



2030 Regional Waste Plan

DRAFT (revised 01/03/17)

Project Work Plan

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SECTION 1: PURPOSE AND BACKGROUND

The purpose of this document is to outline the project work plan, including the planning process and engagement approach, for developing the 2030 Regional Waste Plan.

The Regional Waste Plan, adopted by the Metro Council, is the greater Portland area’s long-range blueprint for managing and reducing the environmental impacts of goods consumed in the region, from production to disposal. The plan sets goals and policies for the region to reduce the amount of waste it generates, promote greater reuse and recycling of items, and manage the waste that is leftover in a manner that protects the environment and public health, gets the best value for the public’s money, and advances racial equity, diversity and inclusion in the region.

The name of the plan is simplified from the current Regional Solid Waste Management Plan to the Regional Waste Plan in order to provide the public with a clear and concise name for an effort that seeks to set ambitious goals for reducing waste and making the most of the discarded materials we don’t want.

The plan will contain:

- A long-term vision for managing and reducing the environmental impacts of goods consumed in the region from production to disposal
- Policies to guide equitable benefits and impacts from system services, financing, design and regulation
- Goals that identify what the region wants to achieve by 2030 and indicators to measure progress
- An action plan that identifies short, medium and long term actions needed to accomplish the plan’s goals

Figure 1. Elements of the Regional Waste Plan



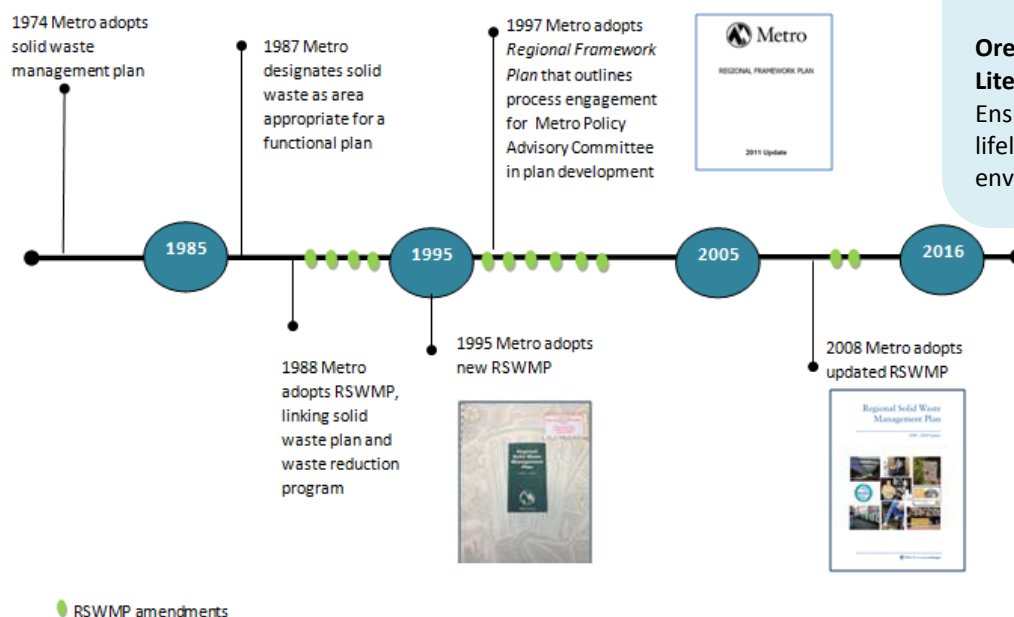
Legal Foundation and History

Metro has broad authority, from the Metro Charter, the Oregon Constitution, and Oregon statutes, for planning, managing and overseeing the regional solid waste system. In 1987, the Metro Council designated solid waste as an area and activity appropriate for a functional plan (Metro Ordinance 87-740), recognizing the complexity of managing this system across two dozen cities and portions of three counties, over a million residents, thousands of businesses and many solid waste service providers. This complexity demands regional coordination. A regional plan provides a unified blueprint to ensure all parties are coordinated and the individual parts of the system function properly as whole.

In addition, the traditional solid waste hierarchy (reduce, reuse, recycle etc.) and many of the guidance documents listed in the sidebar of this page, recognize that managing municipal solid waste is one part of a broader strategy of managing the environmental and human health impacts associated with the production, use and end-of-life management of the products that Metro-area residents and businesses use.

Metro has adopted three solid waste system plans to date. These are shown in Figure 2. The plans are updated roughly every ten years to meet the needs of our changing region and align with state and federal guidance.

Figure 2. History of regional solid waste plan adoptions



Policy Guidance

Metro's Six Desired Outcomes

Metro Council's six desired outcomes for the region

Equity Strategy

Metro's strategic plan to advance racial equity, diversity and inclusion

Regional System Public Benefits

Metro solid waste system guiding values

National Materials

Management Strategy

Environmental Protection Agency's Sustainable Materials Management Plan

Oregon 2050 Vision

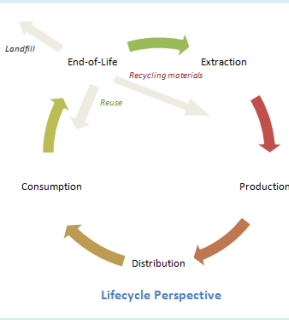
Oregon state vision and action framework for sustainable materials management

Oregon Toxics Reduction Strategy

State strategy aimed at keeping toxics out of the environment

Oregon Environmental Literacy Framework

Ensure students become lifelong stewards of environment and community



Extraction: Natural resources are extracted from the earth and used to produce goods. Some form of energy is always required to extract natural resources (e.g., mining, drilling, forest harvesting).

Production: Raw materials are processed, refined and manufactured into goods, which are assembled and packaged for distribution.

Distribution: Products are moved from their manufacturing source to customers.

Consumption: Goods and services are used by consumers or in the production of other goods.

End-of-life: Materials or products are stored, stockpiled, disposed or processed for recycling.

Since adoption of the 2008 plan, the federal and state governments, as well as Metro, have adopted new policy guidance that will inform the development of the new plan. New plans adopted at the federal and state levels provide an expanded approach for managing materials from production to disposal.

