

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF CONSIDERATION OF) RESOLUTION NO. 06-3655
REGIONAL TRAVEL OPTIONS PROGRAM)
WORK PLANS AND FUNDING SUB-) Introduced by Councilor Rex Burkholder
ALLOCATIONS FOR FISCAL YEARS 05-06)
AND 06-07)

WHEREAS, the Metro Council approved a five-year strategic plan for the Regional Travel Options Program on January 15, 2004 that placed an emphasis on coordinating regional marketing activities and shifted the lead role for managing the program from TriMet to Metro via Resolution No. 04-3400 (For the Purpose of Adopting the Regional Travel Options Program 5-Year Strategic Plan); and

WHEREAS, the Metro Council and Joint Policy Advisory Committee on Transportation (JPACT) established funding levels for the Regional Travel Options Program in the Metropolitan Transportation Improvement Program (MTIP) through the Transportation Priorities funding process adopted by Resolution No. 05-3606 (For the Purpose of Approving the 2006-09 Metropolitan Transportation Improvement Program for the Portland Metropolitan Area), on August 18, 2005; and

WHEREAS, the Regional Travel Options Subcommittee of the Transportation Policy Alternatives Committee (TPAC) adopted proposed work plans and funding sub-allocations to Metro, TriMet and Wilsonville SMART for Regional Travel Options program activities in fiscal years 2005-2006 and 2006-2007 on December 8, 2005; and

WHEREAS, the proposed work plans and funding sub-allocations support implementation of the Regional Travel Options Program five-year strategic plan; now therefore,

BE IT RESOLVED, that the Metro Council:

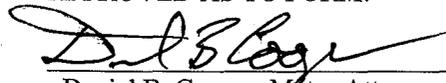
1. Supports and approves the Regional Travel Options Program fiscal year 2005-2006 and 2006-2007 work plans and funding sub-allocations; and
2. The Metropolitan Transportation Improvement Program will be amended to match the organization of the work program categories.

ADOPTED by the Metro Council this 26th day of January, 2006.

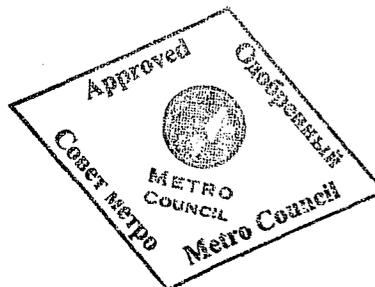


David Bragdon, Council President

APPROVED AS TO FORM:



Daniel B. Cooper, Metro Attorney



STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 06-3655, FOR THE PURPOSE OF CONSIDERATION OF REGIONAL TRAVEL OPTIONS PROGRAM WORK PLANS AND FUNDING SUB-ALLOCATIONS FOR FISCAL YEARS 05-06 AND 06-07

Date: January 5, 2006

Prepared by: Pam Peck

BACKGROUND

The Regional Travel Options (RTO) Program implements regional policy to reduce reliance on the automobile and promote alternatives to driving for all trips. The program emphasizes all alternative modes of travel and all trip purposes, reflecting policies in the Regional Transportation Plan. The Metro Council approved a five-year strategic plan for the Regional Travel Options program in January 2004 that placed an emphasis on coordinating regional marketing activities and shifted the lead role for managing the program from TriMet to Metro.

Key components of the RTO program include a collaborative marketing program, regional rideshare program, transportation management association program, and grant program that provides funds to partner agencies and organizations through a competitive project selection process. Most program activities are implemented by partner organizations and agencies or consultant contracts administered by Metro.

The Metro Council and Joint Policy Advisory Committee on Transportation established funding levels for the Regional Travel Options Program in the 2004-2007 Metropolitan Transportation Improvement Program through the Transportation Priorities funding process. The Regional Travel Options Subcommittee of TPAC is charged with recommending detailed work plans and funding sub-allocations to partner agencies and organizations to support program implementation activities.

The subcommittee adopted the attached proposed work plans for fiscal year 2005-2006 and 2006-2007 at their December 8, 2005 meeting. The work plans implement the program's five-year strategic plan and include a narrative for program activities and recommendations for sub-allocation of program funds to Metro, TriMet, Wilsonville SMART, and area transportation management associations.

The Metropolitan Transportation Improvement Program (MTIP) will be amended to match the organization of the work program categories. The proposed funding sub-allocations include the following changes to the current MTIP allocation:

- Increases the funds available for TriMet's employer program in FY 06-07 from \$195,000 to \$350,000, to maintain the program's current staffing levels and meet the objectives for the employer program detailed in the RTO strategic plan.
- Moves \$100,000 for the regional evaluation program from TriMet to Metro per the proposed work plans and program strategic plan.
- Moves \$54,000 for promotion of the Oregon Department of Energy (ODOE) Business Energy Tax Credit and Telework programs to employers to the Metro material and services budget for marketing. Metro will amend the proposed work plans to include this work after further discussions with ODOE about the specific scope of work and timing for these activities and coordination with other employer outreach efforts. The tasks would be carried out through an intergovernmental agreement between Metro and ODOE.

ANALYSIS/INFORMATION

1. **Known Opposition:** None.
2. **Legal Antecedents:** Resolution No. 04-3400 (For the Purpose of Adopting the Regional Travel Options Program 5-Year Strategic Plan), adopted on January 15, 2004 and Resolution No. 05-3606 (For the Purpose of Approving the 2006-09 Metropolitan Transportation Improvement Program for the Portland Metropolitan Area), adopted on August 18, 2005.
3. **Anticipated Effects:** Provides certainty on funding sub-allocations levels for RTO partner agencies and organizations.
4. **Budget Impacts:** None anticipated, however the program relies on revenue generated through Business Energy Tax Credit (BETC) Program to meet local matching requirements for federal grant funds. The BETC program is currently under review by the Oregon Department of Energy. Revised rules may impact project eligibility requirements and could decrease the amount of revenue available through this program. In FY 2005/2006 the RTO program will explore and develop additional matching fund options.

