

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF SELECTION AND
FUNDING ALLOCATION OF \$1 MILLION TO
TRANSPORTATION MANAGEMENT
ASSOCIATIONS FOR FY 2000 TO FY 2003

RESOLUTION NO. 99-2864

Introduced by Jon Kvistad,
JPACT Chair

WHEREAS, Resolution 98-2676 established a policy basis and funding strategy for Transportation Management Associations (TMAs) for the MTIP/STIP development process; and

WHEREAS, The Priorities 2000/MTIP Process allocated \$1 million to TMA assistance over the next four years; and

WHEREAS, TMAs have become an important institutional option for implementing transportation demand management strategies and are a key RTP demand management strategy; and

WHEREAS, The Transportation Demand Management (TDM) Subcommittee of TPAC established criteria based on Resolution 98-2676 for ranking and allocating funding to existing and potential TMAs; and

WHEREAS, The TDM Subcommittee screened and reviewed twelve TMA applications; and

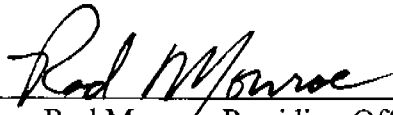
WHEREAS, the TDM Subcommittee recommends funding three existing TMAs and eight new TMAs, and proposed a funding allocation described in Exhibit 1; and

WHEREAS, The TDM Subcommittee recommends revisiting Resolution No. 98-2676 to better articulate regional funding for existing TMAs beyond the three-year formative/operations stage; now, therefore,

BE IT RESOLVED:

1. That JPACT endorse the TMA Assistance Distribution FY 2000 to FY 2003 described in Exhibit 1.
2. That existing, funded and planned TMAs will be incorporated into the current RTP update.
3. That JPACT reconsider the policy basis and funding strategy described in Resolution No. 98-2676 for existing TMAs beyond the three-year formative/operations state.

ADOPTED by the Metro Council this 20th day of December, 1999.



Rod Monroe, Presiding Officer

Approved as to form:



Daniel B. Cooper, General Counsel

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Exhibit 1

TMA ASSISTANCE DISTRIBUTION FY 2000 - 2003
Tri-Met/Metro Proposal on 10/29/99

	Year				Total**	Average \$/Year
	2000	2001	2002	2003		
Tualatin TMA	\$50,250	\$24,750	\$15,000	\$0	\$90,000	\$22,500
WTA TMA	\$50,250	\$24,750	\$5,000	\$0	\$80,000	\$20,000
Lloyd TMA	\$50,250	\$24,750	\$5,000	\$0	\$80,000	\$20,000
Columbia Corridor	\$67,500	\$50,250	\$24,750	\$0	\$142,500	\$35,625
Swan Island	\$67,500	\$50,250	\$24,750	\$0	\$142,500	\$35,625
Clackamas Reg Ctr.*	\$32,000	\$67,500	\$50,250	\$24,750	\$174,500	\$43,625
Gresham Reg. Ctr.*	\$32,000	\$67,500	\$50,250	\$24,750	\$174,500	\$43,625
Ptld. Downtown (APP)	\$17,500	\$0	\$0	\$0	\$17,500	\$4,375
Col. Cor. Rivergate	\$0	\$0	\$32,000	\$0	\$32,000	\$8,000
L. Oswego/Kruse Way	\$0	\$0	\$0	\$32,000	\$32,000	\$8,000
Troutdale	\$0	\$0	\$0	\$32,000	\$32,000	\$8,000
Total	\$367,250	\$309,750	\$207,000	\$113,500	\$997,500	\$249,375
Total Available**	\$278,614	\$278,614	\$278,614	\$278,614	\$1,114,454	\$278,614
Balance	(\$88,637)	(\$31,137)	\$71,614	\$165,114	\$116,954	\$29,239

*Funding for 2001 through 2003 contingent on results of exploratory phase

**Resources - CMAQ - \$1,000,000; Tri-Met local match (89.73/10.27 ratio) - \$114,454

11-5-99

STAFF REPORT

CONSIDERATION OF RESOLUTION OF NO. 99-2864 FOR THE PURPOSE OF SELECTION AND FUNDING ALLOCATION OF \$1 MILLION TO TRANSPORTATION MANAGEMENT ASSOCIATIONS FOR FY 2000 TO FY 2003