The U.S. Environmental Protection Agency’s 2016 strategic plan, *Sustainable Materials Management*, and Oregon Department of Environmental Quality’s *Oregon 2050 Vision and Action Framework for Materials Management* move beyond traditional solid waste boundaries by adopting a life cycle approach. This approach identifies impacts and actions across the life of materials and products as they move through the economy—starting with design and continuing through raw material extraction, manufacture, transport, consumption, use, reuse, recycling and disposal.

In addition, the Metro Council adopted the *Strategic Plan to Advance Racial Equity, Diversity and Inclusion* in June 2016. This plan sets five goals for advancing regional equity:

- Metro convenes and supports regional partners to advance racial equity
- Metro meaningfully engages communities of color
- Metro hires, trains and promotes a racially diverse workforce
- Metro creates safe and welcoming services, programs and destinations
- Metro's resource allocation advances racial equity

To accomplish these goals, Metro will concentrate on eliminating the disparities that people of color experience, especially in those areas related to Metro’s policies, programs, services and destinations. By addressing the barriers experienced by people of color, Metro will also identify solutions and remove barriers for other disadvantaged groups. This strategic direction allows Metro the opportunity to make a difference in the lives of disadvantaged communities, while having a positive impact on the Portland region’s overall quality of life.

The Regional Waste Plan will support Metro’s equity goals by prioritizing equity in all phases of plan development, the community engagement process and incorporated into the plan itself.

SECTION 2: PROJECT OVERVIEW

Project Goal

The goal of the project is to adopt a Regional Waste Plan that reflects community and regional values, sound technical analysis, input from partners and the public, and advances the region as a leader in conserving resources and protecting the environment. This will be accomplished through an inclusive engagement approach. Engagement efforts will focus on individuals and groups who Metro has not historically engaged in decision-making on garbage and recycling issues, but are significantly impacted by the outcomes of those decisions. Those audiences include communities of color, low-income communities, communities historically impacted by the placement of solid waste and recycling facilities, individuals and families living in multi-family housing, and communities with limited English proficiency.

Opportunities and Challenges

With expanded knowledge on the impact of materials, we are presented with a wider range of opportunities for action for protecting human and environmental health and advancing regional desired outcomes. The plan will address a range of challenges and opportunities including:

Leadership and innovation: The Metro area has a strong track record of success when it comes to managing and reducing waste and protecting the environment. Development of this plan gives the region the opportunity to look ahead to make sure that it continues to improve upon this legacy and serve as a national leader. The plan presents an opportunity to further improve the regional system through innovation, new investments and continuing our efforts to enhance and protect the quality of life in the region.

Fully incorporating equity in the plan outcomes: Through this plan, the region has an opportunity to eliminate barriers and generate positive benefits that advance racial equity, diversity, and inclusion through its roles in waste reduction, regulation, management, planning and policy.

Reducing impacts throughout the product life cycle: Although the region is a leader in waste reduction, regional demand for materials and products has impacts on people and the environment. Manufacturers and consumers have important roles to play in increasing the sustainability of the products they make and consume. The plan will need to identify actions that the region can take to impact the entirety of the product life cycle.

Maintaining and improving the current collection system: Strong collaboration among Metro, local governments and service providers has ensured that the region provides an array of recycling programs and services to households and businesses. The challenge ahead is continued improvement of the regional system and ensuring equitable services are provided to all the region's residents.



Adaptability: Our regional collection and processing system needs to be adaptable to opportunities to recycle new materials, such as food scraps, adjust to cyclical ups and downs in existing recycling markets, and keep progressing as changes occur in the private sector that provides many of this system's services.

Making the most of what we don't want: Garbage is a resource we literally throw away. It can provide energy that powers homes and businesses. Landfills must be chosen wisely to minimize the health and environmental impacts and provide benefits to the communities that host them. To make the most of garbage as a resource, the Metro Council is considering options for how to best manage the region's garbage as a part of the Solid Waste Roadmap initiative. The decision the Metro Council makes in late 2017 will be incorporated in the new Regional Waste Plan.

How we get there

The development of the 2030 Regional Waste Plan will consider how to best tackle these opportunities and challenges and set direction for the regional system in the next decade. Development of the plan will require bold leadership, new partnerships, diverse voices, and thoughtful deliberation. From spring 2017 to fall 2018, Metro will engage the public and local, regional and state partners to develop the new plan, which will be completed in five major phases.

Getting started

Share work plan with local, regional, state and community partners.

Phase 1: Values

Develop a shared understanding of existing policy guidance and commitment to values that will guide the development of the plan.

Phase 2: System Scenarios and Vision

Visualize alternative future scenarios to consider tradeoffs of different paths forward and select a preferred scenario to serve as a vision of the plan.

Phase 3: System Analysis and Goal Setting

Analyze the system to identify priority areas and goals for achieving the region's vision and conduct a gap analysis between the current reality and the desired future.

Phase 4: Building a Strategy

Develop short, medium and long-term strategies, initiatives and investments, prioritized into a single plan.

Phase 5: Plan Adoption

Engage stakeholders in review of the plan and bring to the Metro Council for adoption.

SECTION 3: PROJECT ORGANIZATION

The development of the 2030 plan will involve a wide range of individuals, formal bodies and informal groups. Metro is responsible for the overall development of the plan, engaging others and adoption of the final plan.

