planning Association (OAPA) Board recognizes that regional planning has an unrealized potential to improve decision-making in Oregon.

Why improve regional planning in Oregon?

Crisis often highlights inefficiencies and weaknesses in our public institutions. The current economic crisis, compounded by cuts to state and local government, a significant backlog in public infrastructure construction and maintenance, along with Oregon’s critical need to address climate change necessitate using every resource available as efficiently, effectively, and sustainably as possible.

OAPA recognizes that local and state governments are struggling to effectively address issues affecting multiple jurisdictions. Communities across the state are dealing with a number of inter-related regional issues with varying degrees of success, including:

- Climate change related issues, such as efforts to reduce green house gas emissions and adapt to climate change
- Energy facility and transmission siting across the State
- Jobs-housing balance in the Corvallis and Bend regions
- Water resources planning in the Deschutes, Klamath, and Umatilla Basins
- Destination resorts in Central Oregon
- Transportation corridors and commute-shed issues that exceed political boundaries throughout the State
- Urban and rural reserves in the Rogue Valley and Portland regions
- Urban growth boundary expansion issues
- Conservation of regionally important resource lands, natural resources and open space, transfers of development rights across the State

The OAPA Board believes that Oregon communities would benefit significantly from
a new policy framework that better integrates regional planning and decision-making. This missing element in the State’s planning system could help local communities and the State by streamlining current regional efforts and in the process release the creativity of Oregon cities and counties. The authors of a recent study on regionalism in the West summed up the potential when regions come together to solve mutual problems.

... if you bring together the right people in constructive forums with the best available information, they are likely to shape effective solutions to shared problems. What distinguishes regionalism from these other disciplines is its focus on the geography of human needs and interests.¹

A new policy framework can assist State, regional, and local entities in the implementation of regional planning and decision-making across the state, and transition from the current fragmented approach, to a more efficient, fundable, and politically feasible system. This initiative would bring a new regional focus to the core vision of Oregon’s Statewide Goals: Sustainable urban centers and regions, conservation of natural resources, and prosperous agricultural and forest lands. A new framework could also adapt to existing regional structures and resources, and strengthen regional governance and state investments. The State of Oregon could use focused policies and programs to reward regional planning and decision-making and encourage its use in the future. A strengthened regional planning and decision-making body that adopts and implements a regional plan meeting state performance standards could be rewarded with a focused state investment program and more regional control of its planning program in the future.

Table 1 shows the recommendations—organized by statewide recommendations (not including the Portland Metro area) and specific regional recommendations. The recommendations are also organized by short-term activities that build capacity for regional planning (Phase 1, which should be implemented in 2011-2013) and long-term activities that employ new approaches and implementation activities (Phase 2, which should be implemented in 2013-15). We also indicated the type of organization that should initiate the activity:

- **Legis**: the Oregon Legislature, indicating that legislation is necessary to fully implement the recommendation
- **State Comm**: state commission, indicating that administrative rule changes are necessary by the Land Conservation and Development Commission (LCDC) or other state commissions
- **State Agency**: indicating that state agency policy change is necessary by the Department of Land Conservation and Development (DLCD) or other state agencies
- **Local/Region**: referencing cities, counties, special districts, Councils of Governments, or other types of organizations that work on local and regional policies.

<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Ph 1</th>
<th>Ph 2</th>
<th>State, regional, and local actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>S1. A new regional framework</strong></td>
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<tr>
<td>S1A. The State and regions should actively work to create a new regional planning framework that is cost-efficient and effective, removes barriers to regional planning and decision-making, and increases regional coordination and cooperation.</td>
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<td><strong>S2. Addressing regional issues</strong></td>
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<tr>
<td>S2A. The State should allow regions to work together to conduct a regional buildable lands analysis (including a housing needs analysis and an economic opportunities analysis) as the factual base for urban growth boundary expansion analysis for all local governments within that region.</td>
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<td>S2B. Regions should consider (and the State should support) adopting regional plans.</td>
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<td>S2C. The State should adopt performance measures for regional plans.</td>
<td>X</td>
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<td>S2D. The State should empower regions that have acknowledged regional plans with planning review and funding authority.</td>
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<td><strong>S3. Coordination of regional planning and decision-making</strong></td>
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<td>S3A. The State should enable regions to create Regional Planning Commissions.</td>
<td>X</td>
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<td>S3B. The State should support an increased regional planning role of Councils of Governments.</td>
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<td><strong>S4. Supporting regional planning and decision-making</strong></td>
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<td>S4A. The State should look for opportunities to audit and streamline planning (and other) laws, rules, and processes.</td>
<td>X</td>
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<tr>
<td>S4B. The State should fund improvements to state and regional data collection, management, and analysis.</td>
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<td>S4C. The State and regions should prioritize some existing resources and consider adopting new incentive programs to support regional planning.</td>
<td>X</td>
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<tr>
<td>S4D. The State should authorize regions to create Regional Improvement Programs that coordinate state and other resources to effectively implement acknowledged regional plans.</td>
<td>X</td>
<td>X</td>
<td>X</td>
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Table 1. Regional Planning Recommendations, OAPA, 2010
S4E. The State and regions should track, provide input to, and prepare for federal legislation and programs in energy, transportation, housing, and environment that can provide new resources for regional planning.

<table>
<thead>
<tr>
<th>Regional Recommendations</th>
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<tr>
<td><strong>R1.</strong> MPOs should consider expanding their boundaries to provide more comprehensive transportation planning within their travelsheds.</td>
<td>X</td>
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<td><strong>R2.</strong> The Central Oregon region (Deschutes, Crook, and Jefferson Counties) should determine if it wants to address regional land use and transportation planning issues, and if so, what body should coordinate this activity.</td>
<td>X</td>
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# Table of contents

1 Acknowledgements 

iii Executive summary 

vii Table of contents 

1 Chapter 1: Introduction 

1 Background 

3 Project goals and outcomes 

4 Research plan 

4 Limitations of the research 

5 Report organization 

7 Chapter 2: Regional planning in Oregon: Existing laws and organizations 

7 Introduction 

7 State and federal legislation and initiatives 

10 Regional planning organizations and activities in Oregon 

40 Implications for a new regional planning framework in Oregon 

43 Chapter 3: Regional planning from across the country 

43 Introduction 

43 National overview of regional planning 

50 Profiles of statewide systems of regional planning 

72 Profiles of regional systems of planning 

79 Implications for a new regional planning framework in Oregon 

82 Chapter 4: Opportunities and constraints of a new regional planning framework 

82 Introduction 

83 Feedback from regional meetings 

95 Implications for a new regional planning framework in Oregon 

96 Chapter 5: Conclusions and recommendations 

96 Introduction 

97 Conclusions 

105 Recommendations 

116 Appendix A: Regional Meeting Participants 

119 Appendix B: Sources
Chapter 1: Introduction

Background  Crisis often highlights inefficiencies and weaknesses in public institutions. The current economic crisis, compounded by cuts to state and local government, a significant backlog in public infrastructure construction and maintenance, along with Oregon's critical need to address climate change necessitate using every resource available as efficiently, effectively, and sustainably as possible.

According to a recent Brookings Institution report, Americans increasingly live their daily lives on a regional scale. While the Brookings report focuses on large metro regions, even smaller communities throughout Oregon feel the effects of regional issues. While local governance is fragmented, jobs, housing, transportation, water, and air are regional. Regional interdependence is overshadowing local differences. Collaborative regional governance is a necessity, for regions to compete and lead in global, national, and statewide markets.

Oregon's innovative planning system is a legacy of the 1970s, reflecting a remarkable period of state environmental leadership and reform. Reflecting its origins, the Oregon planning framework is mostly divided between state and local processes and governance. This state-local framework is less effective in addressing regional issues, decision-making, and coordination, which have evolved significantly in the past 40 years.

There is an established hierarchy of providing governmental services and managing resources in the United States, with the federal government delegating some powers and authority to the states, which in turn delegate some powers and authority to cities and counties. Governance of cities and counties has changed radically over the past 200 years. When most cities in Oregon were established, travel was slow and difficult, local was truly local, and information traveled slowly. The vast majority of a citizen's life was confined to the city in which he or she lived. That is not the case today. People may live in one location and travel 5, 10, 50, or 100 miles to work, school, or to go shopping. People can access information from anywhere at anytime.

Today, regional planning is widespread in Oregon, but fragmented. In some regions, there is no single planning forum able to tackle broad regional challenges in land use, transportation, economy, climate change, and natural resources in a coordinated manner. Regions with an organizing body, such as a Council of Governments, may encounter other challenges, such as lack of funding, conflicting state regulations, or

difficulty with jurisdictions working together as a region.

The Oregon Chapter of the American Planning Association recognizes that local and state governments are struggling to effectively address issues affecting multiple jurisdictions. Communities across the state are dealing with a number of inter-related regional issues with varying degrees of success, including:

- Climate change related issues, such as efforts to reduce green house gas emissions and adapt to climate change
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The Portland Metro area, with the only elected regional government in the nation, has been more successful than most areas of the State in addressing regional issues. Outside the Portland region, state and local agencies have set up multiple regional bodies—many single-purpose—composed of state and local governments. Oregon has a multitude of Metropolitan Planning Organizations, Area Transportation Commissions, Councils of Government, plus economic, housing, watershed and water related planning entities, each with different regional boundaries and differing missions. More often than not, the decisions of one city or county have impacts, often significant financial impacts, on neighboring cities and counties. The most efficient and effective way to address these impacts is for regions to take responsibility for them, and take advantage of mutually beneficial opportunities while mitigating negative impacts.

On another front, OAPA is currently working with representatives from the Oregon chapters of the American Institute of Architects (AIA) and the American Society of landscape Architects (ASLA) on how the State should address the serious livability issues we will face in the next 25 – 50 years. The three organizations are focusing on statewide issues resulting from the potential addition of two million people, and recognizing, in particular, the associated implications for the state’s overall “settlement pattern,” infrastructure, and social equity. As the State confronts these issues, it seems evident that they will largely play out at a regional scale, and that a strong regional planning and decision-making framework, within the context of a strong state framework, will be necessary to address them appropriately and adequately in the future.
Regional Planning for the 21st Century is a policy reform and outreach project. The Oregon Chapter of the American Planning Association has set four goals for this project.

**Goal 1:** Assure that Oregon can effectively address its emerging 21st Century challenges through cooperative and coordinated regional planning.

**Outcome 1.1:** Identify and define why and how Oregon can better address the following challenges within the context of regional planning: Growth management, land use, transportation, economic development, affordable housing, infrastructure, energy and climate change, water quality and supply, air quality, and natural resources.

**Goal 2:** Adapt, realign, and better coordinate fragmented state and regional decision-making and state resources available to regions.

**Outcome 2.1:** Identify individual agency responsibilities for regional planning, and associated costs.

**Outcome 2.2:** Identify logistical, fiscal, and political opportunities and challenges to better coordinate and integrate regional planning for growth management, land use, transportation, economic development, affordable housing, infrastructure, energy and climate change, water quality and supply, air quality, and natural resources.

**Goal 3:** Develop a policy framework that expands opportunities for regions, the state, and local communities to solve specific problems better accomplished through effective and efficient regional planning and decision-making.

**Outcome 3.1:** Based upon the opportunities and challenges expressed in Goals 1-2, test alternative frameworks and models for regional planning with planning leaders throughout Oregon.

**Outcome 3.2:** Develop a preferred alternative framework that could be implemented within five years in regions across Oregon.

**Goal 4:** Provide the State of Oregon, Oregon communities, OAPA and its members, a set of innovative policy recommendations they can use to create more cost-effective and more efficient regional planning organizations or programs in 2011 and after. 2010 is an election year and the Legislature meets in regular session in 2011. (Goal 4 focuses on OAPA project follow-up, which happens primarily after the Report is complete.)

**Outcome 4.1:** Provide Oregon policy and planning officials, at the State, regional, and local levels, an integrated policy framework for reform of regional planning and decision making in Oregon. Outline the options for implementing reform, which may include policy initiatives, administrative or legislative measures, using the findings of the report.

**Outcome 4.2:** Within one year after publication of the final report, and using its
findings as a framework, at least two regions will consider new policies or programs to increase regional coordination and decision-making in Oregon.

Research plan

The research plan for this study consisted of the following activities:

- **Research and describe existing regional planning activities in Oregon.** Summarize the responsibilities, resources and planning authority by functional area and region for agencies and organizations at the state, regional, county, and city levels including intergovernmental commissions and boards. Assess existing regional bodies, including their areas, membership and planning responsibilities for land use, transportation, economy, climate change, and natural resources.

- **Profile regional planning models from across the country.** Create state and regional profiles of national models for improved regional planning and decision-making. Utilize recent regional planning research by Oregon policy task forces and agencies.

- **Convene regional decision-makers throughout Oregon to identify opportunities, constraints, and alternatives for successful regional planning.** Conduct regional meetings with state and local elected and appointed officials, government staff, and other interested groups. Share preliminary findings and ask participants to help devise an improved framework for regional planning. Hold meetings in Portland with special interest groups, Salem with staff from state agencies involved in planning related activities, and in Salem, Eugene, Medford, and Bend with local elected and appointed officials, government staff, and others.

Limitations of the research

While this report is the only statewide study of regional planning, limited funding and time presented the following limitations to the research:

- **The study does not try to define regions.** There is a direct link between the issue that a region is trying to solve, and the appropriate geography and players best suited to solve them. Rather than trying to define each of the regionally significant topics and geography that should be addressed, it is acknowledged that the geography of the respective issues will change as the issues change. For example, the appropriate region to address transportation issues could logically be based on a commute shed, the area in which a region generally commutes to get from home to work, school, or shopping (and back). The appropriate region to address watershed issues should include all parties within the watershed and affected by watershed issues.

An issue’s geography will not always neatly follow political boundaries. Instead, regions should determine which issue (or set of issues) is the most important to solve, and then determine the appropriate parties and boundaries in which the issue should be addressed.

That said, this report does recommend that existing Councils of Government, with their current membership and boundaries, are the next logical step for improving
regional decision-making in many regions throughout the state. Governments within many regions naturally worked together to create Councils of Governments that could then address regional issues. However, regions should look closely at the issues it is trying to solve and involve the appropriate players to address those issues. In addition, there is a recommendation to expand metropolitan planning organization (MPO) boundaries. This recommendation acknowledges that the current boundaries are not large enough to address commute-shed issues. Even the maximum federally allowed boundaries for MPOs may not be large enough to address these issues.

- **The study presents very limited analysis of the federal government role in regional planning and decision-making.** The project scope is limited to regional planning as practiced at local, regional, and state levels, but does not include federal agency and multi-state planning. Federal lands cover 53% of Oregon. The Forest Service and Bureau of Land Management conduct substantial regional planning for their lands. In the Columbia Basin, federally chartered Bonneville Power Administration and the Northwest Power Planning Council conduct important regional planning for energy supply and conservation, transmission, fish resources, rivers, and watersheds.

- **The study presents limited analysis of regional efforts in Eastern Oregon and the Oregon Coast.** Given the limited time and resources available, the report focuses on the major metropolitan areas outside of Portland: Central Oregon (Bend region), Southern Oregon (Medford region), and the Willamette Valley (Eugene-Springfield region, Salem-Keizer region, and Corvallis region). While there are multiple regional planning efforts in North Central Oregon, Eastern Oregon, and the Coast, these areas have not been studied in depth.

- **The fiscal analysis is limited.** The initial research plan included a more robust analysis of the fiscal resources necessary to implement a new regional framework. However, the resulting recommendations, and limited time to investigate the fiscal aspects of the recommendations, led the research team to focus on the recommendations themselves. Discussions with elected officials and others impressed upon the research team that in the short-term, the only recommendations that have a chance of being implemented are those that don't require new funding. The budget crisis at the state and local levels make funding new initiatives difficult. Thus, the recommendations focus on how the State and regions can work together, pooling resources to improve planning activities and outcomes.

- **The study does not include quantitative measures of success.** Most of the evidence in support of regional planning is based on other qualitative studies and regional meetings.

**Report organization**

The rest of this report is organized into the following chapters:

- **Chapter 2: Regional planning in Oregon: Existing laws and organizations.** This chapter describes laws and programs that allow, encourage, or require regional planning, and describes the organizations that conduct regional planning in
Oregon: regional and bi-state governments, inter-governmental coordination, state-sponsored and supported regional planning efforts, federal requirements for federal money, and ad-hoc regional efforts among multiple public and private entities.

- **Chapter 3: Regional planning from across the country.** This chapter describes statewide programs for regional planning in California, Georgia, North Carolina, and Vermont, and regional planning efforts in San Diego, Salt Lake City, Cape Cod, and Denver.

- **Chapter 4: Opportunities and constraints of a new regional planning framework.** This chapter summarizes the opportunities and constraints to a new regional planning framework in Oregon based on the research on existing laws and organizations, and discussions with decision-makers and local government staff.

- **Chapter 5: Conclusions and recommendations.** This chapter summarizes the findings of the research and proposes a coordinated policy framework to align regions and planning across state, regional, and local agencies for: growth management, land use, transportation, infrastructure, climate change, water quality and availability, air quality, and natural resources.

- **Appendix A: Regional Meeting Participants**

- **Appendix B: Sources**
Chapter 2: Regional planning in Oregon: Existing laws, organizations, and initiatives

Introduction

Regions across the state of Oregon employ a wide variety of models to address regional issues.

This chapter includes the following three sections:

- **State and federal legislation and initiatives** describes the state and federal legislation and initiatives with implications for regional planning in Oregon.
- **Regional planning organizations and activities** in Oregon describes the organizations and programs that provide regional planning in Oregon: regional and bi-state governments, inter-governmental coordination, state-sponsored and supported regional planning efforts, federal requirements for federal funding, and ad-hoc regional efforts among multiple public and private entities.
- **Implications for a new regional planning framework in Oregon** reviews the key findings from the research of regional organizations in Oregon.

Oregon Legislation

**House Bill 3543, Global Warming Actions (2007).** Oregon’s climate change policy enacted in 2007 (HB 3543) sets the State’s greenhouse gas emissions reduction goals: To arrest emissions growth by 2010, to reduce levels by 2020 to 10% below 1990 levels, and to reduce levels by 2050 to 75% below 1990 levels. Transportation is responsible for over a third of Oregon’s emissions, and MPO areas in turn produce about 56% of these emissions.³

**House Bill 2001, Jobs and Transportation Act (2009).** The Jobs and Transportation Act initiated several important changes to regional planning statewide to address transportation greenhouse gasses. It requires a Portland Metro pilot project by 2012, to develop alternative regional land use and transportation “scenarios”, which reduce greenhouse gas emissions to fit State targets. Metro has conducted a regional inventory of greenhouse gas sources and is proceeding with initial steps to develop scenarios.

Under HB 2001, the Central Lane MPO will develop land use and transportation scenarios based on the Metro experience in 2013-14. Other MPOs and their local

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governments will be responsible for scenario planning in the future. By 2013, Department of Land Conservation and Development (DLCD) will develop statewide rules for land use and transportation scenario planning in regional and local plans.

The Act also calls for ODOT and transportation agencies to examine national best practices in regional planning and move toward a “least cost” planning model:

- ODOT will conduct a study of national best practices for improving metropolitan transportation services through enhanced regional decision-making.
- ODOT, in consultation with local governments and MPOs, will develop a least-cost planning model for use as a decision-making tool in the development of plans and projects at both the state and regional level.

**Senate Bill 1059, Metropolitan Scenario Planning for GHG Reduction (2010).**

The 2009 Greenhouse Gas Task Force proposed 2010 legislation for an initial four-year program for local governments within the boundaries of Metropolitan Planning Organizations outside the Portland region to ramp up regional land use and transportation “scenario” planning for greenhouse gas reduction. Because these planning efforts require resources beyond the capacity of MPOs and local governments, the Bill requires ODOT/DLCD to develop a funding report for the 2011 Legislature, outlining the needed resources and sources of funds for regional scenario planning.

Senate Bill 1059 also requires the Transportation Commission to adopt a statewide transportation greenhouse gas reduction strategy by 2011. At the same time, DLCD, assisted by DEQ and ODOT, will develop Greenhouse Gas Targets for all MPOs outside Portland Metro by 2011. ODOT/DLCD will also establish Scenario Planning Guidelines and a Greenhouse Gas Reduction Toolkit by 2011 to assist regional planning and local actions, and to inform the 2013 rulemaking for scenario planning.

**Transfer of Development Rights pilot program (2009).**

The 2009 legislature enacted the Oregon Transfer of Development Rights (TDR) Pilot Program (HB 2228), to be implemented by the Department of Land Conservation and Development (DLCD) and local governments, in consultation with the Oregon Forestry Department and other state agencies. TDRs have been a popular and successful planning tool for regional growth management in other states but have had little use in Oregon. The 2009 legislature also enacted SB 763 that enables local governments to establish TDR programs, and to encourage and develop TDRs in Oregon.

The pilot program is currently taking applications and is seeking nominations of rights transferred from areas within Urban Growth Boundaries, rural exception lands, or designated rural communities to areas within UGBs. TDR is used in regional growth management plans in other states with some success.

**Regional Planning Agencies under (ORS 190, ORS 195.025).** Under ORS 195.025,

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4. Ibid.
each county is “responsible for coordinating all planning activities affecting land uses within the county, including planning activities of the county, cities, special districts and state agencies, to assure an integrated comprehensive plan for the entire area of the county.” This planning coordination authority is potentially quite powerful, but is not used to its full potential. Counties often provide regional population projections and co-adopt urban growth boundary amendments, but the statute authorizes counties to use their coordinating role in other ways that few have employed. The statute also authorizes counties and a majority of the participating cities to form multi-county agencies for regional planning, which authorizes “the association to perform the review, advisory and coordination functions assigned to the counties.” No such association has been formed under this authority.

Oregon regions have similar authority to coordinate planning activities of counties, cities, special districts, state agencies to “assure an integrated comprehensive plan” for the entire region. Participating counties and a majority of the participating cities may form multi-county agencies for regional planning, which authorize “the association to perform the review, advisory and coordination functions assigned to the counties.” Though Metro is recognized in ORS 195.025 as the “county review, advisory and coordinative body” for its region, other associated local governments in Oregon have the authority to form a regional planning agency, and assure participation by State agencies and other regional agencies. Cities and counties can form an agency by Intergovernmental Agreement or other means. The regions must be a “reasonable planning unit” and could be composed of multiple, adjacent counties and their cities, which share common geography, economy, environment, watersheds, and interests.

Federal Legislation

Transportation Reauthorization Bill. With the current Surface Transportation Reauthorization Act (2009) on an 18-month extension, Congress developed several bills to reauthorize federal transportation programs, to address major infrastructure deterioration, and to recharge the lagging Highway Trust Fund. While bills were drafted a year ago, delay has intensified interest in transportation program and funding reform among many groups. The National American Planning Association supports a new transportation act that empowers metropolitan regions, supports integrated planning for sustainable communities, and expands funding flexibility.

Two regional policy issues stand out within the Transportation Reauthorization Bill. Numerous national planning and transportation groups support empowerment for metropolitan and regional planning, and creating much greater flexibility for use of funds (as well as resource levels). The House Transportation Bill offered last year and this year’s proposed Senate Bill reinforce these themes. Prospects are good for transportation reform that expands federal support for regional planning and implementation in innovative and effective ways. The challenge for Oregon will be to reform its planning structures and funding flexibility in ways that creatively responds to federal reforms.

Energy and Climate Change Bills. Several Energy Bills have advanced in the House and Senate in the past year. The current Senate draft, the American Power Act
(Kerry-Lieberman 2010) would require states and MPOs to implement greenhouse gas reduction targets and land use strategies in their transportation plans. The Bill provides funds and technical assistance for MPOs and states to develop and implement greenhouse gas reduction plans. The Bill also provides funding and encourages states and regions to set up competitive grant programs to invest in smart growth and green transportation projects.

**Sustainable Communities Programs.** In a new collaboration, Housing and Urban Development, the U.S. Department of Transportation and the Environmental Protection Agency have teamed up to develop new programs for Sustainable Communities. One of the first efforts is a new 2010 pilot grant program for regional integrated planning of housing, economic development, and transportation. There are numerous legislative proposals coming from members of the House Task Force on Livable Communities, Chaired by Rep. Earl Blumenauer. Chances are good for expanded support of regional planning and implementation initiatives in the next three years. Some observers have suggested that new federal policy on regional planning may be modeling itself on California’s groundbreaking Climate Change and Sustainable Communities Act, Senate Bill 375.

Cities, counties, special districts, and the State traditionally provide most governmental services. In addition, communities across Oregon have created a diverse set of organizations and partnerships to tackle a variety of policy issues. These organizations and partnerships fall into one of five categories:

- **Regional government and bi-state commission** describes Metro and the Columbia River Gorge Commission, respectively.
- **Inter-governmental entities** describe the six Councils of Governments that provide a variety of services for cities, counties, special districts, and tribes.
- **State-sponsored and supported regional planning efforts** describe Regional Problem Solving (coordinated by the Department of Land Conservation and Development), Area Commissions on Transportation (coordinated by the Oregon Department of Transportation), watershed councils, and soil and water conservation districts.
- **Federally designated regional planning efforts** describe Metropolitan Planning Organizations, Economic Development Districts, and Consolidated Plans for housing.
- **Ad-hoc regional efforts** among multiple public and private entities describe several voluntary efforts from around the states.

**Regional government and bi-state commission**

This section highlights two governing entities: Metro and the Columbia River Gorge Commission, as shown in Figure 1.
Metro (Portland Metropolitan Service District)\(^6\)

Established in 1978, Metro provides regional planning, policy-making, and other services for the 1.5 million residents in the Portland Metropolitan Region. Metro's boundaries encompass three counties (Clackamas, Multnomah, and Washington), 25 cities, and multiple unincorporated areas. Metro is governed by seven elected councilors; the Council President is elected region-wide and the remaining six councilors are elected by district.

Metro is the only metropolitan service district in Oregon, which is a 'hybrid' between a special district and a general government.\(^7\) A metropolitan service district goes beyond the definition of a special government given that it has the ability to adopt, amend, revise, and repeal a metropolitan area district charter. A 1993 amendment to the Oregon Constitution created a process to give such abilities to metropolitan service district electors.\(^8\) Additionally, the statute also defined “Metropolitan Areas” eligible for establishing a metropolitan service area. On October 4, 1997, such areas were Clackamas, Multnomah, and Washington Counties, thus making it impossible for any region in Oregon, other than the Portland metropolitan region, to create a metropolitan service district without a Constitutional amendment.

Upon formation, Metro's responsibilities included the management of regional programs and services. Included were urban growth boundary management, transportation planning, waste disposal planning and management, and the Oregon Zoo, all of which continue to be under Metro's purview today. Yet, even with its variety of projects, Metro's primary charge remains regional land-use planning. Metro's charter

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6. Most of the information provided in this section is from the Metro website at www.metro-region.org/, viewed on June 24, 2010.
7. Smith, T. (2006). Regional land use decision-making: The nature and scope of Oregon entities. Memorandum to Judie Hammerstad; Nikki Whitty; Mike Thorne, Big Look Task Force. This memo provides an overview of Oregon laws that allow regional governance and decision-making.
requires that the organization complete a variety of planning tasks, including but not limited to, the completion of Regional Urban Growth Goals and Objectives, Growth Concepts, Regional Framework Plan, and Regional Transportation Plans. Beyond mandated tasks, Metro’s charter reflects the changing needs of regional government and grants authority to work on issues of “metropolitan concern.” As a result, Metro’s programs and services have changed throughout the organization’s lifetime in order to adapt to new regional needs.

Metro’s programs are funded through voter-approved revenue sources, which include property, sales, and income taxes. Currently, the only property tax levy is dedicated to the Oregon Zoo. Temporary capital levies have been used to fund the Oregon Convention Center, natural area acquisition and specific exhibits at the Oregon Zoo. As the federally designated Metropolitan Planning Organization, Metro also receives federal funding for transportation planning.

The following sections describe programs at Metro.

Planning and Transportation. The majority of Metro’s programs are related to planning and transportation. Metro’s current planning programs include:

- **Regional Transportation Plan (RTP).** The RTP presents the overarching policies and goals, system concepts for all modes of travel (motor vehicle, transit, pedestrian, bicycle and freight), funding strategies, and local implementation requirements for the region's transportation system. The RTP offers recommendations on how federal, state, and local transportation funding should be designated for 25-year timeframes.

- **Metropolitan Planning Organization (MPO).** Metro convenes the Joint Policy Council on Transportation (JPACT) in order to determine the objectives and recommendations for RTP and develop an improvement program. JPACT is made up of 17 local elected and state agency officials, as well as officials from major transportation agencies in the region. JPACT is responsible for coordinating the development of the plans that designate required transportation improvements, gaining regional consensus on what improvements are required, and promoting the implementation of the improvements.

- **Metropolitan Transportation Improvement Program (MTIP).** The MTIP is a four-year plan for transportation projects (as designated in the RTP) that are programmed to receive federal funding from the Surface Transportation Program and the Congestion Mitigation/Air Quality program. The MTIP projects are reevaluated every two years. Metro serves as the convener and facilitates the MTIP’s approval by JPACT, the Metro Council, and the Governor of Oregon.

- **Urban and Rural Reserves.** Metro, in coordination with Clackamas, Multnomah and Washington counties, leads the regional designation of urban and rural reserves in the region. The objectives of the Urban and Rural Reserves process include the strategic placement of future growth in order to protect farmland, forests and natural areas for the next 50 years.

- **Regional Planning and the Urban Growth Boundary (UGB).** Metro manages
the region's UGB and reconsiders the placement of the boundary for the next 20 years. While the Metro Council ultimately approves the revised UGB, the council works collaboratively with local governments in its Metropolitan Policy Advisory Committee (MPAC). The Council and MPAC develop policy actions and investments to center growth and economic activity into the urban centers, transportation corridors, and employment areas that are within the existing urban growth boundary (in keeping with the 2040 Growth Concept, and Regional Framework Plan). If the policy actions and/or investments are deemed insufficient to accommodate growth within the UGB, the Council must consider expanding the UGB per Oregon law.

Conservation. Metro’s charter establishes conservation goals and objectives in addition to planning activities. The following describe Metro’s ongoing conservation efforts:

- **Parks and Natural Areas.** Metro currently manages 12,000 acres of parks and natural areas including more than 100 miles of river and stream banks. Metro offers a variety of recreational and educational services within the parks and natural areas, including nature tours, boating facilities, and volunteer opportunities.

