

City of Lake Oswego Transportation System Plan Update PLAN AND POLICY REVIEW, PART 1

Date: March 7, 2012 Project #: 11187
To: Project Management Team
Cc: Transportation System Plan Advisory Committee
From: Joe Dills, Otak and Phill Worth, Kittelson & Associates, Inc.
Project: City of Lake Oswego Transportation System Plan Update
Subject: Lake Oswego TSP Technical Memorandum 3.1 – Part 1: Assessment of City Compliance with State and Regional Plans and Policies

OVERVIEW

A plan and policy review has been prepared for the Lake Oswego Transportation System Plan (TSP) update. It is organized into three memoranda:

Part 1 – Assessment of state and regional plans and policies (this memorandum; also available online at <http://welovelakeoswego.com/citizen-committees/tspac/>)

Part 2 – Summary of state and regional plans and policies¹ (available online at URL above)

Part 3 – Review of local plans and policies² (available online at URL above)

This memorandum is Part 1 of the TSP update's plan and policy review. It is an assessment of Lake Oswego's existing Transportation System Plan (July, 1997), Comprehensive Plan, and Community Development Code regarding their compliance with applicable state and regional requirements for transportation planning. The memorandum is organized into the following sections:

- Executive Summary (page 2)
- Compliance Summary (page 5)
- Appendix A – Compliance Checklists (available online at <http://welovelakeoswego.com/citizen-committees/tspac/>)

¹ Part 2 summarizes state and regional plans and policies, and their applicability to Lake Oswego. It is a separate memorandum titled: "Lake Oswego TSP Technical Memorandum 3.1 – Part 2: Summary of Applicable State and Regional Plans and Policies", Otak, March 6, 2012.

² Part 3 is being prepared by the City of Lake Oswego.

EXECUTIVE SUMMARY

Lake Oswego's Transportation System Plan (TSP) must comply with state requirements in Oregon Administrative Rule Division 12, Transportation Planning, known as the Transportation Planning Rule (TPR). The City's TSP also must comply with the regional planning requirements of Metro, primarily the Regional Transportation Plan (RTP) and Regional Transportation Functional Plan (RTFP).³

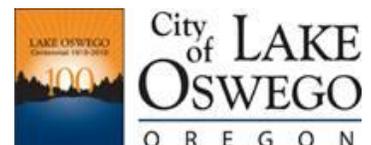
In this memorandum, two icons are used to help identify mandated compliance issues versus required or suggested coordination issues:

- * Compliance requirement
- ➔ Coordination requirement or opportunity

Key findings are summarized below.

1. Much of the existing Comprehensive Plan is in compliance with state and regional requirements. To fully comply, Lake Oswego will need to:
 - * a. Adopt the updated TSP as part of the Comprehensive Plan – The current TSP is not explicitly identified as an adopted part of Lake Oswego's Comprehensive Plan. On a practical level, it is clear that the TSP is functionally a part of the Comprehensive Plan and its implementation. However, the TSP update should include a clear policy and adoption finding that states that the TSP is part of the Comprehensive Plan.
 - ➔ b. Coordinate the timing of the TSP adoption and Comprehensive Plan amendments – At some point, the City will need to make a determination regarding the specific TSP-related Comprehensive Plan amendments it intends to place into an ordinance and take through the adoption process. Initial options are: (1) Adopt the TSP as an integrated part of the new, updated Comprehensive Plan; and (2) Adopt the TSP as an amendment to the City's existing Comprehensive Plan and then integrate it into the full new Comprehensive Plan during subsequent Comprehensive Plan adoption proceedings.
 - ➔ * c. Coordinate further with the state on compliance with TPR Section 060 – Recent amendments to the TPR address what is required when amendments to functional plans, Comprehensive Plans, and Transportation System Plans are proposed. When Lake Oswego's TSP update is completed, it will be adopted through amendments to the TSP, Comprehensive Plan, and Code. Procedurally, the City already complies with Section 060 because it requires such

³ The TPR, RTP, and RTFP are the principal state and regional documents the Lake Oswego TSP must comply with. There are other state and regional plans, policies and regulations which are also applicable. Please see the "Compliance Summary" section of this memorandum for a list of state and regional documents reviewed.