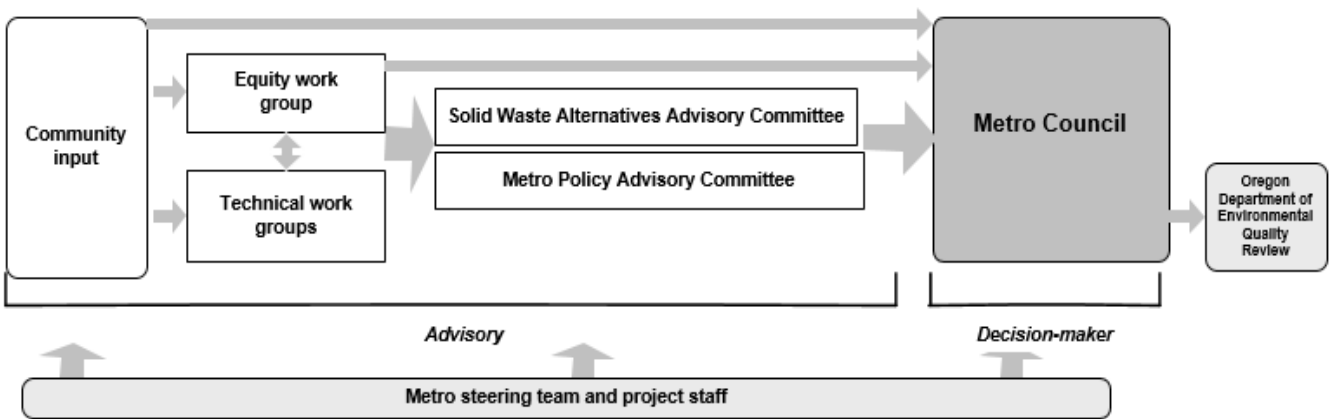
As a functional plan, the Regional Waste Plan has specific requirements for review and adoption as set forth in Metro’s Regional Framework Plan and charter. The adoption framework includes the Metro Council, Metro Policy Advisory Committee (MPAC) and Solid Waste Alternatives Advisory Committee (SWAAC), which have varying levels of responsibility to review and provide input on the development of the plan. The Metro Council is responsible for final review and adoption of the plan after a public hearing. The Department of Environmental Quality is responsible for approving the portion of the plan that addresses statutory waste reduction requirements.

The Metro Policy Advisory Committee and Solid Waste Alternatives Advisory Committee will provide input at key decision points. Integral to this decision-making process is providing timely opportunities for community partners and the public to provide input to these advisory committees.

Additionally, Metro will form several work groups to provide guidance to the Metro Council and the advisory committees. First, Metro will convene an equity work group to help ensure the plan development fully incorporates equity in the planning process and outcomes. The work group will be comprised of community members who are highly impacted by the plan outcomes and who represent historically underrepresented and other marginalized communities. The work group, with staff’s assistance, will be responsible for co-developing and applying equity lens questions in the Racial Equity Guidance Questionnaire from Metro’s *Strategic Plan to Advance Racial Equity, Diversion and Inclusion* throughout plan development.

Second, Metro will convene a set of technical work groups related to system priorities identified in phase 3 of the plan development. The work groups will review draft materials and analysis produced by Metro staff and assist with developing goals, strategies and actions to achieve the region’s vision in phase 4. Work group members will include topical and technical experts, community organizations and local government representatives. Opportunities to share information and collaborate across work groups will be provided in the form of meetings, planning workshops and forums.

Figure 3. Regional Waste Plan Decision-making Framework



The table below outlines roles and responsibilities of the advisory committees and working groups and engagement forums.

Roles and responsibilities	
Metro Council	<ul style="list-style-type: none"> • Accept and approve final plan • Provide leadership and policy direction to staff • Participate in regional leadership forums
Metro Policy Advisory Committee (MPAC)	<ul style="list-style-type: none"> • Provide input on plan development • Represent local government interests • Participate in regional leadership forums
Solid Waste Alternatives Advisory Committee (SWAAC)	<ul style="list-style-type: none"> • Provide input on plan development • Participate in technical forums
Equity work group	<ul style="list-style-type: none"> • Co-develop equity lens questions with Metro staff • Review application of equity lens throughout plan development • Participate in regional leadership forums and planning workshops • Participants will draw from people of color and those historically marginalized from solid waste system planning and policy development
Technical work groups	<ul style="list-style-type: none"> • Provide subject matter expertise • Review draft materials and provide input to staff • Participate in technical forums • Membership will draw from subject matter experts and representatives from local governments, industry, environmental organizations, and SWAAC.
Metro project steering team	<ul style="list-style-type: none"> • Provide project guidance and oversight • Review and comment on deliverables • Membership will draw from cross-agency Metro staff
Metro staff	<ul style="list-style-type: none"> • Provide technical expertise • Keep decision-makers informed of progress • Incorporate input from partners and the public • Present options and recommendations to Metro Council and advisory committees • Convene and staff technical work groups • Participate in technical forums

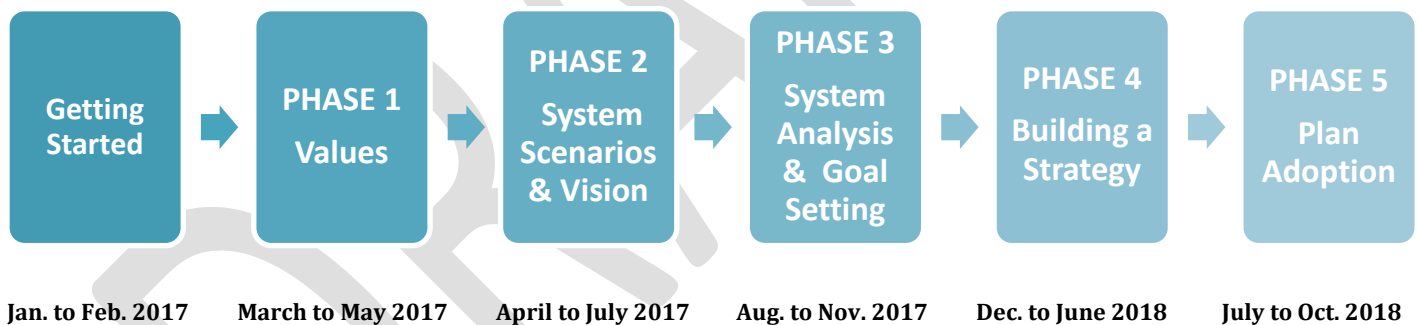
Forums	Description
Regional leadership forum	The forums will convene the Metro Council, members of the Metro Policy Advisory Committee and working groups to foster collaboration, discuss plan guidance and priorities, consider public input and provide direction to staff on development of the 2030 plan.
Technical forum	The forums will convene Solid Waste Alternatives Advisory Committee members, technical experts, local governments and Metro staff to discuss and inform key elements of the plan.
Planning Workshops	The planning workshops will convene Metro staff, technical and equity work group members to share perspectives throughout plan development on application of the equity lens.



Work plan

The 2030 plan will be completed in five phases from spring 2017 to fall 2018.