Date: October 28, 1999

Presented by: Andrew Cotugno

PROPOSED ACTION

The Transportation Demand Management (TDM) Subcommittee of TPAC recommends selection of three existing and eight new Transportation Management Associations (TMA) for funding during the FY 2000 to FY 2003 allocation period. \$1,000,000 in regional CMAQ funds is available for the TMA Assistance Program. A total of \$250,000 is recommended for the three existing TMAs: the Lloyd District TMA, Tualatin TMA, and Westside Transportation Alliance. The remaining \$750,000 is recommended for exploratory and formative/operations phases of eight new TMAs, including the Columbia Corridor TMA, Swan Island TMA, Clackamas Regional Center TMA, Gresham Regional Center TMA, Portland Downtown TMA, Lake Oswego TMA and Troutdale TMA. Recommended funding and proposed annual allocation is described in Attachment A.

FACTUAL BACKGROUND AND ANALYSIS

Earlier this year, the Priorities 2000 (MTIP) funding process allocated \$1 million to TMA assistance over the next four years. TMAs are typically nonprofit coalitions of local businesses and/or public agencies dedicated to reducing traffic congestion and pollution while improving commute options for their employees. In this role, TMAs have become an important institutional option for implementing transportation demand management strategies; particularly those designed to increase the use of alternative modes of travel.

The TMA policy basis and funding strategy is described in Metro Resolution No. 98-2676. TMA development and implementation includes an exploratory and a formative/operations stage. The TDM Subcommittee established criteria based on Resolution No. 98-2676 for ranking and allocating funding to existing and potential TMAs. The TMA funding criteria is described in Attachment B. The TMA criteria were presented to TPAC on August 27, 1999, and to JPACT on September 9, 1999. On September 10, 1999, a wide range of potential applicants were notified about the TMA solicitation, and given over thirty days to submit a proposal.

Summary of the Selection Process

Applications for the formation and regional funding of TMAs were made directly to Tri-Met, the program administrator, with a due date of October 14, 1999. Tri-Met staff then copied the proposals to TDM Subcommittee members for review. The TDM Subcommittee met on October 21, 1999, for initial screening and review of the applications. At a follow-up meeting on October

26, 1999, the Subcommittee selected TMA proposals for funding and allocation. Twelve applications were submitted. The Subcommittee considered both quantitative and qualitative attributes of the applications.

Qualitative Ranking

The qualitative ranking was a group process, based on each Subcommittee member selecting his or her top six TMA proposals. Qualitative attributes included quality of the proposal as a whole, financial need and geographic equity. Table 1 shows the qualitative ranking of all TMA applications by Subcommittee votes.

**Table 1
Qualitative Ranking of All TMAs**

Rank	Applicant	Votes
1	Tualatin	11
2	Columbia Corridor	10
2	Clackamas	10
3	Lloyd District	9
3	Swan Island	9
4	WTA	8
4	Gresham	8
5	APP (Portland)	4
6	Lake Oswego	2
N/A	Cornelius	0
N/A	Multnomah Village	0
N/A	Troutdale	0

The qualitative ranking exercise resulted in seven applicants with eight or more votes (out of a possible 12) from TDM Subcommittee members. Five of the applicants received four or fewer votes. Upon conclusion of this exercise, the TDM Subcommittee adjourned until October 26, 1999, with instructions to submit quantitative rankings to Tri-Met and Metro staff by email or fax.

Quantitative Ranking and Analysis

Eight exploratory phase proposals were compared as group, and five of the seven formative/operations phase proposals were compared as a group. Clackamas and Gresham TMAs requested both exploratory and formation/operations funding, but were scored only on the exploratory phase. Because both Gresham and Clackamas had high qualitative rankings, the Subcommittee felt that the two TMAs should be given a high priority to receive formative funds if they successfully pass the exploratory phase.

The application from the Columbia Corridor Association was divided for quantitative scoring purposes. The exploratory phase of the application focused on the Rivergate industrial area, and was compared with other exploratory applications. The subcommittee felt that the Columbia Corridor/Airport Way area was ready to proceed into the formative/operations phase.