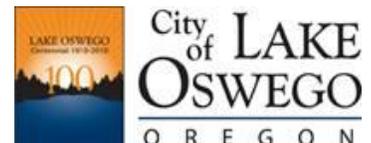


amendments to comply with the Statewide Planning Goals and Oregon Administrative Rules. Substantive amendments being considered in the TSP should be tested for compliance with TPR Section 060 throughout the TSP process, in coordination with the state.⁴

2. The 1997 TSP was fully compliant with state and regional requirements when it was adopted, and was very forward-looking regarding transportation policy. Many requirements have obviously changed since 1997. Notably, Metro's regional planning program and requirements are much more comprehensive today. Lake Oswego should consider the following during the TSP update to meet current regulations:
 - ➔ a. Review the classification of Highway 43 with ODOT – The TSP process should coordinate with ODOT on the state's classification of Highway 43, which changes from a District Highway north of A Street to a Statewide Highway south of A Street. Lake Oswego's Town Center encompasses all of the downtown and State Street. From a land use perspective, a consistent highway classification may be more appropriate.
 - * b. Integrate the Special Transportation Area designation of State Street into the TSP – State Street is a designated a Special Transportation Area (STA). STAs are, in part, how the state recognizes the importance of Oregon's downtowns. Lake Oswego's STA is not mentioned in the current TSP or the Community Development Code. The TSP update process should explore how this designation can benefit Lake Oswego's transportation system and goals for the downtown. The STA must be explicitly recognized in the TSP.
 - * c. Incorporate current state mobility standards for Highway 43 – The current TSP (1997) is based on out-of-date standards. The TSP's technical analysis will need to utilize the Oregon Highway Plan's (OHP) current mobility policy and "Table 7" standards for Highway 43. The new standards and policy framework in OHP Policy 1F provide the City with more flexibility to plan mixed use centers, and integrate land use, economic development, and transportation than previous state mobility standards.
 - * d. Coordinate with Metro on regional High Capacity Transit (HCT) corridors – The TSP update should include coordination with Metro concerning Lake Oswego's obligations regarding the Regional HTC System Plan.⁵ At minimum, the TSP should describe the Regional HCT System Plan's recommendations for the east-west corridor through Lake Oswego. The Transit Plan component of the TSP should examine the corridors, and reference future planning to be conducted.
 - * e. Integrate the RTP's recommendations for all modes – The new RTP (June, 2010) provides a completely updated regional backdrop for Lake Oswego's TSP as compared to 1997. The TSP will need to address recommendations for regional street design classifications, bicycle designations, pedestrian network designations, and mobility corridors. The Regional Trails Map should be part of this integration.

⁴ The finding applies to the Comprehensive Plan as well.

⁵ Regional High Capacity Transit System Plan, 2035 Summary Report, Metro, June 2010.



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- * f. Comply with current TPR standards – Detailed TPR requirements are identified in this memorandum – please see Tables 1-3 in Appendix A. Standards to be addressed range from performance standards to pedestrian districts.

 - * 3. Only minor updates to Lake Oswego’s Community Development Code are needed to comply with the TPR and Metro’s RTP. These include updates that address pedestrian and bicycle circulation (off-site standards), “safe and convenient” pedestrian routes, transit route definitions, potential wider application of carpool and vanpool standards, transportation demand management, parking structures, and updated street standards.