Figure 4. Timeline for Developing 2030 Regional Waste Plan



Project Milestones

February 2017	Metro Council reviews project work plan.
June 2017	Metro Council endorses statement of shared values.
July 2017	Metro Council endorses system vision.
November 2017	Metro Council, MPAC and SWAAC review draft system priorities, goals and indicators.
June 2018	Metro Council, MPAC and SWAAC review draft strategies and actions.
October 2018	Metro Council considers adoption of 2030 Regional Waste Plan.

Objective: Develop a shared understanding of existing policy guidance and commitment to values that will guide the development of the 2030 plan.

The purpose of the first phase is to review existing policy guidance and values that will guide plan development. This will include engaging groups that have been historically underrepresented and other marginalized communities, to develop an understanding of what is important to them, as well as engaging with local government partners and advisory committees. The equity work group will inform the detailed description of the values by applying an equity lens and describing equity outcomes for each value.

The outcome of this phase will be a statement of core values that will guide plan development and frame the vision of the plan.

Key Activities

Planning	<ul style="list-style-type: none"> Review and summarize existing policy guidance and shared values in guiding documents Equity work group co-develops equity lens questions with Metro staff to apply to plan values, and develops clear outcome statements for all values
Engagement	<ul style="list-style-type: none"> Engage the public to understand what is important to different audiences; particularly communities of color and other marginalized communities Discussion with SWAAC and MPAC Discussion with Metro Council
Milestones	<ul style="list-style-type: none"> Metro Council endorses statement of core values
Deliverables	<ul style="list-style-type: none"> Draft statement of values based on existing policy guidance Equity Working Group summary Community input report Statement of values

Objective: Develop a vision of the desired future using scenarios to understand the tradeoffs of different paths forward.

The purpose of this phase is to develop a shared understanding of what future success looks like for the regional system. This will include developing alternative future scenarios for the vision based on the statement of values. The scenarios will help show different paths forward by outlining major characteristics of future systems that represent different tradeoffs.

This phase will include engagement of interested persons from communities of color and other marginalized communities, along with representatives of local governments and the garbage and recycling industry, in a variety of different forums to outline up to three potential scenarios for how the region's garbage and recycling system might look in the future and what it could achieve. The equity work group will use an equity lens to articulate the outcomes of all solid waste system scenarios in terms of how each scenario supports equity outcomes.

The outcome of this phase will be a Metro Council determination of a preferred scenario for defining the future system that will serve as the vision for the plan.

Key Activities

Planning	<ul style="list-style-type: none"> • Develop questions for future system based on values • Host a planning workshop to develop three alternative future system scenarios that represent tradeoffs and priorities based on values • Evaluate scenarios through equity lens
Engagement	<ul style="list-style-type: none"> • Engage the public to provide input on priorities for the future based on core values • Regional leadership forum to provide input on scenarios • Community survey on alternative future system scenarios • Discussion with SWAAC and MPAC • Discussion with Metro Council
Milestones	<ul style="list-style-type: none"> • Metro Council endorses preferred scenario for defining future system that will serve as the vision for the plan
Deliverables	<ul style="list-style-type: none"> • Alternative future visions scenarios • Summary of how each scenario supports equity to varying degrees • Community input report • Final preferred system scenario and vision

Phase 3 | System Analysis and Goal Setting **August to November 2017**

Objective: Analyze the system to identify desired outcomes and goals for achieving the region’s vision and conduct a gap analysis between the current reality and the desired future.

The purpose of this phase is to analyze the current system and identify priority areas for goal-setting to achieve the system vision. Addressing these areas will help to achieve the high-level vision and alignment with the values. Metro will convene technical work groups to identify specific desired outcomes for each system area, including goals and indicators to measure progress. Metro staff will compile data and develop descriptions of the current state of each area, including existing challenges and assets (existing programs, policies, infrastructure), to identify gaps between current reality and the desired future state.

During this phase, the equity work group will add to this analysis by using the equity lens to identify opportunities and barriers to enhance equity and identify indicators to track progress toward an equitable solid waste system. The equity working group’s analysis will feed into that of the technical working groups.

The outcome of this phase will be final goals and indicators for system priorities and a shared understanding of the gap between the current reality and the desired future.

Key Activities

Planning	<ul style="list-style-type: none">• Identify key parts of system that will represent the goal areas of the plan• Convene technical work groups to develop desired outcomes, goals and indicators for each key system area• Compile data and develop descriptions of current state of each area, including existing challenges and assets, to identify gaps between current reality and desired future• Review application of equity lens to gap analysis
Engagement	<ul style="list-style-type: none">• Engage the public to review draft priorities• Discussion with SWAAC and MPAC• Discussion with Metro Council
Milestones	<ul style="list-style-type: none">• Metro Council endorses policies, goals and indicators for system priorities
Deliverables	<ul style="list-style-type: none">• Draft desired outcomes, goals and indicators for system priorities• Description of current reality for each goal area and results from gap analysis• Summary of how outcomes, goals and indicators support an equitable solid waste system• Final desired outcomes, goals and indicators for system area priorities

Phase 4 | Building a Strategy

December 2017 to June 2018

Objective: Develop short, medium and long-term strategies, initiatives and investments to close the gap between today and the desired future.

The purpose of this phase is to develop an action plan to close the gap between today and the desired future state. A technical forum will be used to gather input on strategies for achieving goals. Technical work groups will evaluate and recommend actions in collaboration with the equity working group. SWAAC and MPAC will be engaged to review the draft strategies to provide input to Metro Council. The equity work group will use the equity lens at key stages of this phase to review draft strategies and actions, as well as review the draft plan to ensure accountability to Metro's equity goals. The outcome of this phase will be the prioritized strategies, actions and investments.

Key Activities

Planning	<ul style="list-style-type: none">• Technical forum to gather input on strategic direction to achieve goals• Technical work groups to draft actions and investments to close the gap between today and the desired future• Equity work group to apply equity lens to draft strategies and actions
Engagement	<ul style="list-style-type: none">• Engage the public to review draft strategies, actions and investments• Discussion with SWAAC and MPAC• Discussion with Metro Council
Milestones	<ul style="list-style-type: none">• Metro Council endorses prioritized strategies and actions

Deliverables

- Draft strategies and actions
- Community input report
- Summary of discussions and outcomes of applying equity lens to the strategies and actions of the plan to meet vision of an equitable solid waste system
- Final strategies and actions

Phase 5 | Plan Review and Adoption**July to October 2018**

Objective: Engage stakeholders in review of the plan and bring to the Metro Council for adoption.