Table 2 shows the quantitative ranking for eight exploratory TMAs and their percent score in the quantitative ranking. The percent scores break down into high, medium and low ranges. The Gresham, Clackamas and Downtown Portland proposals scored highest (75 percent or more). The Troutdale, Columbia Corridor (Rivergate) and Lake Oswego proposals scored in the medium range (50 to 60 %). The Cornelius and Multnomah Village proposals scored lowest (30% to 44%).

**Table 2
Quantitative Ranking of Exploratory TMAs**

Rank	Applicant	Percent Score
1	Gresham	77.3 %
2	Clackamas	76.9 %
3	APP (Portland Downtown)	75.3 %
4	Troutdale	59.0 %
5	Columbia Corridor: Rivergate	56.3 %
6	Lake Oswego	50.3 %
7	Cornelius	44.3 %
8	Multnomah Village	30.1 %

The Gresham and Clackamas TMA proposals also scored high in the qualitative ranking, and were recommended for exploratory phase funding in year 2000. Through a series of votes the TDM Subcommittee decided to fund the exploratory phase of the Portland Downtown, Troutdale, Columbia Corridor (Rivergate), and Lake Oswego proposals during the four-year allocation period. The Subcommittee voted against exploratory phase funding for the Cornelius and Multnomah Village proposals. While both proposals were good efforts, the Subcommittee suggested that Tri-Met work with Cornelius to pursue other funding sources and that Multnomah Village work with the City of Portland as a sponsoring jurisdiction in submitting future TMA proposals.

Table 3 shows the quantitative ranking and percent score for five TMAs requesting formative/operations funding. Both the existing TMAs (WTA, Lloyd District and Tualatin) and the proposed TMAs (Columbia Corridor and Swan Island) requesting formative/operational funding scored high in the quantitative ranking.

Table 3
Quantitative Ranking of Formative/Operational TMAs

Rank	Applicant	Percent Score
1	WTA	89.8 %
1	Lloyd District	89.8 %
3	Tualatin	83.6 %
4	Columbia Corridor	83.0 %
5	Swan Island	81.6 %

The quantitative scoring confirmed that the seven existing and proposed TMAs with a high number of “qualitative votes” as shown in Table 1 also ranked high on the TMA funding criteria described in Attachment B.

Results of the Selection Process

The TMA funding assistance distribution recommended by the TDM Subcommittee is shown in Attachment A. The total program amount of \$1 million is divided over the four-year funding period, with an average allocation of \$250,000. In 2001 and 2002 the annual allocation is higher, in order to fund start-up costs for four new TMAs. The \$1 million program total does not include a 10.27 percent Tri-Met match, which totals \$114,456 over the four-year period. The Tri-Met match could be used as a contingency fund to help cover program start-up costs in 2000 and 2001.

Based on a combined qualitative and quantitative ranking process, the TDM Subcommittee recommends funding the three existing TMAs—the Lloyd District TMA, Westside Transportation Alliance and Tualatin TMA. The Subcommittee recommends that the three existing TMAs be funded a total of \$250,000 over the four-year allocation period, with the Tualatin TMA receiving \$90,000 and the WTA and Lloyd TMA receiving \$ 80,000. The TDM Subcommittee recommends that funds for existing TMAs be equally spread over the four-year allocation period, as shown in Attachment A.

Four of the exploratory and/or formative/operations TMAs are recommended for funding, with annual funding allocations as shown in Attachment A. These four TMAs include:

- Columbia Corridor (formative/operations)
- Swan Island (formative/operations)
- Clackamas Regional Center (if the exploratory phasing leads to a yes answer)
- Gresham Regional Center (if the exploratory phasing leads to a yes answer)

Four applicants are recommended for exploratory phase funding only, including:

- Portland Downtown (APP)
- Columbia Corridor – Rivergate industrial area
- Lake Oswego/Kruse Way
- Troutdale

Annual funding allocations are shown in Attachment A. The Portland Downtown proposal was allocated to the year 2000 because it has a local match of \$17,500 for a like amount of regional funds. The remaining applicants were allocated to 2002 and 2003.