COMPLIANCE SUMMARY

Transportation system planning in Oregon is required by state law as one of the 19 statewide planning goals (Goal 12, Transportation). The following state and regional plans and policies have been reviewed to determine the City's compliance with state and regional requirements:

State Plans and Regulations

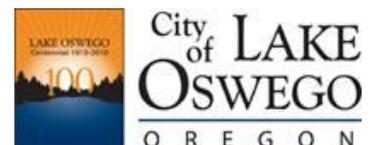
- Transportation Planning Rule (OAR 660-012)
- 1992 Oregon Transportation Plan (updated 1999, 2006)
- 1999 Oregon Highway Plan (updated 2006)
- 2010 – 2013 State Transportation Improvement Program (STIP)
- Access Management Rules (OAR 734-051)
- State and Regional Climate Change Plans and Regulations

Regional Plans and Policies

- Metro Regional Framework Plan
- Metro 2040 Growth Concept
- Metro Urban Growth Management Functional Plan (UGMFP)
- Metro 2035 Regional Transportation Plan (RTP)
- Metro Regional Transportation Functional Plan (RTFP)
- Regional High Capacity Transit Plan, 2035 Summary Report
- TriMet Transit Investment Plan
- Regional Trails
- Checklist for Local Compliance in TSP (from Transportation and Implementation Guidance for the Portland Metropolitan Region)

The findings from the review of the above-listed documents are summarized below in the form of "comments and potential amendments". These findings are grouped according to the Comprehensive Plan, TSP, and Community Development Code. Please note:

- This is intended as a starting point for further refinement and use during the TSP update.
- The City's review of local plans, policies, and regulations will likely reveal local compliance that was not evident from the documents we reviewed.



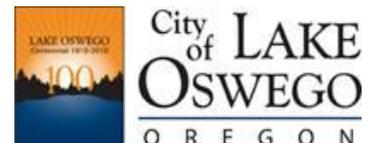
- This review is focused on compliance and coordination. There will be many more policy ideas that emerge as part of the analysis and creative thinking in the TSP update process.
- This review is focused on existing documents. New planning, particularly the Comprehensive Plan update, will influence what ultimately gets considered for amendment in Lake Oswego's TSP.



LAKE OSWEGO COMPREHENSIVE PLAN

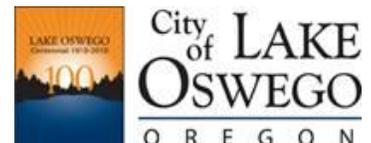
Much of the existing Comprehensive Plan is in compliance with state and regional requirements. The following are comments and potential amendments for the Comprehensive Plan.

Plan or Policy Reference	Comments and Potential Amendments - Comprehensive Plan
TPR 660-012-0015 *	<p>Adopt the TSP as part of the Comprehensive Plan – The current TSP is not explicitly identified as an adopted part of Lake Oswego’s Comprehensive Plan. The TSP, Chapter 12 of the Comprehensive Plan, and the TSP’s adoption ordinance also do not explicitly state the relationship between the TSP and Comprehensive Plan. On a practical level, it is clear that the TSP is functionally a part of the Comprehensive Plan and its implementation. The TSP update should include a clear policy and adoption finding that states that the TSP is part of the Comprehensive Plan.</p>
TPR 660-012-0015 →	<p>Coordinate the timing of the TSP adoption and Comprehensive Plan amendments – Lake Oswego is in the process of updating its Comprehensive Plan. The schedules for the TSP and Comprehensive Plan are being coordinated so that both planning efforts are mutually supportive and inform each other. At some point, the City will need to make a determination regarding the specific TSP-related Comprehensive Plan amendment it intends to place into an ordinance and take through the amendment process. Initial options are:</p> <ol style="list-style-type: none"> 1. Adopt the TSP as an integrated part of the new, updated Comprehensive Plan. 2. Adopt the TSP as an amendment to the City’s existing Comprehensive Plan, and then integrate it into the full new Comprehensive Plan during those proceedings. <p>There may be additional options to consider as this issue is discussed and the City moves closer to completion of the new Comprehensive Plan. The determination of the nature of the TSP adoption should be made as early as possible in the TSP process so it is clear for all participants.</p>
TPR – recent amendments to 660-012-0060 →	<p>Coordinate further with the state on compliance with TPR Section 060 – Recent amendments to the TPR address what is required when <u>amendments</u> to functional plans, Comprehensive Plans, and Transportation System Plans are proposed. When Lake Oswego’s TSP update is completed, it will be adopted as amendments to the TSP, Comprehensive Plan and Code. The amendments will be legislative decisions, in accordance with the provisions of Article 50.75, Legislative Decisions,</p>