RECOMMENDED ACTION

Metro staff recommends approval of Resolution 05-3655.

Regional Travel Options Subcommittee of TPAC

Regional Travel Options Program
Proposed FY 05/06 work plan

Regional Travel Options Program
Proposed FY 05/06 work plan

Adopted Dec. 8, 2005 by the Regional Travel Options Subcommittee of TPAC

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Regional Travel Options Subcommittee of TPAC

- Lenny Anderson, Swan Island TMA
- Dan Bower, City of Portland
- Jan Bowers, City of Vancouver
- Rhonda Danielson, TriMet
- Sandra Doubleday, City of Gresham
- Susan Drake, DEQ
- Mohammed Fatthi, Clackamas County
- Kathryn Harrington, citizen
- Dan Kaempff, ODOT
- Matt Larsen, Multnomah County
- Gregg Leion, Washington County
- Jen Massa, City of Wilsonville SMART
- Pam Peck, Metro
- Gregg Snyder, citizen
- Greg Theisen, Port of Portland
- Rick Wallace, Oregon Office of Energy
- Dan Zalkow, citizen

Background

The Regional Travel Options (RTO) Program implements regional policy to reduce reliance on the automobile and promote alternatives to driving for all trips. The program emphasizes all alternative modes of travel and all trip purposes, reflecting policies in the Regional Transportation Plan.

This scope of work continues implementation of the Regional Travel Options 5-Year Strategic Plan developed by the RTO subcommittee of the Transportation Policy Alternatives Committee (TPAC) in 2003. The strategic plan was adopted by the Joint Policy Advisory Committee on Transportation in December 2003 and by the Metro Council in January 2004. The strategic plan established the following program goals:

Goal 1 -- Develop a collaborative marketing campaign that is an “umbrella” for all travel options programs being implemented throughout the region.

Goal 2 -- Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

Goal 3 -- Develop performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

Goal 4 -- Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

Goal 5 -- Develop regional policies that integrate RTO programs into other regional land use and transportation programs including the Centers Program, TOD Program, Corridors program, water quality programs and TriMet’s Transit Investment Plan.

Goal 6 -- Develop a funding plan that helps create a sustainable Regional Travel Options program.

Key program objectives for fiscal year 2005-2006

- Complete all elements of program transition from TriMet to Metro, including TMA program, 2040 grant program and vanpool program.
- Complete Rideshare Program market analysis and implementation plan study and begin development of Regional Commuter Services Program in coordination with partner agencies and organizations.
- Develop regional marketing media and advertising campaign in partnership with ODOT, coordinate local marketing and outreach activities to support campaign, launch campaign in January 2006.
- Develop monitoring and evaluation strategy and complete 2004-2005 evaluation report.

Relationship to Metro Council goals and success factors

The Regional Travel Options Program supports the following Metro Council goals and objectives*:

1.0 Encourage a strong and equitable regional economy.

1.4 Provide efficient access to jobs, services, centers, and industrial areas.

RTO strategies support economic growth by increasing the capacity of current transportation infrastructure by providing and promoting alternatives to driving alone. The RTO program works directly with employers to find the best travel options for their employees through TriMet's Employer Outreach Program and local transportation management associations (TMAs). Services provided through the RTO program, such as carpool matching, vanpools and transit pass program ensure access to jobs for low-income residents of the region.

3.0 Conserve Resources.

3.4 Use transportation investments and market responsive strategies to promote efficient and compact development, particularly in 2040 mixed-use areas and new urban areas.

3.6 Decrease the region's dependency on and consumption of fossil fuels.

The RTO program can be used to increase the number of people bicycling and walking in centers. TMAs provide local leadership, which is one of the most critical components of developing successful community centers. The RTO program works to reduce drive-alone trips and vehicle miles of travel which results in decreased dependency on and consumption of fossil fuels.

6.0 Protect and restore the natural environment, and integrate the natural and urban landscapes

6.2 Reduce pollution of air, water, and soil.

Motor vehicles are the largest single source of air pollution in the Portland area. The RTO program will continue to work with Oregon DEQ to monitor progress towards reducing commute trips and the resulting air quality improvement. Stormwater runoff from street rights of way is the number one cause of water quality degradation in urban areas. Reducing the number of people driving prevents the expansion of roadways, which in turns prevent the amount of impervious surface being added to watersheds.

*Metro Council Goals and Objectives, Jan. 6, 2005: This document is not, in itself, a strategic plan as it does not define Metro's role in creating these outcomes, nor does it prescribe actions Metro may take. Metro's role in each outcome and the specific initiatives Metro will implement are being developed by the Metro Council through its strategic budget initiative and policy making processes. The Metro Council has committed to work with local governments, stakeholder groups, the region's residents, and Metro employees to collaboratively achieve the outcomes expressed in this document.

Program administration

This scope of work continues implementation of the Regional Travel Options 5-Year Strategic Plan and supports the program structure called for by the strategic plan including administration and management of RTO program functions by Metro and better integration of RTO programs with Metro's Centers, TOD and Corridor programs.