The purpose of this phase is to draft the plan with the associated Metro Code language and present the plan to key decision-makers and the community for review. This will also include review by the Oregon Department of Environmental Quality to ensure the plan's elements address statutory waste reduction requirements.

The outcome of this phase will be final plan review and adoption by Metro Council.

Key Activities**Planning**

- Draft plan and technical documentation
- Department of Environmental Quality review of plan elements that address statutory waste reduction requirements

Engagement

- Release for public review
- Engage MPAC and SWAAC to finalize input to Metro Council

Milestones

- MPAC and SWAAC review of plan
- Metro Council adoption of plan
- Department of Environmental Quality approval of plan elements that address statutory waste reduction requirements

Deliverables

- Draft plan
- Community input report
- Equity report, including strategy for sharing the plan and their work to Metro Council and community partners for celebrating success
- Final plan adoption



SECTION 4: ENGAGEMENT

Objectives

Public engagement in the development and adoption of the Regional Waste Plan will enlist ideas and support from diverse communities and individuals across the Portland metro area for policies and programs that will reduce the impacts of waste on the environment. Through our public engagement efforts, we seek to:

- Communicate accurate, understandable and timely information to the public in formats and languages that are most helpful to a diverse range of audiences
- Increase awareness and understanding of the regional solid waste system and its services, especially among marginalized communities
- Implement Metro's goal to meaningfully engage communities of color (from *Strategic Plan to Advance Racial Equity, Diversity and Inclusion*)
- Demonstrate how the goals of the Regional Waste Plan and the choices it presents affect people's everyday lives
- Provide meaningful engagement opportunities that can inform decision-making
- Provide a framework for incorporating the results of public engagement into decision-making
- Demonstrate how engagement shapes the development of the Regional Waste Plan
- Ensure that the Regional Waste Plan reflects the values and priorities of a diverse range of residents around the region
- Build stronger relationships with more people interested in garbage, recycling and waste prevention issues with whom Metro can communicate more regularly

Approach

The engagement efforts will seek participation of all potentially affected and interested individuals, communities and organizations. While Metro will engage the general public at large through a variety of means, particular emphasis will be placed on engaging communities of color and other communities who may be more directly impacted by the decisions that affect the garbage and recycling system, but may have fewer opportunities to influence and shape that system.

Engagement will also include participation by various businesses, local governments and advocacy organizations. The following sections call out some of these specific audiences.

Marginalized communities

Our efforts will focus on engaging individuals and groups who Metro has not historically engaged in decision-making on solid waste issues, but are (or can be) significantly impacted by the outcomes of those decisions. Those audiences include communities of color, low-income communities, communities historically impacted by the placement of solid waste facilities, individuals and families living in multi-family housing, and communities with limited English proficiency.

Metro will partner with culturally-specific community-based organizations to identify the best ways and methods to reach people in their communities and solicit their ideas for the best ways to reduce waste and its effects on their everyday lives. Through our engagement activities, we will regularly seek feedback on how we can make our engagement efforts more effective and relevant to the needs of different audiences. In addition, public conversations about the goals, policies and outcomes of the Regional Waste Plan will be held with the aim of building long-term relationships with various communities that can assist in the implementation of the plan after it is adopted.

Our engagement will be informed by an environmental justice and equity framework that considers both equity impacts and benefits of the regional solid waste system. We will work to ensure that “the [communities] most impacted, marginalized communities, low-income communities and communities of color,”¹ have opportunities to participate, inform and help shape the plan.

The outcomes of engagement with marginalized communities will include:

- Increased awareness and understanding of regional garbage and recycling system and services and the environmental impacts of goods consumed in the region, from production to disposal
- Gathering of community concerns and vision for success to address and incorporate into the Regional Waste Plan
- An understanding by Metro Council and staff of the priorities and concerns of historically underserved communities, and how to address them in the Regional Waste Plan
- The amplification of voices of those who are impacted by, but have less influence on, the region’s garbage and recycling system
- Stronger relationships with communities of color and other underserved communities
- Identified opportunities for shared implementation and building community capacity

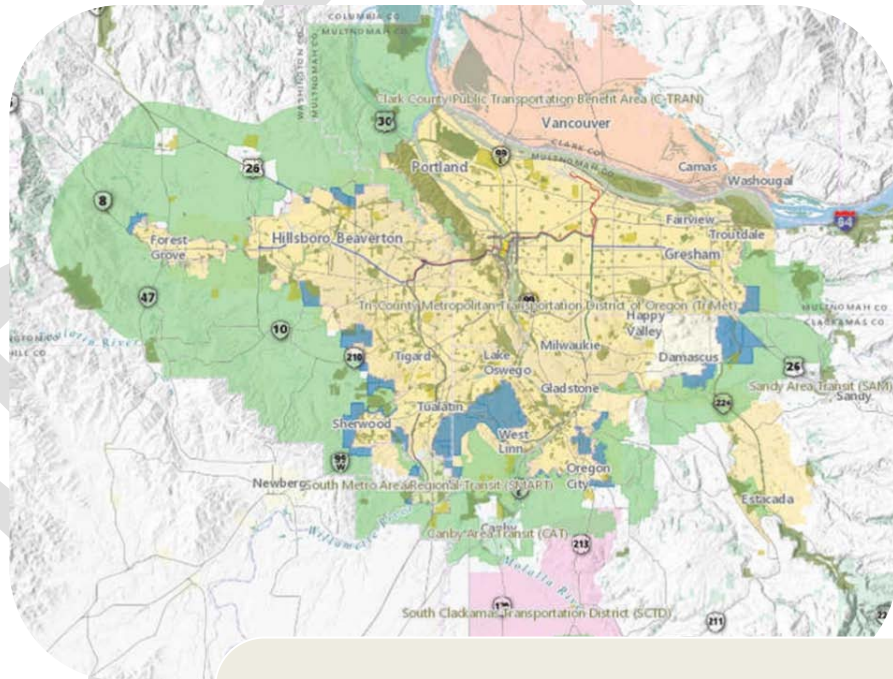
¹ Jacqueline Patterson, NAACP Climate Justice Initiative, http://www.usclimatenetwork.org/resource-database/and-the-people-shall-lead-centralizing-frontline-community-leadership-in-the-movement-towards-a-sustainable-planet/at_download/file

Local governments

Cities and counties are Metro's key partners in implementing the region's garbage and recycling system. Representatives of these local governments will be engaged in the development of the Regional Waste Plan through the Solid Waste Alternatives Advisory Committee and the Metro Policy Advisory Committee.