Plan or Policy Reference	Comments and Potential Amendments - Comprehensive Plan
	<p>of the Code. Procedurally, the City already complies with Section 060 because the Code requires legislative amendments to comply with applicable state law, Statewide Planning Goals, and Oregon Administrative Rules (CDC 50.75.010). Quasi-judicial amendments (e.g. site specific zone changes), do not have this same requirement, but the City has broad authority to require quasi-judicial amendments to comply with “any additional statutory or Lake Oswego code provisions...(CDC 50.79.035, Major Development Review Criteria). The City should consider revising the Major Development Review criteria to be more explicit about compliance with applicable Statewide Planning Goals and Oregon Administrative Rules.</p> <p>The above comments address procedures and criteria. Substantive amendments being considered in the TSP update process should be tested for compliance with TPR Section 060 as early as possible, in coordination with the state.⁶ The recent amendments to the TPR should be analyzed in detail for what, if anything, they mean for both the emerging Comprehensive Plan and the TSP update. This is not a compliance issue for the existing TSP, but rather a future compliance issue as the Comprehensive Plan and TSP are crafted. As just one example, the TPR’s new sections describing “multi-modal mixed use areas” are complex and need analysis as to whether they will be beneficial to Comprehensive Plan concepts under discussion for mixed use centers and economic vitality.</p>
<p>RTFP – Title 4, Parking, 3.08.410I *</p>	<p>Supplement parking policies in centers – Lake Oswego already has parking policies and standards that meet regional requirements. This section of the RTFP says the TSP or the Comprehensive Plan “must consider and may adopt” a list of ideas to manage parking. Please see Appendix A, Table 4, Title 4 section for the RTFP’s ideas to be considered.</p>

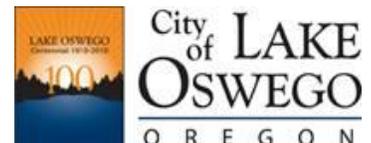
⁶ The finding applies to the Comprehensive Plan as well.



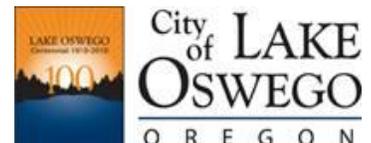
LAKE OSWEGO TRANSPORTATION SYSTEM PLAN

For compliance with state and regional requirements, the following should be considered as the City's TSP is updated.

Plan or Policy Reference	Comments and Potential Amendments - TSP
<p>Oregon Highway Plan, Policy 1A - State Highway Classification System →</p>	<p>Highway 43 classification – The TSP process should coordinate with ODOT on the State's classification of Hwy 43, which changes from District Highway north of A Street to Statewide Highway south of A Street. Lake Oswego's Town Center encompasses all of the downtown and State Street. From a land use perspective, a consistent highway classification may be more appropriate.</p> <p>National Highway System – The TSP process should coordinate with ODOT on the significance of the NHS designations in Lake Oswego and what they mean for decisions to be made in the TSP.</p>
<p>OHP, Policy 1B - Land Use and Transportation * →</p>	<p>Special Transportation Area along State Street – State Street is a designated a Special Transportation Area (STA). STAs are, in part, how the state recognizes the importance of Oregon's downtowns. Lake Oswego's STA is not mentioned in the current TSP or the Community Development Code. The TSP update process should explore how this designation can benefit Lake Oswego's transportation system and goals for the downtown. The STA must be explicitly recognized in the TSP.</p> <p>Lifeline routes – Lake Oswego's current TSP and Community Development Code do not address Lifeline Routes per se. This topic should be explicitly addressed in the TSP update process, in coordination with the state and emergency service providers.</p>
<p>OHP, Policy 1F: Highway Mobility Standards * →</p>	<p>Mobility standards –</p> <ul style="list-style-type: none"> • The current TSP (1997) is based on out-of-date standards. Technical work will need to utilize the OHP's updated policy and Table 7 standards as the starting point for Highway 43. • The new standards and policy framework in Policy 1F provide the City with more flexibility to plan mixed use centers, and integrate land use, economic development and transportation, than previous state mobility standards. • If it is found, during Lake Oswego's TSP process, that it is "infeasible or