- **Recycling and Solid Waste.** Metro owns and operates two transfer stations and hazardous waste stations that accept trash and recyclables from residents, businesses, and commercial waste haulers. In addition, Metro serves as a regional resource for finding local waste haulers and recyclers, and offers educational materials on recycling at home, work, and school.

- **Sustainable Living.** Metro offers multiple resources, via website and workshops, to encourage residents to live sustainably by maintaining a ‘green’ lifestyle. These resources encompass natural cleaners for home use, organic gardening, composting resources, and home improvement. In addition, Metro encourages residents to use sustainable transportation options and offers resources on walking, biking, transit, and ride sharing in order to reduce single-occupancy vehicle use and transportation emissions throughout the region.

Data Resource Center. The Data Resource Center is a “store-front” operation, conducting mapping, spatial analysis, economic analysis, and demographic forecasting to meet internal needs and external requests. While Metro has sharing agreements with many of the local cities and counties allowing free or low-cost sharing of data, private requests can also be made for a fee.

Oregon Zoo. Metro took over the operation of the Oregon Zoo in 1971, after it became too large of a burden for Portland Zoological Society and the City of Portland. After a series of temporary levies throughout its history, voters approved a $5.1 million permanent tax base in 1990, which continues to fund zoo operations. The zoo hosts exhibits and experiences that encourage education and conservation of animals from throughout the world. In total, these programs reach over 500,000 people including area residents, tourists, as well as senior and student groups.
**Metropolitan Exposition Recreation Commission.** The Metropolitan Exposition Recreation Commission (MERC) is a subsidiary of Metro. MERC has a Board of Commissioners recommended by local governments and appointed by the Metro Council president. MERC manages three facilities — the Oregon Convention Center, the Portland Center for the Performing Arts, and the Portland Expo Center, which host two million people at 1,800 events annually. Seventy percent of MERC's operating costs are funded through services (facility rentals, event services, food and catering, and parking); the remaining 30% of the $40 million annual budget is from lodging industry taxes, government contributions, and investment earnings.

**Columbia River Gorge Commission**

In 1987, the federally mandated Columbia River Gorge Commission formed to manage the Columbia River Gorge National Scenic Area per the Columbia River Gorge Compact (ORS 196.150 et seq., RCW 43.97.015 et seq.). The Columbia River Gorge National Scenic Area (NSA) includes an 85-mile stretch of land in both Oregon and Washington along the Columbia River from Troutdale, Oregon and Washougal, Washington to the Deschutes River in the east. The area encompasses a variety of natural, historic and cultural areas, which draw more than 2 million visitors a year in addition to being the home for over 55,000 residents.

The Commission is a bi-state body, funded equally by the states of Oregon and Washington. In addition, the U.S. Congress allocates economic development grants and loans to fund projects within the NSA, and grants for visitor centers and restoration of the Historic Columbia River Highway.

The Commission serves four primary purposes:

- **Sets policy for protecting the non-federal lands in the Columbia Gorge.** The Commission develops and adopts land use and resource protection policy through the Scenic Area Management Plan.

- **Serves as an appeals board.** The Commission is the appeals board for Scenic Area land use decisions issued by a county or by the Commission's Executive Director and challenged by another party. This role increases uniformity of implementation through the six counties and two states in the NSA.

- **Supports counties and constituents.** The Commission works with Gorge counties who administer the land use ordinances that implement the Management Plan (Wasco, Skamania, Klickitat, Multnomah, Clark and Hood River counties). The Commission also administers and enforces a Scenic Area ordinance in Klickitat County, which has not adopted its own ordinance.

- **Supports economic development activities.** In coordination with the Mid-Columbia Economic Development District, the Commission certifies grants and loans by Oregon and Washington's Investment Boards to encourage economic growth that is compatible with the scenic area designation in the Gorge.

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Commission Membership. The Gorge commission has 13 members—each Gorge county appoints one commissioner, the Oregon and Washington governors each appoint three commissioners, and the Secretary of Agriculture appoints an employee of the USDA Forest Service as an ex officio, non-voting member.

Collaborations within the National Scenic Area. The Gorge Commission partners with the following agencies to achieve their mission:

1. U.S. Forest Service: Sets policy for lands in the Special Management Area (approximately 115,000 acres), assures consistency with federal actions in the Scenic Area, and manages 71,000 acres of National Forest land within the NSA.
2. Gorge Counties: Implement ordinances under the Scenic Area Management Plan and manages aspects of development.
3. Gorge Cities: Although cities (designated as “Urban Areas”) are exempt from land use regulations of the Act, economic development is focused in these areas.
4. Tribal Governments: Four Tribal Governments participate in the implementation of the Management Plan and protection of cultural resources.

Intergovernmental Entities (Councils of Government)

Intergovernmental entities, enabled by ORS 190.010 consist of councils of governments (COGs), associations of districts, and leagues of cities. These entities can be created to aid governmental functions. They are usually non-profit organizations formed by participating cities, counties, and special districts, and are allowed to contract with cities or counties to provide governmental services (as long as the governmental entity has the authority to provide the service). For example, many small cities with limited staff will contract with their COG to provide land use planning services. It is important to note that, when participating in regional planning activities, the COG can only make recommendations; it does not have the power to enact legislation with legal force.

Councils of Government are governed by a board of elected officials designated from member organizations.

Some of the benefits of COGs are:

- **Regional forum.** Because COG members are the cities, counties, and many of the special districts and tribes within the region, the Council of Governments they form becomes a natural forum for members to discuss regional issues.
- **Flexibility.** COGs focus on the issues that members ask them to focus on.
- **Voluntary and non-binding.** Locals can choose whether or not to adopt policies recommended by the COG.
- **Neutral.** COG staffs are often viewed as neutral parties.
- **Cost effective.** Local governments often contract with COGs for technical expertise and services that would be more expensive to purchase or maintain directly. For example, many small cities contract with the local COG for GIS services or community development services.
The structure of COGs provides the following challenges to effective regional planning:

- **Accountability.** Unlike city, county, and special district elected officials, the governing board of a council of government is not directly accountable to the public. Even though it may be composed of elected officials, the governing board is appointed by its member organizations, so members are accountable first to the governing bodies of the member organization. In addition, representation can change frequently, depending on who is in office at what time.

- **Fiscal Authority.** Again, unlike cities, counties, and special districts, COGs have no fiscal authority to raise taxes and spend the revenues. This limits their ability to fund programs and services. Most COG funding is from federal and state revenues, followed by fee for service. Member dues are generally less than 5% of the total operating budget for most Oregon COGs.

- **Regulatory Authority.** Additionally, COGs have no regulatory authority. Thus, if they create transportation or land use plans, it is up to local governments to implement them as they deem appropriate. Regional Problem Solving does provide a state sanctioned process for addressing land use and transportation issues at the regional level that requires local adoption, however, it has only been used successfully a few times. While it is listed as a challenge here, it can also be seen as a benefit as it is less threatening to local autonomy by local decision-makers.

Councils of Government (COGs)\(^{12}\) throughout Oregon are the primary conveners of regional activities. The six Councils of Government in Oregon are:\(^{13}\)

- Central Oregon Intergovernmental Council
- Lane Council of Governments
- Mid-Columbia Council of Governments
- Mid-Willamette Valley Council of Governments
- Oregon Cascades West Council of Governments
- Rogue Valley Council of Governments

\(^{12}\) Metro is not in this list because it is a metropolitan service district with elected officials, taxing authority, and regulatory authority.

\(^{13}\) The NorthWest Senior & Disability Services is also a Council of Government. It is not included in our analysis as it provides serves for seniors and people with disabilities only.
Some of the COGs, specifically Mid-Willamette Valley Council of Governments, Lane Council of Governments, and the Rogue Valley Council of Governments (and to a lesser degree Cascades West Council of Governments), have a significant role in transportation planning and coordinating the allocation of transportation funding. Table 2 shows general information about Oregon COGs and Metro and the primary services they provide to members.

### Table 2. Comparison of Oregon Councils of Government and Metro, 2010

<table>
<thead>
<tr>
<th></th>
<th>Metro</th>
<th>MWVCOG</th>
<th>CWCUG</th>
<th>LCOG</th>
<th>RVCUG</th>
<th>MCCUG</th>
<th>COIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date of inception</strong></td>
<td>1978</td>
<td>1957</td>
<td>1960s</td>
<td>1945</td>
<td>1968</td>
<td>1979</td>
<td>1972</td>
</tr>
<tr>
<td><strong>Members</strong></td>
<td>25 cities</td>
<td>31 cities</td>
<td>20 cities</td>
<td>11 cities</td>
<td>13 cities</td>
<td>5 counties</td>
<td></td>
</tr>
<tr>
<td><strong>Population (2009)</strong></td>
<td>1,631,665</td>
<td>482,205</td>
<td>242,290</td>
<td>347,690</td>
<td>290,675</td>
<td>51,255</td>
<td>220,605</td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td>$403 million</td>
<td>$5.3 million</td>
<td>$18 million</td>
<td>$33.4 million</td>
<td>$5.9 million</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Source of funding</strong></td>
<td>NA</td>
<td>90% fed, 10% local</td>
<td>68% fed, 32% local and state</td>
<td>33% fed and state, 47% reserves and local</td>
<td>50% state and fed, 50% local and other</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Staff (FT and PT)</strong></td>
<td>177</td>
<td>22</td>
<td>124</td>
<td>234</td>
<td>42</td>
<td>NA</td>
<td>60</td>
</tr>
<tr>
<td><strong>Transportation</strong></td>
<td>● (MPO)</td>
<td>● (MPO)</td>
<td>○</td>
<td>● (MPO)</td>
<td>● (MPO)</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td><strong>Short-range land use planning</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Long-range land use planning</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Strategic Planning</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Employment and training services</strong></td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Education services</strong></td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Economic Development</strong></td>
<td>●</td>
<td>● (EDD)</td>
<td>● (EDD)</td>
<td>● (EDD)</td>
<td>● (EDD)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Loan Assistance</strong> (business)</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Natural Resources</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Data Center (GIS and Mapping Services)</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Public Facilitation Services</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Grant Writing and/or Administration</strong></td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other services</strong></td>
<td>Zoo, MERC, recycling</td>
<td>Senior and disabled</td>
<td>Senior and disabled</td>
<td>Senior and disabled, Meals on Wheels</td>
<td>Family, Senior and disabled</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** ● is a primary service, ○ is a secondary service

**Metro note:** Budgeted expenditures

Central Oregon Intergovernmental Council\textsuperscript{14}
Created in 1972, the Central Oregon Intergovernmental Council (COIC) provides employment and training services, alternative high school education, business loans, community and economic development, transportation (primarily transit) services, facilitation and collaboration services, and GIS services.

Member organizations are:

- Crook County
- City of Culver
- City of Prineville
- Deschutes County
- City of Madras
- City of Redmond
- Jefferson County
- City of Metolius
- City of Sisters
- City of Bend

One of COIC’s primary functions is to provide economic development services. COIC is the federally designated economic development district for Central Oregon and maintains and updates the Comprehensive Economic Development Strategy (CEDS) for Central Oregon (Crook, Deschutes, and Jefferson Counties).

COIC provides technical assistance to member organizations to secure federal and state financing for public infrastructure projects and management of public works projects. In addition, COIC supports economic development cluster activities for agriculture, forest products, and renewable energy.

COIC also provides natural resources and environmental services to plan, implement and monitor forest restoration and hazardous fuels reduction work; help cities and counties deal with water resources environmental compliance issues (Clean Water Act, Safe Drinking Water Act, Endangered Species Act); work with local farmers and ranchers on improving economic viability through renewable energy development and direct marketing/local food initiatives; and address climate change adaptation and mitigation and ecosystem service markets.

In June 2010, COIC announced that it will take over the Bend Area Transit bus service (BAT) in September 2010, setting the organization up to provide regional transit service. This consolidation of service may be the precursor to a truly regional transit system.

COIC facilitates the following regional boards and committees:

- **Central Oregon Area Commission on Transportation (COACT).** Formed in 1998, the COACT provides a forum for the region to discuss transportation issues. COACT membership includes representatives from each Central Oregon City and County government, ODOT, the Confederated Tribes of Warm Springs, the private sector and various regional organizations (see the section on Area Commissions on Transportation, below).

- **Central Oregon Partnerships for Wildfire Risk Reduction (COPWRR),\textsuperscript{15}**

\textsuperscript{14} Most of the information provided in this section is from the COIC website visited on June 4, 2010, coic.org.

\textsuperscript{15} The information in this section is summarized from the COPERR website, http://coic.org/copwrr/index.htm,
According to the organization website, the COPWRR is a partnership between public agencies, forest products businesses, community groups, and environmental and sustainability organizations to reduce wildfire risk, restore forest ecosystems, and provide local jobs and income within Central Oregon’s forest communities.

- **Central Oregon Workforce Coordinating Council (WCC).** Formed in 2009, the WCC identifies workforce and employer needs and challenges, and coordinates efforts to ensure that “we are all working together, efficiently.”

- **Deschutes Ochoco Resource Advisory Council (RAC).** COIC provides administrative services to the RAC, which provides a forum for the local community and federal land managers to recommend Title II projects on federal lands.

**Mid Willamette Valley Council of Governments**

The Mid Willamette Valley Council of Governments (MWVCOG) has been in existence (in one form or another) since 1957. Over the past 53 years, it has established itself as the forum for regional activities relating to land use, transportation, and economic development. The cities and counties within its service area regularly use its staff to embark upon a variety of regional activities. MWVCOG provides services to members in three counties, 31 cities, 6 special districts and the Confederated Tribes of the Grand Ronde.

Members are:

- Marion County: City of Hubbard, City of Stayton
- Polk County: City of Idanha, City of Sublimity
- Yamhill County: City of Independence, City of Turner
- City of Amity: City of Jefferson, City of Willamina
- City of Aumsville: City of Keizer, City of Woodburn
- City of Aurora: City of Lafayette, City of Yamhill
- City of Carlton: City of McMinnville, Chehalem Park and Recreation District
- City of Dallas: City of Monmouth, Chemeketa Community College
- City of Dayton: City of Mt. Angel, Gates Rural Fire District
- City of Detroit: City of Newberg, Salem-Keizer School District
- City of Dundee: City of Salem, Salem-Keizer Transit District
- City of Falls City: City of Scotts Mills, Willamette Education Service District
- City of Gates: City of Sheridan, Confederated Tribes of the Grand Ronde
- City of Gervais: City of Silverton, Community of Oregon

Most of the regional efforts in the mid-Willamette Valley are coordinated by the MWVCOG. According to the MWVCOG website, the agency provides direct planning and development services to local governments, preparing grants and loan applications for public infrastructure improvements, administrating capital improvement projects for smaller communities, short-range and long-range planning work, and housing rehabilitation program management.

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viewed June 4, 2010.
16. Most of the information in this section is from the MWVCOG website visited on June 4, 2010, www.mwvcog.org/.
One of the most prominent regional coordination activities provided by MWVCOG is the Mid-Willamette Valley Community Development Partnership (the Partnership). The Partnership is the federally designated economic development district and the Regional Investment Board, which is responsible for allocating Oregon lottery funds through two programs: the Rural Investment Fund and the Regional Investment Fund. The Partnership is a flexible forum providing staff and resources to initiatives as they arise. For example, Partnership staff promotes regional tourism, emerging, high value agricultural cluster, and an inventory of rural industrial sites.

MWVCOG provides assistance to small business owners that are considering or applying for federal, state, and local small business loans. In addition, MWVCOG provides GIS, data, mapping services, and hosts eGovernment websites for members.

As the designated Metropolitan Planning Organization for the Salem-Keizer urban area, MWVCOG is also responsible for the Regional Transportation System Plan and the Transportation Improvement Program. It must also develop an annual Unified Planning Work Program and Air Quality Conformity Determinations to ensure air quality to state and federal standards.

**Oregon Cascades West Council of Government**

Oregon Cascades West Council of Government (CWCOG) was formed in the mid-1960s. It provides services and programs for local, state, and federal programs in Linn, Benton, and Lincoln Counties.

Members are:

- Benton County
- City of Harrisburg
- City of Sweet Home
- Linn County
- City of Lebanon
- City of Tangent
- Lincoln County
- City of Lincoln City
- City of Toledo
- City of Adair Village
- City of Millersburg
- City of Waldport
- City of Albany
- City of Monroe
- City of Yachats
- City of Brownsville
- City of Newport
- Port of Newport
- City of Corvallis
- City of Philomath
- Port of Toledo
- City of Depoe Bay
- City of Scio
- Confederated Tribes of Siletz
- City of Halsey
- City of Siletz

The CWCOG provides the following services:

**Community and Economic Development**

- **Transportation.** CWCOG provides administrative support for the MPO for the Corvallis area (Corvallis Area Metropolitan Planning Organization (CAMPO)) and is the convener of the Area Commission on Transportation for the three county area. The agency also provides regional car and vanpool services and

17. This section is summarized from the Oregon Cascades West Council of Government website at http://www.ocwcog.org/ viewed on June 23, 2010.
Transportation Demand Management programs. It also provides a special transportation brokerage program to connect riders to transportation providers.

The CAMPO was created in 2002. It consists of the cities of Corvallis, Philomath, Adair Village and portions of Benton County adjacent to those cities. Like all MPOs, it is responsible for the Regional Transportation Plan, the Transportation Improvement Program, and the Unified Planning Work Program.\(^\text{18}\)

- **Community Development.** CWCOG provides a variety of land use planning services to members, such as visioning and goal setting, research, scenario development, alternatives analysis, process facilitation, and public involvement.

- **Community Facilities Development.** CWCOG assists members in applying for and managing projects and grants for public capital improvements.

- **Economic Development.** As the federally designated economic development district for Linn, Benton, Lincoln, and Lane Counties, CWCOG develops and implements the regions Comprehensive Economic Development Strategy.

- **Business Lending.** CWCOG manages several loan funds for start-ups and expansion of businesses, as well as providing business assistance programs.

**Senior and Disability Services.** CWCOG is the Area Agency on Aging and provides financial, medical, and long-term care services for seniors and the disabled in Linn, Benton, and Lincoln Counties. It also coordinates Food Stamps, Senior Meals and Home Delivered Meals, and Oregon Project Independence.

**Technology Services.** CWCOG provides information technology services, ranging from network management, software and website management to member organizations.

**Lane Council of Governments\(^\text{19}\)**

Formed in 1945, the Lane Council of Governments (LCOG) is a voluntary association of governments in Lane County. It provides a forum for coordination on most regional issues in the southern Willamette Valley.

LCOG members are:

<table>
<thead>
<tr>
<th>Lane County</th>
<th>City of Springfield</th>
<th>City of Veneta</th>
<th>Port of Siuslaw</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Coburg</td>
<td>City of Veneta</td>
<td>City of Westfir</td>
<td>River Road Park &amp; Recreation</td>
</tr>
<tr>
<td>City of Cottage Grove</td>
<td>City of Westfir</td>
<td>Emerald People’s Utility Dist.</td>
<td>School District 19 – Springfield</td>
</tr>
<tr>
<td>City of Eugene</td>
<td>Fern Ridge Library Dist.</td>
<td>School District 52 – Bethel</td>
<td></td>
</tr>
<tr>
<td>City of Florence</td>
<td>Lane Community College</td>
<td>School District 68 – McKenzie</td>
<td></td>
</tr>
<tr>
<td>City of Junction City</td>
<td>Lane Education Service Dist.</td>
<td>Siuslaw Valley Fire &amp; Rescue</td>
<td></td>
</tr>
<tr>
<td>City of Lowell</td>
<td></td>
<td>Western Lane Ambulance Dist.</td>
<td></td>
</tr>
</tbody>
</table>

\(^{18}\) This section summarized from the Corvallis Area Metropolitan Planning Organization website, http://www.corvallisareampo.org/index.html, viewed on June 7, 2010.

\(^{19}\) This section summarized from the LCOG website at www.lcog.org viewed on June 14, 2010 and the LCOG 2009 Annual Report downloaded at www.lcog.org.
LCOG provides a wide variety of services, including:

- **Transportation.** LCOG is the federally designated MPO for the Eugene-Springfield urban area. LCOG staff provides technical expertise on a variety of regional transportation planning, coordination, and modeling projects for members.

- **Natural resources planning.** LCOG provides planning services for parks and recreation and water resources.

- **Land use planning.** LCOG provides a multitude of land-use planning services, which include metro planning, city planning, comprehensive planning, economic development, infrastructure development, legal services, intergovernmental coordination, and facilitation services. According to its website, LCOG also provides analysis of policy issues, preparation of draft administrative rules, legislative concepts and guides, and much more.

- **Community safety services.** LCOG provides systems analysis, resource development, facilitation and planning services, and research and evaluation for police, courts, prosecution, and social services.

- **Boundary changes.** LCOG provides technical boundary change services for annexations, withdrawals, formations, dissolutions, mergers and consolidations.

- **Grant writing.** LCOG staff provides grant-writing services for capital improvement and other major projects.

- **Technology services.** LCOG provides technology services, such as regional telecommunications management and operation, regional information systems planning and coordination, along with managing Metro Television, applied GIS and data services, and the Regional Land Information Database (RLID), on a contract basis.

- **Business loans.** LCOG provides assistance to businesses to obtain local, state, and federal loans. LCOG helps businesses determine if they are eligible for loans.

- **Administrative services.** LCOG provides administrative services to members, including fiscal, human resources, information services, clerical, and real estate.

- **Senior and disabled services.** LCOG is the designated Area Agency on Aging and Disability Services for Lane County and is therefore responsible for the planning and administration of elder and disability services.

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**Mid-Columbia Council of Governments**

In 1979, Wasco, Hood River, and Sherman Counties created the Mid-Columbia Council of Governments (MCCOG). Gilliam and Wheeler Counties joined MCCOG in 1992. According to the MCCOG website, “The purpose of MCCOG is to respond to the request from federal and state governments, for local government, to assume a greater

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responsibility in local decision making, and to address the need for local governments to cooperate and work together for greater efficiencies. Instead of many small local agencies creating burdens of administrative costs and duplicate efforts, this agency consolidated five counties and streamlined the costs of running the programs operating under one entity.”

The MCCOG work focuses on the following areas:

- Workforce development (Workforce Investment Act (WIA))
- Integrated Family Services
- Area Agency on Aging
- Transportation network
- Mid-Columbia Building Codes Services

Rogue Valley Council of Governments

The Rogue Valley Council of Governments (RVCOG) was founded in 1968 by Jackson and Josephine Counties. Today it includes 15 local jurisdictions and 7 special districts.

The 22 members of RVCOG are:

- Jackson County
- Josephine County
- City of Ashland
- City of Butte Falls
- City of Cave Junction
- City of Central Point
- City of Eagle Point
- City of Gold Hill
- City of Grants Pass
- City of Jacksonville
- City of Medford
- City of Phoenix
- City of Rogue River
- City of Shady Cove
- City of Talent
- Jackson Soil & Water Conservation Dist.
- Rogue Community College
- Rogue Valley Sewer Services
- Rogue Valley Transportation Dist.
- So. Oregon Regional Communications
- Southern Oregon University

It has no taxing, legislative, or enforcement authority. The COG’s basic role is to provide regional technical expertise and project management as well as a collective voice in state and federal issues. In 1982 RVCOG was designated as the Metropolitan Planning Organization for the urban area of Jackson County from Ashland to Central Point. With a separate MPO board for this area, RVCOG is responsible for the area’s regional transportation, air quality plans, and coordination of local and state transportation decisions.

The RVCOG focuses on three service areas:

- **Natural Resources Program** works to improve the health of the region’s watersheds. Activities include regional water quality planning, endangered species conservation, water quality sampling and analysis, watershed education, and greenway planning and construction. In addition, the RVCOG provides technical support to members, as well as staffing multi-disciplinary committees.

• **Planning** includes four areas:

_**Land use.**_ RVCOG conducts many short- and long-range planning projects for member organizations. Projects include updates to comprehensive plans or zoning ordinances, coordinating periodic review, or other special studies. One of the most prominent projects is regional problem solving in the greater Bear Creek Valley (see below).

_Transportation._ As the MPO for the Rogue Valley (members are Ashland, Central Point, Eagle Point, Jacksonville, Medford, Phoenix, Talent, White City, Jackson County, RVTD, and ODOT)

**Community Development**

**GIS Services**

• **Senior and Disability Program** provides a variety of services to seniors and the disabled, including Food & Friends (Meals on Wheels), in-home care, disaster registry, foster home licensing, case management, protection from abuse, family caregiver program, and Josephine County Lifespan Respite Program.

**Bear Creek Valley Regional Problem Solving (Now X2).** In 1999, Department of Land Conservation and Development (DLCD) suggested that Regional Problem Solving could help the region plan for growth. The cities of Central Point, Medford, Phoenix, Talent, and Ashland are located in close proximity to each other and over 60% of the county population lives in these cities. The City of Eagle Point, although geographically removed from the other jurisdictions, is also part of the RPS process. According to a project report,\(^\text{22}\) region leaders summed up the challenge:

> The cumulative, regional effects of growth will continue to present increasing challenges to all entities and citizens unless a regional set of solutions is derived that can respond to the issues that arise from the unique characteristics of the Greater Bear Creek Valley. The fact is that the current oversight of growth management in Jackson County by numerous levels of government, including one county, 11 cities, a variety of special districts, and numerous state and federal agencies cause inconsistencies, redundancies, and conflicting requirements. As a result, the future of the valley is now being determined by uncoordinated composite of decisions from a multitude of sources — some local, some not— rather than being shaped within the region by a shared, long-term commitment and vision.

The report also highlighted challenges present by state requirements for periodic review (updating of the local comprehensive plan) and complying with Goal 14. Periodic review staggers the schedule of comprehensive plan updates. The region suggested that by coordinating the review, economies of scale could be realized. Statewide land use Goal 14 requires each community to plan for residential, commercial and employment uses. Given the proximity of the cities, it was reasoned that these uses should be analyzed for the region, and the distribution determined for the region.

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\(^{22}\) Renz, John. (2006, October 6). *Memo to the SB 82 Big Look Task Force, quoted from the Greater Bear Creek Valley Regional Problem Solving Project-Phase One Status Report.*
The project developed five background documents: (1) a Base Case Plan, (2) a Regional Buildable Lands Inventory, (3) Regional Economic Opportunities Analysis, (4) a Regional Housing Needs Analysis, and (5) a Fifty Year Population Forecast for the Regional Plan Area. These documents support the Regional Plan, which is now being adopted by the participating cities and county. This fall, it will go to the Land Conservation and Development Commission for acknowledgement by the state.

DLCD provided over $200,000 in grant funds to support this project. By 2006, locals had contributed at least $205,000 in elected official and staff time, as well as $277,000 in direct costs.

Southern Oregon Center for Community Partnerships. In addition, the RVCOG has a non-profit organization called the Southern Oregon Center for Community Partnerships, which helps support activities between the public, private, education, and non-profit sectors. It has no staff, but administrative support is provided through RVCOG. Current activities focus on the Food and Friends Meals on Wheels program.

**State sponsored and supported regional planning**

**Regional Problem Solving (administered by DLCD)**

In 1996, the Oregon legislature passed HB 3482 (1996 Special Session, codified in ORS 197.652 et. seq.), which established Regional Problem Solving (RPS). The law provides a framework for counties, cities, and other entities to collaborate on land use issues and allows the Land Conservation and Development Commission (LCDC) to acknowledge amendments based on RPS activities that may not fully comply with the statewide planning goals, without taking an exception to the goals.

LCDC chose four pilot projects in the mid- to late-1990s:

- **South County (La Pine).** Deschutes County sought to address a variety of issues related to rural residential development in the La Pine area. Over 13,000 lots exist in the La Pine RPS study area, of which over half were undeveloped. At least 1,800 of the lots are located in areas where the water table is less than two feet. The existence of these lots, created before the formation of Oregon's statewide land use goals, and the potential for development, created numerous water quality, transportation (substandard roads), wildfire hazards, and other issues.
- **Clatsop Plains (north Oregon coast).** Clatsop County sought to address groundwater quality issues and the financing of basic services.
- **Grand Ronde-Willamina.** This project sought to address transportation and growth-related issues related to the construction of the Spirit Mountain casino.
- **Josephine County.** This RPS project addressed multiple issues from developing community plans for unincorporated areas to conducting planning for recreational, watershed, and aggregate resources.

The selection of these pilot projects was accompanied by a commitment by the state to develop an RPS “program” at DLCD. This consisted of dedicated staff and grant dollars to assist completion of the pilot projects. Initially, DLCD had two staff members...
to provide direct assistance to the local governments for the four pilot projects. The dedicated grant funds lasted for several biennia, but by 2003 all the dedicated staff positions had been lost or reassigned and there were no remaining targeted grants. DLCD Technical Assistance grants were employed on a limited basis for continuing projects until 2007.

Of the four pilot projects, only one was completed: The South County RPS. The South County RPS project ran from 1996 to 1999. Over 50 representatives from local, state, and federal agencies, special districts and citizens met over the four-year period. They made numerous recommendations, including:

- Transferable Development Credit program (since initiated) to transfer development credits from environmentally sensitive areas to a receiving area
- Designation of a new neighborhood for the receiving area
- Implementation of multiple activities to increase groundwater quality
- Creation of multiple activities to reduce wildfire hazard

Two other regions initiated RPS projects: Eugene-Springfield region (Region 2050) and the Rogue Valley (Greater Bear Creek Regional Problem Solving). The Region 2050 project was a voluntary planning effort focusing on a growth strategy for the greater central Lane County region over the next 50 years.23 Specifically, the strategy focused on seven areas: land use and development patterns; jobs and the economy; housing; transportation; community facilities and services; natural resources, open space, and the environment; and education.

The project was terminated in 2006. The draft “Regional Growth Strategy,” a product of the multi-year effort, was endorsed by the Lane County Board of Commissioners and several cities. However, two cities withdrew from the effort, dooming its adoption.24 25 It was never submitted to LCDC for acknowledgment.

The final RPS project is in the Rogue Valley: The Greater Bear Creek RPS project, or “NowX2.” Initiated in 1999, this project is a long-range land use plan for the region, which includes urban reserves for each participating city that are intended to accommodate a doubling of the regional population. Coordinated by the Rogue Valley Council of Governments, the Draft Regional Plan was published in November 2009. Cities in Jackson County are now in the process of reviewing and suggesting amendments for Jackson County to consider before final adoption. Once Jackson County adopts the Draft Regional Plan (anticipated in the fall of 2010), it will go to LCDC for acknowledgement (anticipated by the end of 2010).