Metro's objectives in engaging local elected officials in the development of the plan include:

- Creating awareness of the Regional Waste Plan and what it covers
- Bringing local elected officials into the conversation early
- Developing shared ownership in vision, goals and implementation of the future regional waste reduction and management system



Metro serves more than 1.5 million people in Clackamas, Multnomah, and Washington counties. The agency's boundary encompasses Portland, Oregon and 23 other cities – from the Columbia River in the north to the bend of the Willamette River near Wilsonville, and from the foothills of the Coast Range near Forest Grove to the banks of the Sandy River at Troutdale.



Business community

The Portland area's solid waste system consists of several private-sector companies, from local family-owned firms to large national corporations, which collect, handle and dispose of various types of materials or sell them to commodity markets to make new products. Representatives of these companies will also be engaged in the development of the Regional Waste Plan through existing advisory committees and through working groups developed to address specific topic areas.

In addition to businesses in the solid waste industry that deal with various facets of the garbage and recycling system each day, Metro will also engage businesses outside of the solid waste industry and their trade associations to:

- Build awareness and understanding of what the focus of the Regional Waste Plan will be and how it will be developed
- Provide opportunities to inform the development of shared values and vision for the region's solid waste system
- Leverage their expertise and perspectives on different aspects of the region's solid waste system in establishing strategies and actions to meet the plan's goals

Advocacy organizations

Various groups and organizations in the Metro area are active in promoting waste prevention, recycling, better use of discarded materials, natural resource conservation and minimization of toxic chemicals in consumer products. These groups bring expertise and insights to assist in establishing the system vision and goals. These organizations will be engaged through technical forums and working groups formed to address specific topic areas, existing committees such as the Solid Waste Alternatives Advisory Committee and other opportunities to engage the broader public in ways to get more out of the unwanted materials and better protect the environment and the public's health.

Metro's objectives for engaging these advocacy organizations will include:

- Enlisting the expertise and insights of advocates to challenge our region to achieve greater outcomes in minimizing environmental and human health impacts associated with the solid waste system and the life cycle of products
- Identify actions, policies and investments needed to achieve these outcomes

Key message themes

Messages will be based on existing research as well as research conducted in the first few months of the implementation of this work plan. Existing research suggests that an emphasis on protecting family health, protecting the environment, and saving money are key in motivating people to recycle, reuse, and reduce. In addition, the use of more visual approaches to messaging works well, and not just for those with limited English proficiency. Message approaches currently in use that we'll likely continue:

- Connect Metro services and planning to quality of life
- Convey impacts and benefits beyond environment (health, safety, cost, convenience)
- Reinforce reducing and reusing, and include how and why
- Couple climate messages with real, measurable impacts
- Communicate consistently and reinforce the value of public input

It's important to note that the findings and practices listed above are based on an existing body of research that does not widely reflect communities of color. While Metro has information about some audiences, we also want to address some gaps in information about both values and messages related to both topics and audiences, including communities of color, before starting broad outreach. Research conducted over the next year will:

- Fill research gaps that have been identified in topic areas related to the Regional Waste Plan and audiences we know we want to engage
- Ensure the use of research-based messages that resonate with key audiences
- Help ensure equity in Regional Waste Plan engagement activities
- Help ensure that underserved audiences, including communities of color, are not just represented in engagement activities but also in Council policy decisions

Community discussion groups and one-on-one interviews will inform broader public opinion research. This research will fill some of our message gaps, and help inform what tactics, formats, distribution channels and messengers we use.

Engagement Tools

A range of tools will be used throughout the public engagement effort. These tools will be scoped and calibrated to best enable a variety of stakeholders to engage in the development of the Regional Waste Plan in places, times and venues that are most convenient for them.

Tools will include, and not be limited to, the following:

Project pages on the Metro website will set context for the update of the Regional Waste Plan, inform viewers of progress in its development and illustrate opportunities to weigh in on important issues and questions under consideration.

Metro News stories, along with **contributed articles in print and online media**, will highlight and illustrate particular topics of concern and tell stories about challenges and opportunities to improve the region's solid waste system.

A Regional Snapshot, modeled after similar stories on land use, housing, transportation and other issues featured on Metro's website, will provide a richer data-oriented look at the region's current garbage and recycling system and illustrate a few key challenges to address through the development of the Regional Waste Plan.

Focus and discussion groups will provide in-depth and open-ended opportunities to explore specific questions and challenges with a limited number of individuals to better understand public perceptions and views on those questions.

Surveys of the public, through Opt In and other online means, intercept surveys and other person-to-person interactions will provide opportunities to engage individuals and record their feedback on specific questions to inform policymaking and program development.

Email updates will provide regular followers of the Regional Waste Plan's evolution with information about new developments and opportunities for engagement.

Social media posts will provide interested persons with opportunities to learn more about particular aspects of the region's solid waste system, raise questions and offer ideas for improvement.

Video stories will bring individuals to facilities, homes and other places where waste prevention and reduction efforts occur and illustrate challenges and opportunities.

Public meetings and forums, including Metro Council public hearings, will provide opportunities for the public to weigh in on specific proposals and offer views and testimony directly to elected officials and decision-makers.



Indicators of success

- A broader awareness and understanding of the regional solid waste system and services, as well as the environmental and health impacts associated the life cycle of consumer products, is achieved through a cooperative and popular learning model with emphasis on interpersonal, experiential, and knowledge-sharing methods.
- Community concerns and vision for success are identified and incorporated into the Regional Waste Plan.
- A better understanding is gained by Metro staff and councilors of underserved communities' priorities and concerns, and how to address them in the Regional Waste Plan.
- Historically underserved communities achieve greater influence in shaping the values, vision, priorities and implementation of the Regional Waste Plan.
- Stronger relationships are built with communities of color and underserved communities through the development of the Regional Waste Plan.
- Opportunities are identified for shared implementation and building community capacity with community-based organizations.