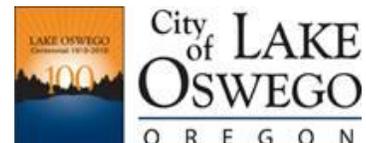


Plan or Policy Reference	Comments and Potential Amendments - TSP
<p>→</p>	<p>impractical” to meet the state’s mobility targets, the policy provides for the proposal of alternative targets that reflect the balance between land use, economic development, social equity, and mobility and safety for all modes of transportation. Alternative mobility targets must be adopted by the Oregon Transportation Commission as part of the OHP.</p> <p>Roadmap for coordination – The TSP update should establish a roadmap early in the process that is coordinated with ODOT, for the evaluation and compliance with Policy 1F, ODOT’s Highway Mobility Standards. There should be on-going dialogue between the City and ODOT about this policy at major tasks of the project, so that coordinated and compliant recommendations are available in Task 11 and 12 of the TSP work plan.</p>
<p>OHP, Policy 3A: Classification and Spacing Standards *</p>	<p>Access standards – As described above in the Oregon Highway Plan section, draft amendments to Policy 3A specifically add the phrase “support economic development” to the state’s access management goal, and, clarify the standards for consideration of deviations from the standards when they cannot met.</p> <p>The State’s drafting and outreach process for the update of Policy 3A (and some associated policies) has been substantially completed. The proposed revisions to the access standards will be before the Oregon Transportation Commission on March 21, 2012.</p> <p>Lake Oswego’s TSP update will need to address the new standards.</p>
<p>2010 – 2013 State Transportation Improvement Program (STIP) →</p>	<p>STIP coordination – The Final 2012-2015 STIP is scheduled to go before the Oregon Transportation Commission on March 21, 2012 for approval. After that, it will be submitted to the Federal Highway Administration and Federal Transit Administration for final approval, which is anticipated to occur in June.</p> <p>The Draft 2012-2015 STIP includes two projects within Lake Oswego:</p> <ul style="list-style-type: none"> • Pilkington Pathway: Jean Road-Dawn Street (17148), \$497,000, Construct pedestrian pathways • Streetcar Extension: Portland-Lake Oswego via Willamette Shore (17286), \$4,458,000, Funding for the draft environmental impact statement



Plan or Policy Reference	Comments and Potential Amendments - TSP
	Lake Oswego’s TSP projects should be consistent with the final, adopted STIP.
Access Management Rules (OAR 734-051) * →	Access management technical evaluation – A compliance review with OAR 734-051 is beyond the scope of this review. It is a technical evaluation that should be conducted as part of the TSP’s modeling and system analysis. For State Street, the regional Town Center designation, existing urban character, and Special Transportation Area status will be key factors in how the access management rules are interpreted and applied.
Regional High Capacity Transit Plan, 2035, Summary Report * →	Coordination with HCT corridors – The TSP update should include coordination with Metro concerning Lake Oswego’s obligations regarding the Regional HTC System Plan. ⁷ At minimum, the TSP should describe the Regional HCT System Plan’s recommendations for the east-west corridor through Lake Oswego. The Transit Plan component of the TSP should examine the corridors, and reference future planning to be conducted.
Regional Trails →	Regional Trails and Pedestrian System Plan – The four Regional Trails identified on the Regional Trails plan should be incorporated into the updated Pedestrian System Plan.
TPR 660-12-0015, 0020(1), 0030 (1a) *	State transportation needs – The updated TSP should mention, in the discussion of transportation needs, how state needs are addressed.
TPR 660-12-0020(3)(b) *	Performance standards – The updated TSP should address performance standards for the road and transit plans.
TPR 660-12-0035(3)(b) *	Air, land, and water quality – The updated TSP should address federal air, land and water quality standards.
TPR 660-12-0035 (3)(c) *	ESEE – The updated TSP should address environmental, social, energy, and economic consequences, in coordination with its Goal 5 compliance.
TPR 660-12-0035 (7) *	Benchmarks – The updated TSP should include benchmarks to assure satisfactory progress towards meeting the standards at regular intervals over the planning period.