The 1.2 FTE RTO program staff will:

- Chair and support RTO Subcommittee of TPAC, including logistics, scheduling and meeting summaries.
- Update RTO subcommittee bylaws to better support RTO program structure and decision-making.
- Conduct quarterly meetings of the Senior Managers group.
- Lead strategic planning for RTO Subcommittee including annual retreat and update of the strategic plan.
- RTO Subcommittee research and support on technical and financial issues.
- Create presentations about RTO programs for Metro committees and regional partners.
- Administer contracts for RTO programs.
- Develop and submit FTA application for CMAQ grant funds and administer grants for RTO programs.
- Identify local matching funds sources for future years.
- Complete Business Energy Tax Credit (BETC) applications and identify local pass through partner.
- Develop RTO program budgets and MTIP funding applications.
- Provide local transportation system plan support on achieving 2020 non-SOV targets.
- Define RTO program staff role in corridor planning studies, including development and analysis of TDM strategies.
- Define RTO program staff and subcommittee role in Regional Transportation Plan Update, including development and analysis of TDM strategies.
- Represent RTO program at Metro committees and jurisdictions and agency meetings.

Key milestones for FY 05/06

- Nov/Dec 05 – RTO work programs and budgets reviewed and adopted by RTO subcommittee
- Jan 06 -- RTO work programs and budgets reviewed and adopted by TPAC, JPACT and the Metro Council
- Jan 06 – BETC applications completed
- Jan 06 – Program transition from TriMet to Metro complete
- March 06 – MTIP pre-application reviewed by RTO subcommittee
- April 06 – RTO subcommittee bylaws drafted
- May 06 – RTO subcommittee bylaws forwarded to TPAC, for review and approval
- May 06 – MTIP application reviewed and approved by RTO subcommittee
- June 06 – MTIP application submitted

- June 06 – RTO subcommittee annual retreat

Deliverables

- FY 06/07 budget
- RTO subcommittee meeting summaries
- Revised bylaws
- Updated strategic plan
- RTO annual retreat summary

Collaborative Marketing Program

The RTO Collaborative Marketing Program coordinates all marketing and outreach efforts of the regional partners to create a broader public awareness of the travel options available to people traveling around the region and to reach new, targeted audiences. The overall program includes a regional marketing media and advertising campaign under development in coordination with ODOT and partner agencies from across Oregon, TriMet's Employer Outreach Program, Wilsonville SMART's TDM Program, and coordination of local partner marketing activities.

Metro's scope of work will focus on coordination of marketing activities carried out by all RTO partners to maximize the program's reach and effectiveness. In addition, the program will work to leverage the state's investment in the regional travel options marketing media and advertising campaign by conducting outreach at neighborhood and community events, providing incentives and giveaways to encourage behavior change, and aligning the messages and outreach strategies used by RTO partners with the messages developed for the advertising campaign.

The 1 FTE RTO program staff, augmented by internships and contracted professional services, will carry out the following tasks:

- Develop scope of services for employer outreach, determine what types of services will be provided, target markets, primary contacts for employers, collateral materials needs, training needs, quarterly outreach goals and tracking methods. Structure partner agreements and contracts to provide information needed for program evaluation.
- Develop RTO collateral materials consistent with the travel options marketing media and advertising campaign brand, including fact sheets, brochures, web pages, event display, and other collateral materials.
- Conduct outreach at key community events, including fairs, festivals and farmers markets, to provide information about travel options and one-on-one consultations with individuals and families willing to make behavior change. Develop a display booth consistent with the travel options marketing media and advertising campaign brand. Offer a commitment form, backed up with incentives for those who follow through by making behavior change.
- Revise the Carefree Commuter Challenge to reach greater numbers of commuters in suburban communities and leverage the travel options marketing media and advertising campaign. (Tentative – pending discussions with Westside Transportation Alliance [WTA])
- Develop regional calendar of events and coordinate presence of RTO partners.
- Support marketing working group for effective coordination and partner communication.
- Research and develop white papers on relationship of the use of travel options to health and economic development.
- Implement marketing plan for Bike There! map, coordinate map updates with Regional Transportation Planning staff, develop workplan for 2007 Bike There!

map, develop proposal for online bike trip planning tool and identify funding to support tool development.

Key milestones for FY 05-06

- Jan 06 -- Kick-off of regional travel options marketing media and advertising campaign.
- Jan 06 – White papers completed.
- March 06 – Events calendar completed
- April 06 – Collateral materials and events display completed.
- April 06 – Scope of services for employer outreach completed.
- May to June 06 -- Outreach at neighborhood and community events.
- June 06 – Bike There! workplan for 2007 map completed (milestones for map development will be included in the workplan)
- Spring 06 (tentative) – Carefree Commuter Challenge
- Ongoing – Implement Bike There! map marketing strategy

Deliverables

- Scope of services and partnership agreements for employer outreach
- RTO collateral materials and events display
- Regional calendar of events
- White papers on relationship of the use of travel options to health and economic development
- Revised Carfree Commuter Challenge defined
- Bike There! 2007 workplan, including online tool defined

Regional Rideshare - Vanpool Program

This program markets carpooling and vanpooling, provides internet-based ride matching services through CarpoolMatchNW.org, and provides vanpool services. Program elements are in the process of transitioning from TriMet and the city of Portland to Metro and will be integrated in a regional rideshare program.

Metro's scope of work focuses on completing program transition activities, assuming operation of vanpool services in January 2006, and strengthening inter-regional ridesharing through enhanced carpooling and vanpooling services and development of a one stop shop for regional commuter services.