Appendix A: Equity Work Group Overview

Purpose

The purposes of the Equity Work Group are to help ensure: 1) that development of the Regional Waste Plan fully incorporates equity in the planning process and outcomes and 2) the Regional Waste Plan advances Metro's progress towards its racial equity goals.

Work Group Desired Outcomes

- Shared understanding of regional solid waste and recycling system.
- Identification of barriers that disproportionately impact communities of color and strategies to eliminate barriers.
- Identification of opportunities to leverage Metro's role in managing the solid waste system to support racial equity outcomes.

Fit with Project Governance

The Equity Working Group will serve as one of the working groups in plan development. The group will work directly with Metro staff to customize and utilize an equity lens. Members will also be invited to participate in key workshops and forums. They will produce a summary of their findings during each phase of development.

Major Tasks

1. Co-develop equity lens questions, adapted from Metro equity strategy
2. Guide application of equity lens throughout plan development
3. Provide report of findings at each phase to inform subsequent phases of planning work

Priorities for recruitment

Metro seeks participants for this working group who have some combination of the following skills and abilities:

- Background in social and racial equity, at both institutional and systemic levels
- Ability to adapt Metro's equity lens and apply it to the regional solid waste system
- Critical thinking skills to identify ways that the current solid waste system is inequitable
- Ability to help articulate a vision for an equitable solid waste system
- Familiarity with planning processes

Metro seeks participants for this working group from communities of color² and those historically marginalized from solid waste system planning and policy development, including:

- Youth (young adults age 18-23)
- Immigrants and refugees
- Elders
- Tribal nations and urban Native American communities
- Certification Office for Business Inclusion and Diversity (COBID)-certified business in waste/recycling field
- Environmental justice advocates

² Communities of Color, as defined in Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion are Native Americans, African Americans, Asian Americans and Pacific Islanders, Latinos or Hispanics, and immigrants and refugees who do not speak English well, including African immigrants, Slavic and Russian speaking communities, and people from the Middle East.

- Solid waste workers (i.e. drivers, sort line workers, transfer station equipment operators)

The ideal number of participants is five to seven members, but no more than ten.

Working group format

The working group will meet regularly throughout all project phases. Metro will select a facilitator for the working group who will serve as a trusted liaison between the working group participants and Metro staff. The facilitator will work with Metro staff to plan working group meetings, facilitate meetings, and prepare meeting summaries and findings of the working group at each phase of the planning process.

The working group will co-create a team charter with Metro staff that includes norms, team agreements, roles and responsibilities. To create a safe space for open and honest conversations among working group members, meetings of the working group will not be public meetings. Metro is committed to transparency, however, and will post working group summaries from each phase of the planning process.

Metro will create multiple opportunities for members of the Equity Working Group to build relationships with and increase access to staff and key decision-makers including:

- Property and Environmental Services (PES) managers and planning staff
- Metro Solid Waste Alternatives Advisory Committee (SWAAC)
- Regional local government solid waste directors
- Metro Policy Advisory Committee (MPAC)
- Metro Council

Prior to kickoff of the working group, Metro will partner with Multnomah County to provide training for Regional Waste Plan planning staff on how to use and facilitate conversations using an equity lens.

Time commitment

Estimated time in meetings and preparing for discussions is 60 to 80 hours per work group member over the duration of the project.

Project Timeline and Tasks

Pre-project kickoff phase

Build understanding of the lifecycle framework and components underpinning the plan. Understand Metro, local government and private sector roles, services and programs. Meet 1:1 with working group members and with the whole group.

- Co-create working group charter, team agreements and decision-making process.
- Review work plan.
- Deliverables: Working group charter, work plan.

Phase 1 –Values

- Co-develop equity lens questions with Metro staff.
- Review values driving Metro’s work system related to the life cycle impacts of the products the region’s residents and businesses consume (protect human and environmental health, foster economic well-being, ensure resilience, provide excellent service and conserve natural resources).

- Use equity lens to identify inequities and disparities in this system, identify equity outcomes for each value statement and recommend how to prioritize values.
- Deliverable: Summary of equity lens discussion; description of values from an equity perspective.

Phase 2 – System scenarios and vision

- Using results of equity lens discussion of solid waste system and values from phase 1, articulate a vision for an equitable system.
- Participate in key planning workshops and leadership forums to create up to three potential scenarios for how the system might look in the future and what it could achieve in terms of equity.
- Deliverable: Description of system vision that includes equity outcomes (both positive and negative) for all system scenarios.

Phase 3 – System analysis and goal setting

- Building on vision statement from phase 2, use equity lens to compare current system (status quo) with vision for equitable system and develop desired outcomes for advancing equity.
- For each desired outcome:
 - Identify opportunities to enhance and barriers to eliminate that will enhance equity.
 - Identify indicators to track progress toward an equitable system.
- Deliverables: Desired outcomes (goals) and indicators to support an equitable system.

Phase 4 – Building a strategy

- Use equity lens at key stages of the planning phase to make process accountable to equity goals.
- Participate in key planning workshops.
- Review draft strategies and actions with equity lens.
- Review draft plan with equity lens.
- Deliverable: Summary of discussions and outcomes of applying equity lens to strategies and actions of the plan to meet vision of an equitable system.

Phase 5 – Plan adoption

- Share findings and working group outcomes with Metro equity advisory committee.
- Present to other stakeholder groups TBD (i.e. Local Government Solid Waste Directors', SWAAC)
- Present to Metro Council work session to share and discuss findings.
- Deliverable: Strategy for sharing the plan and their work to Metro Council and community partners for celebrating success.

Appendix B: Technical Work Group Overview

Purpose

The purpose of technical work groups are to ensure that the Regional Waste Plan is developed with greatest knowledge, expertise, and current best practices available related to managing and reducing the environmental impacts of goods consumed in the region. Multiple technical work groups will focus on specific topical areas based on the values and vision.