The RPS statutes were revised in 2009, based on the recommendations of the Big Look Task Force. HB 2229 clarified regional problem solving procedures, as questions regarding process had proven to be a disincentive to engaging in RPS. The new statute requires a work plan for completion of the project with a three-year scope, similar to periodic review. As of July 2010, DLCD is not in discussions with any other region in Oregon on a future RPS project.

RPS is an existing resource that has the potential to facilitate regional planning for land use and transportation. John Renz, the Southern Oregon Regional Representative for DLCD summed up the statute and its application in the Bear Creek Valley,

Regional problem solving, while not a solution itself, offers the structured, state-sanctioned framework within which regional collaboration on planning issues is raised to unique levels. This has proven to be a powerful incentive for participation by jurisdictions, and may have been the single most important factor in the success of the Phase One of this project. Participants in this process believe that RPS is more likely than any other mechanism to allow the region to generate and implement strategies that will address their special needs while facilitating the approval of state agencies. RPS statues has been, and will probably continue to be, critical to institutionalizing regional planning.

Area Commissions on Transportation
The Oregon Transportation Commission authorized formation of regional advisory commissions in 1996 to provide better public input in the State Transportation Improvement Program (STIP) from local governments and other stakeholders. In 2003, the Transportation Commission formalized the ACT program in a Policy on the Formation and Operation of Area Transportation Commissions. Area Commissions on Transportation (ACTs) are advisory bodies that provide input to the Oregon Department of Transportation and the Oregon Transportation Commission. ACTs have no legal, policy, or administrative powers. Beyond recommendations and priorities on state projects, ACTs make recommendations on multi-modal facilities and projects and state transportation plans.

Ten ACTs, covering two to five counties, now serve most of Oregon. According to the 2003 ACT Policy, “ACT boundaries should be consistent with a “geographical community of interest” regarding the state Transportation System and coordinated with existing regional intergovernmental relationships. Shared interests might include a similarity of population, economy, land use, infrastructure needs, contiguous boundaries, commute shed, political and programmatic interests, and collaborative opportunities” Portland Metro and Hood River Counties have chosen not to form an ACT, but do coordinate programs and STIP advice directly with ODOT. Lane County is working with ODOT to form an ACT now (November 2010). Figure 3 shows the existing ACTs in Oregon.


ACTs are composed of elected officials of counties and cities (must be 50% of members), representatives of tribes, port districts, transit districts, and other regional bodies, ODOT Area Managers, and local agency staff. Some ACTs also include interest group stakeholders in transportation, business, and environment. Oregon Dept of Transportation (ODOT) Area Managers share coordination of most ACTs with local partners. Four Regional Partnerships (Lower John Day, Northwest, South Central, Southeast) and four Councils of Government (Central Oregon, Cascades West, Mid-Willamette Valley, Rogue Valley) each assist ACTs.

**Authority of ACTs.** ACTs are authorized in Oregon Transportation Commission policy. They are voluntary bodies and strictly advisory to ODOT and the Transportation Commission. According to a 2008 participant survey, ACTs are most effective in the areas of public input process, in better recommendations and priorities for the State Transportation Improvement Program (STIP), and in recommendations on special ODOT projects and programs. Participants found ACTs are less effective in coordination with Metropolitan Planning Organizations (MPOs), and in integration of land use and transportation issues.

ACTs overlap in membership with four MPOs (Bend, Corvallis, Rouge Valley, and Salem MPOs), but in general, MPO planning activities are not integrated with ACT functions. Except for Portland Metro, Oregon MPOs cover areas that are much smaller than their travelsheds and have not tackled land use issues. This may change in the near term, as local governments within all six MPO areas begin to develop new scenario plans for land use, greenhouse gasses, and transportation under Oregon HB 2001 and SB 1059. Presently, ACTs (or MPOs) have no defined role in the state’s initiatives to reduce greenhouse gas emissions through integrated transportation and land use planning.

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Intergovernmental Roles. To the extent that ACTs deal with projects or plans coming from city, county, MPO, and state transportation plans, they engage in intergovernmental planning. Unlike California, Vermont, and several other states, Oregon does not require regional transportation plans for all parts of the state outside its six MPOs, or for the wider regions covered by ACTs.

While they are valued locally, ACTs are underutilized in their intergovernmental planning potential, by just being regional advisory bodies to one state agency. The 2009 ODOT report on Oregon ACTs found that Oregon has a weaker regional transportation planning system in comparison to California, Iowa, and Washington. The Oregon ACT system is deficient in the following five key areas of state and regional transportation management:28

- **Planning.** Unlike the ACTs, regional organizations in California, Iowa and Washington have the authority and mandate to perform planning duties in addition to project prioritization.
- **Statewide coordinating meetings.** All three of the comparative study states have statewide coordination meetings for their regional organizations.
- **Common MPO/regional policy board leadership.** Washington and some of California’s regional organizations share the same policy board membership as their local MPO.
- **Funding authority.** Regional organizations in California, Iowa and Washington tend to have greater final decision-making authority on project funding allocations than Oregon’s ACTs.
- **Use of information technology.** Iowa and California use a web-based system that allows easy access to the State Transportation Improvement Program (STIP) process for all.

Program Characteristics. ACTs are innovative in their inclusiveness of local governments and other stakeholders. ACTs open local participation in their advisory function to broad groups of transportation stakeholders, usually on a monthly basis. To ODOT’s credit, no other state agency has established such long-standing and locally accepted regional advisory boards. Most participants feel that building regional consensus and recommendations on transportation projects is both valuable and informative.

As advisory bodies, Area Commissions on Transportation do not develop broader plans or visions for their region. ACTs are constrained by their limited advisory role to deal effectively with emerging statewide issues of greenhouse gas emissions, expanding and overlapping regional travelsheds, major multi-modal transportation corridors, and related regional land use issues. Most Oregon MPOs are also handicapped in tackling travelshed issues by tightly drawn MPO limits, reflecting Urban Growth Boundaries, as opposed to California where urban county MPOs usually include the entire county. Except for Metro, Oregon MPOs cover areas that are much smaller than their

travelsheds. Several major statewide corridors like I-5, I-84, US 101, and US 97 need integrated transportation and land use plans, which neither Oregon, or its ACTs and MPOs are structured to develop.

**Budget and Funding Authority.** ACTs do not have specific budgets, but are funded and staffed through ODOT’s Area Managers and through agencies involved in Regional Partnerships and Councils of Government. ACTs prioritize and recommend the state’s transportation investments, but do not allocate any funds, or review and prioritize other regional capital projects.

In *Oregon’s ACTs, Cross jurisdictional Collaboration and Improved Transportation Planning*, Susan Brody and Richard Margerum recommend that Oregon consider several options for broader regional transportation planning by ACTs. These include:

- Involve ACTs earlier in reviewing ODOT policy documents and provide more lead time for comments
- Consider providing opportunities for ACTs to review county, city and MPO transportation system plans that contain transportation projects of regional significance
- Consider ways for ACTs to participate in regional transportation planning

**Regional Investment Boards/Infrastructure Finance Authority**

In the decade before 2007, Oregon developed a system of thirteen regional investment boards, appointed by counties and assisted by the Oregon Economic and Community Development Department. These Boards, of at least two counties, developed a biennial “regional investment strategy” for economic development priorities in a region. The strategies were intended to form the “basis for state financial assistance” to projects and activities to meet regional priorities. The State had created both a Rural Investment Fund and Regional Investment Fund, which provided funds for technical assistance and priority projects within each region. In 2007 the regional investment boards submitted a list of regional infrastructure needs to the Economic Development Department. The Legislature has since phased out this program, due to concerns about the effectiveness of some projects and activities. In some regions Economic Development Districts continue regional economic planning while informal multi-county coordination also occurs.

In 2009, the Oregon Economic and Community Development Department restructured to focus on infrastructure finance and business development, in two separate program areas. Both core programs have regional representatives to work with local governments, but no longer provide funding to support regional economic development boards. The new Business Development Department focuses on local economic development assistance through its business programs and the new Infrastructure Finance Authority (IFA). The IFA offers numerous programs for loans or grants to cities, counties, ports, and private parties:

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Community Development Block Grants for non-entitlement cities and counties
- Main Street Program
- Marine Navigation Improvement Fund
- Port Revolving Loan Fund
- Port Planning & Marketing Fund
- Renewable Energy Feasibility Fund
- Safe Drinking Water Revolving Loan Fund
- Special Public Works Fund funding industrial infrastructure
- Special Public Works Emergency Projects for disaster assistance
- Water/Wastewater Financing

**Watershed Councils**
Watershed councils are one of Oregon's most established examples of community-based natural resource management. Councils were created to aid local and state efforts to recover native fish, wildlife, and water quality. The councils are voluntary groups that focus on place-based projects, programs, and policies in order to improve the ecology and economy of watersheds throughout the state. Oregon has 60 such watershed councils divided into five regions throughout the state. A list of the councils and regions, along with maps of the boundaries, can be found at the end of this section. Figure 4 shows the boundaries of watershed councils in Oregon.

**Figure 4. Watershed Councils, Oregon, 2010**

Source: Sara Schooley, OAPA, 2010.

**Network of Oregon Watershed Councils.** The Network of Oregon Watershed Councils is the statewide organization that facilitates and offers support to individual watershed councils in Oregon. The Network focuses on achieving three outcomes at the local
level:31

- Help build watershed council capacity through training, information sharing, funding and internal communication,
- Work to improve key relationships with watershed council partners such as Oregon Water and Electric Board, Oregon Association of Conservation Districts, Oregon Plan Liaisons, River Network, Oregon State University Extension and other organizations in the state, and
- Promote public awareness of watersheds and watershed councils

Council Actions. Since every watershed is a unique planning environment, each watershed council develops its own plan to meet the outcomes mentioned above.32 The plan may vary, but in general involves the following tasks:

- **Monitoring and assessing conditions.** Watershed Councils conduct scientific field-based assessments of watershed conditions in order to prioritize restoration and enhancement projects. Often, the results of the monitoring and assessment are used by other agencies such as cities, counties, soil and water conservation districts, universities and state and federal agencies.

- **Building community.** Watershed councils look to a wide variety of stakeholders in order to best reflect their community and offer the greatest insight into watershed issues, often requiring the council to establish efforts to engage both rural and urban residents and stakeholders.

- **Leveraging Oregon Watershed Enhancement Board (OWEB) funding.** The Network of Oregon Watershed Councils estimates that one OWEB dollar invested leverages $3.72 in match funds from other sources. This additional money goes into watershed efforts and economic growth in the region.

- **Educating stakeholders.** Watershed councils use education as their main tool for gaining stakeholder involvement and eventual support. Education can take many forms including workshops, restoration work parties, classroom visits, and outings.

Collaborative Efforts. Watershed councils rely on stakeholder buy-in to meet their objectives of improving the ecology and economy of a watershed. While many of these stakeholders include local, regional, and federal entities, councils also rely on internal connections to influence outside organizations. These internal connections are a result of volunteers and council board members serving in various roles in outside organizations.

Table 3 describes the cross-pollination between watershed council participants and active participant involvement with outside organizations. Tables 2 and 3 showcase

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32. The Network of Oregon Watershed Councils has prepared a “how to” book for watershed councils to advise and support the formation of the strategic plan and achieving desired outcomes. A copy can be downloaded from their website at http://oregonwatersheds.org/.
council collaboration with government entities, regional jurisdictions, and civic and non-profit organizations.

### Table 3. Watershed Council members/active participants involvement with other organizations, 2005

<table>
<thead>
<tr>
<th></th>
<th>Organizations w/nat. resource focus</th>
<th>Organizations w/o Nat. Resource Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Range of Percent of Members and Active Participants Involved with Other Organizations</td>
<td>10-100%</td>
<td>10-100%</td>
</tr>
<tr>
<td>Estimated Average Percent of Members and Active Participants Involved with Other Organizations</td>
<td>64%</td>
<td>62%</td>
</tr>
</tbody>
</table>


### Table 4. Government Collaborative Partners, 2005

<table>
<thead>
<tr>
<th>Oregon State Agency/Organization</th>
<th>% of respond. listing agency as a partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Agriculture</td>
<td>31%</td>
</tr>
<tr>
<td>Department of Environmental Quality</td>
<td>44%</td>
</tr>
<tr>
<td>Department of Fish and Wildlife</td>
<td>73%</td>
</tr>
<tr>
<td>Department of Forestry</td>
<td>46%</td>
</tr>
<tr>
<td>Department of State Lands</td>
<td>6%</td>
</tr>
<tr>
<td>Department of Transportation</td>
<td>10%</td>
</tr>
<tr>
<td>Department of Water Resources</td>
<td>23%</td>
</tr>
<tr>
<td>Oregon State University/Extension</td>
<td>17%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Federal Agency/Organization</th>
<th>% of respond. listing agency as a partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forest Service</td>
<td>46%</td>
</tr>
<tr>
<td>Bureau of Land Management</td>
<td>40%</td>
</tr>
<tr>
<td>Environmental Protection Agency</td>
<td>12%</td>
</tr>
<tr>
<td>NOAA Fisheries</td>
<td>19%</td>
</tr>
<tr>
<td>Fish and Wildlife Service</td>
<td>33%</td>
</tr>
<tr>
<td>Bureau of Reclamation</td>
<td>5%</td>
</tr>
<tr>
<td>Army Corps of Engineers</td>
<td>7%</td>
</tr>
<tr>
<td>Natural Resource Conservation Service</td>
<td>17%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Governments/Entities</th>
<th>% of respond. listing agency as a partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>County and City Governments</td>
<td>100%</td>
</tr>
<tr>
<td>Soil and Water Conservation Districts</td>
<td>52%</td>
</tr>
<tr>
<td>Tribes</td>
<td>17%</td>
</tr>
</tbody>
</table>


33. The figure for soil and water conservation districts appears to be low. Most respondents mentioned SWCDs at one time or another during the interview. It may be that some respondents omitted to mention them in answer to the specific questions about collaborative partners because many watershed councils are administratively linked to SWCDs.
### Table 5. Civic and Non-Profit Collaborative Partners

<table>
<thead>
<tr>
<th>Type of Organization</th>
<th>% of Respondents Listing Organization as a Partner</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental groups or recreational groups with environmental interests</td>
<td>69%</td>
<td>Nature Conservancy, various fishing groups, Izaak Walton League</td>
</tr>
<tr>
<td>Economic Development groups</td>
<td>10%</td>
<td>Chambers of commerce, community development groups</td>
</tr>
<tr>
<td>Civic Organizations</td>
<td>46%</td>
<td>Lions Club, Community foundations, Church groups, Volunteer firemen</td>
</tr>
<tr>
<td>School and Youth Groups</td>
<td>27%</td>
<td>Boy Scouts, Boys and Girls Club</td>
</tr>
</tbody>
</table>


### Table 6. Regional Collaborative Partners

<table>
<thead>
<tr>
<th>Type of Organization</th>
<th>% of Respondents Listing Organization as a Partner</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governmental</td>
<td>53%</td>
<td>All state and federal resource management agencies listed elsewhere; USEPA; tribes; soil and water conservation districts, economic development organizations</td>
</tr>
<tr>
<td>Non-Profit or other Public-Sector</td>
<td>26%</td>
<td>Surfrider Foundation, EcoTrust, Nature Conservancy, fly fishing organizations</td>
</tr>
<tr>
<td>Private Sector</td>
<td>8%</td>
<td>Timber and agricultural businesses</td>
</tr>
</tbody>
</table>


### Soil and Water Conservation Districts

Oregon Soil and Water Conservation Districts (SWCD) are considered municipal corporations, which are political subdivisions of state government that are not state agencies. ORS 568 directs the formation, governance, and powers of SWCDs.

**Formation.** In 1935, President Roosevelt signed the Soil Conservation Act, which established the Soil Conservation Service (SCS) within the Department of Agriculture. The SCS was initiated to conserve soil and natural resources, which were increasingly fragile given the environmental degradation of the “Dust Bowl” era.

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34. All of the information in this section was obtained on June 21, 2010 from the Oregon Soil and Water Conservation District Guidebook – A Guide to Operations and Management published on http://oregon.gov/ODA/SWCD/.
The SCS realized that enhancing the nation's soil and water resources would be more effective at a regional and local scale given the variety of landscapes, issues, and economic needs. In 1937, Roosevelt pushed state governors to allow and develop a model conservation district law. Oregon quickly followed suit. In 1939, Oregon passed legislation to establish conservation districts to implement programs that protected local renewable natural resources.

Currently, the Oregon Secretary of State certifies conservation districts. This certification awards multi-jurisdictional recognition, as well as allows the conservation districts access to public funding mechanisms and resources. SWCDs receive funding from a host of sources including, among others, county appropriations, federal and state grants, local income-producing projects, individuals, corporations, businesses, and foundations. Unlike watershed councils, SWCD have the authority to levy property taxes and several do so.

**Role.** ORS 568.550 directs SWCDs on their erosion control responsibilities and interagency requirements. The main responsibilities include identifying soil erosion, floodwater and sediment damage; responsibility for the conservation, development, utilization, and disposal of water; and implementing protective measures as needed. SWCDs are also given legal powers to implement or inhibit any actions that might affect soil erosion or water quality.

ORS 568.554 requires five actions from SWCDs: a long-range plan, an annual work plan, an annual meeting and notice, an annual report, and annual financial reports. The Oregon Soil and Water Conservation District Guidebook – A Guide to Operations and Management, offers the following methodology (planning cycle) to complete the actions: (1) identify local conservation needs (resource concerns), (2) set corresponding goals, (3) develop plans with clear, measurable objectives toward those goals, (4) ensure implementation, (5) monitor programs or projects during their implementation, and (6) evaluate results.

SWCDs in Oregon. There are currently 45 SWCDs in Oregon that take on various soil erosion and natural resource conservation roles per local needs. All SWCDs have a board of directors who serve 4-year terms. Each SWCD has different goals and objectives given its unique environmental concerns.

**Federally Designated Regional Planning**

This section describes three federally designated regional planning bodies that receive federal funding: Metropolitan Planning Organizations (MPOs) and Economic Development Districts (EDD), and Consolidated Plans for Housing. Figure 5 shows each of the EDDs across the state and the MPOs.
**Metropolitan Planning Organizations**
Per US Code, Title 23, an MPO is a federally mandated and funded transportation planning organization for regions that include, at a minimum, urbanized areas with a population greater than 50,000 and areas likely to be urbanized in the next 20 years. MPOs are responsible for developing a long-range, 20-year, transportation plan for the urban area, developing a 4-year Transportation Improvement Program (TIP), selecting projects to be funded from regionally-allocated federal and state revenues, or from local revenues, and developing a region's Unified Planning Work Program.

Oregon's six MPOs cover about 60% of state's population in the state's largest urbanized areas, within the urban growth boundaries of those centers. MPO boundaries can also cover much larger regions that include entire counties around urbanized areas, as long as they are within federal Standard Metropolitan Statistical Areas (SMSA) or Consolidated Statistical Areas. By using SMSA boundaries, California MPOs cover 98% of the state's population, including entire counties. If Oregon MPO's were expanded to the SMSAs, then they would then cover over 82% of Oregon's population.

Under the Oregon Transportation Planning Rule, the state requires MPOs to integrate their federal Regional Transportation Plans with state-required Regional Transportation System Plans (RTSP) and with county and local plans. The MPO prepares the TSP for its area (which constituent cities and counties must adopt) and Counties adopt a regional TSP for areas outside of the MPO boundaries. In the Portland MPO, Metro adopts the regional TSP and local jurisdiction plans must be consistent.

The following organizations serve as the conveners and provide professional staff for the six MPOs:

Regional Planning for the 21st Century | Oregon Chapter of the American Planning Association

November 2010 | Page 37

- Bend Area: Bend Metropolitan Planning Organization
- Central Lane: Lane Council of Governments
- Salem-Keizer: Mid-Willamette Valley Council of Government
- Rogue Valley: Rogue Valley Council of Governments
- Portland Metropolitan Area: Metro
- Corvallis Area: Corvallis Area Metropolitan Planning Organization

**Bend Metropolitan Planning Organization**

The Bend Metropolitan Planning Organization (BMPO) is the federally designated regional transportation planning organization for the Bend area. It is an intergovernmental entity that coordinates transportation planning activities for the planning area. The BMPO planning area includes the City of Bend and its urban growth boundary, with adjacent areas that are expected to urbanize over the next 20 years. The MPO area does not include the Bend region’s wider commute-shed, which includes Sisters, Redmond, Prineville and La Pine and large rural residential areas in between these cities. The Bend MPO population of 88,000 is about 50% of the population of Crook and Deschutes counties (181,195 Census Est. 2009).

The BMPO is responsible for the Regional Transportation Plan, Unified Planning Work Program, and Annual List of Obligated Projects for the region. It is also coordinating the Deschutes County Intelligent Transportation System Plan, a joint project between the Oregon Department of Transportation, the City of Bend, the City of Redmond, Deschutes County, Deschutes County 9-1-1, and the Federal Highway Administration to plan for the implementation of advanced technologies and management techniques to improve safety and efficiency.

Tyler Deke, AICP, the Bend MPO Manager said that there has been some interest in expanding the Bend MPO, however, other cities are hesitant to do so given the passage of SB 1059. SB 1059 will require local governments within MPOs to conduct scenario planning, and municipalities are hesitant to take on additional activities without funding.

The other five MPOs are described in Chapter 2 under Metro and Councils of Government.

**Economic Development Districts**

Funding is available to economically distressed regions across the country by the Federal Economic Development Administration (EDA). To be eligible for grants, the region must create a Comprehensive Economic Development Strategy (CEDS) and be designated an Economic Development District (EDD) by the EDA. The EDD is responsible for carrying out the strategies listed in the CEDS. The CEDS is an “economic roadmap” describing regional economic goals and the strategies to accomplish those goals. The CEDS should also generally list projects such as infrastructure, local capacity building, and business development aimed at decreasing unemployment in economically distressed EDDs. The EDD Board works with both public and private

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organizations to carry out the goals of the CEDS.

The CEDS must be informed by both public and private business, including but not limited to public officials, community leaders, workforce development officials, higher education, labor groups, and business leaders. A CEDS includes a description of the current economic conditions of the EDD, including the economy, population, geography, workforce development and use, transportation access, resources, environment, and other information. It must then include an in-depth analysis of economic opportunities and challenges of the regional economy. Once these issues are identified, the CEDS must list goals and objectives to address these issues. The CEDS must also show how the public and private sector will work together to achieve the goals of the CEDS. Finally, the CEDS must list the projects, programs, and activities the region seeks to fund to accomplish the goals of the CEDS.

Economic Development Districts in Oregon are:

- CCD Business Development Corporation (Roseburg)
- Central Oregon Intergovernmental Council (Redmond)
- Columbia Pacific Economic Development District (St. Helens)
- Greater Eastern Oregon Development Corporation (Pendleton)
- Mid Columbia Economic Development District (The Dalles)
- Mid Willamette Valley Council of Governments (Salem)
- Northeast Oregon Economic Development District (Enterprise)
- Oregon Cascades West Council of Governments (Albany)
- South Central Oregon Economic Development District (Klamath Falls)
- Southern Oregon Economic Development District (Medford)
- Portland-Vancouver Economic Development District (Portland)

Consolidated Housing Plans
The US Department of Housing and Urban Development (HUD) requires local governments to prepare and update a five-year “comprehensive housing affordability strategy,” which describes and programs housing and community development projects to be funded by HUD. This strategy is commonly known as a Consolidated Plan. Multiple jurisdictions in a region often combine efforts and submit one regional plan.

For example, all Multnomah County jurisdictions cooperate in a consortium to submit a single plan from Portland, Gresham, and Multnomah County. The plan must address housing needs of low and moderate-income residents for affordable rental and ownership housing and for opportunities to build incomes and assets. The plan must also include a local program to end homelessness. Annual action plans must describe how HUD funds will be used in the coming year to carry out the Consolidated Plan.\footnote{Cities of Portland, Gresham and Multnomah County (2005). Consolidated Plan 2005-2011.}
Ad-Hoc Regional Planning Efforts

Finally, many regional players turn to ad-hoc planning activities when there are multiple organizations needed to address a problem that covers multiple boundaries. Generally, an informal organization forms where representatives get together to discuss and educate themselves, and offer solutions to decision-makers. This section highlights just a few of the regional efforts.

**Deschutes Water Alliance** ([http://www.deschutesriver.org/](http://www.deschutesriver.org/)) is a group that is planning for water management of the Deschutes River Basin. It is composed of the Deschutes Basin Board of Control (North Unit, Central Oregon, Swalley, Tumalo, Three Sisters, Arnold, and Ochoco irrigation districts), the Confederated Tribes of Warm Springs, the Deschutes River Conservancy, and the Central Oregon Cities Organization (Bend, Culver, Madras, Maupin, Prineville, Redmond, and Sisters). The group seeks to balance the needs of agriculture, urban communities, and the ecosystem.

**Project Wildfire** ([http://www.projectwildfire.org/](http://www.projectwildfire.org/)). Project Wildfire was created via a Deschutes County Ordinance in an effort to prevent deaths, injuries, property loss and environmental damage resulting from wildfires in Deschutes County. The organization is governed by a 25 member Steering Committee that includes public leaders (local and state), private sector representatives (a marketing consultant, forestry consultants, homeowners associations, insurance representatives, and environmental advocates), and federal fire agencies.

Project Wildfire uses their connections to further education efforts around Community Wildfire protection Plans, and the risks on being a community with Wildland Urban Interfaces. The organization believes their success is a result of “building partnerships, sharing resources and eliminating redundancies.”

**Commute Options for Central Oregon** ([www.commuteoptions.org](http://www.commuteoptions.org)). Commute Options for Central Oregon began in 1991 as a resource and forum for central Oregon residents who were looking into traveling by bike. In the past 20 years, the group has gained five staff and has changed their focus to include advocacy and education campaigns around transportation means other than driving alone (vanpool, carpool, transit, bicycling and walking). Commute Options is a non-profit organization funded largely by ODOT, with the remaining 20% coming from private sponsors, cities, counties, community organizations and other municipalities. The group focuses is efforts in Crook, Deschutes, and Jefferson Counties.

The organization was a four-member advisory board and an eight-member working group. The working group is made up of municipal and community leaders who assist Commute Options with networking, future development, assessing the business climate and outreach.

**Central Oregon Cities Association (COCO)**. COCO was formed in 2002 in order for the cities in Central Oregon to unite behind their commonalities and important community issues such as water resources, transportation and economic development. Originally, COC included the cities of Bend, Culver, Madras, and Redmond. Since 2002, La Pine, Maupin, Metolius, Prineville, and Sisters have also joined COCO.
The Siuslaw Estuary Partnership ([http://www.siuslawwaters.org/](http://www.siuslawwaters.org/)). The Siuslaw Estuary Partnership is collaboration between the City of Florence and federal, state, and local partners with the mission to protect and improve water quality and fish and wildlife habitat in the lower Siuslaw River Watershed. The partnership began because of the concern that Florence (the only city within the Siuslaw Watershed) was contributing to watershed degradation. Therefore, the partnership was formed to facilitate a three-year project to identify environmental concerns, educate community stakeholders, and plan for future growth.

The Siuslaw Estuary Partnership Project is staffed by an Interdisciplinary Team representing 19 local, state, and federal agencies, including: the City of Florence; Lane County; Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians; Heceta Water District; Oregon Department of Environmental Quality; Oregon Department of Fish and Wildlife; Oregon Department of Human Services, Drinking Water Program; Oregon Department of Land Conservation and Development; Oregon Department of State Lands; Oregon Department of Transportation; Oregon Department of Water Resources; Siuslaw Soil and Water Conservation District; Siuslaw Watershed Council; US Army Corps of Engineers; US Bureau of Land Management; US Geological Survey; USFS Siuslaw National Forest; and the US Environmental Protection Agency. The Partnership is funded by project partners and the US Environmental Protection Agency.

West Lane Alliance. The West Lane Alliance was formed in 2009 by the cities of Veneta, Florence, and Junction City in order to gain traction in Lane County. Given their commonalities as small, rural communities in western Lane County, the cities believed they had common perspectives and desires for planning and united behind their similar goals. Most notably, the group has looked to further economic development and tourism planning. Each city has three representatives on the Alliance – the mayor, a councilor, and the city administrator. The group has not received any formal recognition by Lane County, but hopes that their combined efforts will force more recognition in the future.

Recent and proposed state and federal legislation provides funding and regulatory opportunities for regional planning. Oregon HB 2001 and SB 1059 direct local governments within the boundaries of MPOs (in coordination with MPOs) to conduct scenario planning to inform work to reduce greenhouse gas emissions. Regional coordination of local governments and MPOs will be required to successfully conduct scenario planning. In addition, new federal programs are also targeting regions for new funding to conduct transportation, housing, and economic development at the regional level.

Climate change legislation is requiring MPOs to consider and provide input on regional planning issues. MPOs are designed to satisfy federal transportation planning requirements (RTP, TIPs, air quality, etc.) and develop Oregon’s Regional Transportation System Plans. They are now being asked to work with local governments on transportation and land use scenario planning to reduce greenhouse gas emissions. This may be a challenge for some MPOs that would need to increase capacity and land

**Implications for a new regional planning framework in Oregon**

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use capabilities to meet these requests. The MPO Greenhouse Gas Task Force provides a logical four-year sequence of state and regional capacity building. This program should help to meet the planning, regulatory, technical, and resource needs of MPOs and local governments to implement land use and transportation scenarios. Oregon’s program may receive additional support from federal programs, standards, and funding during the same period.

Councils of Government are conducting most of the regional planning functions for land use, transportation, and economic development in the Willamette Valley (outside of Portland) and the Rogue Valley. Most regional activities, including federal requirements for federal funding, are coordinated by COGs.

Figure 6. Councils of Government, Economic Development Districts, Metropolitan Planning Organizations, and Metro, Oregon, 2010

Source: Sara Schooley, OAPA, 2010.

While a COG may be the most natural organization to conduct additional regional planning and decision-making activities, there are a number of drawbacks.

- **Accountability.** Unlike city, county, and special district elected officials, the governing board of a council of government is not directly accountable to the public. Instead, they are accountable only to their constituents. In addition, representation can change frequently, depending on who is in office at what time.