The .25 FTE RTO program staff, augmented by contracted professional services, will carry out the following tasks:

- Complete market research and implementation study.
- Release a request for proposals for vanpool operations and program management and develop agreements with vendors for provision of services.
- Develop a financial plan for vanpool operations including proposed policies for vanpool subsidies, pricing structure for passenger fares, provision of matching funds, target markets for new vanpool services, and scope for referral/incentive program.
- Update strategic plan program goals for starting new vanpool groups based on resource identified in the financial plan.
- Work with van vendors and area transit agencies to develop a system for reporting vanpool mileage to National Transit Data (NTD) and obtaining 5307 funds to create an additional funding source for vanpool operations in FY 08.
- Develop a "one-stop shop" for regional rideshare services including vanpool operations, carpool matching, and marketing of services. Develop a program work plan that includes objectives/targets for services, outreach and formation of new carpools, methods for tracking and reporting performance, and a marketing plan that identifies marketing messages, branding opportunities, such as a unified phone number and URL, and collateral materials needs including fact sheets, brochures, web pages and other collateral.
- Participate in development of statewide ridematching system, assist with defining specifications for system needs to meet the needs of the regional rideshare program.
- Improve CarpoolMatchNW web site by adding greater depth of knowledge and create more interactive functionalities.
- Support rideshare working group of RTO Subcommittee for effective coordination and partner communication.

Key milestones for FY 05-06

- Jan 06 -- Transition vanpool program from TriMet to Metro.
- March 06 – Draft vanpool operations financial plan forwarded to RTO subcommittee for review and approval
- April 06 – Plan for one-stop shop for regional rideshare services program forwarded to RTO subcommittee for review and approval (program launch date and additional milestones to be determined in the plan)

- June 06 – Vanpool mileage reporting systems in place

Deliverables

- Market research and implementation plan study
- Financial plan for vanpool services
- Regional Rideshare Services Program workplan defined, including performance targets and marketing plan

Transportation Management Association (TMA) Program

The TMA Program operates under the policy direction as provided in Metro Resolutions No.98-2676 and No.02-3183. TMAs are important private/public partnership tools that can be used effectively in the Central City, Regional Centers, Industrial Areas, and some Town Centers. TMAs provide important leadership development in Region 2040 centers that catalyze economic and community development.

The following TMAs provide trip reduction services to employers in the Portland metropolitan area: Clackamas Regional TMA, Gresham TMA, Lloyd TMA, Swan Island TMA, Troutdale TMA, and Westside Transportation Alliance.

RTO program staff will work with the TMAs to (note that Metro staff support for the tasks listed below is included in Program Administration):

- Complete transition of TMA program administration from TriMet to Metro.
- Involve TMAs in development of scope of services for employer outreach (as detailed in the Collaborative Marketing section of the workplan on page 5).
- Review TMA work plans for FY 06-07.
- Develop and administer TMA funding agreements.
- Hold quarterly meetings of TMA directors for effective coordination and partner communication.

Key milestones for FY 05-06

- Aug 05 – TMA program transitioned to Metro
- Nov 05 – TMA directors meeting held
- Jan 06 – TMA directors meeting held
- April 06 – TMA directors meeting held
- May 06 – TMA funding agreements for FY 06-07 executed
- June 06 – TMA directors meeting held

Deliverables

- TMA funding agreements
- Summaries of quarterly TMA director meetings
- Quarterly progress reports

2040 Initiatives Grant Program

This program is administered by Metro with oversight from the RTO subcommittee. Grant funds are allocated bi-annually and fund TDM services and programs implemented by local jurisdictions, TMAs and non-profit groups located within Metro's boundary. Projects funded with 2040 grants must strive to reduce the usage of single occupant vehicles and/or daily vehicle miles traveled within a specific geographic location. All projects must quantify this reduction and quantify CO2 reduction or other air quality improvements.

In FY 06 the program will be administering grants the second year of grant funding awarded by the RTO subcommittee for 2004-2006. Grant administration FTE is included in Program Administration. In addition, RTO program staff will work with the RTO subcommittee to develop a grant allocation process, selection criteria, evaluation measures, budget and schedule for future grant allocations.

Applicant/Project	FY 06 Funding
SMART Walking Program	\$16,000
Lloyd District Pedestrian Program	\$10,925
Swan Island Vanpool Program	\$12,500
Portland/CarpoolMatchNW	\$60,000
Gresham TMA Bike Program	\$14,950
WTA Car Free Carefree	\$35,653

Key milestones for FY 05-06

- March 06 – Grant allocation process, selection criteria, evaluation measures, budget and schedule for future grant allocations forwarded to RTO subcommittee for review and approval. (Additional milestones will be included in the allocation schedule.)
- June 06 – Completion of 2004-2006 projects.

Deliverables

- Revised grant allocation process defined
- Quarterly progress reports

Evaluation Program

This program collects, analyzes and reports data for each RTO program to ensure that RTO program funds are invested in the most cost effective ways. This scope of work transitions primary responsibility for evaluation of the regional program from TriMet to Metro.

The .25 FTE RTO program staff, augmented by contracted professional services and with guidance from an evaluation working group, will work to identify and implement standard and consistent data collection methods for measuring program effectiveness. This effort will be informed by the recommendations in the *UrbanTrans Rideshare Program Market Research and Implementation Plan* report, as well as the *Metro 2040 Modal Targets Study* report. RTO program staff will be responsible for on going and consistent data collection and tracking.

RTO program staff will provide data to an independent third party, such as Portland State University Transportation Research Center, to produce a program evaluation report for 2004 –2005. The evaluation report will be used to refine program development, marketing and implementation. Previously the program has produced an annual evaluation report, with the last report documenting 2003 program impacts.

In addition, RTO program staff and the evaluation working group will participate in the development of Metro's Travel Behavior Survey of 6,000 households. Metro will track the travel behavior of 1,000 of these households for up to five years, providing the RTO program with the ability to examine many factors related to travel behavior and to track the long-term impact of transportation demand management strategies.