Roles and Responsibilities:

- Provide subject matter expertise
- Review draft materials and provide input
- Participate in technical forums
- Collaborate with the Equity Work Group

Desired Outcomes for Each Technical Work Group

- Advanced understanding of shared values, key system issues (or gaps), and future system vision
- Comprehensive knowledge and understanding of best practices from within and outside the region to inform policy and program options to achieve the future system
- Identification of options to achieve the future system related to each topic area for consideration by decision makers

Fit with Project Governance

The technical work groups will work on topics of strategic importance identified in phase 3 of the plan development. It is expected that approximately five to seven working groups will be convened. The size and composition of group participation will be dependent on the group's task. Metro staff will convene and coordinate the work of the technical work groups and serve as liaisons between the work groups and Metro Council and advisory committees.

Major Tasks

Technical work groups will be brought together for fixed periods of time to work on specific tasks. Individuals participating in these groups will be expected to have the time, interest, and commitment to participate in the production of deliverables assigned to the group. Major tasks for each technical work group will be as follows and can be viewed in terms of a backcasting approach to systems planning. To achieve the desired future state as defined in early stages of the Regional Waste Plan, the technical work groups will:

1. Develop desired outcomes, goals and indicators for each key system area
2. Conduct gap analysis for each topic area including reviewing the current state of each area, such as existing challenges and assets, to identify gaps between current reality and desired future
3. Research and evaluate best practices from within the region and beyond for consideration within the plan framework
4. Identify and assess alternatives to achieve the desired future system
5. Identify and deliberate on strategies and actions to close the gap between the desired future and current reality
6. Consolidate best options towards desired future state into technical work groups' documents

Priorities for membership

Technical work group membership will include staff and stakeholders with relevant subject matter expertise and the time and interest to participate fully. It is expected that technical work group members will be drawn from those who are knowledgeable about the life cycle impacts of consumption and how to address these impacts from material extraction to end-of-life management, and from those who actively participate in the broader solid waste system, including representatives from, local governments, solid waste facility operators, haulers, advocacy organizations and Metro's Solid Waste Alternatives Advisory Committee. Since these groups are expected to provide deliverables within a set amount of time, group size is limited to facilitate collaboration and decision-making. The ideal number of participants is five to seven members per technical work group.

Metro seeks participants for this working group who have some combination of the following skills and abilities:

- Relevant technical knowledge, skills, and experience in each identified topic area
- Experience with broad systems thinking, especially related to life cycle approach and related subjects
- Supportive of Metro's equity objectives and willing to consider equity opportunities within system-wide planning.

Project Timeline and Tasks

The technical working groups will meet regularly throughout project phases 3 and 4, and monthly at a minimum. The projected tasks by phase are highlighted below.

Pre-project kickoff phase- Pre Work Group

Phase 1 – Values- Pre Work Group Work

Phase 2 – System scenarios and vision- Pre Work Group Work

Phase 3 – System analysis and goal setting

- Ensure collaborative understanding of current system and how we got here
- Ensure collaborative understanding and buy in for phase 1 and 2 work and outcomes
- Co-create technical work group charter, team agreements, work plan, decision-making process (from template)
- Develop desired outcomes, goals and indicators for each key system area
- Assess current state of each area including existing challenges and assets (programs, policies, investments)
- Conduct gap analysis

Phase 4 – Building a strategy

- Develop action plans for each topic area to bridge gap between current and desired future state based on Phase 3 research and deliberation
- Coordinate with Equity Work Group on action planning for each topic area

Phase 5 – Plan adoption

- Provide input during review and adoption process

Appendix C: 2030 Regional Waste Plan | Project Work Plan Overview

ENGAGEMENTS	TASKS	MILESTONES AND DELIVERABLES
PHASE 1 VALUES MARCH-MAY 2017		
Community input	<ul style="list-style-type: none"> Review and summarize existing policy guidance Equity work group co-develop equity lens questions with Metro staff to apply to plan values Engage the public to determine what is important to different groups Metro Council endorses statement of values 	▲ Community input report
Equity work group		▲ Draft values
SWAAC & MPAC		▲ Equity report
Metro Council		◆ Statement of core values
PHASE 2 SYSTEM VISION APRIL-JULY 2017		
Community input	<ul style="list-style-type: none"> Develop future alternative system scenarios that represent tradeoffs and priorities based on values Evaluate scenarios with equity lens Engage the public to provide input on scenarios Convene leadership forum to provide input scenarios Metro Council endorses on preferred scenario to define future system to serve as the vision for the plan 	▲ Alternative future scenarios
Planning workshop		▲ Community input report
Leadership forum		▲ Equity report
Metro Council		◆ Final vision statement
PHASE 3 SYSTEM ANALYSIS AND GOAL SETTING AUGUST-NOVEMBER 2017		
Technical forum	<ul style="list-style-type: none"> Identify key parts of system which need to be addressed to achieve the future vision Convene technical work groups based on priorities to develop desired outcomes, goals and indicators for each key system area Compile data and develop descriptions of current state of each area including existing challenges and assets to identify gap between current reality and desired future Engage the public to review draft priorities 	▲ Draft goals and indicators for system priorities
Equity & technical work groups		▲ Description of current reality
Community input		▲ Equity report
Metro Council		◆ Final goals and indicators for system area priorities
PHASE 4 BUILDING A STRATEGY DECEMBER 2017-JUNE 2018		
Leadership forum	<ul style="list-style-type: none"> Technical work groups to draft strategies, actions and investments to close the gap between today and the desired future Review draft strategies and actions with equity lens Engage the public to review draft strategies Convene leadership forum to provide input on draft strategies and actions Engage regional advisory committees to provide input to Metro Council 	▲ Draft strategies
Equity & technical work groups		▲ Draft actions
Community input		▲ Community input report
MPAC & SWAAC		▲ Equity Report
Metro Council		◆ Prioritized strategies, actions and investments
PHASE 5 PLAN ADOPTION JULY-OCTOBER 2018		
Community input	<ul style="list-style-type: none"> Draft plan and technical documentation Department of Environmental Quality review of plan elements that address statutory waste reduction requirements Release for public review Engage regional advisory committees to finalize input to Metro Council Metro Council adoption of plan Department of Environmental Quality approval of plan elements that address statutory waste reduction requirements 	▲ Draft plan
Equity work group		▲ Community input report
MPAC & SWAAC		▲ Equity report
Metro Council		◆ Final plan adoption

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