- **Fiscal Authority.** Again, unlike cities, counties, and special districts, COGs have no fiscal authority to raise taxes and spend the revenues. This limits their ability to fund programs and services. Most COG funding is from federal and state revenues, followed by fee for service. Member dues are generally less than 5% for most Oregon COGs.

- **Regulatory Authority.** Additionally, COGs have no regulatory authority. Thus, if they create transportation or land use plans, it is up to local governments to
implement them as they deem appropriate.

Central Oregon Intergovernmental Council is the primary regional body in Central Oregon, however, it does not focus on transportation or land use, inhibiting its ability to help the region tackle these tough issues. Central Oregon faces a variety of regional transportation, land use, economic development, and natural resource issues. While COIC is generally viewed as the forum for regional activities, the lack of focus and expertise in the transportation, land use, and natural resources policy areas inhibits regional coordination in these areas. If the region wants to comprehensively tackle these issues, it needs to decide if it wants to empower COIC to take them on, or create a new organization to coordinate activities.

Regions are highly motivated to conduct regional planning when it is a precondition for receiving money. Oregon communities now complete complex federally required plans for transportation and economic development in order to receive federal funds.

Regional problem solving is one potential tool for planning land use and transportation at the regional level. Regional Problem Solving does provide a state sanctioned process for addressing land use and transportation issues at the regional level that requires local adoption, however, it has been used successfully only a few times. State law now requires cities within a region to update comprehensive plans based on when their last update was completed (approximately), and they are not required to plan together. Greater efficiencies could be realized if communities within a region plan together.

Staggered deadlines for state and federal planning requirements and uncoordinated activities are inefficient. Efficiencies may be found when state and federal planning requirements are coordinated within a region. Communities that are intertwined could benefit if they could coordinate activities related to periodic review, planning for urban growth, updating regional transportation plans, and comprehensive economic development strategies. These activities and reports are based on much of the same data: population growth and related increase in jobs and housing.

While the primary role of ACTs is to provide advice to ODOT, they could play a much larger role in regional transportation planning. Oregon’s ACTs could provide a governance model for building broader regional planning bodies. The same local ACT participants are dealing with complex regional land use, transportation, economic and environmental issues, which could also be coordinated and integrated through a revamped regional forum.

Using new federal transportation and livable communities planning funds and initiatives, Oregon has the opportunity to develop innovative new regional planning commissions that would incorporate ACTs, with an initial charge of developing effective regional transportation plans that meet the state’s new greenhouse gas strategy and targets.
Chapter 3: Regional planning from across the country

Introduction

States and regions across the country have experimented with a variety of regional planning models. From California to Vermont and most places in between, regional planning organizations tackle a wide range of issues. This chapter explores different types of governance or coordination models, from strictly voluntary to government entities. It profiles information on regional planning strategies in four other States and five regions.

This chapter has four sections:

- **National overview of regional planning** discusses the evolution of regional planning in the US, why communities conduct regional planning, and illustrates some of the issues that must be considered by when forming a regional organization.

- **Profiles of statewide systems of regional planning** details how the states of California, Georgia, North Carolina, and Vermont implement regional planning.

- **Profiles of regional systems of planning** details how the San Diego, Salt Lake City, Cape Cod, Denver and St Paul-Minneapolis coordinate on regional issues.

- **Implications for a new regional planning framework in Oregon** reviews the key findings from the research of regional planning across the country.

National overview of regional planning

The Challenge of Regional Planning 1600-2010

Regional planning has been part of the American landscape since early colonial days. Royal charters delegated significant regional authority to colonial governments and private companies, to build roads, ports, bridges and canals. Colonial governments, in turn, asked local governments to provide regional road maintenance, poor relief, schools, peacekeeping, and tax collection. Cooperation among adjacent towns was common and necessary. Regional boards proliferated, to administer public health, schools, police, ports, tax allocation, and poor relief. In some areas, single-purpose regional boards became so cumbersome that larger cities consolidated them in city-county governments.

In the 19th Century, State governments swung toward localism, with new laws to make
town formation easy and home rule possible. Municipal annexation and consolidation also grew in popularity, as a way for cities to achieve regional economic, fiscal, and political goals. This trend diminished in areas where suburban towns took on more urban services, but annexation remains a key regional tool in the South and West.

From the 1890s to the 1930s, states enabled regional utility districts for water, gas, electricity, and sewers. States also granted county governments more regional authority to provide public health, parks, libraries, road maintenance and sewers. At the same time, voters in the 1920s and 30s repeatedly rejected proposals for major annexations, city-county consolidation and metropolitan governments.

From the 1930s onward, expanding federal programs promoted regional actions and plans in return for federal funds. These programs required regional decision bodies for highways, airports, sewer systems, mass transit, housing, and economic development, and planning. Federal and state laws tended to place new issues under regional or county control, such as environmental planning, water pollution, and mental health. Since the 1990s, a “new regionalism” has emerged that links regions across issues and across local borders.39

Regionalism today features a growing integration of regional plans for growth, equity, economy, and the environment. Local communities cannot tackle new “cross-cutting” issues that affect whole states and regions in isolation. Bill Dodge, former director of the National Association of Regional Councils, foresees a new regional imperative, for local governments to work together on tough environmental challenges, in an era of limited resources. Dodge warns that local governments have “reached the limit of their capacity to sustain their services, maintain their facilities, and finance employee health care and retirement.” He believes that: “The future of human settlements depends on local governments being able to work together. Region-by-region, local governments need to design and build a “regional charter” that empowers them to work together, as effectively as their individual charters empower them to work independently.” To build regional capacity he urges both state and federal governments to prioritize funding for regional initiatives.40

**Regional Planning Issues**

In order to offer practical and implementable recommendations for regional planning, it is necessary to understand the perspectives of planners and policymakers in current regional planning frameworks. In our first meeting with this project's advisory committee (the members of the Advisory Committee can be found in Appendix A), they defined what they believed was the greatest challenge or opportunity for regional planning in Oregon. The following section describes their views in addition to national planning literature.

**Power Sharing.** One of the major objectives of regional planning is to properly balance urban and rural issues in order to promote strategies that benefit the entire region.41

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41. Campbell, S. and D'Anieri (2002). *Unpacking the impetus for regional planning in the U.S.: cooperation, coercion...*
This objective often causes individual jurisdictions to worry that a regional focus might overlook important local considerations in favor of regional or state needs, leading to a loss of self-governance at the local level.

In addition, multiple advisory committee members expressed concern about the interface between regional decision-making and state and local functions. Although there is growing local and state support for regional planning efforts, the success of regional planning directly depends on the relationship between regional decision-making and state and local governments. Each entity requires empowerment in regional planning in order to be a vested and constructive partner.

“Natural Geography.” There is agreement that the role each level of government should have in decision-making (state, regional, or local) should vary depending on the issue and whom it might affect. For example, a city might not be large enough to contain all the factors that can affect a local economy (housing market, labor market, etc.) or a travelshed, whereas a state might be too large of an area. This situation is also easily replicated in the environmental planning field, where a watershed or air quality basin nearly always extends beyond a single city’s limits, yet is smaller than an entire state.42

McKinney et al (2002) describes these various geographic boundaries as the “natural geography” of the issue. In Oregon, this “natural geography” often causes one area (city, county, etc.) to be covered by a multitude of regional decision-makers with an even larger multitude of planning objectives. Thus, it is important to identify all the players within a specific geographical area to evaluate which organization is doing what and which groups should be collaborating to avoid duplication of efforts and/or promote regional goals. OAPA is especially interested in how defining the “natural geography” of land-use planning in Oregon can help to better manage growth, instead of continually expanding urban growth boundaries.

**Efficient Use of Resources.** One of the main purposes of this research project is to offer a regional decision-making framework that encourages wise and efficient use of resources. The use of resources (people and money) is especially important in the present economy as cities, counties, and states are looking to cut their budgets without causing a detriment to existing or desired services.

Brian Campbell, the current Oregon APA President, believes that the greatest regional planning challenge for Oregon is finding sustainable ways to make more effective and efficient decisions at the regional level. McKinney et al (2002) echoes Campbell’s views and believe that regionalism has proved itself as an effective way to run sustainable communities and address larger problems with fewer resources.

**Measuring Success.** Currently, Metro is beginning work on a regional indicators project to evaluate its undertakings and how the organization’s efforts have affected regional planning outcomes. Measuring Metro activities will offer insights on whether the methods, types, and resources spent on regional planning are working to improve the

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Measuring success offers the opportunity for regional decision-making bodies to reevaluate their purpose and decide whether they are achieving their desired objectives. Ethan Seltzer, Professor of Urban and Regional Planning, Portland State University believes that regional entities should first identify what problem(s) a regional organization intends to solve through its existence. Barth (2001) views these regional issues as ‘wicked problems’ that traditional bureaucracies cannot address. Therefore, a regional decision-maker must organize itself to best address the problem(s) it formed to solve and measure whether it is actually solving that problem to validate its existence.

National Snapshot of Regional Planning Models
As mentioned above, regional planning is often attempted as a solution to issues crossing city, county, and/or state boundaries. While each regional planning entity has its own story as to how and why it formed, the following are themes that are fairly common across the nation. Specific case studies are in the Regional Planning Profiles later in this chapter.

There are currently four models of regional planning that exist in the United States. While each regional entity is unique, these four models offer good overview of the basic structure that exists:43

- **Voluntary, nonbinding.** This approach encourages voluntary participation by providing incentives (such as infrastructure funding and/or technical resources). This model is often consensus-based and can offer flexibility if local needs or interests change. Yet, this model does not provide any enforcement powers, which can result in the avoidance of participation from jurisdictions that disagree with goals. Examples of this type of governance include the Southern California Compass Blueprint and Envision Utah.

- **Voluntary, binding.** In this model, jurisdictions voluntarily join but are bound to participate once they opt in. Incentives play a large part in the success of voluntary, binding models since the authority and success of the regional organization is dependent on the ability of local jurisdictions to implement regional plans and policies. This model often results in more regionally representative plans, since jurisdictions with varied opinions are locked in to form a collaborative plan. Yet, because there is no enforcement over jurisdictions, local jurisdictions might interpret and/or implement regional agreements differently causing inconsistent actions within a region. Examples of this type of governance include Denver’s Mile High Compact, and Chicago 2040 Regional Framework. California’s new Sustainable Communities and Climate Change Protection Act, SB 375, is a hybrid of the Voluntary Binding and Strict compliance models.

- **Strict compliance.** Strict compliance models require local jurisdictions to comply with agreed upon regional goals via legislation or another public process. Participation in this model is required, decisions are made per the majority vote.

43. These models were summarized in *Working across boundaries: people, nature and regions* by M.J. McKinney and S. Johnson (2009).
and dispute resolution occurs via through formal mechanisms. This model is enormously beneficial for implementation, since local jurisdictions are required by law to comply with regional decisions and policies. The major downside of this model is the lack of opportunities for local jurisdictions that disagree with the regional vision. This may result in the region adopting a plan regardless of a local disagreement or without mediation. Examples of this type of governance include Portland's Metro and the Minneapolis and St. Paul Metropolitan Council, and Vermont's Regional Planning Commissions.

- **Consolidation model.** This model occurs when multiple local jurisdictions consolidate into one regional government. While the consolidation model has the benefits of efficiency and less levels of bureaucracy, it also may cause the loss of regional identity and local relationships. IndyGov in Indianapolis-Marion County, Indiana is an example of a consolidation model.

In summary, there are a variety of regional planning and governance models that can provide a wide spectrum of governance, services, and enforcement to meet a region's needs. In order to determine what sort of regional government is appropriate for the situation at hand, McKinney and Johnson (2009) offer five questions for regions to ask:

1. Who develops the regional plan?
2. What is the authority of the plan?
3. Who participates in the regional governing body?
4. How does a regional body make decisions?
5. How are disputes resolved between regional and local interests?

The answers to these questions will point the region towards the sort of decision-making structure that would best suit its members, issues, and political climate.

**Reasons For, and Use of, Regional Planning**

While there are an endless number of issues that regional decision-making bodies can address, there are specific issues that are often the impetus for formation. These issues, among others, include:

- Economic development
- Transportation
- Solid waste management
- Infrastructure
- Education/schools
- Quality/affordable housing
- Watershed protection and/or development
- Natural resources/ecosystem services
- Social equity and justice
- Senior and disability
Once a region determines the specific issue(s) it will address, it also must decide what role its decision body will play. Regional entities have taken on one or more of the following roles throughout the country:

- **Knowledge building.** Regional organizations have conducted research and education in order to increase the capacity of elected officials and residents to better understand regional issues and inspire action. The Southern Rockies Ecosystem Project and the Blue Mountains National Resource Institute have in essence become think tanks for their region and help to define what being a region means in terms of the environment, economics, and social identity.

- **Community building.** Many regional entities serve to bring a variety of voices to the table in order to address a particular issue. This action has been shown to build political and personal relationships via facilitated conversations that would have otherwise not taken place. These organizations often refer to themselves as ‘conveners.’ Watershed councils are an excellent example of community building entities that often start as ad hoc forums for concerned citizens and governments.

- **Share resources.** While many local organizations would appreciate detailed data such as population growth measures, transportation systems, etc., many cannot afford to single-handedly complete data gathering and analysis. Regional governments have filled this gap by providing services to an entire region and in so doing, creating an information hub. For example, Portland’s Metro houses a Data Resource Center, which provides mapping services to many cities and counties within its region. This practice allows local jurisdictions access to important data and analysis without needing in-house resources or expertise.

- **Advisory.** Most regional governments form to take an advisory role in local decisions that have the potential to have regional effects. For example, the Santa Fe Regional Planning Authority was designed to address issues of trans-boundary growth. While regional planning entities can rarely, if ever, make decisions without local government buy-in, their participation in the decision allows a broader perspective to evolve.

- **Advocacy.** Some regional organizations serve as an advocate for specific regional issues. This is especially common in areas where environmentally sensitive regional decisions are occurring, such as watershed, air quality, or soil management decisions. Yet, regional entities have also been known to play an advocacy role for other avenues, such as the Pacific Northwest Economic Region, which is designed to promote economic opportunities in the Northwest.

- **Govern.** Fewer regional entities are set up to make, administer, and/or enforce broad policy in a region. Portland’s Metro does this in regional transportation, land use, solid waste and greenspaces. Most MPOs make and administer regional transportation policy. In the west, the Columbia River Gorge Commission and the Lake Tahoe Regional Planning Authority are two examples of broader federally-chartered regional governing organizations.

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Regional Planning for the 21st Century
Oregon Chapter of the American Planning Association
November 2010 | Page 49

**Metropolitan and Rural Uses of Regional Planning**
Regional alliances form to address the development and success of a community vision. In addition to varying per their chosen issue(s) (e.g., economic growth, environmental conservation, etc.), they vary per the community’s make-up, whether it is metropolitan, rural, or a combination of both. Regional alliances often serve to bridge urban/rural disconnects on issues that can affect both types of communities. While the uses are not mutually exclusive, the following trends are worth noting.

**Metropolitan Uses.** In Pittsburgh, the Allegheny Conference on Community Development believes that the “The Region is a Product,” and that the mission of the organization is to make people want to “live, work, invest and visit” the product.45 This mission is common within regions that include a large metropolitan center, and even more common in those that include more than one metropolitan center. Another obvious example of selling a region as a product is the promotion of the Research Triangle in North Carolina that involves marketing Raleigh, Durham, and Chapel Hill as a combined unit.

Metropolitan areas also use regional planning as a way to influence and/or inform themselves on issues that may affect them but occur on land beyond their boundaries. For example, Michigan’s Huron River Watershed Council is a consortium of governments that promote water quality management in the Detroit area. Many of the impacts to the watershed happen outside of Detroit, such as agricultural runoff (although many happen within Detroit as well), and the regional framework allows all of those affected to have a role in framing policy to protect the environment as a whole.

Growth management is possibly the most important use of regional governments for metropolitan areas area, especially in Oregon. While this issue has a multitude of inter-related issues – economics, transportation, housing, and equity–planning for these issues will undoubtedly impact all the jurisdictions within the metro area. For example, Maryland’s Moderately Priced Dwelling Unit (MPDU) initiative in Montgomery County looks at the metropolitan distribution of poverty and affordable housing. By looking at these issues from a regional perspective, versus a strictly urban perspective, poverty and its “attendant public costs” are evenly distributed throughout the county.46

**Rural Uses.** Due to limited resources, rural environments often lack planning staff and/or programs. Regional planning bodies or councils of governments can fill the resource gap by providing a central area for expertise. For example, in Texas, regional associations provide emergency management, economic growth, and senior service resources, all which have the possibility to drain any small jurisdiction’s budget.47 By centralizing resources and personnel, rural areas get the advantage of the services without debilitating the budget.

In addition, regional decision-making bodies have the ability to act as an adaptive government. This situation is common within rural unincorporated areas. Despite

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45. Allegheny Conference on Community Development, as cited in Campbell and D’Anieri, 2002.
47. More information of specific duties of regional governments in Texas can be seen at http://www.txregionalcouncil.org/display.php?page=region.php&COG=SPAG.
a limited governing structure, these areas need to be involved in regional decisions that affect them (e.g., urban growth boundaries) or that effect other areas (e.g., natural resource protection). This practice allows rural areas to participate in rural/urban discussions to increase understanding of regionalism and to decrease future disagreements and/or litigation.

This section describes the statewide systems of regional planning in California, Georgia, North Carolina, and Vermont. These states have pioneered in various approaches to regional planning for several decades and offer lessons and models for improvement of Oregon’s regional planning framework. Each state has delegated substantial decision authority to regional councils or commissions. Each state has delegated significant funding authority to its regional bodies, to create attractive incentives for regional and local cooperation.

- Vermont, Georgia and California have given regional bodies expanded planning and funding authorities, together with explicit state requirements and goals for integrated regional and local plans.
- Vermont and Georgia require performance by regions in return for funding and home rule incentives.
- Vermont’s regional commissions review and approve state-mandated comprehensive plans.
- California offers a strong new national model for an integrated regional planning framework that addresses climate change.

**Building the new California dream: Connecting climate change, transportation, land use, and housing**

California illustrates an empowered system of regional planning, which promises to integrate plans for global warming, sustainable communities, transportation, land use, and housing. Regional transportation planning agencies with significant planning and funding authority cover the entire state. California wants to transform its national leadership in climate change and energy planning, into a national model to control sprawl under Senate Bill 375, the Sustainable Communities and Climate Change Protection Act.

**Scope of the planning body.** In 2008 America’s largest state (36.9 million residents, Census estimate 2009) adopted what may be “the nation’s most comprehensive effort to reduce sprawl.” Governor Schwarzenegger hailed SB 375 as “the most sweeping revision of land use policies since Gov. Reagan signed the California Environmental Quality Act (CEQA)” in 1970. For decades, California has been a model for energy conservation and air quality plans and for strong state environmental and coastal review, although it is often seen as an icon for auto-dependent sprawl. It is the third biggest state in size at 163,396 square miles.

SB 375 expands the state's regional planning system by adopting the following practices:

- Regional targets for reduction of greenhouse gas emissions related to autos and light trucks.

- Regional targets for reduction of greenhouse gas emissions related to autos and light trucks.

- A sustainable communities strategy in future regional transportation plans that shows how a region will meet its targets through transportation and land use measures, while also considering best available scientific information on resource areas and prime agricultural land.

- Regional transportation funding decisions must be consistent with the new sustainable communities strategy.

- Regional housing needs plans, which are required under separate state statutes, must be consistent with the sustainable community strategy.

- California Environmental Quality Act (CEQA) exemptions and streamlining are offered for residential and transit priority projects that conform to a sustainable communities strategy.

In California, regional planning happens statewide in an integrated framework. Metropolitan Planning Organizations (MPO) cover both urban and rural areas in counties within Metropolitan Statistical Areas (98% of the state population). Regional Transportation Planning Associations (RTPAs), an analogous state designation, cover the remaining rural counties. Local elected officials guide the work of these organizations at the policy level. Caltrans (California Department of Transportation) works with these regional bodies to assure there is broad communication among regions and the state. Planners representing the 18 MPOs meet regularly with Caltrans and other state agencies to coordinate regional planning efforts and share best practices. While regional agencies focus on transportation, some MPOs and RTPAs associated with Councils of Government also assume planning and funding roles for housing, energy, land use, and environment.50

**Authority.** Two unique features empower California’s regional planning framework, (1) the California Air Quality Board (CARB) and (2) shared state funding for regional transportation agencies. Established in 1967, CARB programs have national impact on air quality management, vehicle standards, alternate fuels emissions reductions, and low carbon fuel. Under the Global Warming Solutions Act of 2006, CARB developed a landmark Scoping Plan to reduce greenhouse gases from all sources to 1990 levels by 2020, and to 80% of 1990 levels by 2050. In 1998, California granted its regional agencies strong funding authority, by passing through 75% of all State Transportation Improvement Program funds (state and federal). The regions have the lead authority to allocate these funds, even on the state highway system.

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Under SB 375, CARB is setting the regional targets this year (2010). The regions are now estimating potential greenhouse gas reductions, and they must adopt and implement Sustainable Community Strategies. Several MPOs have developed regional “Blueprint” plans, which contain the elements that SB 375 wants to integrate. Local officials on the regional bodies will decide whether transportation-funding decisions are consistent with the regional strategy. Local government plans and regulations, however, are not required to be consistent with the regional strategy. It’s too soon to tell how well regions will connect all these efforts, but signs are that they are taking this seriously.

**Intergovernmental Roles.** The state’s role has changed in the past decade, from deciding most transportation improvement investments, to facilitating regional planning and funding decisions. Much of the state’s transportation improvement decision-making has devolved to regional and local levels. New greenhouse gas targets and broad regional strategies push the envelope on traditional state and regional transportation planning and programming, both in California and nationally.

**Program Characteristics.** The intent of SB 375 is comprehensive regional planning and transportation funding that links greenhouse gas reduction, land use, transportation, housing, and economic needs. At a state level, this is a breathtaking expansion of standard regional transportation plans (under federal rules).

**Innovative Features.** The Urban Land Institute (ULI) declared SB 375 as a “cohesive regional approach” in a recent analysis of that bill. ULI concludes that the SB 375 planning process:

- Rationally aligns regional planning, transportation, environmental policy, and funding
- Potentially improves regional and local jobs-to-housing balance
- Provides clarity to developers on desired direction of development
- Initiates needed CEQA reform
- Allows for flexible regional and local solutions
- Improves efficiency and effectiveness of transit

To make the SB 375 work best, ULI recommends expanded transit investment certainty, better alignment of policy, development decisions, public services, and funding across federal, state, regional and local levels, and further CEQA review streamlining.

**Constraints in the Current System.** Among governance constraints, MPOs and Regional Transportation Planning Associations lack land use coordination authority. Most MPOs operate under voluntary Councils of Government. Local governments lack local incentives at present to adapt local plans to regional strategies. The University of California Center for a Sustainable California highlighted these concerns in a recent report, *Make It Work*.52

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Budget and Funding Authority. MPOs and Regional Transportation Planning Associations operate through local option taxes, state revenue sharing, and federal pass through funds. California has practiced expanded regional transportation planning and funding authority for over a decade.

Additional Factors. SB 375 has unleashed a flood of creative thinking about California's planning system. The *Make It Work* report from the Center for a Sustainable California recommends a set of ten essential policy and funding reforms to strengthen the state's new planning framework, change land use patterns and reduce greenhouse gasses:

- Direct state and regional transportation funds to regions, priority development areas, and localities that achieve “smart mobility” performance targets and provide transit-supportive land uses.
- Provide greater state and regional revenue-raising authority for transportation, contingent on those funds being used for SB 375 objectives.
- Encourage parking strategies that promote efficient use of land and transportation.
- Provide more funding options to support infrastructure and infill development.
- Enforce Regional Housing Needs Assessment (RHNA) requirements and redesign RHNA into a performance-based approach.
- Modify state property tax laws that encourage localities to base land use decisions on potential revenues that can be generated (a.k.a. “fiscalization of land use”).
- Provide additional CEQA streamlining for projects within priority development areas designated in regional strategies, and provide funding mechanisms to assist governments in conducting plan-level CEQA review.
- Implement an Indirect Source Review program within regional air quality management districts to reduce vehicle miles traveled (VMT).
- Strengthen priority regional development areas and priority conservation areas with a regional transfer of development rights program.
- Develop and fund state and regional open space and conservation plans and programs as part of Sustainable Communities Strategies.

Summary and Conclusions. The stakes are high and so are the aspirations for what may be the nation’s most ambitious 21st Century growth management program. California offers a strong emerging model of integrated regional planning and funding. It is asking its transportation agencies and Councils of Government to expand their horizon beyond transportation, to critical related planning. California’s evolving planning system under SB 375 is a major leap beyond just delegating more authority and funds to regions, to implement traditional transportation plans. It is a striking example of how state delegation of planning, authority, and resources can accomplish important regional and national objectives.

Sustainable Communities Strategies are untested on a statewide scale, but several regions have developed and implemented regional “Blueprints” with some success. The state has granted substantial funds and technical support to its regions, but more
incentives are needed to align local plans with regional plans. Presumably, California can strengthen state policies and local incentives, and enforce transportation funding consistency, by awarding or withholding regional funds.

With a strong state framework of regional funding and air resources planning, California MPOs and Regional Transportation Planning Associations enjoy some distinct advantages compared to Oregon MPOs and Area Commissions on Transportation (ACT), as shown in Table 7.

Table 7. Comparison of regional planning in California and Oregon

<table>
<thead>
<tr>
<th>Regional Planning</th>
<th>California</th>
<th>Oregon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide Coordination of regional planning bodies</td>
<td>Yes, by Caltrans</td>
<td>No ACTs Voluntary MPO association</td>
</tr>
<tr>
<td>Integration of MPOs with other regional transportation bodies</td>
<td>Yes</td>
<td>ACTs and MPOs not integrated</td>
</tr>
<tr>
<td>MPOs cover full urban counties, not just urban growth boundaries</td>
<td>Yes (MPOs cover Metropolitan Statistical Areas)</td>
<td>No</td>
</tr>
<tr>
<td>Population within MPOs</td>
<td>98%</td>
<td>60%</td>
</tr>
<tr>
<td>Conducting regional transportation planning</td>
<td>Yes, All areas of the state</td>
<td>Yes MPOs No ACTs</td>
</tr>
<tr>
<td>Integrated local and regional transportation plans</td>
<td>Yes (Must be consistent)</td>
<td>Yes, within MPOs under Or Trans Planning Rule No ACTs</td>
</tr>
<tr>
<td>Conducting other planning</td>
<td>Yes, most areas</td>
<td>No, ACTs/most MPOs (except Portland Metro)</td>
</tr>
<tr>
<td>Regions make funding decisions, with State pass-through revenues</td>
<td>Yes 75% of State TIP funds allocated by regions</td>
<td>MPOs limited authority ACTs advisory only</td>
</tr>
<tr>
<td>Greenhouse gas plans tied to transportation, land use, housing, natural resources</td>
<td>Yes</td>
<td>MPOs only in transportation (except Metro) No ACTs</td>
</tr>
</tbody>
</table>

Georgia on our minds: Regional commissions and local plans

Georgia illustrates a system of Regional Planning Commissions and local planning which has evolved over two decades. This system emphasizes state investments through regions to support regional and local plans.

Scope of Planning Body. In contrast to Oregon, the State of Georgia has used education and funding incentives to encourage smart growth and regional planning. With a population of 9,829,211 (2009 estimate)\textsuperscript{53} covering 57,906 square miles,\textsuperscript{54} Georgia has a much larger population, and a much smaller landmass than Oregon.


Georgia has a three-tiered planning system, which includes roles for local governments, regional governments, and the state. Unlike Oregon's regulatory approach, Georgia incentivizes local governments to adopt comprehensive plans, and more recently implementing (zoning) ordinances, with the “carrot” of state funding.

Georgia passed its first zoning law in 1957. Over the next several decades, few local governments adopted zoning regulations. John M. DeGrove summed up the state of planning in Georgia during this period,

… as of 1986, less than one-fifth of these jurisdictions [the 700 units of government] had adopted comprehensive plans; only one-third had adopted land use plans; and about half of the cities and nearly two-thirds of the counties had not even adopted zoning ordinances… Weak regional agencies, hundreds of local governments acting in isolation from one another, and lack of coordination among state agencies created a fragmented system incapable of addressing the growth issues facing the state.\(^{55}\)

The Governor of Georgia, Joe Frank Harris, established the Growth Strategies Commission in 1987. It was charged with developing a growth management strategy for the state, which was adopted in 1989. The Georgia Planning Act:\(^{56}\)

- Empowered the state's Department of Community Affairs (DCA) to assist local governments in the preparation and implementation of comprehensive plans.
- Directed DCA to assist the governor “… in the development of a comprehensive plan for the state.”
- Established or re-designated local area planning commissions as regional commissions.
- Authorized the appropriate regional commission (for example, in the Atlanta area, the Atlanta Regional Commission) to review local plans, point out conflicts, and force local government reconsideration of plans.

To be eligible for state funding, local governments must prepare and adopt comprehensive plans that comply with state planning standards for six land use elements: population, economic development, natural and historic resources, community facilities, housing, and land use. The law also required plans to be updated every ten years.

Almost all 700 local governments adopted comprehensive plans, showing that the threat of losing state funding was a strong incentive. However, many of the plans did not result in change in development patterns because, by 1995, only half of the counties and one-third of the cities adopted zoning ordinances to implement the plans. The Growth Management Strategies Reassessment Task Force (GSRTF) was formed in 1998


found that, “the requirements and incentives were sufficient to get local governments to make and adopt plans, but they were not sufficient to overcome the forces pushing local governments to plan and act in isolation from one another.”

**Authority of Regional Planning.** The Georgia Planning Act of 1989 identified land use planning roles for the state, regions, and local governments. The Act created regional development centers (RDCs) that reviewed and commented “on local plans to ensure coordination and consistency; preparing regional plans, including mediating conflicts between local plans; providing technical assistance to local governments; and preparing local plans if contracted to do so.” Memberships in RDCs are mandatory for local governments, which must pay minimum dues (at least $1 for each resident in each county). All areas of Georgia are represented by an RDC, as shown in Figure 8. According to DeGrove, if a local government failed to become a “qualifying local government” through participation in the planning and plan review process, grants from DCA and certain other grant and loan programs could be withheld, a disincentive strong enough to draw almost all local governments into the system.