The .5 FTE RTO program staff will:

- Support an evaluation working group that includes members of the RTO subcommittee and TPAC. The working group will review the draft 2004-2005 evaluation report and will work with staff to develop a recommended framework for evaluating RTO programs.
- Determine awareness, participation, customer satisfaction and program impact measures that will be tracked and used to evaluate RTO programs.
- Identify land use measures that can be monitored and related to travel behavior data.
- Conduct on going data collection and tracking for all RTO funded programs.
- Develop a set of prediction factors that would be used to select the most cost-effective RTO programs for implementation.
- Evaluate Region 2040 Centers on a biannual basis to determine progress towards non-SOV modal targets.

Key milestones for FY 05-06

- Jan 06 – Scope of work and production schedule for 2004-2005 evaluation report defined
- Jan 06 – Kick-off meeting for evaluation working group
- Feb 06 -- Process for developing prediction factors defined

- May 06 – 2004 to 2005 evaluation report forwarded to RTO subcommittee for initial review and discussion
- June 06 – 2004 to 2005 evaluation report presented to TPAC, JPACT and the Metro Council

Deliverables

- Evaluation working group formed
- 2004-2005 program evaluation report
- Data collection and tracking methods for future evaluation efforts defined

Budget

Regional Travel Options Program Revenue FY 06	
FFY 04 MTIP carry over revenue	
Metro RTO Program	\$227,106
FFY 05 MTIP categories (FFY 05 MTIP = Metro FY 06)	
Core TDM Program (TriMet)	\$403,000
Metro RTO Program	\$562,494
SMART TDM Program	\$55,000
Carryover from TriMet/Metro IGA	\$312,361
Total Grants	\$1,559,961
Other program revenue sources	
ODOT TDM funds	\$1,036,600
BETC (expected to be received in 05/06)	\$101,217
BETC carryover from FY 05	\$43,000
Local match (partners)	\$95,225
Total other sources	\$1,276,042
Total revenues	\$2,836,003

Revenue source	Grants	Match/Metro	Match/local	ODOT	Total
Program administration					
Metro Program Manager (.5 FTE)	56,486	6,465			62,951
Metro Assoc Trans Planner (.25 FTE)	20,091	2,299			22,390
Administrative staff (.45 FTE)	35,292	4,040			39,332
Contingency and shared cost	3,033	347			3,380
Total program administration					128,053
Collaborative marketing					
Travel Options Marketing Campaign				1,036,600	1,036,600
Marketing/outreach interns (4 interns/160 hours each)	17,368	1,988			19,356
Metro Program Manager (.5 FTE)	56,486	6,465			62,951
Metro Program Assistant 2 (.5 FTE)	28,892	3,307			32,199
Materials and services (display, collateral, incentives)	73,266	8,385			81,651
TriMet employer program**	303,000		34,680		337,680
SMART TDM Program**	55,000		6,295		61,295
Total collaborative marketing					1,631,732
Region 2040 Initiatives Grants**	170,000		19,457		189,457
Transportation Management Assoc. Program**	174,000		19,915		193,915
Regional Rideshare Program					
Regional vanpool fleet operations (20% match)	130,248	32,562			162,810
Rideshare marketing materials and services	25,000	2,861			27,861
CarpoolMatch NW (customer service)***	30,000		3,433		33,433
Metro Assoc Management Analyst (.25 FTE)	19,150	2,192			21,342
Total regional rideshare program					245,446
Evaluation and tracking					
Regional evaluation (1 FTE TriMet)	100,000		11,445		111,445
Metro Travel Behavior Household Survey	22,433	2,567			25,000
Metro Assoc Trans Planner (.25 FTE)	20,091	2,299			22,390
Contracted professional services	35,892	4,108			40,000
Total evaluation and tracking					198,835
Grant carry over for 2040 Initiatives Grants in FY 07	184,233				184,233
BETC carry over for future local match					64,332
Program total*	1,559,961	79,885	95,225	1,036,600	\$2,836,003

Budget notes:

*Proposed Metro staff support totals 2.7 FTE

**Funding sub-allocations to TriMet, Wilsonville SMART, TMAs and 2040 grant recipients

***An additional \$60,000 for improvements to the CarpoolMatchNW web site is included in the Region 2040 Initiatives Grants Program budget

Regional Travel Options Subcommittee of TPAC

Regional Travel Options Program
Proposed FY 06/07 work plan

Regional Travel Options Program

Proposed FY 06/07 work plan

Adopted Dec. 8, 2005 by the Regional Travel Options Subcommittee of TPAC

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Regional Travel Options Subcommittee of TPAC

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Background

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This scope of work continues implementation of the Regional Travel Options 5-Year Strategic Plan developed by the RTO subcommittee of the Transportation Policy Alternatives Committee (TPAC) in 2003. The strategic plan was adopted by the Joint Policy Advisory Committee on Transportation in December 2003 and by the Metro Council in January 2004. The strategic plan established the following program goals:

Goal 1 -- Develop a collaborative marketing campaign that is an “umbrella” for all travel options programs being implemented throughout the region.

Goal 2 -- Work with senior managers to become key advocates for RTO program and funding support at TPAC, JPACT and Metro Council.

Goal 3 -- Develop performance measures for all RTO programs, evaluate the success of these programs on an annual basis and use the results to refine future program investments and marketing strategies.

Goal 4 -- Develop an integrated RTO program organizational structure that supports a more collaborative approach to Regional Travel Options program implementation and decision making.