⁷ Regional High Capacity Transit System Plan, 2035 Summary Report, Metro, June 2010.

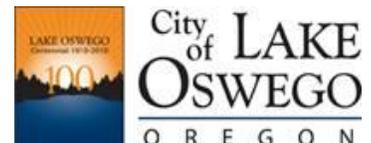


Plan or Policy Reference	Comments and Potential Amendments - TSP
TPR 660 -12-0040(2)(d) *	Project selection policies – The updated TSP should include explicit policies to guide selection of transportation projects to meet the identified benchmarks.
TPR 660-12-0045(5)(a) *	TODs along transit routes – The TSP should describe the transit system as nodal, i.e. that there are low density neighborhoods between TOD centers and corridors.
TPR 660 660-12-0045(5)(d) *	Residential parking districts – The TSP should consider whether residential parking districts have applicability in Lake Oswego.
RTFP Checklist for compliance in a local TSP * →	Please see Appendix A, Table 4, for 16 recommendations for the TSP related to compliance with the Regional Transportation Functional Plan.
RTFP, Title 1, Pedestrian System Design * →	Pedestrian districts – The TSP should define and discuss “pedestrian districts” as the term is used in the RTFP. However, the term should only be carried forward into policy if it also is also used in the Comprehensive Plan.

LAKE OSWEGO COMMUNITY DEVELOPMENT CODE

Only minor updates to Lake Oswego’s Community Development Code are needed to comply with the TPR and Metro’s Regional Transportation Functional Plan. The following are revisions that should be considered for the current Code.

Plan or Policy Reference	Comments and Potential Amendments – Community Development Code
TPR 660-12-0045(3)(b) *	Off-site pedestrian and bicycle circulation – Add “Neighborhood Activity Centers” and the TPR’s half mile criterion to the Code. Add a compliance standard for off-site pedestrian and bicycle routes – this can be a reference to the Comprehensive Plan and TSP. Code sections to be potentially amended include Article 50.59, On-site Circulation – Bikeways, Walkways and Accessways, and Article 50.60, Local Street Connectivity.



Plan or Policy Reference	Comments and Potential Amendments – Community Development Code
TPR 660-12-0045(3)(d), and (6) *	Safe and convenient routes – Add “safe and convenient” as part of direct route standards in Article 50.59, On-site Circulation – Bikeways, Walkways and Accessways. Add a compliance standard for off-site pedestrian and bicycle routes – this can be a reference to the Comprehensive Plan and TSP.
TPR 660-12-0045(4)(a) *	Transit routes – Review definitions and consider adding “transit routes” as a term that has the same meaning as “transit streets” (which are defined and used in the Code).
TPR 660-12-0045(4)(d) *	Carpool and vanpool parking – In Article 50.55, Parking Standards, consider expanding the “preferential parking for carpools standard” to developments with 25+ employees, as recommended in the 1997 TSP.
TPR 660-12-0045(5)(c) *	Transportation Demand Management – Expand the City’s authority to require TDM measures during development review. Add additional TDM measures described in the TSP. For these revisions, the appropriate location in the Code needs to be determined.
TPR 660-12-0045(d) *	Parking structures – In Article 50.55, Parking, consider exempting parking structures from maximum parking requirements, provided they meet design standards similar to downtown. In the Code, consider adding provisions regarding redevelopment of parking lots over 3 acres (Code section to be determined). In the TSP, consider whether residential parking districts have applicability in Lake Oswego.
TPR 660-12-0045(7) *	Street standards – Update the street standards in the TSP and add a referencing section in the Code. There will be multiple sections within the Code to cite the street standards.