**Figure 8. Regional Commissions, State of Georgia, 2010**

Source: Georgia Department of Community Affairs “Establishing Regional Commissions Under HB 1216, April 2008 (Commissions effective July 1, 2009).

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One of the other roles of an RDC is to review developments of regional impact (DRI). The RDC must review developments that may have a regional impact. The review covers six categories: environment and natural resources; the economy; water and sewer; solid waste or other public facilities; public transportation; and housing. The RDC is charged with determining if the development will or will not be “in the best interests of the state.” If the local government then did not attempt to mitigate the negative impacts of the development, it could lose its qualified status and the funding that goes with it.

One of the less successful regional efforts was the attempt to designate regionally important resources (RIRs). The Department of Community Affairs (DCA) Board developed procedures for designation and review of RIRs, “a natural or historic resource which has natural boundaries extending beyond a single local government’s jurisdiction or has value to a broad constituency and which is vulnerable to the actions and activities of man.”

Of the 160 areas nominated, only one was ultimately selected. DeGrove summed up the challenge of the Act in relation to these programs, “RIRs and DRIs shared with other elements of the Georgia Planning Act a Question of how effective a system based on incentives and disincentives could be.” DeGrove also said, “The current system cannot force a local government in a DRI to mitigate greater-than-local impacts; thus, the efforts to protect significant natural or historic resources have failed.”

Mediation of local land use disputes, another role of the RDCs, has not lived up to its potential.

In 2003, then Governor Sonny Purdue appointed The Commission for a New Georgia, with the purpose of making state government more effective and efficient. The Commission was made up of business and professionals from across the state that divided its work into teams of 8 to 12, to quickly analyze key operational functions of government. The task force that reviewed land use planning recommended consolidating some of the RDCs into a new structure of Regional Commissions, with uniform governance, funding, and accountability structures.

The recommendations were incorporated into HB 1216, which was passed in 2008. It stated that the purpose of regional planning is to: coordinate state contract terms, identify appropriate state and federal funding for the pursuit of shared service delivery goals, coordinate planning of state and federal resource allocation and state service delivery, and identify issues and opportunities requiring state, regional, or local action.

**Intergovernmental Roles.** The Georgia Office of Planning and Quality Growth within the Georgia Department of Community Affairs oversees the state planning program, however, it does not play a significant regulatory role at the regional or local level. The Department does give out grants to regional commissions to assist local governments with a variety of activities including preparing comprehensive plans, solid waste plans, and service delivery strategies; review of plans; mediation; GIS, development of zoning ordinances; conducting studies; and much more.

**Program Characteristics.** Local comprehensive plans are guided by the state planning
goals and quality community objectives. Communities must evaluate the consistency of their policies, activities, and development patterns with these goals and objectives.  

**Statewide Planning Goals**

- **Economic Development Goal:** To achieve a growing and balanced economy, consistent with the prudent management of the state's resources, that equitably benefits all segments of the population.

- **Natural and Cultural Resources Goal:** To conserve and protect the environmental, natural and cultural resources of Georgia's communities, regions and the state.

- **Community Facilities and Services Goal:** To ensure the provision of community facilities and services throughout the state to support efficient growth and development patterns that will protect and enhance the quality of life of Georgia's residents.

- **Housing Goal:** To ensure that all residents of the state have access to adequate and affordable housing.

- **Land Use and Transportation Goal:** To ensure the coordination of land use planning and transportation planning throughout the state in support of efficient growth and development patterns that will promote sustainable economic development, protection of natural and cultural resources and provision of adequate and affordable housing.

- **Intergovernmental Coordination:** To ensure the coordination of local planning efforts with other local service providers and authorities, with neighboring communities and with state and regional plans and programs.

**Quality Community Objectives**

- Regional Identity Objective
- Growth Preparedness Objective
- Appropriate Businesses Objective
- Educational Opportunities Objective
- Employment Options Objective
- Heritage Preservation Objective
- Open Space Preservation Objective
- Environmental Protection Objective
- Regional Cooperation Objective
- Transportation Alternatives Objective

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• Regional Solutions Objective
• Housing Opportunities Objective
• Traditional Neighborhood Objective
• Infill Development Objective
• Sense of Place Objective

Each comprehensive plan must contain three components:

• **The Community Assessment** lists issues and opportunities to be addressed, existing conditions, and evaluation of current community policies, activities, and development patterns.

• **The Community Participation Program** is the public participation program for the preparation of the comprehensive plan.

• **The Community Agenda** is the vision for the community and the strategy for achieving that vision. It must include three components: (1) the community vision, (2) a list of issues and opportunities, and (3) an implementation program.

Depending on the community size, additional requirements may include an evaluation of the transportation system and additional data and maps.

HB 1216 changed the requirements for regional plans. Regional plans must now also include a Projected Development Patterns Map that has a Conservation category that conforms to the RIR map. Regional plans must also have a stakeholder Involvement Program, and a Regional Agenda, which includes a vision section, and implementation program, guiding principles, and performance standards, and evaluation and monitoring activities. Regional plans are the vehicle for coordinating all local, state, and regional activities.

**Innovative Features.** Three specific innovative organizations in Georgia are worth highlighting: The Georgia Quality Growth Partnership, the Atlanta Regional Commission, and the Georgia Regional Transportation Authority.

**Georgia Quality Growth Partnership.** The Georgia Quality Growth Partnership, formed in 2000, is a public-private partnership of over 30 organizations that provide government and citizens with tools and information to create high quality communities in Georgia. The Partnership developed a toolkit of best practices that include development patterns, mobility, community/sense of place, preservation, protection, and conservation, economic development, finance, and zoning process/government regulations. The Partnership also collected numerous examples of quality growth and provides assistance to local communities on quality growth projects.

**Atlanta Regional Commission.** The largest and most active regional commission in Georgia is the Atlanta Regional Commission (ARC). Authorized in 1971, the ARC is the MPO for the Atlanta region and develops the Regional Transportation Plan and

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the Transportation Improvement Program for the region. The ARC is also charged with reviewing local plans with consistency to statewide goals. This was especially challenging in the 1990s, as many local governments were not motivated to implement land use planning. In addition, the ARC is responsible for a number of activities, including:

- Atlanta Fifty Forward, a regional visioning project for the next 50 years
- Plan 2040, the Atlanta region’s plan to accommodate economic and population growth over the next 30 years
- Water Conservation, a program that encourages water conservation and plans for water supply
- Livable Centers Initiative, an effort to encourage local communities to comply with the regional development plan to implement strategies that link transportation to land use to create livable, sustainable communities

Georgia Regional Transportation Authority. In 1999, the state created the Georgia Regional Transportation Authority (GRTA), one of the most aspirational regional efforts in the state. The GRTA addresses air pollution, traffic congestion, and sprawling development in the Atlanta region. The GRTA was given significant power to block federal transportation funds if local governments did not meet new air quality standards. The GRTA was also given the power to stop road construction projects and developments. Local governments that did not comply could lose all state funding.

Constraints in the Current System. While the state has made strides to improve regional coordination, it has depended primarily on funding for implementation. The regional commission’s role is primarily one of providing guidance and improving the coordination between neighboring jurisdictions. Given the relative ease of complying with the statewide goals, on-the-ground change has been slow.

Budget and Funding Authority.66 In addition to local government dues that are a minimum of $1.00 per capita, a regional commission gets funding from multiple state and federal sources. The GA Department of Community Affairs (DCA) is just one source of funding. No funds are directly dispersed to the local governments but rather indirectly through services provided by their respective regional commission as described below. DCA funds provide for regional commissions to:

- Develop, promote, and assist in establishing coordinated and comprehensive land use, environmental, transportation, and historic preservation planning in the state;
- Assist local governments to participate in an orderly process for coordinated and comprehensive planning and plan implementation;
- Assist local governments to prepare and implement comprehensive plans which will develop and promote the essential public interests of the state and its citizens and advance positive governmental relations among the state, regional, and local levels; and

66. From Elizabeth Smith, GA Department of Community Affairs, via email from September 8, 2010.
• To prepare and implement comprehensive regional plans which will develop and promote the essential public interests of the state and its citizens.

DCA funding is appropriated each year by the Georgia Legislature and the amount depends on available funding through general funds. Funding for fiscal year 2010 is nearly $2.8 million and this total is divided among 12 regional commissions. DCA uses a funding formula based on the number of counties and population per region to distribute these funds to the 12 regional commissions.

Summary and Conclusions. Georgia’s system of delegating review of local plans to regional councils is different than the state review and acknowledgement of comprehensive plans in Oregon. Oregon’s 19 statewide land use goals and corresponding statutes and administrative rules are much more detailed than Georgia’s and provide a common framework for all jurisdictions in Oregon to work from. Georgia’s 2009 reforms are making regional planning commissions more effective, by coordinating state and federal grants and services, through a regional framework.

The threat of losing state funding has been a successful incentive to completing comprehensive plans. In addition, the state mandated the creation and funding of regional commissions for every area of the state. However, consolidation of some regions was necessary as the low population, and corresponding funding, was too little to sustain some of the most rural commissions.

North Carolina’s Regional Councils: Filling the gap between state and local

North Carolina, utilizes regional councils as the state’s primary regional planning and decision-making tools. The state contains 9,380,884 people (Census est. 2009) in 53,865 sq. mi.). Regional councils serve in the administration, planning, fiscal management, and development needs of local governments while also being a resource for state government agencies looking to gather regional viewpoints and input. The following sections describe the formation, duties, authority, opportunities, and challenges within North Carolina’s regional council system.

History. In 1969, the North Carolina Department of Administration was charged with developing “a system of multi-county regional planning districts to cover the entire state” (GS 143-341). This charge was pre-empted by a year by the Intergovernmental Cooperation Act, in which Congress called for improved relationships and more efficient cooperation between state and local governments implementing federal programs.

In 1970, as a reaction to the Department of Administration’s charge and the Intergovernmental Cooperation Act, North Carolina formed 17 regions that shared similar economic, physical and social characteristics. One year later, the state enacted the Lead Regional Organization policy, which specified that each designated region would have a representative organization that would serve as the single touch-point for state agencies.

67. The information in the section was obtained from the North Carolina Regional Councils’ website at http://www.ncregions.org/ (Accessed on July 21, 2010) and from correspondence with their Executive Director, Betty Huskins.
Regional Councils were formed as these organizations. Figure 9 shows the boundaries of the regions.

**Figure 9. North Carolina Regional Council Boundaries**


**Lead Regional Organizations.** North Carolina went a step further in regional coordination with the state by requiring all regions to choose/form a lead regional organization (LRO). The LROs maintain a direct relationship with the state and are the channel for state and federal programs. As of 2005, 13 of the state’s LROs were councils of governments, four were planning and economic development commissions. 68

**Intergovernmental Roles.** Regional Councils work extensively with both local and state agencies as an intermediary. Table 8 highlights roles Regional Councils play in local governance and state decision-making. More specifics on what services regional councils deliver to various state governments can be found in the Regional Council’s *Interactions with State Agencies Report*. 69

**Table 8. Roles of Regional Councils in local governance and state decision-making**

<table>
<thead>
<tr>
<th>Local Governance</th>
<th>State Decision-making</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share information to solve common problems</td>
<td>Planning, coordinating and overseeing the administration of state and federal programs</td>
</tr>
<tr>
<td>Avoid duplication of efforts and better coordinate services</td>
<td>Assisting local governments in handling tasks set by state regulations</td>
</tr>
<tr>
<td>Work through a single agency to obtain and administer funds from numerous federal and state agencies as well as from private foundations and corporations</td>
<td>Providing a flexible network for effective regional action</td>
</tr>
<tr>
<td>Use professional expertise to aid in local operations</td>
<td>Fostering cooperation that helps avoid duplication of efforts and takes advantage of economies of scale</td>
</tr>
</tbody>
</table>


Promote cooperation between the public and private sectors

Determine ways of improving the quality of life for residents in their region


Regional councils are also the primary forum for regional transportation planning. Metropolitan Planning Organizations (MPOs) develop and set funding priorities for transportation. Additionally, in 2000, the General Assembly created Rural Planning Organizations (RPOs) to provide a regional forum for transportation although they are voluntary and do not directly influence transportation spending. RPOs are the vehicles for fostering regional cooperation on transportation issues.70

**Program Characteristics.** The structure of regional councils allows the councils to work beyond local and county boundaries to deliver federal and state services, planning, and implementation. The regional council structure also helps keep overhead and staff at a minimum because it encourages joint use of those with expertise, independent of the organization where the expertise is found.

Yet, there are gaps within the regional councils due to cities and towns that choose not to participate in the regional councils. Therefore, the regional councils will try to provide services when requested by non-members and when working with non-members is necessary for stronger collaboration. However, the regional councils do not work in non-members areas unless requested.

**Services Provided.** Regional Councils serve a wide variety of purposes for both local and state governments. Regional Councils cater to the needs of the localities within the region and council roles are determined by the council board which governs the operations of the individual council. The council boards are elected selected by the member organizations and vary in size depending on what the member organizations desire.

Each council houses staff that serve as resources for local and state governments. While each council's roles vary depending on the region's needs, every regional council provides technical assistance to member organizations. Much of the technical assistance is current information on state and federal programs, in order to communicate any programmatic or funding changes to local governments.

In addition, all 17 regional councils administer state funds for community and economic development, are area agencies on aging, and are affiliates of the North Carolina State Data Center.

**Top Regional Legislative Priorities 2010.** Every year, the association of Regional Councils determines their top priorities. This year, their priorities touch on popular national themes of sustainability and economy, while also putting emphasis on a relatively new issues in the world of planning – a rapidly aging population. The goals of

the regional councils for 2010 include:

- **Goal 1:** Support Regional Water Resource Planning. Seek explicit authorization for lead regional organizations to facilitate intergovernmental water resource planning within river basins as the state considers revisions to permitting and allocating water resources. Regional cooperation among local governments, water users, and other stakeholders is considered the most effective way to protect water supplies, maintain water quality and address drought and other problems. Regional Councils are in an ideal position to organize alliances among local governments and other water users.

- **Goal 2:** Support for Rural Transportation Planning Organizations. Support state and federal legislation providing continued funding for rural transportation planning organizations (RPOs), enabling increased participation in transportation planning by local elected officials in the state’s non-urban areas.

- **Goal 3:** Funding for Regional Planning Services. Restore state funding to enable regional councils to provide more assistance to distressed communities.

- **Goal 4:** Aging and Long Term Care Needs for the Older Population. Seek legislative action to ensure adequate funding for services and planning activities for the Home and Community Care Block Grant Program.

**Constraints in the Current System.** Funding is the largest constraint on the regional council framework. In addition, since the regional councils are the conduit for state and federal funding, if state and federal funding decreases, the need for, function of, and funding for regional councils also decreases.

The Association of Regional Councils is strengthening its framework of cooperation and collaboration with many outside sources and among themselves, in order to be less susceptible to downturns in state and federal efforts. Regions councils are starting to deliver statewide services as a “unit” when and where it is feasible, and will sign an Intergovernmental Agreement to provide these services in a uniform manner at the council level. In addition, the Association is developing a Staff Resource Directory and working to implement a statewide Action Plan to facilitate easier and more efficient statewide planning.

**Budget and Funding Authority.** Regional Councils use a variety of funding mechanisms including membership dues, federal and state grants, private grants, fees for service and state allocations. State allocations began in 1985 after the Regional Council executive directors convinced the Joint Regional Forum, the North Carolina Association of County Commissioners, and the North Carolina League of Municipalities to support this.

The amount appropriated by the state is allocated evenly via two factors: half allocated dependent on population in the region and half on the basis of the number of local governments that participate in the council. The goal of the state appropriation is to simply provide a funding base that would be added to by the mechanisms discussed previously.
Summary and Conclusions. Because the major role of the regional councils is to administer and support state and or federal requirements at a local scale, important initiatives that might be lacking within the state planning system are also lacking at the regional level. For example, North Carolina has no requirements for local governments to adopt growth management plans (as in Oregon). In addition, there are no restrictions on where infrastructure money can be spent; thus, it can be spent in areas that are not designated for urban growth.\textsuperscript{71} This combination of factors results in regional councils and individual localities to decide and implements growth independently, which, depending on the local leadership, could lead to progressive planning or no planning at all.

Vermont's Regional Planning Commissions: Regional partnership, local results

The Vermont profile illustrates a statewide planning system with a 40-year track record. Vermont integrates local and regional comprehensive plans based on State Goals. Regional planning commissions have existed since the late 1960s, but have been more active in comprehensive planning and coordinated into this system across the state since 1988.

Scope of planning body. Vermont is one of America's most rural states. With 9,250 square miles and 621,760 residents,\textsuperscript{72} only 38.2\% of Vermonter live in urban areas.\textsuperscript{73} Vermont's 237 incorporated towns and nine cities cover the entire state and typically include a mix of small urban centers and farm, forest, and resource lands. While Vermont has no official State vision, State Goal 1 and resident values support its de facto vision: Traditional, compact towns and villages separated by countryside.

Vermont has a heritage of local autonomy and democratic decision-making, based on its “town meeting” form of government. Towns and cities provide nearly all of Vermont's urban and rural services, including land use planning, transportation and infrastructure, environmental, housing, and emergency services. Vermont's 14 counties provide the state's court system, but not municipal services.

Vermont's modern state planning era began in 1970 with anti-sprawl Act 250. Act 250 requires state impact review and permitting of “major” subdivisions and developments, by the state's District Environmental Commissions. Act 250 permit review intends to minimize impacts on agricultural and forestlands, natural resource areas, and public facilities. By the 1980s, concerns grew that this approach did not account for cumulative growth. In 1988, Vermont adopted Act 200, the Growth Management Act, which dramatically expanded the scope and coordination of local and regional planning.

Act 200 empowered both local planning and Regional Planning Commissions (RPC), with a new process to integrate comprehensive plans at the local, regional, and state levels; new State goals to measure all plans; and increased funding for planning, housing and conservation easements. Act 200 strengthened the existing regional

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\textsuperscript{72} US Census Estimate, 2009.

\textsuperscript{73} US Census, 2000.
planning commissions, 12 at that time, 11 still exist. It charged the RPC’s with creating and integrating new regional plans and coordinating and approving local plans. The State Agency for Commerce and Community Development and local governments designated RPC regions based on “a logical geographic and a coherent socio-economic planning area.”

Most RPC regions largely follow county boundaries. However, several make exceptions because of geography or encompass more than a single county. RPCs must adopt a regional plan by a 60% vote of municipal members. In addition to regional plans, RPCs provide substantial services to their municipalities, state agencies, and other regional groups. Since less than 40 municipalities have their own planning staff, most rely on RPCs to develop local studies, plans and implementing ordinances.

**Authority of Regional Planning Commissions.** Vermont has delegated and decentralized the state’s planning authority to its regions. RPCs are mandated and authorized in the Vermont Municipal and Regional Development Act, (VSA, Title 24, Chap 117) which evolved from Act 200. The regional plan is the key process that mediates and integrates local and state plans and actions. Regional Plans must include elements that address basic regional policies, land use, energy, transportation, utilities and facilities, preservation of rare natural areas, an implementation program, regional development trends, and housing for all economic groups.

Among their key duties and powers, Regional Planning Commissions must do the following (VSA, Title 24, Chap 117, 4345a):

- Prepare a regional plan that is “consistent” with the State Goals and “compatible” with other regional and area municipal plans. No review process exists for regional plans. Regional and local plans expire and must be updated every five years.
- Prepare guidelines for development of the local and regional plans that will attain consistency with the State Goals.
- Review comprehensive municipal plans, confirm towns are engaged in a planning process by providing people and resources to support planning and “approve” municipal plans that are consistent with State Goals, compatible with their regional plan and the plans of adjacent municipalities and contains all the elements required in statute.
- Provide technical assistance to municipalities on public financing, plan and bylaws development, capacity studies, and state capital investment review.
- Promote cooperation among its jurisdictions for economic development for the “appropriate development, improvement, protection and preservation of the region’s physical and human resources.”
- Identify viable agricultural lands and “areas of regional significance” including historic, scenic, and natural resources.

Regional Planning Commissions provide a wide range of local and regional services:

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74. Vermont Statutes Annotated, VSA, Title 24, Chap 17, 4341.
• Municipal plan and zoning bylaws updates
• GIS and mapping services
• Transportation Planning studies and project development
• Watershed planning and project development, river corridor assessments
• Grant writing and project development for local and regional environmental, housing, urban centers, homeland security, and emergency management, transportation, and infrastructure programs.
• Emergency response planning
• Brownfield assessments and plans
• Special projects on downtown revitalization, recreation paths, farm preservation, economic development, energy and affordable housing.

“Confirmed” local plans give municipalities attractive incentives for effective community development. While comprehensive local plans are voluntary, 220 municipalities out of 246 had adopted plans in 2008. The RPCs provide strong technical support to most communities, even the smallest.

Vermont created incentives for communities to adopt and update local plans, several of which are subject to require regional approval. These incentives include:

• Greater local zoning and development review authority
• Authority to use Tax Increment Financing for urban renewal
• Authority to levy impact fees
• State grants aimed at supporting local planning and infrastructure
• Funding for conservation easements in agricultural and resource lands
• Funding for affordable housing
• Grants for municipal planning
• State-designated Growth Centers, especially downtowns, which enable state income tax credits and small business loans, special transportation and facility grants, business improvement districts, and Act 250 review waivers.

**Intergovernmental Roles.** Three bodies play major roles in coordinated intergovernmental planning:

• **The Agency for Commerce and Community Development** (ACCD) oversees the state planning system, but does not play a heavy regulatory role in regional and local planning. The ACCD and other state agencies, especially Transportation, provide a variety of resources for regional and local planning and projects.

• **State Environmental District Boards** have Act 250 regulatory oversight of major developments, at least in their environmental and public service impacts. Act 250 defines major developments at a higher review threshold for municipalities with
• **Regional Planning Commissions**, in lieu of the state confirm the local planning process and approve local plans. Municipalities implement “approved” plans through zoning regulations, site plan and subdivision reviews, along with capital improvement programs, special area or functional plans, and a variety of state-enabled development tools.

**Program Characteristics.** The state planning system is grounded in 13 substantive goals. The Vermont Planning Goals are:  

- Plan development to maintain historic settlement pattern of compact village and urban centers.
- Provide a strong and diverse economy.
- Broaden access to educational and vocational training opportunities.
- Provide safe, convenient, economic, and energy efficient transportation systems.
- Identify and preserve important natural and historic features.
- Maintain and improve quality of air, water, and wildlife, and land resources.
- Encourage efficient use of energy and development of renewable energy resources.
- Maintain and enhance recreational opportunities for Vermont residents and visitors.
- Encourage and strengthen agricultural and forest industries.
- Provide wise and efficient use of natural resources.
- Ensure availability of safe and affordable housing.
- Provide an efficient system of public facilities and services.
- Ensure the availability of safe and affordable childcare.

The Vermont planning goals declare that municipalities, regional commissions and state agencies will engage in a continuing planning process “To encourage citizen participation at all levels of the planning process, and to assure that decisions shall be made at the most local level possible commensurate with their impact.”  

Vermont’s dominant Town Meeting form of government facilitates direct citizen participation in most municipal decisions. Voters may directly decide municipal plans and bylaws, including the local planning process.

**Innovative Features.** Vermont’s planning system has several notable innovative features:

- **Multi-purpose integration of regional and local planning:** Vermont has created an incentive-based comprehensive planning system, with a strong focus on

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regional policies and actions that bridge small town insularity and autonomy. Insular planning is a challenge to effective regional and local planning throughout New England, where the same town and village pattern prevails.

- **Creative mix of regional regulation with state incentives:** Vermont offers its towns a wide array of state programs, which support downtown renewal, a “current use” taxation program that taxes farm and forest land enrolled in the program at substantially less than “fair market value” for other uses and widely used funding for conservation easements and affordable housing. With regional commissions that both assist towns and coordinate planning, and a menu of state incentives, Vermont offers a mix that its towns need.

- **Growth Centers program:** This evolving program is refocusing the state’s investment in places that are most critical to the state’s economic and social progress and historic self-image: Traditional and new town and village centers and industrial lands.

**Constraints in the Current System.** Among the constraints in the current system are the limited coordination of state agency plans and programs. Act 200 originally created a Council of Regional Commissions (composed of all RPCs and three state agencies) as a body to review, coordinate, and approve state agency plans and regional plans. Instead of a state planning office, the Council was intended to be a state planning commission. This oversight board ceased operation in the early 1990s, ostensibly for budget reasons. This lapse allowed state agency plans and programs to be less effective and accountable for implementing the state's planning goals. Several groups support reinstatement of the Council to improve the effectiveness of state agency plans and regional coordination. However, it was struck from statute in the last legislative session.

Additionally, while the state clearly wants to promote growth in existing downtowns and village centers, it has established its incentives to promote these policies in a piecemeal fashion. Accordingly, it created a Downtown program, a village center program, a growth center program, and a new town center program, all of which have slightly different rules, incentives, and processes. This failure to create an easy to use comprehensive program results in inefficiency and apathy towards certain programs.

While Vermont has many innovative state programs that support community development and conservation, outcomes are less effective than anticipated. Smart Growth Vermont, a planning watchdog group, rated state programs in 2007 on whether they tended to support compact growth or sprawl patterns:

- State programs that supported compact growth were state building construction, school construction support, small business loans, conservation easements, housing support, and Growth Centers, with mixed results in transportation.
- State programs tending to support sprawl patterns included economic development incentives and water and sewer programs.\(^{77}\)

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Budget and Funding Authority. Regional Planning Commission base funding comes from the Municipal Regional Planning Fund, “the MRPF fund,” created by Act 200. Revenues for the fund are generated by the Vermont Property Transfer Tax, a tax on nearly every real estate transaction in the state. MRPF funds are allocated by the Vermont legislature, purportedly by formula, each year and passed through the Vermont Agency of Commerce and Community Development, which administers the allocations to the municipal planning fund. RPC block grants from the MRPF fund amounted to $2.6 million in the 2009-2010 state budget. In addition, certain percentages, by formula, of the MRPF fund also support municipal planning, and a Housing and Conservation Fund, that funds the purchase of conservation easements on important agricultural and other resource lands and the development of affordable housing.

RPCs leverage their annual base funding many times over from federal and state grants for transportation, brownfields, emergency management, watershed and water quality, and local planning. Another modest source of RPC funding is municipal dues. The RPCs also coordinate, develop, and administer local capital funding plans and projects, grants and tax credits to towns.

At the State level, two additional factors affect the ability of regions to implement their plans:

- **Agency of Commerce and Community Development.** The ACCD is a unified state development department. It includes programs for economic development, tourism, land use planning, housing, brownfields, community development, and historic preservation and growth centers. The ACCD allows towns and regions to deal with one state agency for many needs, rather than with multiple agencies.

- **Focused State Investment.** Vermont has a focused state investment program for state and local priority areas. The Vermont League of Towns and Cities supports this program but believes that more can be done, stating “All state programs must provide strong incentives and regulatory relief to encourage growth in tax increment financing districts (TIFs), designated downtowns, new town centers, village centers, growth centers, in Vermont Neighborhoods and as appropriate, on remediated brownfield sites.”

Summary and Conclusions. Vermont offers a strong model of integrated regional and local planning and incentive based local planning, that implements state goals. Vermont’s Municipal Regional Planning Fund provides relatively stable and flexible base funding for planning, by its regional commissions and municipalities, together with dedicated resources to implement plans with conservation easements and affordable housing. The state has delegated substantial authority to its regions, and includes a modest set of financial and home rule incentives for “approved” local plans. Mandatory

local and regional plan updates every five years stimulate continuous plan improvement, similar to regional transportation plans for Metropolitan Planning Organizations. Vermont’s “center out” regional planning model is an attractive alternative to top-down state planning systems, such as Oregon. Compared to Oregon, Vermont local governments interact more with their region than with state agencies. Vermont regions and local governments integrate, originate, and own their regional planning, rather than pursue balkanized regional efforts under state supervision. However, Vermont’s incentive system may be less effective and focused than it could be in accomplishing State Goals, due to weak state agency coordination and overlapping incentive programs.

Figure 10. Vermont Regional Planning Commissions

This section describes five regional planning organizations across the country. These organizations illustrate four different frameworks for regional planning:

- **Voluntary partnership.** Envision Utah is one of the most effective non-profit organizations that conduct planning at the regional level. It is successful in large part because of its extensive public participation and involvement of local leaders.
• **Council of Government.** With six active councils of government, Oregon communities are very familiar with COGS. SANDAG is a council of government in southern California that recently evaluated its role in governance for the region. The issues discussed in this review are relevant to the discussion of effective and efficient regional planning in Oregon. The Metro Mayors Caucus and the Denver Mile High Compact something of a hybrid between a voluntary partnership and a council of governments.

• **Regional Commission.** The Cape Cod Commission is a regional planning commission that has authority over larger developments within town boundaries. In addition, it can empower towns to adopt special regulations to protect districts with valued resources (historical, environmental, etc.).

• **Regional government.** Along with Portland’s Metro, the St Paul-Minneapolis Metropolitan Council is one of the few regional governments in the country.

**Envision Utah**

Envision Utah, a non-profit organization, formed in 1997 to develop a quality growth strategy for the Greater Wasatch area in the Salt Lake City region of Utah. The region was expected to add over a million residents by 2020, compounding transportation and quality of life issues. Envision Utah is probably one of the most successful voluntary efforts to create positive change in the areas of land use and transportation.

For the first five years of its existence, Envision Utah conducted analysis, research, and public outreach to build support for the findings in the Quality Growth Strategy, a plan to protect the region’s environment, economy, and quality of life. The Quality Growth Strategy identified six goals:

• Enhance air quality
• Increase mobility and transportation choices
• Preserve critical lands, including agricultural, sensitive and strategic open lands
• Conserve and maintain availability of water resources
• Provide housing opportunities for a range of family and income types, and
• Maximize efficiency in public and infrastructure investments to promote other goals.

The Growth Strategy also identified 32 strategies to realize these goals. Envision Utah's success is generally credited to significant public outreach — it conducted over 135 public meetings sent out 930,000 questionnaires — and outreach to civic, business, religious, and other leaders to develop the Strategy. The leadership of Envision Utah engaged any and everyone that was necessary for a regional vision to succeed. At the onset, leaders throughout the region were asked what they valued. By identifying what was most important to people, they reasoned that it would be easier to accomplish common goals. “The overarching lesson here with respect to

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implementation is to identify and build on people's values and to remove barriers to the desired future.\footnote{ McKinney, M.J., and S. Johnson (2009). Working across boundaries: people, nature, and regions. Lincoln Land Institute of Land Policy. P. 95.} The efforts were entirely voluntary.