Goal 5 -- Develop regional policies that integrate RTO programs into other regional land use and transportation programs including the Centers Program, TOD Program, Corridors program, water quality programs and TriMet’s Transit Investment Plan.

Goal 6 -- Develop a funding plan that helps create a sustainable Regional Travel Options program.

Key program objectives for fiscal year 2006-2007

- Implement year two of the regional travel options marketing media and advertising campaign.
- Recommend target area for TravelSmart individual/household based marketing campaign in fiscal year 2007-2008.
- Launch one-stop shop for Regional Rideshare Program.
- Develop criteria for formation of new TMAs.
- Recommend prediction factors for selecting cost-effective RTO programs that produce desired program impacts.

Relationship to Metro Council goals and success factors

The Regional Travel Options Program supports the following Metro Council goals and objectives*:

1.0 Encourage a strong and equitable regional economy.

1.4 Provide efficient access to jobs, services, centers, and industrial areas.

RTO strategies support economic growth by increasing the capacity of current transportation infrastructure by providing and promoting alternatives to driving alone. The RTO program works directly with employers to find the best travel options for their employees through TriMet's Employer Outreach Program and local transportation management associations (TMAs). Services provided through the RTO program, such as carpool matching, vanpools and transit pass program ensure access to jobs for low-income residents of the region.

3.0 Conserve Resources.

3.4 Use transportation investments and market responsive strategies to promote efficient and compact development, particularly in 2040 mixed-use areas and new urban areas.

3.6 Decrease the region's dependency on and consumption of fossil fuels.

The RTO program can be used to increase the number of people bicycling and walking in centers. TMAs provide local leadership, which is one of the most critical components of developing successful community centers. The RTO program works to reduce drive-alone trips and vehicle miles of travel that results in decreased dependency on and consumption of fossil fuels.

6.0 Protect and restore the natural environment, and integrate the natural and urban landscapes

6.2 Reduce pollution of air, water, and soil.

Motor vehicles are the largest single source of air pollution in the Portland area. The RTO program will continue to work with Oregon DEQ to monitor progress towards reducing commute trips and the resulting air quality improvement. Stormwater runoff from street rights of way is the number one cause of water quality degradation in urban areas. Reducing the number of people driving prevents the expansion of roadways, which in turns prevent the amount of impervious surface being added to watersheds.

*Metro Council Goals and Objectives, Jan. 6, 2005: This document is not, in itself, a strategic plan as it does not define Metro's role in creating these outcomes, nor does it prescribe actions Metro may take. Metro's role in each outcome and the specific initiatives Metro will implement are being developed by the Metro Council through its strategic budget initiative and policy making processes. The Metro Council has committed to work with local governments, stakeholder groups, the region's residents, and Metro employees to collaboratively achieve the outcomes expressed in this document.

Program administration

This scope of work continues implementation of the Regional Travel Options 5-Year Strategic Plan and supports the program structure called for by the strategic plan including administration and management of RTO program functions by Metro and better integration of RTO programs with Metro's Centers, TOD and Corridor programs.

The 1.3 FTE RTO program staff will:

- Chair and support RTO Subcommittee of TPAC, including logistics, scheduling and meeting summaries.
- Conduct quarterly meetings of the Senior Managers group.
- Lead strategic planning for RTO Subcommittee including annual retreat and update of the strategic plan.
- RTO Subcommittee research and support on technical and financial issues.
- Create presentations about RTO program for Metro committees and regional partners.
- Administer contracts for RTO programs.
- Develop and submit FTA application for CMAQ grant funds and administer grants for RTO programs.
- Identify local matching funds sources for future years.
- Complete Business Energy Tax Credit (BETC) applications and identify local pass through partner.
- Develop RTO program budget for FY 07-08.
- Track MTIP funding process and provide updates to RTO subcommittee members and other program partners.
- Provide local transportation system plan support on achieving 2020 non-SOV targets.
- Provide staff support for development and analysis of TDM strategies in corridor planning studies.
- Provide staff support for development and analysis of TDM strategies included in the Regional Transportation Plan Update.
- Represent RTO program at Metro committees and jurisdictions and agency meetings.

Key milestones for FY 06/07

- Sept 06 – RTO 07/08 work programs and budgets reviewed and adopted by RTO subcommittee
- Oct 06 – RTO 07/08 work programs and budgets reviewed and adopted by TPAC, JPACT and the Metro Council
- Nov 06 – BETC applications completed
- June 07 – RTO subcommittee annual retreat
- Ongoing – Track MTIP allocation process
- Ongoing – Participate in Regional Transportation Plan Update and corridor planning studies.

Deliverables

- FY 07/08 budget
- RTO subcommittee meeting summaries
- Updated strategic plan
- RTO annual retreat summary

Collaborative Marketing Program

The RTO Collaborative Marketing Program coordinates all marketing and outreach efforts of the regional partners to create a broader public awareness of the travel options available to people traveling around the region and to reach new, targeted audiences. The program includes implementation of the second year of a regional marketing media and advertising campaign, TriMet's Employer Outreach Program, Wilsonville SMART's TDM Program, and coordination of local partner marketing activities.

Metro's scope of work will focus on coordination of marketing activities carried out by all RTO partners to maximize the program's reach and effectiveness. In addition, the program will leverage the state's investment in the regional travel options marketing media and advertising campaign by conducting outreach at neighborhood and community events, providing incentives and giveaways to encourage behavior change.