Next Steps

Completing the TMA selection process led to a number of issues for future discussion, most notably funding existing TMAs. There is an ongoing debate on the amount of public funding a TMA needs in order to survive. Also, the question of how much, if any, regional funding should be allocated to a TMA after the three-year formative/operations phase should be addressed. The TDM subcommittee stands by its recommendation to fund the three existing TMAs during this allocation period. However, Resolution No. 98-2676 should be revisited to better articulate regional funding for existing TMAs in the future.

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ATTACHMENTS

- A. TMA Assistance Distribution FY2000 - 2003
- B. TMA Funding Criteria

TMA ASSISTANCE DISTRIBUTION FY 2000 - 2003
TDM Subcommittee Recommendation: October 26, 1999

	Year				Total**	Average \$/Year
	2000	2001	2002	2003		
Tualatin TMA	\$22,500	\$22,500	\$22,500	\$22,500	\$90,000	\$22,500
WTA TMA	\$20,000	\$20,000	\$20,000	\$20,000	\$80,000	\$20,000
Lloyd TMA	\$20,000	\$20,000	\$20,000	\$20,000	\$80,000	\$20,000
Columbia Corridor	\$67,500	\$50,250	\$24,750	\$0	\$142,500	\$35,625
Swan Island	\$67,500	\$50,250	\$24,750	\$0	\$142,500	\$35,625
Clackamas Reg Ctr.*	\$32,000	\$67,500	\$50,250	\$24,750	\$174,500	\$43,625
Gresham Reg. Ctr.*	\$32,000	\$67,500	\$50,250	\$24,750	\$174,500	\$43,625
Ptld. Downtown (APP)	\$17,500	\$0	\$0	\$0	\$17,500	\$4,375
Col. Cor. Rivergate	\$0	\$0	\$32,000	\$0	\$32,000	\$8,000
L. Oswego/Kruse Way	\$0	\$0	\$0	\$32,000	\$32,000	\$8,000
Troutdale	\$0	\$0	\$0	\$32,000	\$32,000	\$8,000
Contingency Fund	\$0	\$0	\$0	\$2,500	\$2,500	\$625
Total	\$279,000	\$298,000	\$244,500	\$178,500	\$1,000,000	\$250,000

* Funding for 2001 through 2003 contingent on results of exploratory phase

** Total does not include 10.27 pct. Tri-Met match, which totals \$114,456 over the 4-year period

TMA Funding Criteria

Regional Transportation Demand Management System Goal 5, Objective 2 of the RTP promotes the establishment of TMAs as a means to support programs to reduce the need to travel and to make it more convenient for people to use alternative modes for all trips throughout the region.

Does the TMA application meet the above Objective? If yes, evaluate based on the following criteria.

CRITERIA [POTENTIAL POINTS]

Applications for TMA funding will be evaluated based on the following criteria.

1. Definition of geographic area. Map required from applicant.
2. Definition of employment population.
 - Employment population that would be served by the TMA (required from applicant).
 - Employment population of the area (Metro to define).
3. Definition of transportation problem(s) or issue(s) common to the geographical area. [0-10]
 - The transportation problem should be included in, or related to, other transportation plans, particularly the Regional Transportation Plan.
4. Description that the TMA is in an area of regional significance. [0-10]
 - Population/employment density.
 - 2040 Land Use Link.
5. Demonstration of community support for a TMA. [0-15]
 - Letters of interest from area employers.
 - Letter of support from local jurisdiction.
 - Letters of support from neighborhood associations.
6. Description of financial strategy. This category should identify potential public and private funding sources for the first five years of operation. [0-10]
7. Description of the TMA's potential to assist in meeting the non-auto mode split targets established for the area by Metro and the local jurisdiction. Points will be assigned based on the applicant's intended strategies to reduce VMT and single-occupant vehicle trips, increase access and develop transportation alternatives. [0-10]
8. Description of how the TMA will benefit members and non-members in the area. [0-5]
9. Demonstrated level of support of an identified anchor patron, major employer/organization, core group, chamber of commerce, developer, etc., toward the formation of the TMA. There may be a group currently working on transportation access issues in the proposed area that would facilitate TMA development. [0-15]
10. Coordination with major capital investments, current transportation strategies and/or programs in practice in the area to reduce single-occupant vehicles. [0-5]

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