The Quality Growth Strategies have been used to help support a $45 million bond measure to protect open space, as well as increase the sales tax to build light rail and commuter rail. It has also been used to increase density in downtown Salt Lake City and discourage strip malls.

Envision Utah expanded its model and the organization has conducted numerous visioning plans for other counties and regions throughout the state. In addition, they have conducted or participated in the development of economic development plans and transportation and land use plans. They also developed numerous toolkits and best practices for local governments.


The Denver region has several regional organizations that work on land use, transportation, affordable housing, and other issues. The Denver Mile High Compact is a unique effort to plan for the Denver region. It is a partnership between the Metro Mayors Caucus, an organization that represents 37 Mayors in the Denver region, and the Denver Regional Council of Governments (DRCOG), which represents 9 counties and 47 cities.

In response to failed efforts to address growth related issues statewide in the 1990s, leaders in the Denver region crafted the Denver Mile High Compact in 2000, a plan to manage growth. By signing the compact, cities are bound to principles in Metro Vision (updated in 2007 and now called Metro Vision 2035).

Begun in 1992 by the DRCOG, Metro Vision\footnote{ Summarized from the Metro Vision 2035 brochure, downloaded on July 20, 2010 at http://www.drcog.org/documents/MV%20plan%20brochure%202%2011x17.pdf.} is a scenario evaluation of projected growth in the Denver region, and analysis for the update of the federally required Regional Transportation Plan. After analyzing several alternative growth scenarios, area leaders chose a preferred alternative and developed visions, goals, and policies to implement the preferred alternative.

The Metro Vision provides a framework for local governments regarding development, transportation needs, and environmental quality. The need for the plan came from regional leaders concerns over traffic congestion, air and water quality, cost of infrastructure and public services, and development of parks and preservation of open space.


• Ensure that urban development occurs within a defined urban growth boundary/area to promote an orderly, compact and efficient pattern of future development.
• Manage the extent of low-density, large-lot development occurring on the periphery of the urban area consistent with Metro Vision's stated policies.
• Encourage the development of higher-density, mixed-use, transit and pedestrian-oriented urban centers throughout the Denver region.
• Maintain Boulder, Brighton, Castle Rock and Longmont as distinct and self-sufficient communities, separate from the larger urban area.
• Recognize the small communities located in the rural and semi-urban areas of our region and more clearly define and support their regional role.
• Create senior-friendly communities by promoting development patterns and community design features that meet the needs of residents as they age.
• Provide safe, environmentally sensitive and efficient mobility choices for people and goods; and integrate with and support the social, economic and physical land use development of the region and state.
• Establish an integrated, linked, permanent parks and open space system that will include a variety of open space and make appropriate open space accessible to all of the region's population. A minimum of 854 total square miles of parks and open space should be protected by 2035.
• Restore and maintain the chemical and physical integrity of the region's waters to ensure clean water for residents and a balanced, healthy, ecological community.
• Protect human health and environmental quality by achieving and maintaining ambient air quality standards.
• Minimize exposure to excessive noise levels associated with land use and transportation activities.
• Adopt or update zoning and development codes that implement the comprehensive plan.
• Link comprehensive and master plans to Metro Vision

Implementation of the Metro Vision is voluntary. The Metro Vision states, “Relying on voluntary participation allows the plan to be implemented without the formality and resources required within a more traditional regulatory framework. Without full participation by all jurisdictions, though, the goals contained in Metro Vision cannot be achieved.” As of June 2010, 45 communities representing almost 90% of the region's population had signed the Compact.

William Broderick, a regional planner with DRCOG, said that critics are concerned by the lack of “traditional enforcement methods” and that implementation of the Metro Vision instead depends on “incentives, education, awareness, and public pressure.”

2001, DRCOG tied 20% of the points for rating transportation projects to elements of local transportation projects the implement the Metro Vision.

**San Diego Association of Governments (SANDAG)**

Eighteen cities, over 200 special districts and 18 Native American reservations (represented by 17 tribal governments) all operate within San Diego County, complicating governance of the region. SANDAG, Created in 1966 (as a Comprehensive Planning Organization, a subcomponent of San Diego County), was formed to address long-range land use planning and transportation issues. SANDAG is a council of governments and Metropolitan Planning Organization (MPO), and is governed by a board of elected officials from the cities and county. Like most councils of government, it has no directly elected officials or land use regulatory authority, but it does have transportation taxing authority and provides regional transit services.

SANDAG represents the 18 cities and the County of San Diego in southern California. With a population of over three million in the county (2009 US Census) covering 2.7 million acres, the San Diego is much larger than any MPO region in Oregon.

The primary responsibilities of SANDAG are:

- **Transportation planning.** As the region’s federally designated MPO, SANDAG is responsible for the development of the Regional Transportation Plan, Regional Transportation Improvement Program, and a Regional Short Range Transit Plan. It is also the state Regional Transportation Planning Agency (which enables it to administer a half-cent sales tax) and the San Diego County Regional Transportation Commission (which makes it responsible for coordinating planning and operations throughout the county). In addition, SANDAG plans for highway and transit service (though not airport or port planning).

- **Transit.** SANDAG is responsible for the development and operation of the region’s Metropolitan Transit System

- **Regional planning** SANDAG is responsible for two major plans.

  - **The Housing Needs Assessment**, which describes the number of housing units that must be incorporated into housing planning documents in each city (or entity that does planning), and

  - **The Regional Comprehensive Plan**, which integrates local land use and transportation plans into a regional plan. The first Plan was adopted in 2004 and is more a vision than implementation plan.

One of the unique elements of SANDAG’s program is self-certification of the regional housing needs assessment. State law authorized a pilot program (due to sunset in 2010) for the San Diego region. Under the pilot program, SANDAG set affordable housing production goals over a five-year period. If the county or city meets the goals, then they are not required to submit their plans for state review. To encourage self-certification,
SANDAG is tying grant funding to housing production by local governments. It is also using transportation funding as an incentive for affordable housing. However, according to the State Legislative Analyst’s Office report, the limited use of funding as an incentive has limited the effectiveness of this approach.

In 2006, the state’s Legislative Analyst’s Office conducted a study of the governance of SANDAG. It came to several conclusions:

- SANDAG is most effective at transportation planning, where it has direct control of resources (about $377 million in 2004-05, a third of all transportation funds for the region) and decision-making. By consolidating transportation planning, SANDAG does a better job of considering a wide range of options (such as highway expansion, transit, and managed lanes, and weigh service needs throughout the region).
- SANDAG has wide-ranging set of responsibilities, for which it can do a better job of pursuing policies and expending resources that achieve multiple goals.
- Because it has no way to implement the Regional Comprehensive Plan, and no authority to require local governments to implement it, SANDAG’s influence in land use is limited.
- Outside of transportation planning, SANDAG is primarily a public forum for regional decision-making and building consensus.
- Decision-making sometimes represents geographic equity, as opposed to what is best for the regions. For example, funds from the regional sales tax appear to have been allocated to each city to ensure geographic equity, instead of where it is most needed in the region.
- SANDAG’s lack of authority over land use reduces the effectiveness of transportation planning.

Based on 2009 research by Richard Ross for the City Club or Portland Transportation Governance Report and two interviews with the SANDAG director, he disagrees with some of the conclusions listed above regarding SANDAG’s relative impact. SANDAG may be California’s most powerful COG. With $377 in regional transportation resources to allocate annually, the Metropolitan Transit System and regional housing certification, SANDAG controls more resources and can have more direct impacts on regional land use than other California COGs/MPOs or Portland’s Metro.

Cape Cod Commission

The Cape Cod Commission (CCC) in Massachusetts, was created by the Cape Cod Commission Act in 1990 and confirmed by a majority of voters in Barnstable County. The Commission helps guide the development patterns, as well as protect the environment and unique character of Cape Cod. It serves 15 towns and Barnstable County.

87. This section summarized from the Cape Cod Commission website, viewed on July 10, 2010 at http://www.capecodcommission.org/.
The Commission is the land use and regulatory agency for the County. The CCC is governed by a 19-member commission, with one member appointed to a three-year term by the Board of Selectmen from each of 14 Cape towns and by the Town Manager for the Town of Barnstable. Three members are appointed by the Barnstable County Commissioners (one County Commissioner, one Native American, and one Minority representative), plus one Governor appointee, who is a non-voting member.

The CCC is a planning and regulatory body that is responsible for:

- **Creation and updates of the Cape Cod Regional Policy Plan.** This document provides 31 goals and minimum performance standards to accomplish these goals.

- **Review of Developments of Regional Impact.** The CCC reviews developments that are regional in nature, such as water quality, traffic flow, historic values, affordable housing, open space, natural resources, and economic development. Once the CCC reviews and approves or denies the application, it then goes to the town regulatory board for review. In addition, applicants can request a joint state/regional review of projects going through the Massachusetts Environmental Policy Act (MEPA) process.

- **Designation of Districts of Critical Planning Concern.** Districts of Critical Concern, nominated by local towns and approved by the Barnstable County Assembly of Delegates and the County Commissioners, allow the town (or group of towns) to adopt special rules and regulations to protect natural, coastal, scientific, cultural, architectural archaeological, historic, economic, or recreational resources or values of regional, statewide, or national significance.

**The Metropolitan Council**

The Metropolitan Council is the regional planning agency for the Twin Cities in Minnesota. It was created in 1967 by the state legislature and is empowered to coordinate planning and development in the Twin Cities metropolitan area. Additional legislation strengthening its role within the region was passed in 1974, 1976, and 1994. The 1994 legislation merged the Council with the Metropolitan Transit Commission, the Regional Transit Board, and the Metropolitan Waste Control Commission. Appointed by the Governor, the Council is composed of a chair and 16 members, representing districts of the region.

It has jurisdiction over seven counties in the St. Paul-Minneapolis metropolitan region. It has over 3,700 staff and a $700 million budget, most of which is dedicated to running the regional transit and wastewater treatment facilities for the region.

Its functional areas are:

- **Transportation** includes two transportation services:
  - **Metro Transit** is the transit service for the metropolitan region, one of the

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88. This section summarized from the Metropolitan Council website, viewed on July 15, 2010 at http://www.metrocouncil.org.
largest transit systems in the country.

- **Metropolitan Transportation Services** is the metropolitan planning organization for the region and creates and updates the Regional Transportation Plan and Transportation Improvement Program, among other planning projects, for the region.

- **Community Development** is responsible for the creation, maintenance, and outreach to local communities for the Regional Development Framework, the regional growth plan for the region. In addition, this unit provides local planning assistance, as well as provides research and data about the region, and forecasts growth. Two additional programs it provides is the Livable Communities program, which provides funding to local communities for economic revitalization, affordable housing, and connects land use, transportation, and enhances local identity. It also is the Council’s housing and redevelopment authority and administers federal Section 8 Housing Choice voucher program for four counties.

- **Environmental Services** runs the region’s wastewater sewer and treatment facilities.

Unlike Portland’s Metro, the Metropolitan Council runs transit and wastewater treatment. According to the first chair of the consolidated council, there are benefits to operating as well as planning for regional services. “I understand critics’ point about combining planning and operations—that operations consume a lot of time and attention,” said Curt Johnson, the first chair of the revamped Council. “But the point they miss is the synergy between the two. You put the folks thinking long-term next to the ones putting service on the street and a lot of learning takes place.”

“The record shows this region has more efficient services and better stewardship of natural resources than it would have by doing things more piecemeal. Having one organization focused on the region as a whole gives the Twin Cities a big advantage over many other places,” said Johnson. 89

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**Implications for a new framework for regional planning in Oregon**

Reform of regional planning should integrate and streamline any newly designated regional bodies with existing regional bodies and configurations, such as COGs, MPOs and Area Transportation Commissions, as is done in California, Vermont, and Georgia.

With varying degrees of effectiveness, Vermont, North Carolina, and Georgia have multi-county Regional Planning Commissions that decentralize state coordination of planning and state funding to regions and local communities. As a local option, regions could form Regional Planning Commissions, composed of local governments, and delegated to prepare state-certified regional land use and transportation plans, to review and acknowledge local plans, and to administer and allocate a focused Regional Investment Program. As a starting point, Regional Planning Commissions could be

authorized within the boundaries of Area Commission on Transportation areas. Consolidated regional planning commissions could better integrate the existing transportation and other planning functions, resources and activities of ODOT, DLCD, ACTs, MPOs, Regional Partnerships, and Councils of Government. MPO plans would nest within broader regional transportation plans, as several states have done. The payoff for Oregon would be a system of effective and complete regional land use and transportation plans and initiatives, that would better address the aspirations and pressing issues of 21st century Oregon communities.

Using the California model and recent Oregon transportation and climate change legislation, Oregon could develop a new framework for all regions (not just MPO regions) to create and adopt multi-county regional “Blueprint” plans. Under California SB375, these plans are now called “Sustainable Community Strategies.” Blueprints are based on regional land use and transportation scenarios. These regional general plans integrate land use and transportation for a 40-year future. Blueprints should coordinate, at a minimum, policies and actions for energy and climate change, land use, transportation, housing needs, economic development and natural resources. The Blueprint plans would cover feasible land use and transportation options, which vary by region. Guidelines for these plans could vary between urban and rural areas, based on variations in community character and economy.

As California has done for transportation, Oregon could delegate substantial land use and transportation policy, decision-making, and funding authority to regional bodies that adopt and maintain Blueprint plans. The Legislature could create a framework for regional Blueprint plans through legislation that builds upon the Governor’s Transportation Vision, HB 2001 and SB 1059.

Oregon can also advance a new regional planning framework through the Oregon Transportation Commission’s Statewide Transportation Strategy (in 2011) and in the Land Conservation and Development Commission’s new rules for land use and transportation scenarios (in 2013). These two efforts are great opportunities to expand public dialogue about regional planning and decision-making, regional Blueprint plans, “sustainable community strategies” and other regional policies and actions that can better address climate change and a host of interrelated regional issues (E.G. Transportation and land use patterns, least cost planning, cost-efficient communities and services, smart growth, transportation options, resource conservation). By 2011, new federal Transportation and Energy legislation and funding is likely to push state policy boards, regions, and the Legislature towards more widespread regional planning in a more coordinated framework.

Voluntary organizations have the potential to affect change in local communities. The efforts of Envision Utah show that a voluntary organization can have a great deal of influence in local decision making. The key is that local decision makers must believe that the organization fairly represents his or her constituents (which Envision Utah demonstrated through broad public outreach and survey work), and is based on credible information (which Envision Utah showed through various studies). This type

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of planning at the regional level takes sustained effort and exemplary leadership, which may be difficult to sustain over time.

**Organizations with both funding and regulatory authority are generally more effective.** When an organization has regulatory authority, it is clear who has to do what. The evaluation of SANDAG showed that it has strong transportation funding resources, which provide effective incentives but cannot compel local governments to implement land use elements of a regional plan. Many Oregon Councils of Government have a structure like SANDAG, but have fewer resources to create and implement a regional plan, and ensure that locals implement it in land use plans.

**Many states and regions focus on reviewing major development applications.** California’s Environmental Quality Act, Regional Commissions in Georgia, Act 250 Environmental permits in Vermont and the Cape Cod Commission are all processes that review developments that have regional or state impacts. These processes are modeled after the federal Environmental Impact Statement (EIS) process in the National Environmental Protection Act. Oregon has a similar but less used authority to designate Areas of Critical State Concern under ORS 197.405-410, but does not have state EIS review. Oregon’s planning system is structured to incorporate environmental impacts into the local Comprehensive Plan and zoning processes, which must meet State Goals and approval. Oregon local jurisdictions are the primary reviewers of major developments, even those with regional impacts, as long as they are permitted in the local plan.

**Tying state funding to regions and local communities to the creation and implementation of regional plans can be an effective incentive.** The States of Georgia and Vermont are effective at incentivizing the adoption of local comprehensive plans by requiring local governments to adopt comprehensive plans that comply with state goals and regional plans, if those communities want to receive state funding and enabling authorities. Funding and enabling powers should be tied to both planning and implementation of local and regional plans, in order to achieve optimum results.
Chapter 4: Opportunities and constraints of a new regional planning framework

Introduction

Is there merit in regional decision-making? Based upon the research presented in Chapters 2 and 3 of this report, it is believed there is. However, there are many different models practiced in Oregon and across the country, each with a number of benefits and detractors.

For example, while the larger urban counties across Oregon have very active Councils of Government, these organizations are limited in their ability to create change. In one sense, COGs are as effective as the membership wants them to be. They only engage in activities that are of interest to their members, and because of their flexibility addressing particular issues relevant to their areas, may shy away from controversial topics. COGs also have limited resources, and may not have the capacity to tackle issues that are expensive to address. Yet, even with limited resources, COGs remain critical organizations for efficient regional decision-making since they often provide the staff support for MPOs and EDDs.

Some of the most promising regional efforts across the country use regional planning commissions receiving funding from the state and pass it through as expertise, technology, and direct funding to local jurisdictions. California is embarking upon a grand experiment to reduce greenhouse gases by requiring regions to adopt Sustainable Community Strategies.

Cumulatively, the research did not convince the research team or the advisory committee that there is one regional decision-making model to investigate, but that there are a variety of alternatives should be tested with local officials and staff, non-profit representatives, and state agency representatives.

In August 2010, the research team conducted six meetings: four meetings with local elected and appointed officials and local government staff in Bend, Central Point, Eugene, and Keizer; one meeting with representatives from non-profit organizations in Portland; and one meeting in Salem with state agency representatives. Each meeting was three hours long and participants were asked to fill out a survey. A total of 82 people participated in the six meetings.

At each meeting, participants were first asked what they thought was the biggest opportunity or challenge to regional planning in their region (or statewide). Then, each
group was asked the following questions regarding regional planning:

1. Assuming that your region will have to conduct regional planning in the future, what is the most appropriate organization to conduct regional planning? Potential answers: local COG, local MPO, local ACT, a new regional planning commission, a new non-profit.

2. How important is it for regions to do the following? Asked participants to rank the following: regional blueprint plans, regional land use plans, regional transportation planning, regional land use planning, regional economic development planning, regional infrastructure development planning, regional housing planning, regional energy and climate change planning, regional natural resources planning, regional open space conservation planning.

3. Would you support the following? Potential answers: delegation of acknowledgement of city and county land use comprehensive plans (and amendments) to regions based on the acknowledgement of a regional plan; delegation of state grant and funding decisions to regions (transportation, infrastructure, economic development, and use planning, etc.) based on state acknowledged regional plans.

4. What would motivate you and the people you represent or serve to encourage/ensure regional collaboration? Potential answers: Crisis/problems that affect more than one county or city; learning about best practices; state funding contingent on the completion of specific regional activities (for example, a region would be eligible for enhanced state and federal funds if it had an “acknowledged” regional plan); grants to conduct regional and local planning; and state regulations requiring regional planning.

**Feedback from the Central Oregon regional meeting**

There were 17 participants in the Central Oregon meeting, including city, county, regional and state officials, of which five were staff, planning commissioners, or elected officials from Bend. The meeting participants from Bend focused on the relationship between state planning agencies (the Department of Land Conservation and Development and the Land Conservation and Development Commission) and the City of Bend, especially over recent activities related to the expansion of Bend’s urban growth boundary. The representatives from Bend voiced their frustration with state regulations, a sentiment echoed by several other participants.

One of the most commonly mentioned challenges to regional planning was transportation. Another challenge for regional planning and decision-making described by participants was the potential for a new regulatory structure for MPOs regarding climate change. One participant voiced the challenge of collaboration between economic development and infrastructure activities. Funding was also listed as a challenge. One person mentioned the opportunities for regional collaboration and cited the Deschutes Water Alliance efforts as a good example of regional collaboration.
The group emphasized the need for leaders in the region to determine the most pressing issues; the state should not decide the pressing issues for the region. They also stressed that they did not want the planning process to become more complex—it is complex enough already. One person said that Central Oregon may need a regional government like Metro at some point in the future, but that there were a number of interim structures that could help make the region more effective. He also stressed the reluctance of any local jurisdiction to give up authority. Another participant voiced his skepticism over regional decision-making, believing that the state would never cede its authority to make it happen.

A participant posed the question on how to introduce reform without getting rid of “the good stuff” in the current system. The group discussed the need to ensure that implementation is part of the planning process. There was some concern voiced that the good efforts of the Deschutes Water Alliance, a voluntary effort, were not being implemented.

What is the most appropriate agency to do regional planning and decision-making? The participants discussed the role of Central Oregon Intergovernmental Council (Central Oregon's Council of Governments). A staff member of COIC discussed the evolving role of the organization and issues relating to capacity. One person suggested that COIC could emerge as a “stronger tool in the toolbox” for decision-making in the region.

The group indicated that they preferred a new regional planning commission, followed closely by the COG.

What should regional entities be doing? Participants generally indicated that the region should address regional land use, transportation, climate change, and economic development issues. There was less support for blueprint planning and scenario planning.

Among those who voiced their frustrations with state regulations, one person noted that the current efforts to reduce GHG emissions were a “state mandate,” stating, “that is not the way to plan.” One official cautioned against requiring anything that would increase the impact on local budgets. Others echoed this idea saying that there would be more support for regional planning if the state could show it would save money.

What responsibilities should be delegated to regions? In general, the group supported devolving authority to regions, as well as funding decision-making. Several people cautioned that regional plans should comply with state goals, and that there should be a balance between state and local interests. Another person stated that regions should have more flexibility and that the system should not be too “top down.”

One person suggested that the state develop performance measures and then locals could determine how they could be achieved and implemented.

What incentives could motivate governments to act regionally? The group stressed that any new regional efforts would have to be incentivized by the state and that, if the
state could show that regional planning could save money, they would be more willing to do it. Several people also emphasized that regions should identify the most critical issues, and those issues should dictate what is covered in regional plans.

**Feedback from the Mid-Willamette Valley area regional meeting**

This meeting was the smallest regional meeting, with eight city, county and regional officials from the mid-Willamette Valley region, and one representative from ODOT. The group consisted of local and county planners, a planning commission member and a city councilor. The variety of perspectives as well as professional differences made this conversation especially interesting for the research team as well as the participants involved.

The planners in the group saw a fairly uniform set of challenges and opportunities presented by regional planning. Regional planning was seen as an opportunity to take advantage of the uniqueness of the region’s urban and rural assets. Yet, the variety of rural and urban environments also presents the largest challenges for unified regional planning. Often, localities are unintentionally competing against each other for resources and power in regional decisions because of funding and population imbalances. Regional planning was discussed as a method that could be used to engage smaller communities and unite regions behind universal issues such as transportation and planning for climate change, and potentially cure the competition mentality.

The elected officials at the meeting were concerned about how regional planning has the potential to misrepresent individual communities within a region. Instead, they believed that regional planning should allow individual communities to grow and operate as desired, with the understanding that mistakes will probably be made along the way. The elected officials were looking for flexible regional planning rules and decisions that cities could adapt to their unique environment and culture.

Participants were especially sensitive to how regional planning can and cannot happen given the current financial realities.

- **Limited funding.** The participants discussed how limited and directive funding opportunities are shaping the local and regional scale planning efforts. The DOT, HUD, and EPA Sustainable Communities Grants were mentioned as potentially valuable funds that could not be realized because the partnerships and projects needed to apply for these grants do not exist in the region (in addition to the short application timeline). Also, the current focus on greenhouse gas reductions has the potential to redirect funding from other necessary planning efforts such as infrastructure.

- **Stakeholder involvement.** Limited funding also has its benefits. Given limited resources, groups are working together that have up until now worked independently. School districts participated in the Transit Community Leaders Task Force (a voluntary effort to restructure the public transit system in Salem-Keizer) for the first time, motivated by reduced funding for school districts.
What is the most appropriate agency to do regional planning and decision-making? Although various agencies were discussed as regional advisory and/or decision-making entities (e.g., ACTs, COGs, MPOs), participants quickly turned the discussion to the lack of staff within these agencies that have the ability and/or time to engage in regional planning efforts. Currently, most regional planning discussions have centered on transportation because of the presence of the ACTs and funding from ODOT to actually implement transportation planning decisions.

Meeting attendees expressed frustration that no regional entity is available to ‘house’ some of the most pressing regional issues, such as urban growth boundary delineation and climate change. The group believed that some of the existing regional entities cover the correct geography to deal with these issues, but would need to spend time and resources training internal staff and engaging external stakeholders in order to have productive discussions about these issues. Participants suggested that there would have to be a quasi-organic element to these regional efforts and discussions in order to avoid the perception that another layer of governance was being added to the already confusing regional decision-making structure.

What should regional entities be doing? Participants believed that scenario planning and land use planning should be the top priorities for regions. Scenario planning helps to inform a whole range of other planning efforts (economic, environmental, transportation, etc.) and can unite a region behind a single vision. Land use planning also breaks the silos between topical planning efforts, since land use is often the driver for other types of planning.

Planning for climate change was also discussed as a higher-level effort that could unite all types of planning, possibly through Regional Climate Action Plans.

What responsibilities should be delegated to regions? Meeting attendees were interested in the potential for regions to do blueprint planning, similar to California’s model (see Chapter 3 for more details). Blueprint planning was attractive because of the wide variety of issues covered in the plan and stakeholders needed. However, participants cautioned against the vagueness of blueprint planning, and the necessity for the plans to ‘have teeth’ and not conflict with existing local, county, or state rules. Participants envisioned the blueprint plan incorporating state and federal regulations in order to better inform the region’s localities.

If the state delegates responsibilities to regions, participants wanted to ensure that large population centers do not hijack the process or its outcomes. The elected officials believed that the best decisions were made at the local level and that any regional responsibility would have to allow for flexibility in order to maintain local identity and opportunities.

What incentives could motivate governments to act regionally? Meeting participants all agreed that incentives were an immensely important part of the regional planning process, although there were varied opinions about which incentives would be more useful. Regulations were seen as a fail-safe measure for regional planning, but could cause animosity and would necessitate some sort of enforcement mechanism. However,
regional regulations that included all applicable state and federal planning regulations could make planning and decision-making much clearer for localities. Crisis situations were also mentioned as a less-than-ideal, but enormously successful method for motivating people to work regionally.

**Feedback from the Lane County regional meeting**

The workshop in Eugene offered a unique perspective in terms of the diversity of participants as well as the history of regional planning efforts in the region. 14 participants included city, county, and regional planning staff from urban and rural entities, elected officials from both city and state offices, and a tribal planner. No representatives from Eugene participated.

Although the Lane County area might be considered to have the most formalized regional planning structure in Oregon outside of Portland, recent conflicts over Region 2050, urban growth boundary delineation, and political factions have resulted in frustrating regional planning efforts.

This frustration could be seen in the participants’ expressions regarding the opportunities and concerns of regional planning; many more mentioned challenges than opportunities. The challenges centered on trust between levels of governments, not complicating the existing structure, defining the vision for regional planning, and maintaining a grass-roots feel for regional planning efforts. Opportunities included financial savings and the emergence of issues that must be dealt with on a regional scale (e.g., transportation, climate change, housing/jobs balance).

Participants began the discussion of regional planning and decision-making by reflecting on some past planning efforts and why they did or did not work. Some of these efforts include:

- **Region 2050.** Region 2050 was a multi-year effort in Regional Problem Solving led by the Lane Council of Governments (LCOG), which set out to define a regional growth strategy. Unfortunately, the process became lengthy and ultimately estranged some communities and reduced the level of trust in and the need for regional planning efforts.

- **Busting the silos.** The group talked about the difficulty of organizing meetings between different planning interests (e.g., transportation, housing, economic development, etc.). In addition, universities were mentioned as their own silo that although have an enormous impact on a region's viability, often have little or no involvement in regional planning or decision-making. Tribes were also discussed as important partners given their varied governmental relationships, knowledge of rural and tribal cultures, and involvement in transportation and service provisions.

- **Political factions and frustrations.** The group was quick to admit that politics is a key player in their frustration with regional planning. Participants, including elected officials, discussed how elected officials should be playing a more positive role in regional planning, versus what is sometimes seen as a hindering or turf-protecting role. Participants acknowledged that the political environment could
change after the next election, but getting the actual decision-makers involved with regional planning in a positive way is critical.

**What is the most appropriate agency to do regional planning and decision-making?** Given that LCOG is both the MPO and COG for Lane County, and has a history of working on regional planning initiatives, many participants believed that LCOG was the most appropriate agency for regional planning efforts. LCOG staff agreed and explained that the organization started their climate and sustainability group in order to better house a more regional and diverse conversation about planning.

Participants discussed how planning for these larger issues such as climate change caused boundary confusions – should the region be looking at travel-sheds, joint economies or something else? One of the participants from the coastal area supported the current county boundary for regional efforts given the strong economic and transportation ties that they have to Eugene and Springfield, even though their environmental and disaster resilience issues might be more comparable to other coastal communities.

**What should regional entities be doing?** Meeting attendees agreed that scenario planning would be beneficial at the regional level, but that it would have to be accepted as a tool instead of an outcome. Instead, the goal, whether it is related to climate change, economics, or some other area, would have to be defined to make the outcome(s) of the scenario planning efforts valuable. In addition, the recommendations of scenario planning would need to be pushed towards elected decision-makers for adoption. This process would assure that scenario planning is a useful tool and would engage stakeholders in adopting actual outcomes.

**What responsibilities should be delegated to regions?** When asked about what planning and/or decision-making responsibilities could be delegated from state to region, the discussion immediately turned to power-sharing issues. A region needs to be responsible for power distribution between rural and urban communities, as well as accounting for population distribution. In addition, regional decisions on power-sharing should be adaptable over time, as population throughout the region will change.

Participants also talked about the potential for co-adoption of local and regional elements within city, county, and potentially, regional plans. This would not only be more efficient for localities (they would not have to spell out elements already covered by other entities), but it would also ensure that regional visions were included at the local level and vice versa.

**What incentives could motivate governments to act regionally?** Although regulations were the first topic discussed, they were not the preferred incentive. Many meeting attendees believed that regulations would always result in localities and regions barely meeting the rules. Voluntary efforts are more valuable and would result in more creative thinking.