The 1.5 FTE RTO program staff, augmented by contracted professional services, will carry out the following tasks:

- Develop RTO collateral materials consistent with the regional travel options marketing media and advertising campaign brand, including fact sheets, brochures, web pages, and other collateral materials.
- Create an RTO presence at key community events, including fairs, festivals and farmers markets, to provide information about travel options and one-on-one consultations with individuals and families willing to make behavior change. Offer a commitment form, backed up with incentives for those who follow through by making behavior.
- Develop regional calendar of events and coordinate presence of RTO partners.
- Support marketing working group for effective coordination and partner communication.
- Audit existing school outreach and marketing programs and recommend RTO role in reaching families with children through school-based outreach.
- Recommend target market(s) for TravelSmart individual/household marketing project(s) funded in the 2006-2009 MTIP. Forward recommendations to the RTO subcommittee, TPAC, JPACT and the Metro Council as part of the RTO budget for fiscal years 2007-2008 and 2008-2009.

Key milestones for FY 06-07

- July-Aug 06 -- Outreach at neighborhood and community events.
- Aug 06 – Recommendation on RTO role in school-based outreach forwarded to RTO subcommittee.
- Sept 06 – Recommendation on target area(s) for TravelSmart individual/household marketing project(s) in fiscal years 2008 and 2009 forwarded to RTO subcommittee.
- Oct 06 – Recommendation on target area(s) for TravelSmart project(s) forwarded to TPAC, JPACT and the Metro Council.
- March 07 – Events calendar completed
- May to June 07 -- Outreach at neighborhood and community events.

- Ongoing – Implement year two of the regional travel options marketing media and advertising campaign.
- Ongoing – Implement Bike There! map marketing strategy
- Milestones to be determined – Coordinate update, printing and marketing of 2007 Bike There! map, and possible development of online trip planning tool

Deliverables

- RTO collateral materials
- Regional calendar of events
- TravelSmart target areas defined

Regional Rideshare - Vanpool Program

This program markets carpooling and vanpooling to employers, provides internet-based ride matching services through CarpoolMatchNW.org, and provides vanpool and shuttle services. The scope of work for fiscal year 2006-2007 includes development of new resources, launch of new or increased services in target markets identified in the August 2005 *Rideshare Program Market Research and Implementation Plan* report, and public launch of the one stop shop for provision of rideshare services.

The .5 FTE RTO program staff, augmented by contracted professional services, will carry out the following tasks:

- Work with van vendors and area transit agencies to report vanpool mileage to National Transit Data (NTD) to secure 5307 funds for vanpool operations in FY 08.
- Refine program financial plan.
- Implement vanpool pilot projects in target markets in collaboration with local outreach partners, including TMAs, with the goal of starting 10 new vanpool groups.
- Promote carpooling in targeted markets to meet targets/goals established in FY 06.
- Develop collateral materials including fact sheets, brochures, web pages, testimonials, and other collateral.
- Implement visual brand for program developed in FY 2005-2006 and launch one stop shop to the public.
- Continue participation in development of statewide ridematching system; determine timeline for migrating the regional system to the statewide system.
- Maintain CarpoolMatchNW web site until statewide matching system is available to provide these services for the region.
- Refine targets for services and outreach.
- Track and report on program performance.
- Support rideshare working group of RTO Subcommittee for effective coordination and partner communication.

Key milestones for FY 06-07

- Milestones to be determined – Launch, administer and evaluate one-stop shop for regional rideshare services.
- Ongoing -- Implement vanpool mileage reporting strategy.

Deliverables

- Promotion and marketing plan for 2007
- Regional rideshare services collateral materials
- Updated program financial plan

Transportation Management Association (TMA) Program

The TMA Program operates under the policy direction as provided in Metro Resolutions No.98-2676 and No.02-3183. TMAs are important private/public partnership tools that can be used effectively in the Central City, Regional Centers, Industrial Areas, and some Town Centers. TMAs provide important leadership development in Region 2040 centers that catalyze economic and community development.

The following TMAs provide trip reduction services to employers in the Portland metropolitan area: Clackamas Regional TMA, Gresham TMA, Lloyd TMA, Swan Island TMA, Troutdale TMA, and Westside Transportation Alliance.

RTO program staff will work with the TMAs to (note that FTE for these tasks is included in Program Administration):

- Conduct a study to better understand why the Tualatin and Columbia Corridor TMAs were not successful and use the results to create new criteria for the TMA approval process.
- Explore opportunities to develop TMAs in regional centers where significant transportation investments are being made. Over the next 3-5 years this will include proposed TMA start-ups in Hillsboro, Washington Square, Gateway and Oregon City (if they are ripe for TMA formation).
- Develop work plans for each TMA that support the unique character of each regional center and industrial areas and recognizing that at different levels of development.
- Hold quarterly meetings of TMA directors.
- Track TMA performance toward meeting outreach and performance targets.
- Recommend options for better linking TMA performance to funding.
- Develop performance measures for TMAs.
- Recommend options for better linking performance to funding.

Key milestones for FY 06-07

- Oct 06 – TMA directors meeting held
- Jan 07 – TMA directors meeting held
- April 07 – TMA directors meeting held
- May 07 – TMA funding agreements for FY 06-07 executed
- June 07 – TMA directors meeting held
- Milestones to be determined – Recommend criteria for formation of new TMAs.

Deliverables

- Report on factors that create a successful TMA
- TMA agreements
- Summaries of quarterly TMA director meetings
- Quarterly progress reports

2040 Initiatives Grant Program

This program is administered by Metro with oversight from the RTO subcommittee. Grant funds are allocated bi-annually and fund TDM services and programs implemented by local jurisdictions, TMAs and non-profit groups located within Metro's boundary. Projects funded with 2040 grants must strive to reduce the usage of single occupant vehicles and/or daily vehicle miles traveled within a specific geographic location. All projects must quantify this reduction and quantify CO2 reduction or other air quality improvements.