Participants also discussed how reducing the number of planning efforts required could be an incentive for regional planning. For example, a locality coordinating with the
region during their transportation planning process could result in a ‘waiver’ for some ODOT transportation requirements. This reduction in effort and related costs could be a large incentive to work regionally.

In summary, the participants agreed that any regional planning process would have to incentivize meeting state goals and the regional vision. Any incentive that makes jurisdictions plan purely for the incentive (funding was mentioned as an example) would negate the purpose of regional planning and cause issues in the future.

**Feedback from the Southern Oregon regional meeting**

The project had record turnout in Southern Oregon, 26 people participated, along with high temperatures (105 degrees on the day of the meeting). Participants from city, county, regional and state agencies, and city and county elected officials, listed a wide array of issues that they saw as presenting the biggest challenges and opportunities to regional planning. While several participants voiced their frustration with the regional problem solving project taking too long, changing players, and uncertainty over its adoption, others stated that it presented an opportunity for the region and “took as long as it needed to take” for elected officials to move forward. Another person stressed that regional decision-making presents opportunities to create positive relationships and better allocate scarce resources. She emphasized the need to be more strategic in the regional approach to issues. Several elected officials stated their concerns regarding funding government services, and feeling “over-regulated.” Yet, another participant noted that one of the most important benefits of regional decision-making is the ability to influence state decisions.

Other participants voiced the tensions between rural and urban land uses. One person said that rural residential uses were “boxing in” city expansions. Another person stressed the need to pay attention to what is happening on agricultural lands. A representative from Grants Pass commented on the possibility of Grants Pass becoming an MPO and the challenges of coordinating regionally on transportation.

The group discussed the need to engage the public, which generally has a low awareness of regional decision-making and regional issues. The diversity of committees and groups highlighted the need to streamline the decision-making process.

**What is the most appropriate agency to do regional planning and decision-making?**

The group voiced a variety of concerns regarding regional decision-making. One participant that had lived in multiple states said that in his view, the higher up decision-making goes (for example, at the state level), the more concern there is for the general populace. The more local decision-making becomes, the more it focuses on the pocketbook of individuals.

The group generally agreed that elected officials should be the decision-makers, not governmental or non-profit staff. They also agreed that it is important not to make the work more complicated or bureaucratic: that would only increase costs.

The group also discussed focusing on regional goals and the best way to achieve
them. For example, one person suggested that the region have a goal of a successful agricultural economy instead of preserving agricultural land. Preserving agricultural land is not necessarily the best way to ensure a successful agricultural economy. Several people noted that current zoning of agricultural lands is overly constrictive.

In general, participants liked the idea of planning regionally, especially if the rules were more flexible and the state gave up some control. Only one person stated that the state should be totally removed from decision-making. Most of the participants stressed that any devolution of authority (either regulatory or funding) would have to come with oversight from the state.

Overall, participants indicated that the best type of organization to facilitate regional decision-making is the Council of Governments, followed by the MPO, and then a new planning commission.

What should regional entities be doing? Several people at the meeting voiced their concerns at the cost of doing regional planning. One person noted that Mayors across the state are concerned about the state budget and the ramifications on city budgets. Another participant suggested that any regional planning should address the overlap and inefficiencies in the current system. Another person suggested that if a region decides to do a regional blueprint, there should be less “torture” and more incentives and flexibility offered from the state. Another person stated that regional planning could potentially be a big savings.

Several participants emphasized that it would be better to focus on outcomes, not on developing the “numbers” and the analysis.

What responsibilities should be delegated to regions? Participants stated that any delegation of responsibilities should be simpler and less expensive than the existing system. One participant voiced the need to tie land use, environmental, and transportation planning into a long-term vision for the region. Another person said that it is difficult to overcome institutional inertia, and therefore it is easier not to do regional planning.

The large percentage of land in federal ownership has a significant impact on roads, schools, agricultural lands, forest resources, grazing and much more, according to one participant. He noted that this study should discuss the relationship between federal land and resource governance on regions.

What incentives could motivate governments to act regionally? In general, voluntary activities and activities required to receive state funding were preferred incentives over new regulations. Participants discussed the need for flexibility and simplification. One person said that Transportation Growth Management grants were “double the bureaucracy” and the general incentive rule does not apply for them.

The participants discussed how the definition of a region would affect the success of regional decision-making efforts. They discussed the need to define regional goals and outcomes. Equity among all the regional players was also emphasized.
Feedback from the state agency representatives meeting

The State Agency workshop included a wide range of agencies that focus on transportation, environmental regulations, land use, and agriculture, among other issues. The participants were fairly unanimous in their thinking that planning for climate change was an opportunity to start planning regionally. Yet, the group also acknowledged the challenges to regional decision-making. The group discussed the difficulty of defining a region, identifying issues, funding availability, keeping the public engaged, managing political factions, and properly incentivizing regional planning.

The state agency representatives said that regional planning should be different for each area of the state given cultural, environmental, population, and economic interests. Participants discussed the role of state agencies in regional planning, including setting a statewide vision or framework on which to base regional planning and decision-making. Once again, climate change and its related issues (water supply, energy needs, transportation, etc.) were the principle topics of discussion. Participants acknowledged that any regional planning efforts would have to be done either more efficiently or at less cost than present planning to be acceptable to local governments.

The group was especially interested in how they could improve regional planning via better regulations as opposed to adding regulations. The following suggestions were made as methods to improve state agency programs and services:

- **Embed planning experts in “non-planning” agencies.** Many, if not all, state agencies have an impact on planning whether it is through environmental regulations (Department of Environmental Quality), wetland and waterway permitting (Department of State Lands), or distribution of federal funds (Oregon Department of Transportation). By having a planner on staff to understand how an agencies’ requirements might impact planning, future issues and/or conflicting policies can be changed before they are implemented.

- **Make sure there is a funding stream for the entire planning process.** Often, state funds are available for localities to do the initial planning, but are not available to complete the planning process.

- **State agency regulations could be better coordinated.** Often, localities and regions are meeting state requirements “just to check a box.” State agencies need to understand their own goals and be able to communicate their larger goals to localities and regions in order to gain credibility. In addition, there are opportunities for multiple agencies to review regulatory requirements and consolidate some activities for local jurisdictions.

What is the most appropriate agency to do regional planning and decision-making?

State agency representatives expressed that there are challenges in dealing with a variety of regional entities whose responsibilities are often unclear and whose decision-making authority is often non-existent. In addition, the expertise, reputation, and duties of existing regional entities throughout the state vary, making it difficult to choose one agency as the preferred regional planning or decision-making organization.
Participants agreed that deciding on which regional entity is ‘in charge’ will depend on how the region is defined; the region could vary by issues (e.g. travel-shed, watershed, energy use, etc.). When asked to rank five options, Area Commissions on Transportation were the most preferred type of regional organization, followed closely by COGs or a new planning commission. State agency representatives believed that COGs currently do not have the necessary ‘fire-power’ to help regions make tough decisions. COGs would need better tools to ensure implementation of regional plans to be effective.

**What should regional entities be doing?** Participants had a difficult time defining which issues regional entities should address, although natural resources, infrastructure, housing, and climate change were mentioned. Instead, participants thought that individual regions should decide what issues are the most pressing for their area. Most participants agreed that a regional entity should help fill a regional decision-making gap, not create another layer of bureaucracy.

**What responsibilities should be delegated to regions?** Not surprisingly, participants were cautious about the idea of delegating authority from state agencies to regional bodies. Participants mentioned political motivations and competition between localities as reasons why the state should remain a reviewing authority on land use and funding decisions.

However, most participants said that they might support the delegation of acknowledgement of local plans to a regional body, or allowing a regional body to make decisions on how to spend state funding, if the state provided oversight and it was clear that decisions were closely tied to regional goals and strategies that comply with statewide land use goals or other regulations.

**What incentives could motivate governments to act regionally?** State agencies felt that nearly every planning issue could, in itself, be a reason to plan regionally. Yet, since this does not happen, participants suggested that locals should define their most pressing issues.

Funding and regulations were also seen as motivators, although they were not preferred options and might distract regions from identifying their needs and taking positive steps to solve them. Overall, state agency representatives seemed willing to take a regulatory role in regional planning, but preferred local governments to conduct regional planning without regulatory requirements.

**Feedback from the non-profits and advocacy groups meeting**

The Portland-area workshop targeted non-profits working throughout the state on planning-related issues. The Bicycle Transportation Alliance, 1000 Friends of Oregon, Oregon Solutions, Urban Land Institute participated in the discussion, as well as a representative from a suburb of Portland and another from the Oregon Department of Transportation.

When asked what major challenges and opportunities exist in regional planning, most
participants were optimistic. Many described the multitude of existing organizations that have the expertise and connections for regional planning, although the organizations would have to come to an agreement on who is doing what regional tasks and be able to communicate that to localities and other stakeholders. Given many of the participants’ experience in wading through existing layers of planning procedures, many of which were seen as duplicative, they looked forward to a simplified regional structure which correctly defines regions per issue, saves funds, and protects the natural environment.

After hearing about national regional planning and decision-making efforts summarized in Chapters 2 and 3 of this document, the participants began to brainstorm how similar efforts could be envisioned in Oregon. These ideas included:

- **Public-Private Partnerships.** Given the continuing budgets cuts by public entities (and no sign that this will change), private organizations should be considered as possible partners. Private organizations can benefit from regional planning and should therefore be part of the solution. These partnerships could also gain the public’s trust since often the public does not trust entirely public nor entirely private-run efforts.

- **Performance-based metrics.** Many of the participants believed that regional planning should work to meet triple bottom-line goals of economic, environmental, and social sustainability. By defining metrics to measure whether goals have been met, cities, regions, advocacy groups, and the state can better determine the quality and effectiveness of regional efforts.

- **Formalized relationships.** While it was agreed that voluntary efforts would be preferred, participants believed that formalized relationships between agencies would ensure that regional decision-making happens outside of topical silos. This relationship could happen through ‘compact planning,’ in which the outcomes are determined, and then the applicable stakeholders are engaged and sign on to a statement outlining the goals and tasks that need to be accomplished in order to reach those goals as a region. This practice might also close some existing gaps between agencies.

**What is the most appropriate agency to do regional planning and decision-making?** Meeting attendees unanimously agreed that creating another planning or decision-making entity would hinder regional planning efforts. MPOs were offered as a possible regional decision-maker, although it was identified that they would have to better engage and represent rural interests. EDDs were mentioned as an already-funded mechanism that covers the entire state, although they currently have a limited purview.

Participants went on to discuss how no organization in its current form could serve as a regional entity. Instead, regions should look to form an advisory and/or decision-making entity that represents various private and public interests throughout the geographic area (much like Metro’s Joint Policy Advisory Council on Transportation). This would allow rural entities to have a potentially equal say on issues and their urban counterparts. However, participants stressed that an existing organization should house
this effort versus creating an entirely new organization.

The lack of expertise and resources available to rural localities was also discussed and seen as a potential ‘carrot’ to encourage rural entities to participate in regional decision-making. ‘Circuit planners,’ regionally funded planners that work with multiple communities, could be offered to rural cities if they choose to work with a regional decision-making group. But, participants also cautioned about relying too much on incentives and instead making sure that the incentives align with the greater goals of the region.

**What should regional entities be doing?** Participants believed that scenario planning and land use planning should be the top priorities for regions. Scenario planning helps to inform a whole range of other planning efforts (economic, environmental, transportation, etc.) and can unite a region behind a single vision. Land use planning also breaks the silos between topical planning efforts, since land use often is the driver for other types of planning.

Planning for climate change was also discussed as a higher-level effort that could unite all types of planning, possibly through Regional Climate Action Plans.

**What responsibilities should be delegated to regions?** Meeting attendees stressed that state oversight should be required if some authority is delegated to regions. Much of the discussion focused on how funding mechanisms and prescribed processes could become more efficient and better represent a regional perspective, versus a local perspective.

For example, ODOT and DLCD could work together with regional planning bodies to formulate a new process for reviewing regional transportation plans. This process could give the region more responsibility in making sure its localities’ transportation plans work in tandem, while also streamlining the state processes.

**What incentives could motivate governments to act regionally?** Participants agreed that crisis situations were the most effective avenue for regional planning (especially given current resource restrictions). Regulations were also mentioned as effective incentives, but would not necessarily inspire creative thinking or problem solving. All participants agreed that if regulations were the primary incentive for regional planning, funding would have to be provided to the involved entities.

**Meeting participants generally agreed that there is a need for regional decision-making in Oregon.** Participants presented multiple examples of regional efforts, as well as regional issues that are not being addressed in their areas and around the state. Representatives from small cities discussed their frustrations trying to mitigate the impacts of decisions from larger cities in the region, and vice versa. Participants discussed numerous regional issues related to transportation and water issues. While some regions have attempted to address some of these issues, no region expressed that their region was addressing its regional issues in a satisfactory way. Participants at all of the meetings discussed the need to coordinate land use and transportation decisions on a regional basis.
The current economic crisis means that there is no additional money at the state or local level to fund new regional efforts. Budgets at the state and local level have been reduced in recent years because of the current economic crisis. In addition, the focus on providing basic services will make it challenging to introduce new legislation or programs that enhance regional decision-making.

Regional planning that is a cost-saving measure is more likely to get traction at both the state and local level. Participants at multiple meetings said that they would be interested in regional efforts if it could be shown that it would save local government money.

The state should look for ways to streamline processes for local governments that can save money, without weakening standards. Meeting participants gave several examples of state requirements that could be streamlined to decrease the costs of planning. As a starting point, DLCD and ODOT should review their requirements and determine how they could coordinate and provide regulatory relief that would still satisfy the goals that guide each agency. In addition, DLCD staff should review the processes around periodic review and expansion of UGBs to determine how a combination of streamlining and regulatory relief could satisfy the statewide land use planning goals. Ideally, these efforts would work for individual municipalities, as well as for regions working together.

Overall, participants designated their local COG as the preferred regional decision-making forum, followed by a new regional planning commission, and third by the regional MPO. While the COG was rated highest among the choices presented to all participants, they did stress that each region should determine what kind of decision-making body would be best for the region. In general, participants discussed the multiple organizations that are conducting regional decision-making and expressed a desire to consolidate efforts.

If funding or regulatory authority is delegated to regions, there should be state oversight. Participants generally agreed that regions should still be subject to state oversight to ensure that regions and local jurisdictions adhere to statewide goals. Overall, participants generally agreed that it the state should delegate funding authority if there are funds available. There was just slightly less support for delegating regional authority to acknowledge local plans that comply with regional plans. Most of those responses included the caveat that there should be State oversight to ensure adherence to Statewide goals.

Performance standards may be one way to require statewide standards for regional land use and transportation plans, and still allow some regional flexibility. At most of the regional meetings, participants discussed how a region’s unique geographic, cultural, economic, population, or environmental interests makes it difficult for a state process to work identically in all areas of the state. Performance standards would be a method to ensure that regions are meeting state goals, while allowing the regions the opportunity to design and implement how they will meet those standards based on their local environmental, political, and social identity. Regions that address state performance standards in a regional plan would be allowed greater discretion of implementing measures and strategies that satisfy these standards.
Chapter 5: A 21st century regional planning framework for Oregon

Introduction

This chapter summarizes the findings of the project research and proposes increased coordination to align regions and planning across state, regional, and local agencies for the following: land use and transportation, growth management, infrastructure, climate change, housing needs, economic development, energy, water quality and availability, air quality, and natural resources.

Oregon’s planning system began with a unique vision of a “partnership between state and local governments” that produces a “mosaic of state-approved local comprehensive plans”. Today, this sometimes-uncomfortable partnership needs the mediating influence of regional plans. In 2006, the Urban Land Institute Oregon Land Use Forum proposed that Oregon adopt a “center-out” regional planning model that moves beyond its historic state-local hierarchy:

> Although statewide planning laws have provided the skeleton upon which the system is built, that system does not adequately acknowledge the regional variation we experience. There are regional differences that need to be recognized and addressed in order for regions to work collaboratively… Dialogue and civic engagement is the best way to “educate and inform.” It may be true that Oregon’s system started as a “top-down process” that encouraged avenues for involvement from the “bottom-up.” Perhaps a better model is from the “center-out,” so that rings of influence permeate the social fabric and flatten the system rather than shifting the concentration of power from one end of the spectrum to the other.\(^91\)

If state and local governments can succeed in forming viable regional partnerships, Oregon’s planning system can produce plans that effectively meet regional challenges, thereby working more effectively at the local level, while supporting State goals and standards.

The rest of this chapter is organized into the following two sections:

- **Conclusions.** This section focuses on conclusions organized around four topics: A new regional planning framework, addressing regional issues, coordination...

\(^91\) Urban Land Institute Oregon Land Use Report, August 2006.
of regional planning and decision-making, supporting regional planning and decision-making.

- **Recommendations.** This section lists recommendations on a statewide and regional basis.

**Conclusions**

This section presents conclusions of the research described in Chapters 2, 3, and 4, followed by specific recommendations for the state and regions.

**C1. The new regional planning framework**

A more effective and efficient regional planning framework would better meet Oregonian’s current and future needs.

**C1A. Oregonians value and practice regional planning widely, yet we often do this in fragmented ways.**

Oregon governments plan largely at the state and local levels, while Oregonians today increasingly live, work, travel, and trade within regions. Decisions made by one jurisdiction often have significant fiscal ramifications on multiple jurisdictions. While some regions are actively working together to address multiple issues (notably the Greater Bear Creek Valley region in Southern Oregon), some other regions are not as active in regional coordination.

**C1B. The current economic crisis is forcing state and local governments to operate under significant fiscal constraints, while planning and building quality communities.**

As revenues are shrinking, state and local governments must develop plans and infrastructure improvements as cost-effectively as possible. This crisis is a strong motivator for change.

**C1C. Recent, and proposed, state and federal legislation provides policy and funding opportunities for regional planning.**

Oregon HB 2001 directs Portland Metro to prepare and select alternative regional land use and transportation scenarios, to reduce greenhouse gas emissions. SB 1059 anticipates (but does not require) that local governments within Oregon’s five other Metropolitan Planning Organizations (Portland, Eugene-Springfield, Salem-Keizer, Medford, Corvallis, and Bend regions) will prepare and select alternative land use and transportation scenarios, to reduce greenhouse gas emissions.

New federal policies and funding in transportation, housing and urban development, and energy are pushing regions to develop integrated land use, transportation, and climate change plans. The House draft “Surface Transportation Authorization Act of 2009” proposes $450 billion funding of surface transportation programs over six years, a 38% increase over the current funding levels ($326 billion). This Act could provide all Oregon MPOs with substantial new planning funds as well offer the larger MPOs (Portland, Eugene-Springfield, Salem-Keizer) a greater share of flexible project funding. The Act also proposes to support Rural Planning Organizations for areas outside MPOs, which could offer greater funding to Oregon rural regions that form these bodies.
C1D. Leaders in Oregon want to improve regional decision-making. Regional planning benefits local governments, the state, and the public. Participants in the Oregon Chapter of the American Planning Association (OAPA) meetings across the state acknowledged that they could often accomplish more in a regional forum than they could separately.

C1E. Oregon’s livability and prosperity depends on doing a better job meeting regional challenges.
Emerging regional challenges and decision-making today will shape Oregon for the next century. Regional issues are growing in number and complexity. Local communities and the State are struggling to address significant regional issues.

Participants at all of the OAPA regional meetings discussed numerous regional issues, including population growth, transportation, transit, economic development, housing, water quality and quantity, school siting, energy facilities and siting, and many more. While it cannot accurately be predicted what new and challenging policy issues regions will have to address, potential advances in telecommunications, energy, transportation, and other areas are likely to increase regional interdependence must be addressed. Oregon’s need to respond to climate change will require each region of the state to develop its own plan to address this major new issue.

C1F. Ongoing and inclusive regional bodies make regional planning more effective. Oregon can more effectively meet its regional challenges by directing existing regional bodies to address regional issues, or through the creation of regional planning bodies designed to foster strong communications and collaborative decisions.

As Chapter 3 (state and regional profiles) and the OAPA regional meetings confirm, mutual and formal acceptance of regional decision bodies, plans, and agreements by the state and local participants reinforces the continuity, accountability, and effectiveness of regional planning.

C1G. Continuous regional communication and relationship building is key to successful regional decision-making.
Regional decision-making often requires multi-year processes. With turnover in elected and appointed officials, and staff, it is not always possible to retain the decision-makers from start to finish in a regional process. At its inception, a regional process should clearly define its decision framework and expectations, and communicate these to decision-makers who join later. Participants in the nearly completed Bear Creek Valley (Medford area) Regional Problem Solving project report that they have built stronger relationships, but the process has suffered from an open-ended timeline (over 10 years).

C1H. Poor regional communication and relationships cost money. Good communication and relationships save money.
OAPA regional meeting participants described situations where poor communications or relationships between staff, decision-makers, and the public at all levels of government caused the State, cities, and counties to have to redo planning related work. For example, in the case of Region 2050 in Lane County, the State, LCOG, and local jurisdictions spent hundreds of thousands of dollars for regional problem solving
analysis. When the project terminated before adoption, cities and the county then had to do the analysis all over again, but this time individually.

C1I. **Regional planning gives individual cities and counties a means to influence policy decisions at state, region, county, and city levels, which ultimately affect all jurisdictions.**

In several OAPA regional meetings, small cities noted that they benefit from equitable representation in regional planning processes. This gives them a say in regional decisions and a stake in a shared vision of a larger community.

C1J. **While Regional Problem Solving (RPS) is a useful tool to address regional land use and transportation issues, it does not assure regional planning will continue over a longer term.**

Regional Problem Solving provides a state-sanctioned process for addressing regional planning issues. Any decisions reached on a regional level must receive local and State approval and adoption. State law also requires some cities within a region to update comprehensive plans based upon when the completion dates of any previous updates (approximately). Greater efficiencies could be realized if communities within a region update plans together. Since few of the past RPS efforts have been successfully completed, additional reforms may be necessary. While Regional Problem Solving processes, as in Bear Creek Valley and Lane County, are valuable efforts, they do not assure a continued regional structure for communication, cooperation, and action over a longer term.

C2. **Addressing regional issues**

Regional planning should be customized to address issues determined to be the most pressing for the region. Ideally, such customization would coordinate current regional activities (such as transportation and economic development planning) and incorporate them into a Regional Plan that addresses land use, transportation, economic development, housing, and other elements. One of the objectives should be to reduce government costs and bureaucracy for all jurisdictions.

C2A. **Regions would benefit from doing a better job of addressing regional issues as a collaborative effort.**

Regional meeting participants repeatedly brought up issues and examples of regional topics that are not adequately being addressed. The top three issues were:

- **Land use:** Land use topics related to housing, economic development, and the expansion of UGBs were repeatedly mentioned as pressing issues for local governments. Participants in many meetings discussed the lack of coordination between local jurisdictions. The challenges of working within the state regulatory framework were discussed at all of the meetings.

- **Transportation and infrastructure:** One of the primary externalities of land use decisions by individual jurisdictions is coping with the transportation issues of neighboring jurisdictions and the State. In addition, meeting participants and advisory committee members repeatedly mentioned the high cost of infrastructure to meet residential and employment needs. Decision-makers across the state
mentioned the need to better control land use in order to better control the cost of infrastructure.

- Greenhouse gas emissions: Many participants were concerned about what new state mandates would mean for their jurisdiction, both fiscally and for local policies.

**C2B. Regions may benefit from planning work that creates a regional vision, goals, and strategies for growth management.**

There are numerous national and state models of regional plans that use strong visions and implementation programs (see Chapters 2 and 3). These include California’s Sustainable Communities/Blueprint Planning program, Vermont’s Regional Planning Commissions, Envision Utah plans, and the Denver Region’s Mile High Compact, and Regional Problem Solving in the Greater Bear Creek Valley in Southern Oregon. Despite these examples, others show that not all regional planning efforts result in change on the ground. No participants in the OAPA meetings favored planning for the sake of planning. Instead, many expressed the strong desire to make sure regional plans are implemented.

**C3. Coordination of regional planning and decision-making**

Oregon can use and adapt existing regional decision structures as a base for more integrated and effective regional planning and decision-making. Regional Planning Commissions or Councils of Government are the best forums for coordination of regional planning and decision-making.

**C3A. Regions should explore opportunities to consolidate regional efforts, where appropriate, to realize economies of scale and expertise.**

Many regions throughout the state coordinate regional activities of Metropolitan Planning Organizations, Area Commissions on Transportation, Economic Development Districts, and other regional activities through their local Council of Governments. Overall, participants in regional meetings supported the work of Councils of Governments. However, there are large sections of the state that are not covered by Councils of Governments. California, Vermont, and Georgia require this kind of regional coordination, by placing regional planning bodies in Councils of Government or regional commissions, serving one or more counties.

**C3B. According to OAPA regional meeting participants, creation of Regional Planning Commissions or the use of existing Councils of Government, each governed by local elected officials, provide the two best options for regions to conduct regional planning.**

**Regional Scenario Planning,** as described by the state’s 2009-10 Task Force on MPO planning, is a tool for local governments and citizens to “construct and test different alternatives for accommodating expected growth” and to “consider a range of possible alternative choices about land use patterns and transportation options, and evaluate their effectiveness in reducing” greenhouse gases. Oregon plans have used similar alternatives analysis practiced for several decades. Regional scenarios may have a longer timeframe (25-40 years) and consider a broader range of alternatives and actions to reduce emissions, than previous planning tools.
Both options offer “bottom-up” regional planning and funding authority to a consortium of local governments, and both could be enabled as regional planning bodies in state law. Participants at all of the OAPA meetings stressed that locals should be able to determine what type of organization would be best as a regional decision-making forum. Some participants noted that regions outside Portland might even wish to consider regional government in the future.

C3C. Central Oregon (Deschutes, Crook, Jefferson Counties) should determine if it would be beneficial to tackle land use and transportation related issues at a regional level, and if so, what forum should be used to address these issues. This rapidly growing area has not designated a forum through which to address issues relating to land use and transportation. As the Council of Government for the region, Central Oregon Intergovernmental Council may be a good organization to conduct such work.

C3D. Metropolitan Planning Organization (MPO) boundaries could be expanded to address larger regional land use and transportation issues in a more integrated way, as is happening in California (Chapter 3 profile). Oregon's six MPOs could expand to cover all Willamette Valley counties, plus Columbia, Deschutes, Crook, and Jackson counties, thus serving entire counties within federal Standard Metropolitan Statistical Areas (SMSA) or Combined Statistical Areas. Oregon's MPOs, use the smallest boundaries allowed by federal guidelines (mostly within Urban Growth Boundaries). The MPOs admit that regional jobs-housing, travelshed, and corridor issues far exceed the reach of their boundaries. Expanded MPOs would then serve 82% of the Oregon's population, rather than about 60% currently. California MPOs cover entire counties and serve 98% of the state population. They are now charged with comprehensive land use, transportation, and climate change planning under California SB 375, and receive significant funding authority from the State. While larger MPOs can raise concerns of metropolitan area dominance, in California, MPO boards in urban/rural counties usually include rural elected officials, and the state sponsors rural Regional Transportation Planning Agencies for counties outside MPOs.

C4. Supporting regional planning and decision-making

There are numerous steps that the State and regions could take to support regional planning and decision-making efforts. Such steps could include improved technical support, increased financial support, and empowering regional planning by increasing regulatory and funding authority at the regional level.

C4A. Flexibility is important. Regions are most likely to be successful when addressing self-determined critical issues. As described in the Chapter 3 profiles of California, Georgia, and Vermont and other regions, successful regional planning happens when states empower regions to tackle their priorities. A flexible regional planning framework facilitating more regional and

local goal setting and decision-making could reduce the current costs of state-directed planning, administration, and regulation.

**C4B. Regulatory simplification can complement a new framework for Oregon regional planning.**
At OAPA regional meetings, local governments cited the need to simplify state land use and transportation regulations and processes, and to a lesser extent, environmental regulations. Many players and lengthy processes increase the complexity of regional planning. Local governments feel that local and regional processes take too long, in part because some processes require regional consensus (where majority rule is not an option), and because state oversight often requires several layers of approval.

Currently, state regulations and processes are perceived to be overly complex, time consuming, and costly. OAPA meeting participants cited examples of urban growth boundary expansions, urban and rural reserves analyses, TGM grants managed by two agencies, and regional problem solving projects.

Participants reported favorably that some regional initiatives could effectively resolve specific land use, infrastructure, or regulatory problems, when state agencies participate as partners. For example, Jackson County representatives noted that agency flexibility helped allow a sewer hookup Goal exception for a group of rural properties on poor soils previously served by septic systems.

Current budget shortfalls can provide an opportunity to simplify the state’s regulatory framework. The State could initiate an audit of planning-related statutes, goals and rules, and processes, which could then be consolidated or simplified while maintaining high standards for outcomes and long range planning, starting with land use and transportation. HB 2229, the 2009 Big Look legislation calls for, but did not fund, a “policy neutral review and audit” of planning statutes, goals and rules with recommendations “to allow for greater variation between regions of the state over time and to reduce complexity.” Regulatory simplification is more urgent now as planning resources face even greater fiscal stress.

**C4C. Any revision and streamlining of statewide regulation should consider performance measures as a metric to determine if regions have satisfied statewide requirements.**
Participants at several of the regional meetings mentioned performance measures as a preferred metric to determine conformance of local or regional activities to statewide goals. State performance measures could assure that regions meet common state standards and interests, while a region could detail its specific measures for evaluating, tracking, and implementing planning goals. Performance measures can facilitate regional planning focused on visions, goals and outcomes, rather than complex state rules and processes.

In several states, including Oregon, regional plans are using performance measures. In 2007-09, OAPA proposed that the Big

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**Performance Measures** are qualitative and quantitative measures that states, regions, and localities use to evaluate plan alternatives and track progress on implementing plans.
Look legislation authorize planning performance measures, so the State could focus on planning outcomes, versus process and regulations. The US House of Representative's draft “Surface Transportation Authorization Act of 2009” also contains an outline of Federal performance measures for MPO regional transportation plans. The recent Senate version of the Livable Communities Act would also require improved accountability for regional plans through use of performance measures. Several notable programs of regional performance measures are described here.

California’s voluntary Blueprint Planning program requires 20-year regional plans to use performance measures addressing a region’s vision, as well as the most efficient and effective transportation and land use patterns. The Sacramento Area Council of Governments has pioneered this approach in its award-winning 2004 regional Blueprint Plan. The five-county plan has reported notable progress in its performance measures, including transportation choices, housing choices, mixed land uses, compact development, use of existing assets, natural resource and agricultural lands conservation, and quality urban design.