In FY 07 the program will be administering grants awarded by the RTO subcommittee for 2006-2008. Grant administration FTE is included in Program Administration. 2040 grant funds available for 2006-2008 total \$291,350 for a 2-year program total of \$324,696.

Key milestones for FY 05-06

- July 06 – Work on 2006-2008 projects begins.
- Oct 06 – Quarterly progress reports submitted to Metro
- Jan 07 – Quarterly progress reports submitted to Metro
- April 07 – Quarterly progress reports submitted to Metro
- July 07 – Quarterly progress reports submitted to Metro

Deliverables

- Quarterly progress reports

Evaluation Program

This program collects, analyzes and reports data for each RTO program to ensure that RTO program funds are invested in the most cost effective ways. A biannual evaluation report is used to refine program development, marketing and implementation to ensure that limited program dollars are invested in the most cost effective ways.

The .65 FTE RTO program staff will be responsible for on going and consistent data collection and tracking that will be used to produce an evaluation report for 2006-2007 in fiscal year 08. RTO program staff and the evaluation working group will continue to participate in the development of Metro's longitudinal Travel Behavior Survey of 1,000 households for up to five years and recommend survey projects for future years that will assist with evaluation of the RTO program and could result in models that would better predict the impact of investments in TDM strategies and infrastructure for travel options.

The .65 FTE RTO program staff will:

- Support RTO evaluation working group for effective partner involvement in the RTO evaluation program.
- Conduct on going data collection and tracking for all RTO funded programs.
- Create a central database for the RTO program that can be used in conjunction with other regional travel behavior data to monitor each program component.
- Develop a set of prediction factors that would be used to select RTO programs for implementation based on cost-effectiveness and ability to achieve desired program impacts.
- Recommend options for RTO participation in the longitudinal Travel Behavioral Survey.

Key milestones for FY 06-07

- July 06 – Workplan for development of program database and prediction factors completed. The plan will identify milestones for the evaluation program in FY 06-07.
- Ongoing – Data collection and program tracking.

Deliverables

- Program effectiveness prediction factors.
- Central database completed.

Budget

Regional Travel Options Program Revenue FY 07

FFY 06 MTIP categories (FFY 06 MTIP = Metro FY 07)

Regional evaluation (TriMet)	\$100,000	
TriMet employer program	\$195,000	
Core TDM Program	\$987,000	
Telework (ODOE)	\$27,000	
BETC (ODOE)	\$27,000	
SMART TDM Program	\$121,000	
Carry over for 2040 Initiatives Grants	\$184,233	
Total grant revenue		\$1,641,233

Other program revenue sources

ODOT TDM funds	\$823,435	
BETC (expected to be received in 06/07)	\$112,037	
BETC carryover from FY 06	\$64,332	
Local match (partners)	\$91,010	
Total other sources		\$1,090,814

Total revenues		\$2,732,047
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Revenue source	Grants	Match/Metro	Match/Local	ODOT	Total
Program administration					
Metro Program Manager (.5 FTE)	\$57,306	\$6,559			\$63,865
Metro Assoc Trans Planner (.5 FTE)	\$42,805	\$4,899			\$47,704
Administrative staff (.3 FTE)	\$18,145	\$2,077			\$20,222
Contingency and shared cost	\$20,324	\$2,326			\$22,650
Total program administration					\$154,441
Collaborative marketing					
Travel Options Marketing Campaign				\$823,435	\$823,435
Metro Program Manager (.5 FTE)	\$57,306	\$6,559			\$63,865
Marketing/outreach interns (4 interns/320 hours each)	\$35,228	\$4,032			\$39,260
Metro Program Assistant 2 (1 FTE)	\$57,784	\$6,614			\$64,398
Materials and services (collateral, incentives)	\$29,415	\$3,366			\$32,781
TriMet employer program*	\$350,000			\$40,059	\$390,059
SMART TDM Program (07 and 08)*	\$121,000			\$13,849	\$134,849
Total collaboration marketing					\$1,548,647
Region 2040 Initiatives Grants (2006-2008)*	\$145,675		\$16,673		\$162,348
Transportation Management Assoc. (TMA) Program*	\$148,500		\$16,996		\$165,496
Regional rideshare program					
Regional vanpool fleet operations (20% match)	\$130,248	\$32,562			\$162,810
Vanpool pilot projects operations (20% match)	\$88,000	\$22,000			\$110,000
Rideshare marketing materials and services	\$40,000	\$4,578			\$44,578
CarpoolMatch NW (maintenance)	\$30,000		\$3,433		\$33,433
Metro Assoc Management Analyst (.5 FTE)	\$40,766	\$4,666			\$45,432
Total regional rideshare program					\$396,253
Evaluation and tracking					
Metro Travel Behavior Household Survey	\$22,433	\$2,567			\$25,000
Metro Assoc Trans Planner (.5 FTE)	\$42,805	\$4,899			\$47,704
Data Resources and Transportation Research (.15 FTE)	\$17,817	\$2,039			\$19,856
Total evaluation and tracking					\$92,560
Grant carry over for 2040 Initiatives Grants in FY 08**	\$145,675				\$145,675
BETC carry over for future local match					\$66,627
Program total***	\$1,641,232	\$109,743	\$91,010	\$823,435	\$2,732,047

Regional Travel Options Program
Proposed FY 06-07 work plan, adopted Dec. 8, 2005

Budget notes:

*Funding sub-allocations to TriMet, Wilsonville SMART, TMAs and 2040 grant recipients

**2040 grant funds available for 7/06-6/08 will total \$291,350 for a 2-year program total of \$324,696

***Proposed Metro staff totals 3.95 FTE