The Washington DC Region Council of Governments (D.C., Maryland, and Virginia) has adopted Region Forward, A Comprehensive Guide for Regional Planning and Measuring Progress in the 21st Century (2010). Region Forward is a regional vision, strategic plan, and a comprehensive set of measurable targets. The target areas include land use, transportation, economy, housing, health, environment, climate and energy, education, and public safety. Region Forward is implemented through the Greater Washington 2050 regional compact.

Georgia Department of Community Affairs, in its 2009 Regional Planning Requirements, directs regional plans to incorporate performance standards to measure achievement of regional visions and progress in addressing regional issues and opportunities. Standards may address “recommendations for fitting local character areas into the larger regional planning context, implementation measures to achieve the desired development patterns for the region, recommended new or revised local development regulations, incentives, public investments, and infrastructure improvements.” Regions must define both minimum essential standards and desired excellent standards. Achieving excellent standards qualifies regions for state incentive funding.

Greater Portland-Vancouver Indicators Project 2010-11 is a public-private effort led by Portland State University and Metro. Regional indicators are being developed for education, quality housing and communities, economic opportunity, healthy people, natural environment, arts/culture/creativity, access and mobility, and civic engagement and connections. Metro will use the indicators to assess outcomes in its regional plans;

other public institutions and business groups will use their indicators in their strategic plans.\footnote{Greater Portland-Vancouver Indicators Project, Portland State University, Institute of Metropolitan Studies, 2010 http://www.pdx.edu/ims/indicators.}

**C4D. Reliable funding for regional efforts is critical. Incentive programs and partnerships are essential to support regional planning and decision-making efforts.**

Meeting participants repeatedly cited the current economic recession and financially-strapped local governments as reasons for the inability to fund new regional planning requirements. They stated that state and/or federal funds and incentives would be necessary for a successful regional effort. When resources are scarce, the State and local governments should make every effort to ensure that funds are used as efficiently and effectively as possible. Participants were also highly supportive of having the ability to exercise more control of State and Federal funding in their respective regions.

California shares 75\% of its Transportation Improvement funds (state and federal) with its regional planning agencies. These agencies then determine which projects to fund, even on the state highway system. California’s generous resource sharing backs up its strong commitment to the new Sustainable Communities and Climate Change Act, SB 375, requiring regions to adopt integrated land use, transportation, and housing plans, thereby reducing greenhouse gas emissions. Georgia and Vermont also have a broad array of regional smart growth incentives, which provide local and regional authority, grants, and loans to support planning, infrastructure and finance, from conservation easements to town centers.

Participants in OAPA regional meetings generally agreed that showing how regional planning could save state and local government time and money is a strong motivator for regional planning. Participants emphasized that local governments would strongly oppose any new programs requiring additional local funding. Some participants expressed concern that mandated state and federal MPO planning for greenhouse gasses could be too narrow in scope and area to deal with the multiple issues Oregon regions face.

Funding for regional planning bodies in states profiled in this report comes from dedicated state or flexible federal sources. Vermont uses Real Estate Transfer Tax funds, California federal and state transportation funds, and Georgia and North Carolina state allocations. In these states, regional planning bodies are administered through Councils of Government or similar consortiums. Regional bodies derive other funds from member dues, administration of regional and local grants and projects, and fees for services to local governments. MPOs receive federal formula allocations of planning funds. Oregon SB 1059 requires ODOT and DLCD to propose new funding sources to the 2011 Legislature for MPOs to develop land use and transportation scenarios and greenhouse gas reduction plans.

**C4E. Empowering regional bodies with some regulatory and funding authority is likely to increase their effectiveness.**

Regional efforts across the country that have both regulatory and funding authority are...
generally more effective at regional planning than those that do not. Many participants at the regional meetings believe regional planning should be supported by delegating some state regulatory and funding authority to regions. Local jurisdictions could also empower a regional authority by committing to a common regional vision, goals, and strategies, and funding the subsequent efforts. Participants at regional meetings were generally favorable to this idea, though many elected officials were concerned it would result in an additional layer of bureaucracy and cost local governments more money. The advisory committee provided a cautious note, saying more discussion and thought should go into such a concept, and that the economic climate was not right at this time.

**Recommendations**

OAPA believes Oregon communities would benefit significantly from a new policy framework that better integrates regional planning and decision-making. This missing element in the state’s planning system could help local communities and the State by streamlining current regional efforts and releasing the creativity of Oregon cities and counties. The authors of a recent study on regionalism in the West summed up the hope inherent in regions coming together to solve mutual problems.

> … if you bring together the right people in constructive forums with the best available information, they are likely to shape effective solutions to shared problems. What distinguishes regionalism from these other disciplines is its focus on the geography of human needs and interests.⁹⁸

A new policy framework could help state, regional, and local entities implement more unified regional planning and decision-making across the state, and transition from the current fragmented approach, to a more efficient, fundable, and politically supportable system. A new framework could adapt existing regional structures and resources, to strengthen regional governance and state investments. The State of Oregon could reward sustainable regional and local plans with a focused state investment program and measurable performance standards, supporting the State, counties, and cities in forming more effective regional planning and decision-making bodies.

Table 9 shows the recommendations—organized by statewide recommendations (not including the Portland Metro area) and specific regional recommendations. The recommendations are also organized by short-term activities that build capacity for regional planning (Phase 1, which should be implemented in 2011-2013) and long-term activities that employ new approaches and implementation activities (Phase 2, which should be implemented in 2013-15). We also indicated the type of organization that should initiate the activity:

- **Legis:** the Oregon Legislature, indicating that legislation is necessary to fully implement the recommendation
- **State Comm:** state commission, indicating that administrative rule changes are necessary by the Land Conservation and Development Commission (LCDC) or other state commissions
- **State Agency:** indicating that state agency policy change is necessary by the

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Department of Land Conservation and Development (DLCD) or other state agencies

- **Local/Region**: referencing cities, counties, special districts, Councils of Governments, or other types of organizations that work on local and regional policies.

### Table 9. Regional Planning Recommendations, OAPA, 2010

<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Ph 1</th>
<th>Ph 2</th>
<th>State, regional, and local actions</th>
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<tbody>
<tr>
<td><strong>S1. A new regional framework</strong></td>
<td>X</td>
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<td>X</td>
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<tr>
<td>S1A. The State and regions should actively work to create a new regional planning framework that is cost-efficient and effective, removes barriers to regional planning and decision-making, and increases regional coordination and cooperation.</td>
<td>X</td>
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<td>X</td>
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<tr>
<td><strong>S2. Addressing regional issues</strong></td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>S2A. The State should allow regions to work together to conduct a regional buildable lands analysis (including a housing needs analysis and an economic opportunities analysis) as the factual base for urban growth boundary expansion analysis for all local governments within that region.</td>
<td>X</td>
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<tr>
<td>S2B. Regions should consider (and the State should support) adopting regional plans.</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>S2C. The State should adopt performance measures for regional plans.</td>
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<td>S2D. The State should empower regions that have acknowledged regional plans with planning review and funding authority.</td>
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<td><strong>S3. Coordination of regional planning and decision-making</strong></td>
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<td>X</td>
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<td>S3A. The State should enable regions to create Regional Planning Commissions.</td>
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<td>X</td>
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<td>S3B. The State should support an increased regional planning role of Councils of Governments.</td>
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<td><strong>S4. Supporting regional planning and decision-making</strong></td>
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<tr>
<td>S4A. The State should look for opportunities to audit and streamline planning (and other) laws, rules, and processes.</td>
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<tr>
<td>S4B. The State should fund improvements to state and regional data collection, management, and analysis.</td>
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<tr>
<td>S4C. The State and regions should prioritize some existing resources and consider adopting new incentive programs to support regional planning.</td>
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</table>
The State should authorize regions to create Regional Improvement Programs that coordinate state and other resources to effectively implement acknowledged regional plans.

The State and regions should track, provide input, and prepare for federal legislation and programs in energy, transportation, housing, and environment that can provide new resources for regional planning.

Regional Recommendations

R1. MPOs should consider expanding their boundaries to provide for more comprehensive transportation planning within their travelsheds.

R2. The Central Oregon region (Deschutes, Crook, and Jefferson Counties) should determine if it wants to address regional land use and transportation planning issues, and if so, what body should coordinate this activity.

Statewide recommendations

This section includes recommendations that are applicable to all regions in Oregon.

S1. A new regional planning framework

S1A. The State and regions should actively work to create a new regional planning framework that is cost-efficient and effective, removes barriers to regional planning and decision-making, and increases regional coordination and cooperation. Regional planning should fill a gap in decision-making, not create another layer of bureaucracy.

Key recommendations for the State needed to create an effective regional framework include:

- Provide a state and locally recognized legal framework for regional planning bodies, plans, and agreements, fostering strong communications and collaborative decisions, and assuring on-going, accountable, and efficient decision making.

- Allow variation in regional planning structures and functions, integrating with existing regional character and local government structures and functions.

- Support acknowledged regional plans with Regional Improvement Programs and other funding incentives, through State and regional partnerships that better align State, Federal and other funding assistance.

- Streamline state oversight of regional and local planning in areas with acknowledged regional plans.

Recommendations for regional bodies to improve regional planning and create an
effective regional decision-making framework include:

- Make regional decisions through an inclusive process that represents a majority of regional planning body members, and possibly by the representatives of a majority of the region’s population (or other weighted voting mechanism, as determined by the local decision-making body). Consensus should be a goal, but not a requirement.

- Define the regional decision framework and expectations clearly when a regional process is being created. Communicate this to decision-makers and the public so that it is clear how regional decisions will be reached over the long term.

- All regions should identify the most pressing regional issues and determine the most appropriate organizations to be involved.

- The choice of a regional decision-making structure should be up to local participants. The two most widely supported options for a regional planning body are through the local COG or a newly created Regional Planning Commission. The governing board of the regional decision-making organization should be composed of local, elected officials.

S2. Addressing regional issues

The State should encourage collaboration between local jurisdictions in addressing regional issues. The recommendations in this section are organized in the order in which they should be implemented.

S2A. The State should allow regions to work together to conduct a regional buildable lands analysis (including a housing needs analysis and an economic opportunities analysis) as the factual base for urban growth boundary expansion analysis for all local governments within that region.

The Department of Land Conservation and Development appropriately encourages cities and counties to prepare regional housing needs analyses, economic opportunities analyses, and buildable/suitable lands inventories. However, if such studies may result in an amendment to a city’s urban growth boundary, DLCD believes that they must be considered in the broader context of a UGB amendment “in the manner of periodic review.” Effectively, this means that local governments cannot rely on these key building blocks in the UGB amendment process until the entire package is presented to LCDC.

OAPA recommends that the State amend state statute to encourage regions to address regional land use issues by allowing regions to conduct a regional buildable lands analysis. Once the analysis is complete for a region, participating jurisdictions could submit it to the Land Conservation and Development Commission for acknowledgment. Once it is acknowledged, local jurisdictions could use the findings as a “safe harbor” for urban growth boundary expansions.

This recommendation would save money and improve reliability. Currently DLCD provides limited funding for buildable lands analysis. Given that housing and employment studies share a common factual base and can be completed more efficiently
at the regional level, there should be added incentives to encourage regional studies. DLCD could support more cities with fewer funds by supporting regional analysis, compared to funding the analysis for each city independently.

In addition, cities and the State could save money by determining at an earlier stage in the UGB analysis process if the factual base upon which all UGB decisions are determined will be appealed and upheld in court.

Housing, economic, and job markets are regional in nature. By encouraging cities and counties to work together to address common growth issues, limited public facilities investments could be focused in areas where they are most likely to yield desired results in terms of affordable housing and job opportunities.

To maximize the relevance of a regional buildable lands analysis, DLCD should review the periodic review schedule and institute changes allowing jurisdictions in a region to coordinate periodic review activities at the same time (currently most jurisdictions have staggered periodic review schedules).

S2B. Regions should consider (and the State should support) adopting regional plans.
A regional plan should create a common regional vision, policies, and goals, as well as an implementation program that considers alternative, long-term land use and transportation scenarios. The State should define the basic and optional elements of a regional plan and provide guidelines and performance measures (see recommendation S2C) for meeting the statewide planning goals.

OAPA recommends that a regional plan should address the following elements at the regional scale: land use, transportation, housing, economic development, growth management, infrastructure, climate change, water quality and availability, air quality, energy facility siting, and natural resources. Regional plans would enable cities and counties to reduce their long-range scenario responsibilities and cost, but still retain authority over their more detailed comprehensive plans and implementing ordinances. With regional plans determining urban growth and major infrastructure issues, local governments would be able to concentrate on issues specific to their jurisdictions.

S2C. The State should adopt performance measures for regional plans.
Oregon should create performance measures holding regions accountable for regional plans and plan implementation. Performance measures are qualitative and quantitative measures that States, regions, and localities use to evaluate plan alternatives and track progress on implementing plans. The performance measures should facilitate regional plans focusing on visions, goals and outcomes, rather than rules and process. Performance measures should assure that regions meet common state standards and interests, while a region and its local jurisdictions would detail its specific measures for plan evaluation, tracking of outcomes, and plan implementation.

S2D. The State should empower regions that have acknowledged regional plans with planning review and funding authority.
OAPA recommends reforms over a five year period: first, build capacity for
regional planning and decision-making, leading to adoption of regional plans and the acknowledgment of those plans by the Land Conservation and Development Commission. Once acknowledged regional plans move into implementation. Local plans, plan amendments, and periodic review would then be accountable to the regional plan. With review and coordination handled by the regional planning body local reporting to the State would be significantly reduced. The one exception would be for new cities—both the regional body and the Land Conservation and Development Commission (LCDC) should approve the first Comprehensive Plan of a newly incorporated city. This recommendation depends on increased coordination and cooperation at all levels of government.

In addition, regions with acknowledged regional plans should have more influence over state funding within their region. For example, the State could empower regional bodies to implement regional plans through a revenue sharing model for flexible state and federal funds. (See Recommendation S4C).

S3. Coordination of regional planning and decision-making.
All regions should integrate existing regional planning activities under one body. The choice of a coordinating structure should be up to local participants. The two recommended options for a regional planning body are Councils of Governments or a Regional Planning Commission. The governing board of a regional planning body should be composed of local, elected officials.

Basic functions of a regional planning body should include:

- Development of a regional vision, goals, and policies and implementation program in a regional plan that includes, at a minimum, a long term land use and transportation scenario, key infrastructure requirements, a program to address climate change, and housing and job strategies
- Coordination of planning activities in the region to “assure an integrated comprehensive plan” (ORS 195.025) for the entire area
- Representation of the region on matters of regional and state policy
- Creation of a regional citizen involvement program
- Administration of Federal, State, and other resources, grants, and partnerships
- Satisfaction of State goals and performance standards for regional plans
- Development of a Regional Improvement Program (See Conclusion S4D below) to implement regional and local plans
- Ultimately, coordination, scheduling, review, and acknowledgment of local plan updates and amendments, based on the Statewide goals and the acknowledged regional plan

Optional functions of a regional planning body could include:

- Provision of local and regional planning and other services
- Convening participants to address regional or sub-regional issues
• Development of a region-wide Goal exceptions or create regionally customized policies or objectives, guidelines or rules, consistent with the State Goals

• Review of updates to State Agency Coordination Programs

S3A. The State should enable regions to create Regional Planning Commissions

The State should enable regions to create Regional Planning Commissions, composed of local elected officials, as multi-county coordinating bodies with authority to adopt regional plans and assume other planning responsibilities. With revisions to ORS 190, 195 and 197, the State could enable Regional Planning Commissions to adopt state-acknowledged regional land use and transportation plans and to prepare, administer, and allocate a Regional Improvement Program (See recommendation S4D). MPO regional transportation plans could then be required to fit within broader regional land use and transportation plans, as California is doing (See Chapter 3). In addition, Regional Planning Commissions should also be charged with integrating the existing planning functions of ACTs, MPOs, Regional Partnerships, Councils of Government, Economic Development Districts, and other regional bodies.

S3B. The State should support an increased regional planning role of Councils of Governments.

The State should enable Councils of Government to assume formal responsibility for coordination of all planning bodies within their service area, to adopt regional plans, and to assume other delegated planning powers under revisions to ORS 190, 195, and 197.

The State should encourage existing COGs to assume more integrated regional planning and decision-making functions and should support the formation of COGs elsewhere in the State to take on these functions.

The State should authorize COGs to perform the same multi-county coordination and planning functions as described above for Regional Planning Commissions (see Recommendation S3A). Similarly, COGs should be charged with integrating the existing planning functions of ACTs, MPOs, Regional Partnerships, and Councils of Government Economic Development Districts, and other regional bodies.

S4. Supporting regional planning and decision-making

State agencies should re-examine the requirements and processes for long-range planning activities and implement efficiencies designed to save state and local government money and time, while maintaining high standards for long-range planning.

S4A. The State should look for opportunities to audit and streamline planning (and other) laws, rules, and processes.

Per HB 2229, Big Look legislation, the audit should make recommendations “to allow for greater variation between regions of the state over time and to reduce complexity.” An audit should identify:

• Statutes, goals or rules that can become guidelines or performance standards
In addition, the State should inventory and assess local government support programs which do, or could, support regional planning and plan implementation. The review should include the programs of the Departments of Agriculture, Business Development, Infrastructure Finance Authority, Environmental Quality, Fish and Wildlife, Energy, Forestry, Housing, Land Conservation and Development, Parks and Recreation, Transportation, Tourism, Water Resources, and the Watershed Enhancement Board.

This recommendation is very ambitious. Even if a comprehensive audit is not feasible in the short-term, important reforms could be made to some of the most costly and complex activities. At a minimum, state agencies should review their procedures for:

- Expanding UGBs (DLCD, Agriculture, Forestry, Water Resources)
- Transportation planning (DLCD and ODOT)
- Environmental permits (DSL and DEQ)
- Transportation Growth Management Grants (DLCD and ODOT)
- Energy Facility Siting (DLCD, Energy, Agriculture, Fish and Wildlife)

S4B. The State should fund improvements to state and regional data collection, management, and analysis.

It is difficult to effectively address regional issues if the State, regions, and local governments do not have good data to accurately quantify and analyze the problem. Data systems, such as GIS, have improved significantly over the past 20 years. Many regions and local governments have kept up with these improvements, but many others do not have the resources to do so. Both DLCD and the Department of Administrative Services (DAS) have proposals to upgrade spatial, and other, data and hardware to better manage this data. OAPA believes that it is important to make sure that regions have good data to make the best and most cost effective decisions.

S4C. The State and regions should re-prioritize some existing resources and consider adopting new incentive programs to support regional planning.

It is difficult and problematic to conduct planning without the necessary funds. To better address regional issues and build Oregon’s regional planning capacity, the State should consider dedicated funding for regional activities. Given the current state fiscal reality, new funding for regional planning will be hard to come by. However, even in the tough fiscal times, the State will spend considerable funds that could effectively be re-directed to better support regional planning. While many current funds are limited to categorical purposes, both state and federal programs and policies are moving towards greater flexibility. The State should assess all current and future sources of regional infrastructure, housing, and planning funds for those that have the flexibility to support and implement effective regional plans.
The State should look at existing programs and consider changes and restructuring supportive of regional planning. For example, the State could implement recommendation S2A, and prioritize funding for UGB analyses to regions. Likewise, the State could dedicate some current or expanded Transportation Growth Management resources, in support of new regional plans or planning efforts. For the same purposes, the State should examine its current federal and state transportation, economic development, infrastructure and housing funds, and consider reprogramming, or restructuring, some funds that would be better allocated to support regional planning.

The State should also assist regional planning bodies with grant applications for federal funds (including the Sustainable Communities Grants) to ensure every opportunity is pursued for early regional planning activities.

Grant authority for some planning, transportation, economic development, housing and infrastructure funds could be delegated through regional planning bodies. The State should coordinate and prioritize its investment (of all types of resources) in those regions implementing acknowledged regional plans with a Regional Improvement Program.

The State should examine options for regional revenue sharing to support regions in implementing acknowledged regional plans, considering programs used by other states. Shared revenues could include state and federal planning, transportation, economic development, housing, and infrastructure funds. The California transportation revenue sharing model that creates strong regional governance and incentives to integrate land use, transportation, and housing plans in order to reduce greenhouse gas emissions, is one model that is worth Oregon's consideration.

In parts of Oregon not currently served by COGs, or where existing COGs do not have regional planning functions, the State should provide administrative and fiscal incentives for formation of a COG or a Regional Planning Commission. Dedicated base level funding for COGs or Regional Planning Commissions, as is done in Vermont, Georgia, and North Carolina, could be one incentive.

In 2010-11, the State and MPOs should leverage needed efforts and resources for regional greenhouse gas planning, under HB2001 and SB 1059. To assure success, any such endeavor must:

- Effectively incorporate a wide scope of regional land use and transportation issues and consider the travelsheds of MPOs, not just areas within the existing MPO boundaries.
- Carefully integrate with ongoing MPO planning (Regional Transportation Plans, Transportation Improvement Programs), the Oregon Transportation Plan and the Statewide Transportation Improvement Program (STIP), and with other regional planning efforts underway in MPO regions.
- Examine the funding sources and scope of planning under California's Sustainable Communities and Climate Change Act, SB 375, to assess comparable opportunities for Oregon MPO scenario planning and implementation.
• Anticipate likely 2011 federal transportation funding and policy changes.

Multiple 2010-11 efforts by the Oregon Transportation Commission and Land Conservation and Development Commission are vitally important to developing new regional planning resources and tools:

• SB 1059 ODOT and DLCD recommendations to the 2011 Legislature for funding Scenario Planning.
• SB1059 Scenario Planning Guidelines (ODOT and DLCD)
• SB 1059 Statewide Transportation Strategy (OTC)
• SB1059 Greenhouse Gas Reduction Toolkit (ODOT/DLCD)
• SB1059 Greenhouse Gas Target Rulemaking (LCDC)
• HB 2001 Review of best practices for regional planning governance under the Jobs and Transportation Act (by ODOT and OTC)

S4D. The State should authorize regions to create Regional Improvement Programs that coordinate state and other resources to effectively implement acknowledged regional plans.
As part of efforts to enable new regional plans and planning bodies, the State and regions should identify a funding package, called a Regional Improvement Program, to help implement regional plans. These programs should be focused on high priority elements of regional and local plans, should reduce regional conflicts and inefficiencies, and should provide a coordinated and focused package of resources from federal, state, regional, and private sources and with tax, fiscal, and finance incentives.

The Governor’s Economic Revitalization Team and Infrastructure Finance Authority should coordinate State support for regional plans and Regional Improvement Plans.

S4E. The State and regions should track, provide input to, and prepare for federal legislation and programs in energy, transportation, housing, and environment providing new resources for regional planning.
The State and regions should cooperatively identify and review potential changes to Oregon’s regional planning programs that may be needed to align with new Federal policies, programs, and funding.

Regional recommendations
This section includes recommendations that are applicable to specific regions.

R1. MPOs should consider expanding their boundaries to provide for more comprehensive transportation planning within their travelsheds.
When desirable in their regions, the MPOs should expand boundaries to cover complete counties within Standard Metropolitan Statistical Areas (SMSA) or Combined Statistical Areas, thus addressing larger regional land use and transportation issues in a more integrated way, as is happening in California. MPO expansions, under Federal
Highway Administration guidelines, should include consultation with the Governor’s office and affected local governments, and should consider State and local laws, MPO bylaws, and new 2010 Census information.

If MPOs cover full county areas in the Willamette Valley, Southern and Central Oregon, regions can plan more effectively for land use and transportation, growth scenarios, growth management, jobs-housing balance, reduction of greenhouse gas emissions (under Oregon SB 1059), regional travelsheds and major corridors. Expanded MPOs could mean more federal planning and project funding under a new federal transportation act. If expanded, MPOs should include rural elected officials on their boards.

**R2. The Central Oregon region (Deschutes, Crook, and Jefferson Counties) should determine if it wants to address regional land use and transportation planning issues, and if so, what body should coordinate this activity.**

The region should determine a coordinating body to conduct regional decision-making in the areas of land use, transportation, economic development, housing, and climate change. The region should consider forming a regional planning body through the Central Oregon Intergovernmental Council to cover the existing area of the COIC and Central Oregon Area Commission on Transportation (Deschutes, Crook, and Jefferson Counties). Consider expanding the Bend MPO to cover Deschutes and Crook counties (Consolidated Statistical Area).
Appendix A: Regional meeting participants

Central Oregon Regional Meeting

Nick Arnis, Transportation Engineering Manager, City of Bend
Scott Aycock, former COIC staff
Phil Chang, Program Administrator, Central Oregon Intergovernmental Council
Tyler Deke, Manager, Bend MPO
Mark DeVoney, Region 4 Planning Manager, Oregon Department of Transportation
Kathie Eckman, Mayor, City of Bend
Butch Hansen, Area Manager SCO, Oregon Department of Transportation
Pam Hardy, Staff Attorney & Central Oregon Advocate, 1000 Friends of Oregon
James Lewis, Transportation Planner, Central Oregon Intergovernmental Council
Mel Oberst, Community Development Director, City of Bend
Patrick Oliver, Planning Commissioner, City of Bend
Eric Porter, Principal Planner, City of Sisters
Brian Shetterly, Long Range Planning Manager, City of Bend
Jon Skidmore, Planning Director/Community Development Director, Jefferson County
Karen Swirsky, Consultant, Central Oregon Intergovernmental Council
Damian Syrnyk, Senior Planner, City of Bend
Cliff Walkey, Hydrogeologist, Oregon Chapter of the American Planning Association Board Member

Mid-Willamette Valley Regional Meeting

Cathy Clark, Councilor, City of Keizer and SKATS
Suzanne Dufner, Project Manager, Mid-Willamette Valley Council of Governments
Vicki Hardin Woods, Community Development Director, City of Salem
Mike Jaffe, MPO Program Manager, Mid-Willamette Valley Council of Governments
Sonya Kazen, ODOT Region 1
Jim Lewis, Executive Officer, Salem Assn. of Realtors and Salem Planning Commission
Kimberly Moreland, Urban Planner, Salem Community Development Department
Karen Odenthal, Transportation Planner- Civil Engineering Associate, Marion County
Les Sasaki, Principal Planner, Marion County
Lane County Regional Meeting

Megan Banks, Senior Planner, Lane Council of Governments
Pamela J Barlow Lind, Tribal Planner, Confederated Tribes of Siletz Indians
Terry Beyer, Oregon State Representative
Kay Bork, Planning Director, City of Junction City
Sonya Carlson, Legislative Assistant, Representative Phil Barnhart
Diane Conrad, City Councilor, City of Cottage Grove
Len Goodwin, Assistant Public Works Director, City of Springfield
Erik Havig, Interim Planning Section Manager, Transportation Development Division, Oregon Department of Transportation
Kent Howe, Planning Director, Lane County
Andrea Riner, Transportation Planner, Lane Council of Governments
Howard P. Schesser, Community Development Director and Emergency Program Manager, City of Cottage Grove
Byron Vanderpool, Government Services Director, Lane Council of Governments
Judy Volta, Mayor, City of Coburg
Rob Zako, Transportation Consultant

Southern Oregon Regional Meeting

Loree Arthur, Grants Pass Urban Area Planning Commissioner, City of Grants Pass
Laura Barton, Trade Development Manager, Oregon Department of Agriculture
John Becker, Regional Manager, Oregon Department of Environmental Quality
Sandi Cassanelli, Commissioner, Josephine County Board of Commissioners
Michael Cavallero, Executive Director, Rogue Valley Council of Governments
Dick Converse, Principal Land Use Planner, Rogue Valley Council of Governments
Carlos DeBritto, Mayor, City of Phoenix
Eugene Dunaway, Grants Pass Urban Area Planning Commissioner, City of Grants Pass
Jeff Griffin, Regional Coordinator, Governor’s Economic Revitalization Team
Harold Haugen, Government Affairs Coordinator, Rogue Valley Association of REALTORS*
Greg Holmes, Planning Advocate, 1000 Friends of Oregon
Larry R. Holzgang, Business Development Officer, Business Oregon
Kirk Jarvie, Economic Revitalization Liaison, Department of State Lands
Mike Kuntz, Engineer, Jackson County
Josh LeBombard, Senior Planner, Jackson County
Jim Lewis, President, Rogue Valley Council of Governments
Bunny Lincoln, Principal Planner, City of Eagle Point
Kelly Madding, Development Services Director, Jackson County
Michael Morter, Regional Services Manager, State Building Codes Division
Tom Schauer, Senior Planner, City of Grants Pass
Michael Snider, Planning Director, Josephine County
Bruce Sund, Deputy Region Manager, Oregon Water Resources Department
Paige Townsend, Senior Planner, Rogue Valley Transportation District
Sarah Vaile, Project Coordinator, Rogue Advocates
Hank Williams, Mayor, City of Central Point
State Agency Representatives
Regional Meeting
Anna Buckley, Wetlands Planner, Oregon Department of State Lands
Scott Fairley, Eastern Region ERT Coordinator, Governor's Office
Dan Fricke, Senior Transportation Planner, Oregon Department of Transportation Region 2
Elizabeth L. Hormann, Sustainability Planner, Oregon Department of Transportation
Jim Johnson, Land Use and Water Planning Coordinator, Oregon Department of Agriculture
Jane Lee, Region 2 Manager, Oregon Department of Transportation
Vivian Payne, Area Manager, Oregon Department of Transportation
Amanda Pietz, Interim Planning and Implementation Unit Manager, Oregon Department of Transportation
Tom Roick, Senior Policy Analyst, Oregon Department of Environmental Quality
Jeff Weber, Coastal Conservation Coordinator, Department of Land Conservation and Development

Non-Profit and Advocacy Groups
Regional Meeting
Julia Babcock, Program Associate, Oregon Solutions
Dominic Colletta, Chair, Urban Land Institute Oregon
David Kim, Metro West Area Manager, Oregon Department of Transportation
Jason Miner, Executive Director, 1000 Friends of Oregon
Susan Peithman, Statewide Advocate, The Bicycle Transportation Alliance
Tara Sulzen, Organizer, 1000 Friends of Oregon
Alwin Turiel, AICP, Long Range Planning Supervisor, City of Hillsboro
Appendix B: Sources

Chapter 2


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